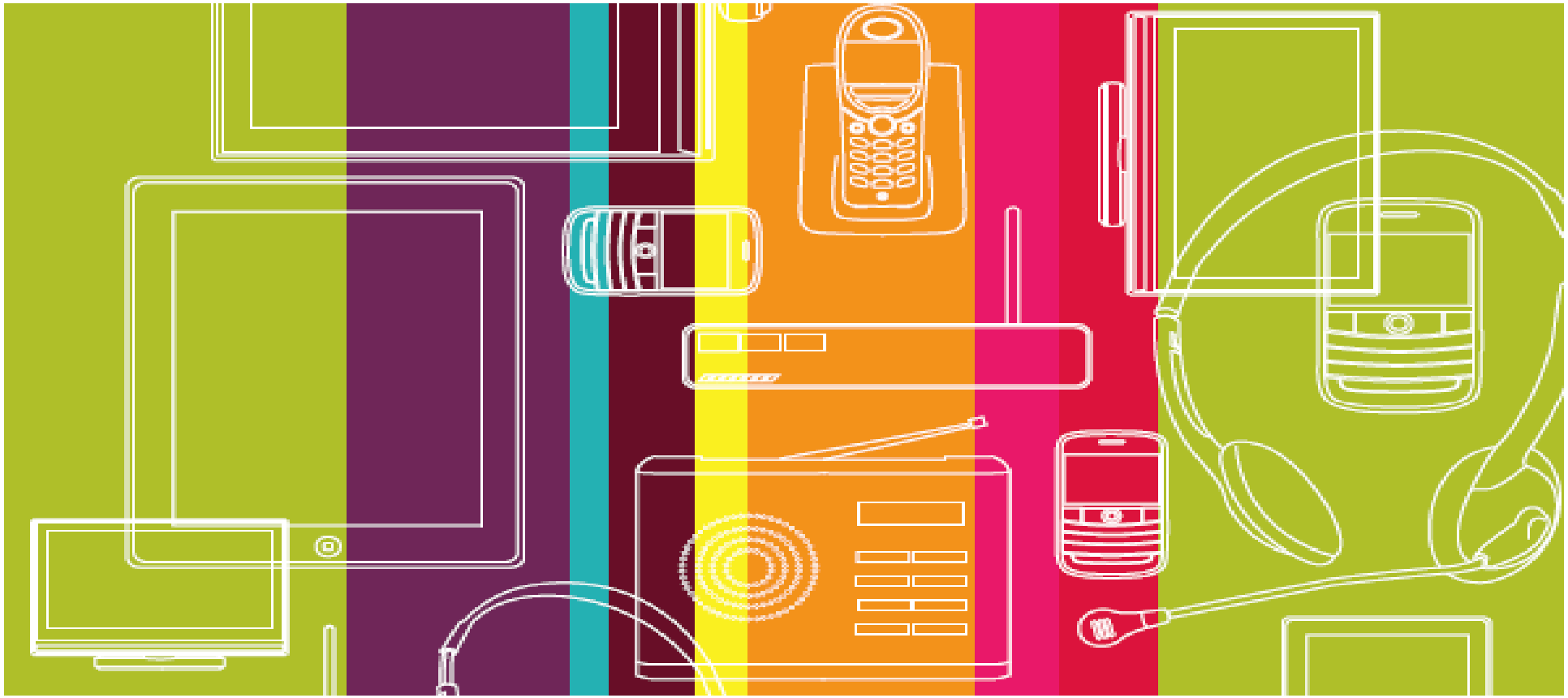
The Communications Market Report 2010



1.2 The market in context

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Figure 1.1

Digital communications service availability, 2008 and 2009

Platform	UK 2009	UK 2008	UK change		England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0%		100%	100%	100%	100%
2G mobile[1]	97%	n/a	n/a		99%	87%	89%	89%
3G mobile[2]	87%	n/a	n/a		91%	66%	69%	40%
DSL[3]	99.6%	99.6%	0.0%		-	-	-	n/a
Cable broadband[4]	48%	49%	-1%		51%	37%	23%	30%
LLU[5]	85%	84%	1%		87%	71%	77%	69%
Digital satellite TV	98%	98%	0%		-	-	-	-
Digital terrestrial TV[6]	73%	73%	0%		82%	82%	98%	66%

Sources: Ofcom and:

1. Proportion of population living in postal districts where at least one operator reports at least 90% 2G area coverage. Sourced from GSM Association / Europa Technologies
2. Based on Q2 2010. Proportion of population living in postal districts where at least one operator reports at least 90% 3G area coverage. Source from GSM Association / Europa Technologies. Data is not comparable with previous report
3. Proportion of premises able to receive DSL services based on data reported by BT
4. Proportion of households passed by Virgin Media's broadband-enabled network
5. Proportion of households connected to an LLU-enabled exchange
6. Availability of services from all six multiplexes

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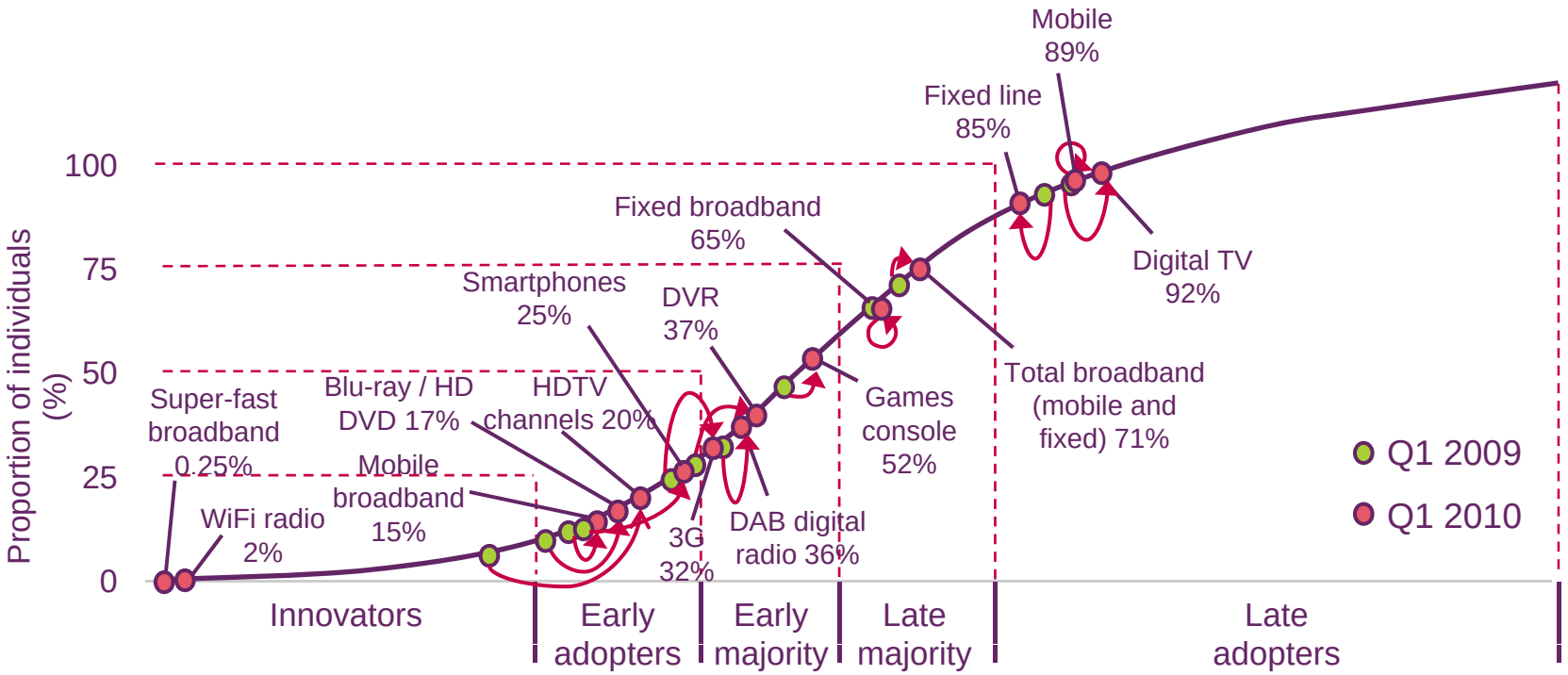
Figure 1.2

Digital technology adoption, Q1 2009 and Q1 2010

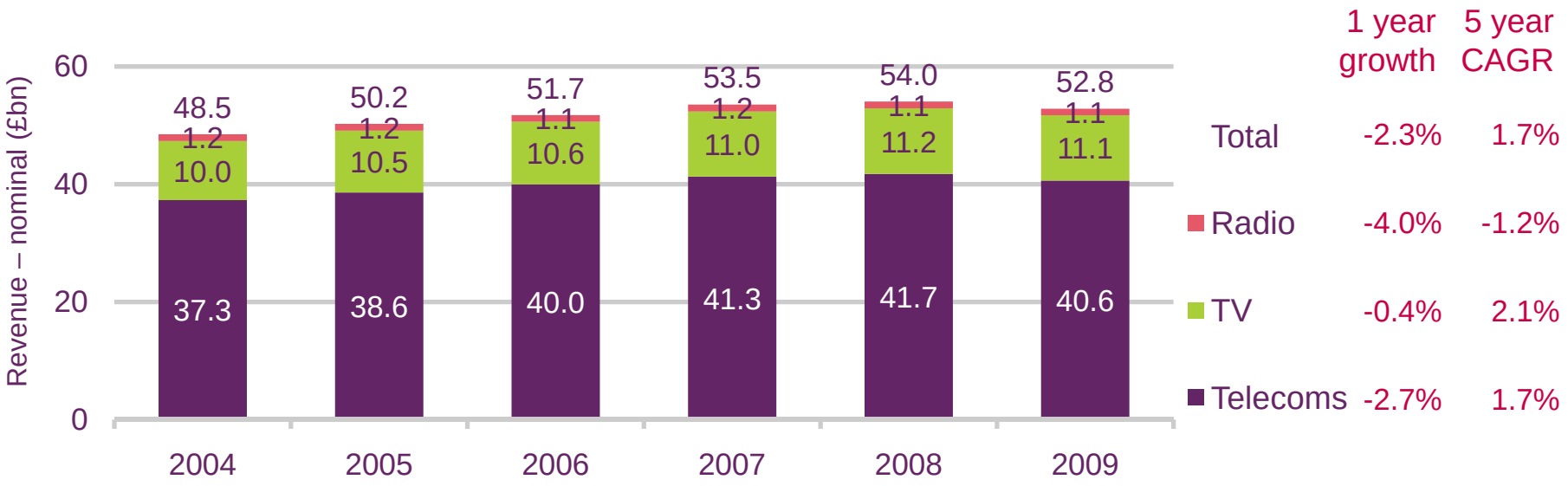


Source: Ofcom research and operator data

Notes: All figures are measured as a proportion of individuals except for 3G, which represents the proportion of mobile subscribers and HDTV and DTV, which represent the proportion of homes with a digital television reception device on the main set.

Figure 1.3

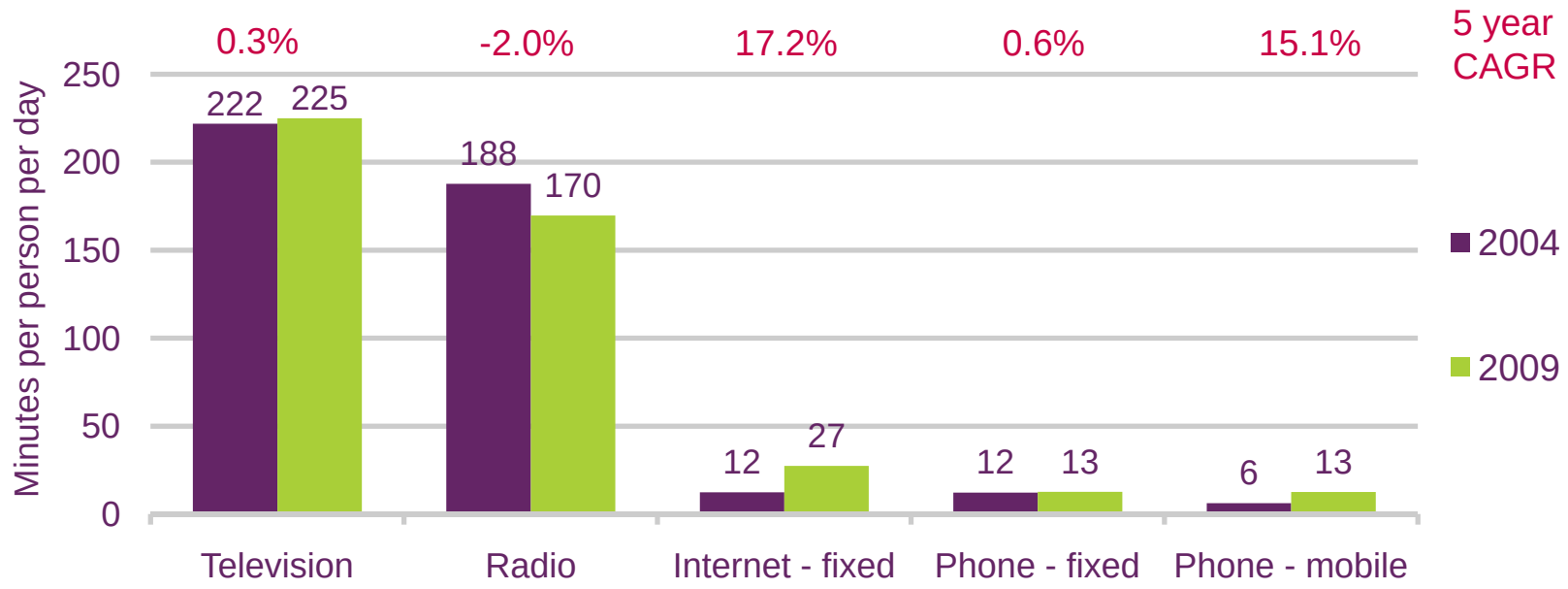
Communications industry revenue



Source: Ofcom / operators
Note: Includes licence fee allocation for radio and TV

Figure 1.4

Average time per day spent using communications services

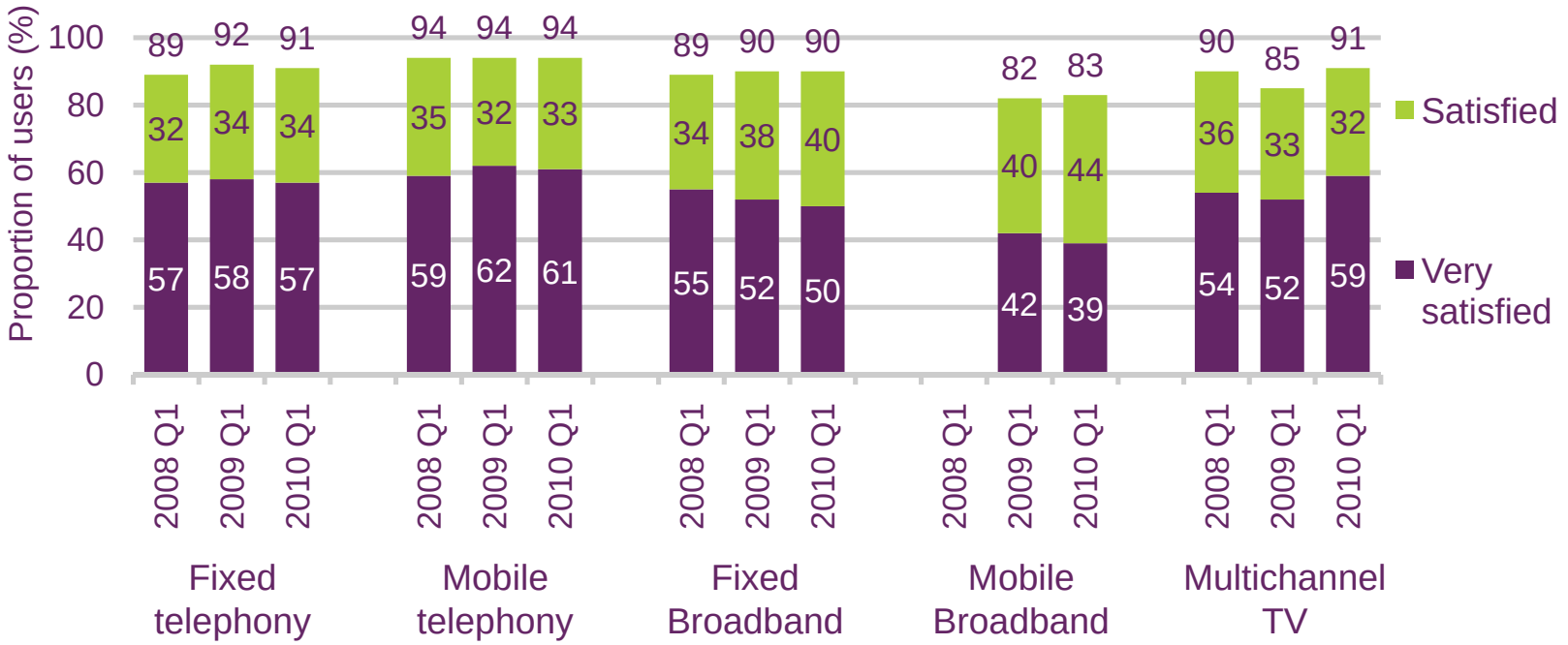


Source: Ofcom / BARB / RAJAR / Nielsen Netratings (home use only)

Note: Daily figures were calculated from monthly data on the assumption that there are 30.4 days in the average month; the exception was for internet consumption where the quoted figures relate to May 2004 and May 2009, and 31 days were used; the internet consumption figures include the use of online applications such as streaming media and only include use at home; mobile telephony figures are estimated assuming that the average time taken to send and receive a text message is 35 seconds.

Figure 1.5

Overall satisfaction with communication services



Source: Ofcom research

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

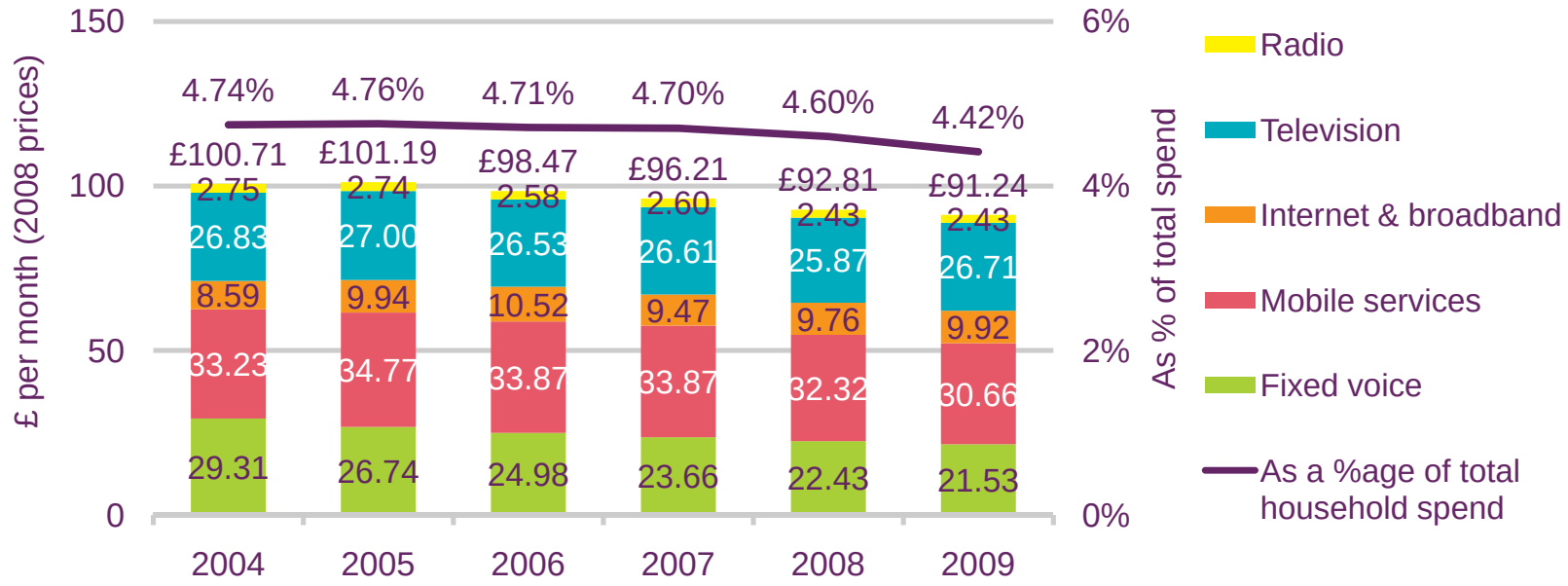
Figure 1.6

Which media activity would consumers miss the most

A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 1824 in 2009), adults aged 16-24 (530 in 2005, 413 in 2007, 253 in 2009), adults aged 25-34 (604 in 2005, 473 in 2007, 274 in 2009), adults aged 55-64 (412 in 2005, 344 in 2007, 276 in 2009).
Circles show statistically significant change between 2007 and 2009.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009 and September to October 2009

Figure 1.7

Average household spend on communications services



Source: Ofcom / operators

1.3 The consumer’s digital day

Figure 1.8
Fast Facts

	All 16+	16-24s	25-44s	45-54s	55+	Men	Women	Working	Not Working
Time Awake (minutes per day)	945	913	945	961	951	951	939	953	935
Time spent with media and communications (minutes per day)	425	395	438	442	416	453	398	437	410
Proportion of media and communications time that is solus	80%	71%	77%	81%	88%	80%	81%	78%	84%
Proportion of media and communications time that is simultaneous	20%	29%	23%	19%	12%	20%	19%	22%	16%
Amount of media and communications activity (minutes per day)	528	572	564	537	467	576	482	553	495
Watching video (% of all activity)	40%	32%	36%	37%	52%	38%	42%	35%	48%
Listening to audio (% of all activity)	17%	14%	17%	22%	17%	18%	17%	18%	16%
Voice communication (% of all activity)	5%	6%	5%	6%	5%	5%	6%	6%	5%
Text communication (% of all activity)	15%	30%	18%	11%	6%	16%	15%	16%	14%
Print Media (% of all activity)	6%	3%	4%	5%	10%	5%	7%	5%	8%
Games (% of all activity)	3%	5%	3%	2%	1%	3%	2%	3%	3%
Other internet (% of all activity)	7%	5%	8%	9%	4%	8%	5%	8%	4%
Other media (% of all activity)	7%	5%	9%	9%	4%	8%	5%	10%	3%

XX Percentage figure is significantly higher than the population average

XX Percentage figure is significantly lower than the population average

Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373; men = 3815; women = 4151; working = 4417; not working = 3549

Figure 1.9

Media consumption activities

Activity category	Activity subcategories	Activities
Video	Television – TV	Television set: TV live; Television set: recorded TV on PVR; Television set: recorded TV on DVD/VHS; Television set: TV on-demand
	Television - other	TV or films on-demand or live on a computer; TV or films on-demand on a mobile phone
	Other video	DVDs or videos (rented or bought); Video clips on a computer; Downloaded TV, films or video clips on a computer; Downloaded TV, films or video on a mobile phone; Downloaded TV, films or video on hand-held device.
Audio	Radio – radio set	Live radio on a fixed or portable set
	Radio – other device	Radio on a TV set; Radio live or on-demand on a computer, mobile phone or hand-held device
	Other audio	Streamed music, streamed podcasts, downloaded music or other audio, music or other audio on a stereo or music centre or portable devices.
Voice communications		Making or receiving phone calls on a landline; Making or receiving phone calls on a mobile phone; Making or receiving phone calls or video calls on a computer.
Text communications		E-mailing, social networking or instant messaging on a computer or mobile phone and texting or video messaging on a mobile phone; newspapers, magazines or books.
Games		Playing games on a TV set, computer or portable device (e.g. hand-held games console or MP3 player .
Other	Other internet	Internet activity on a computer or mobile phone that is not covered by the previous categories.
	Other media	All other media and communications activity on a hand-held device, and all other non-internet activity on a computer or mobile phone.

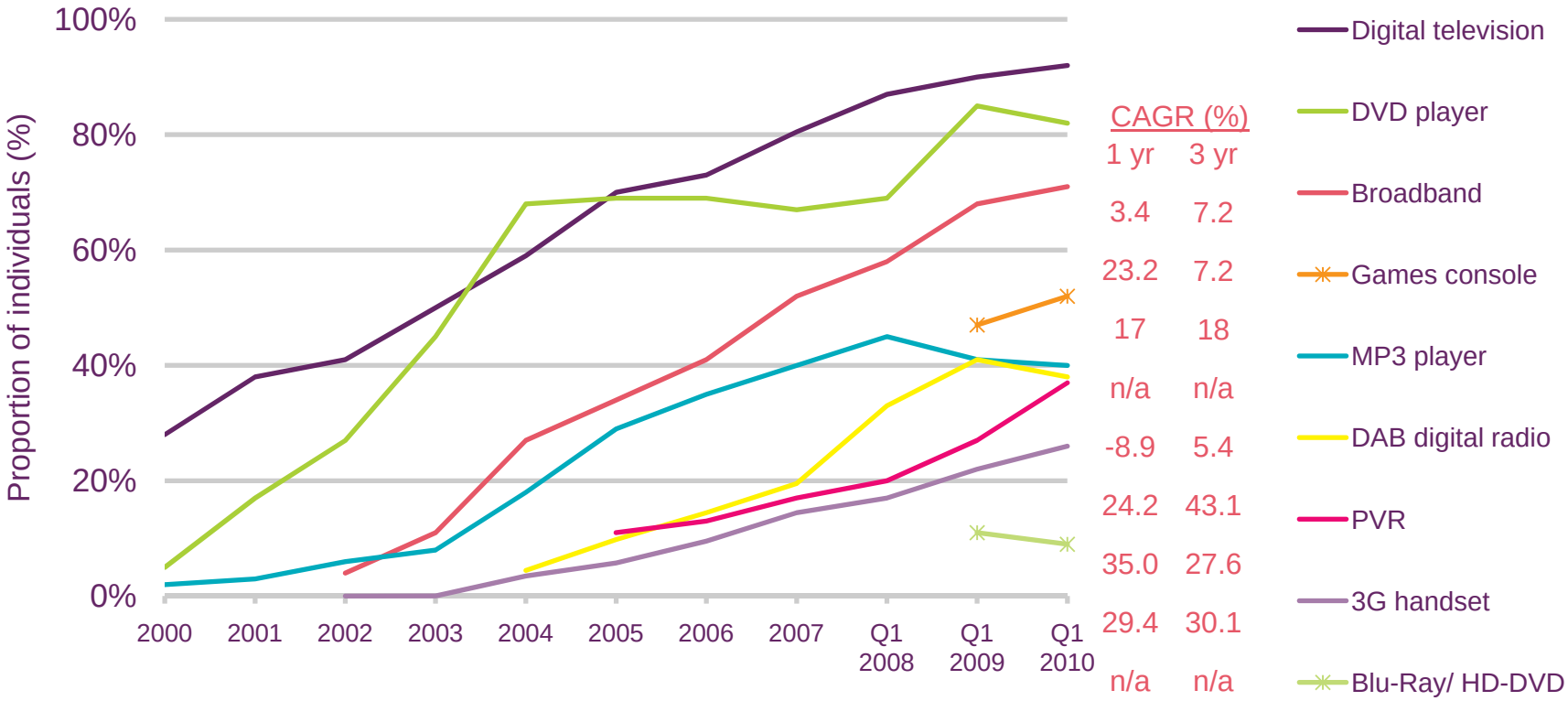
Figure 1.10

Terminology used in this section

Definition	Description
Simultaneous media consumption	Media consumed while doing another media activity at the same time, e.g. texting and watching television.
Solus media consumption	Media consumed while doing no other media activity.
Weekly reach	The proportion of individuals consuming each media within the week.
Daily reach	The proportion of individuals consuming media on a typical day.
Volume	Average minutes consumed per day.
Attention	The average score or the claimed attention by activity for all activities recorded in the diary (on a scale of 1 to 5).
Importance	The average score of claimed importance overall for each activity (on a scale of 1 to 10).

Figure 1.11

Take-up of a range of communications devices and services

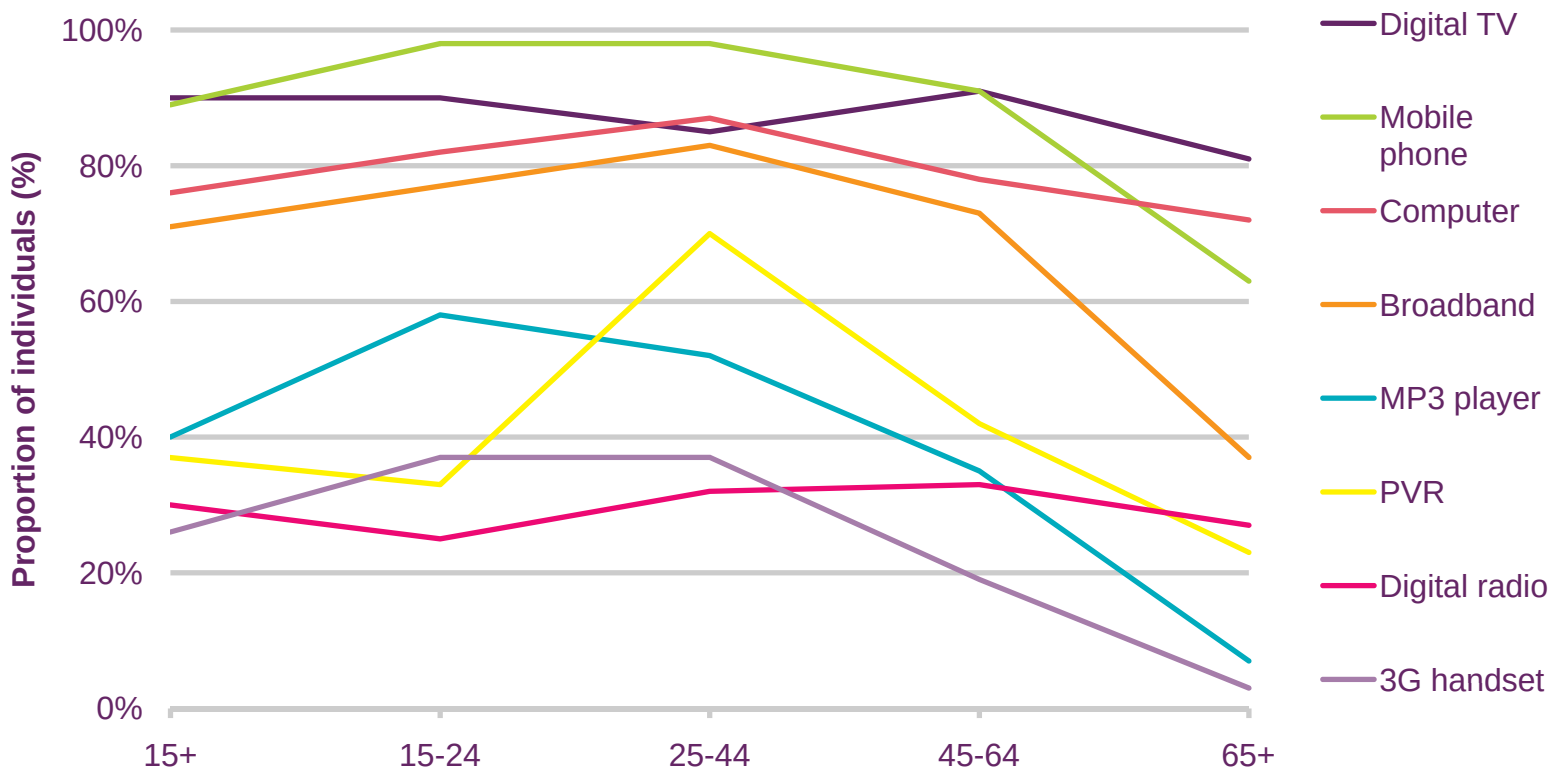


Source: Ofcom research.

Note: The Question wording for DVD Player and DVR was changed in Q1 2009 so data is not directly comparable with previous years.

Figure 1.12

Adoption of new technologies, by age



Source: Ofcom Technology Tracker, Q1 2010, n=9013 15+; 1351 15-24s; 3111 25-44s; 2639 45-64s; 1912 65+

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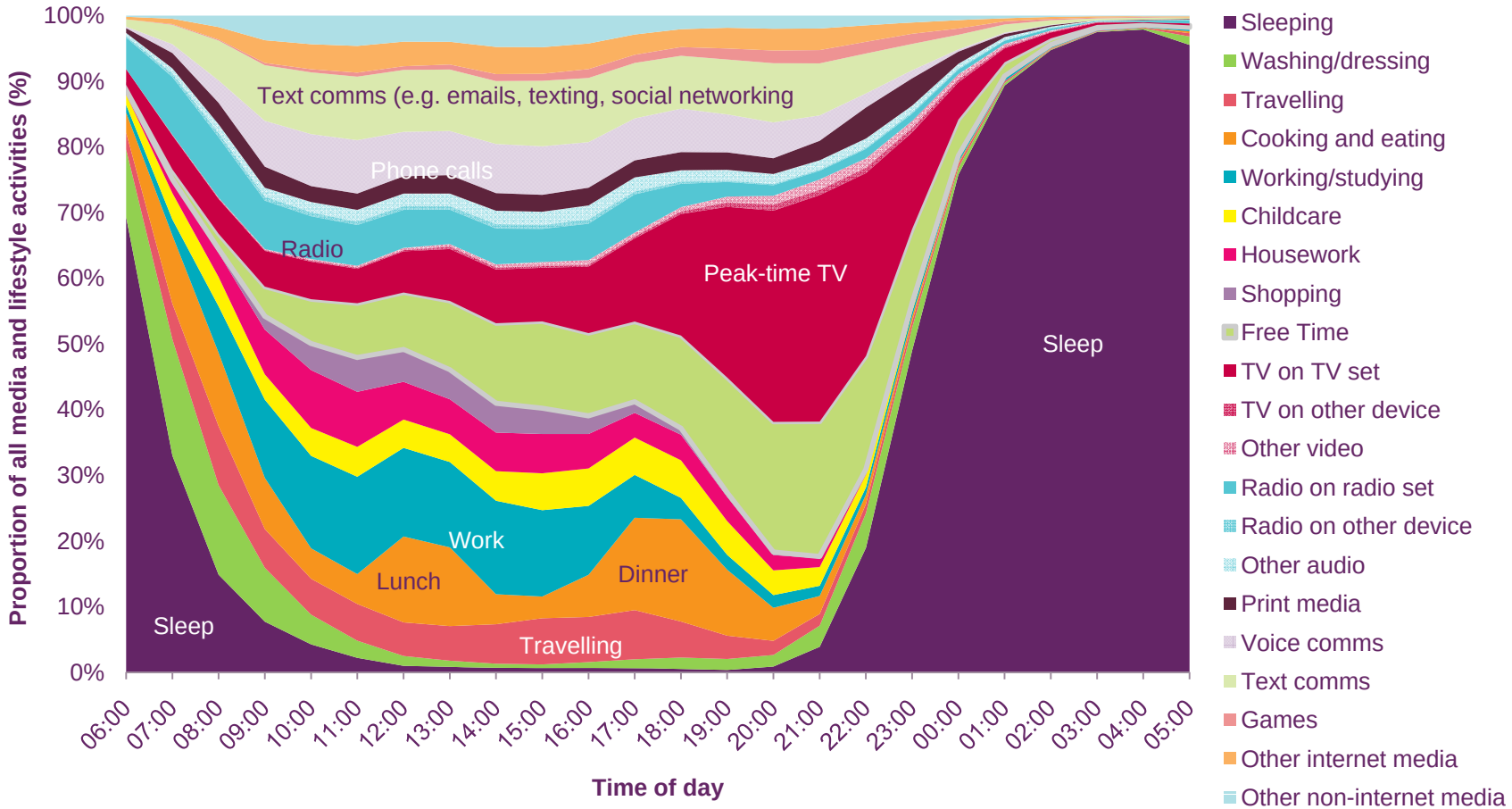
Figure 1.13

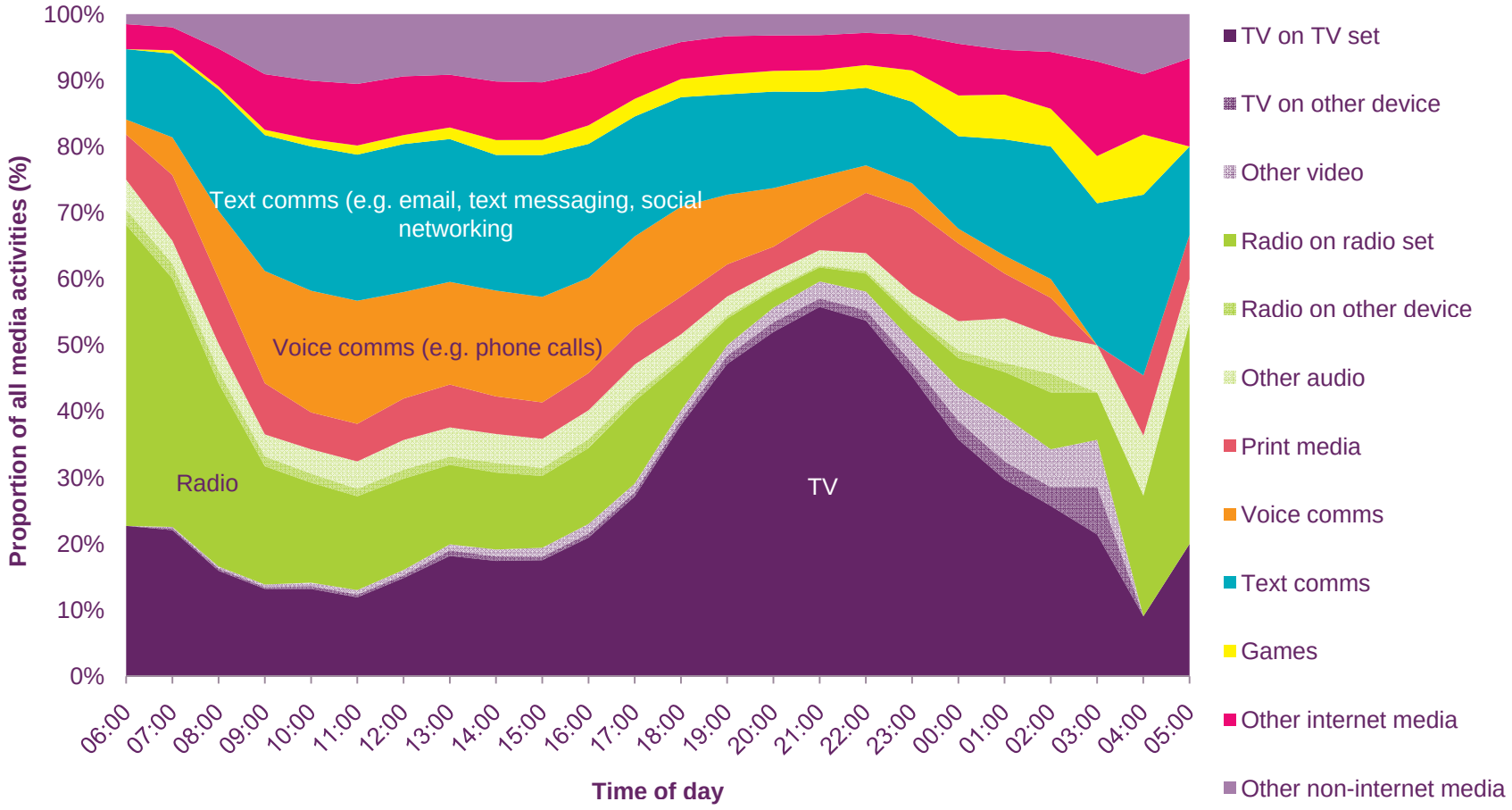
Proportion of all lifestyle and media activity throughout the day



Source: Ofcom research, base = all respondent days: 7966

Figure 1.14

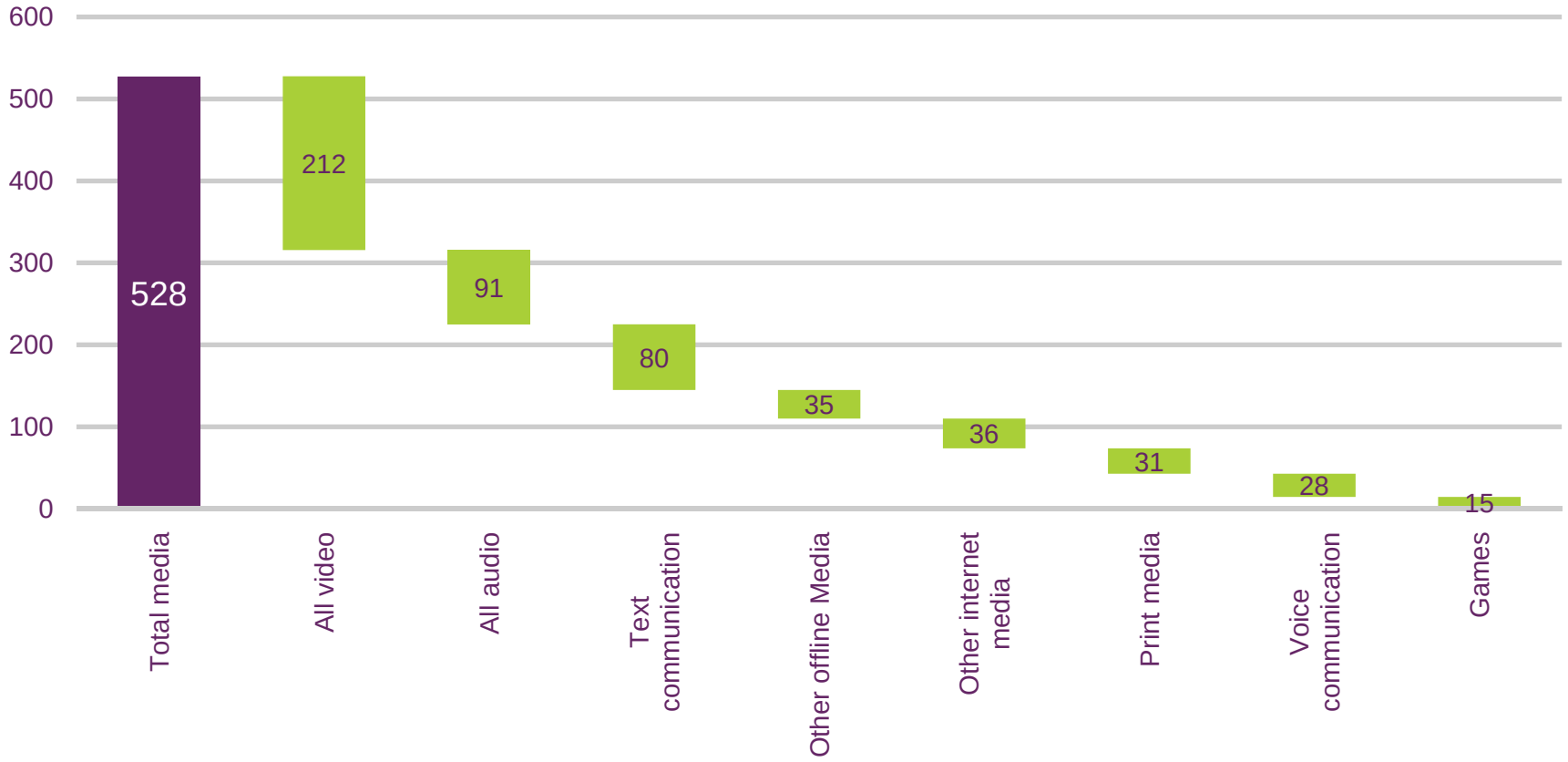
Proportion of all media activity throughout the day



Source: Ofcom research, base = all respondent days: 7966

Fig 1.15

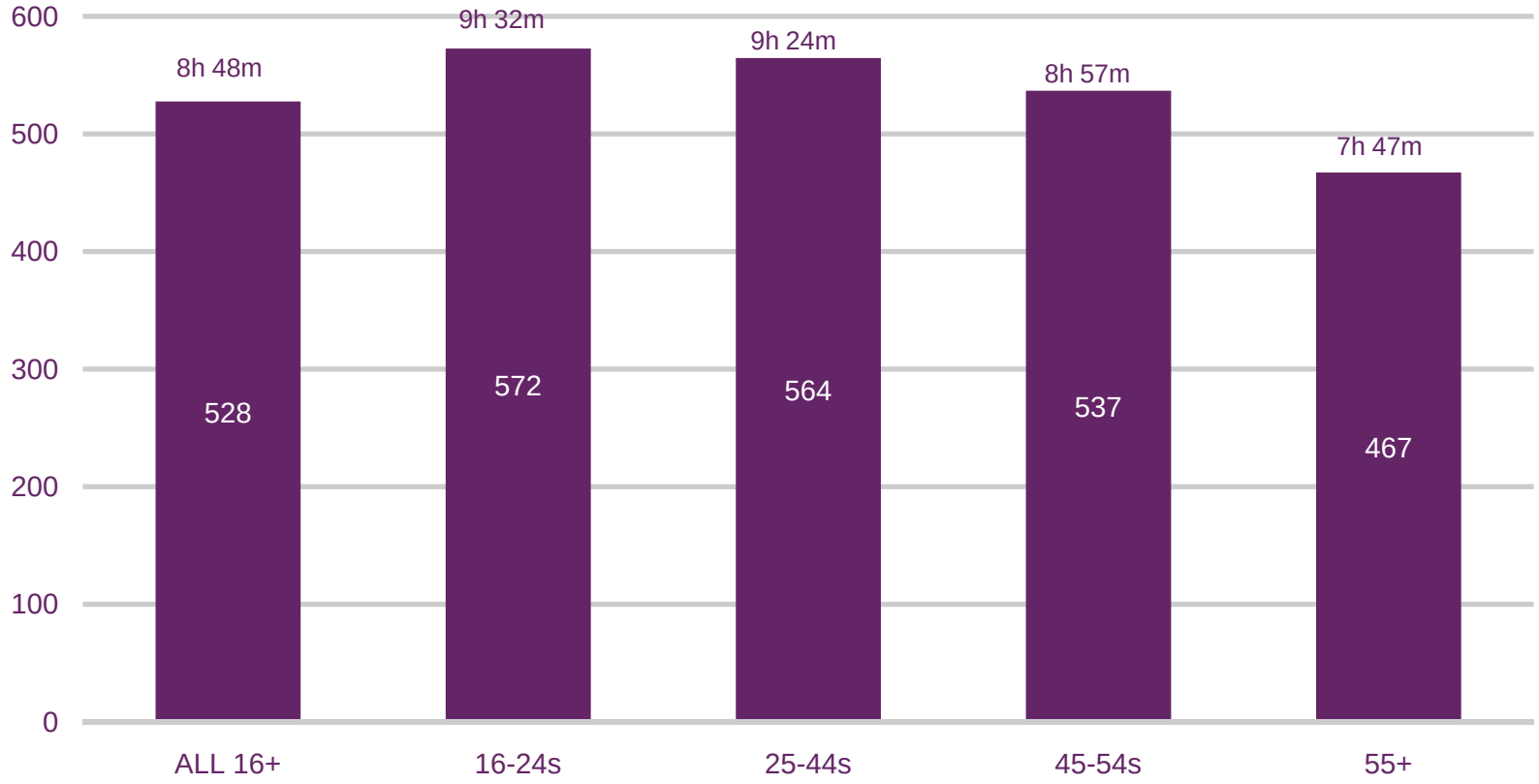
Average amount of media used per day



Source: Ofcom research, base = all respondent days: 7966

Figure 1.16

Average amount of media used per day, by age



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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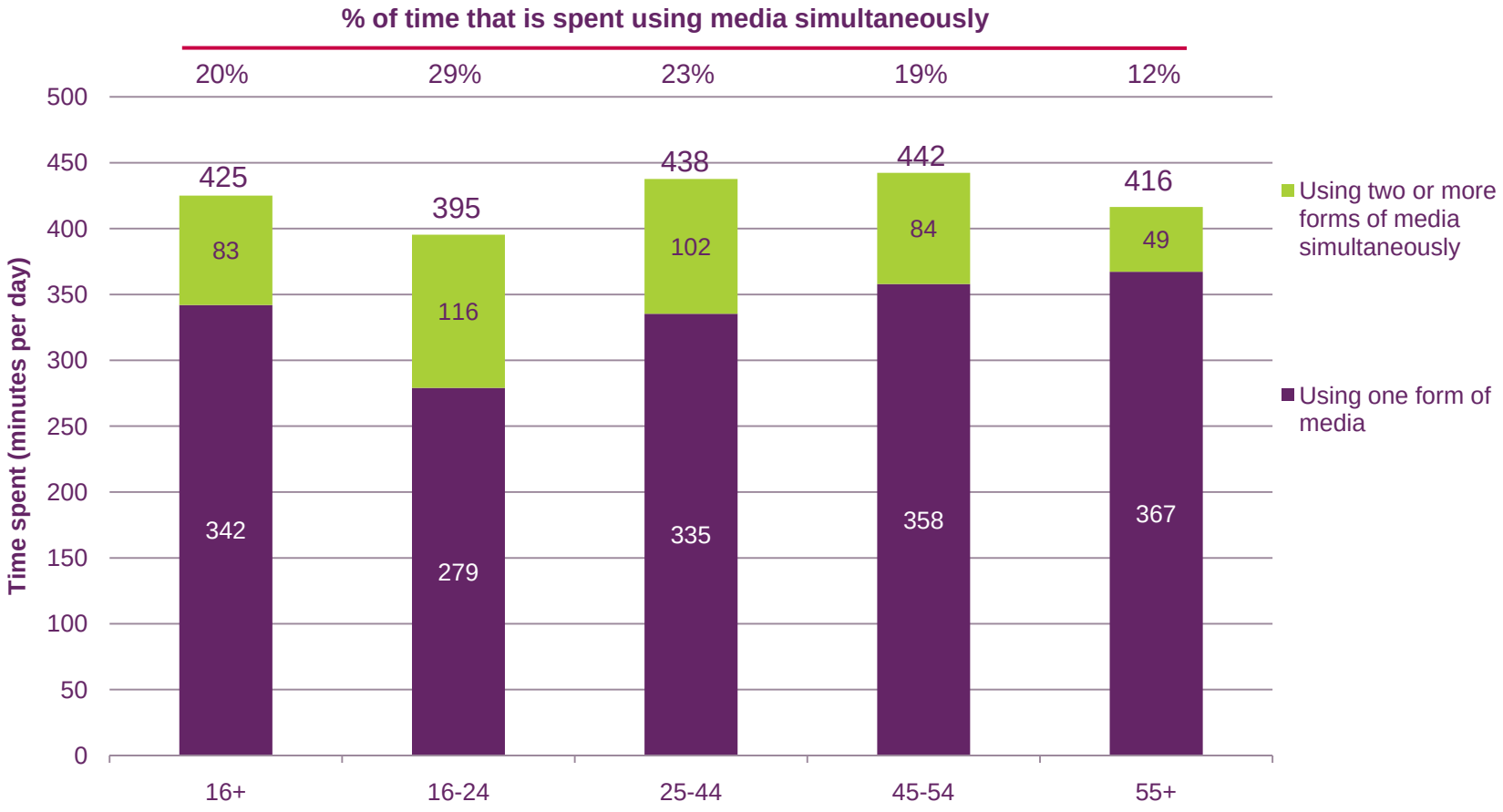
Figure 1.17

Time spent using media, split by solus and simultaneous



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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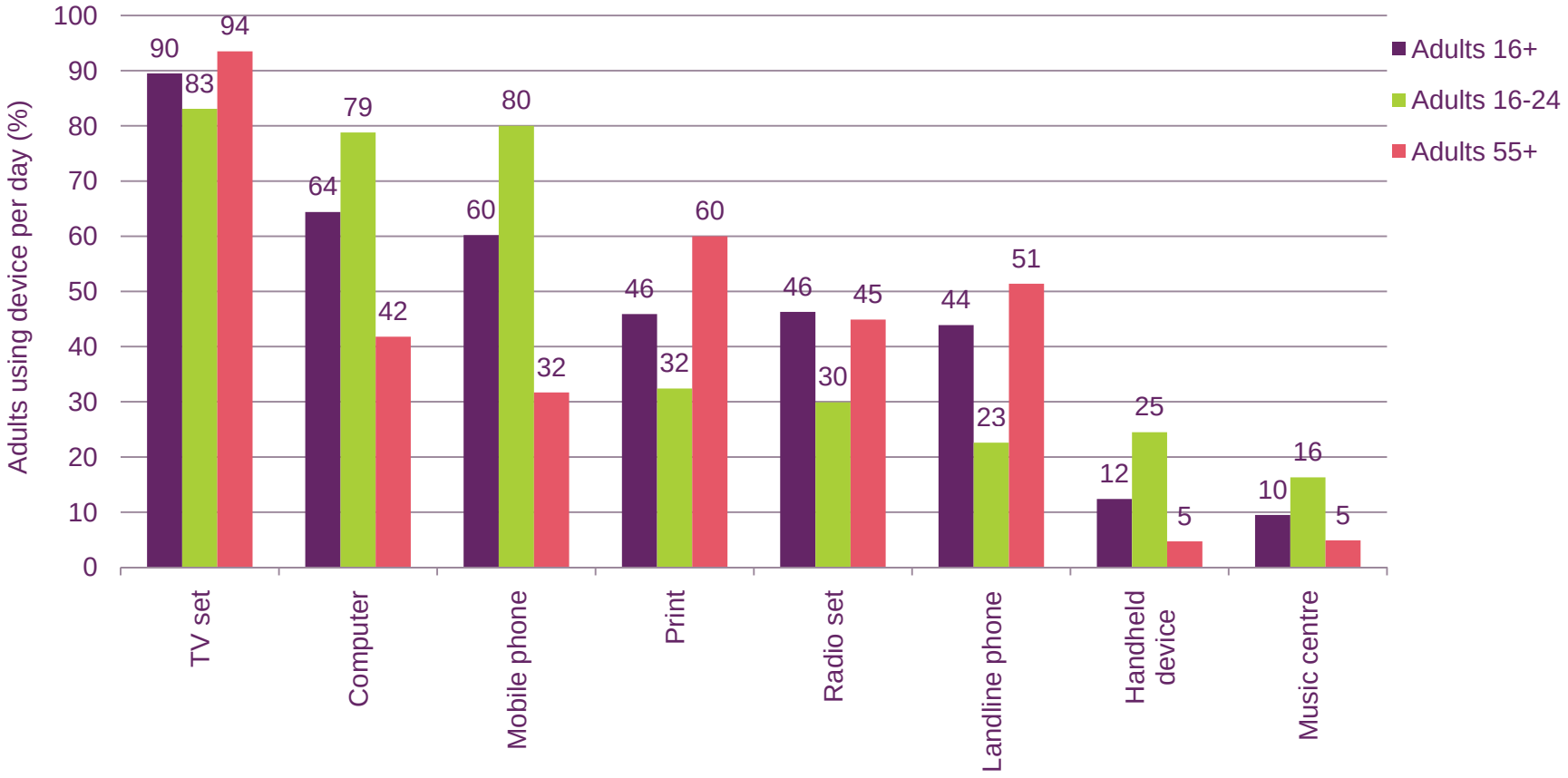
Figure 1.18

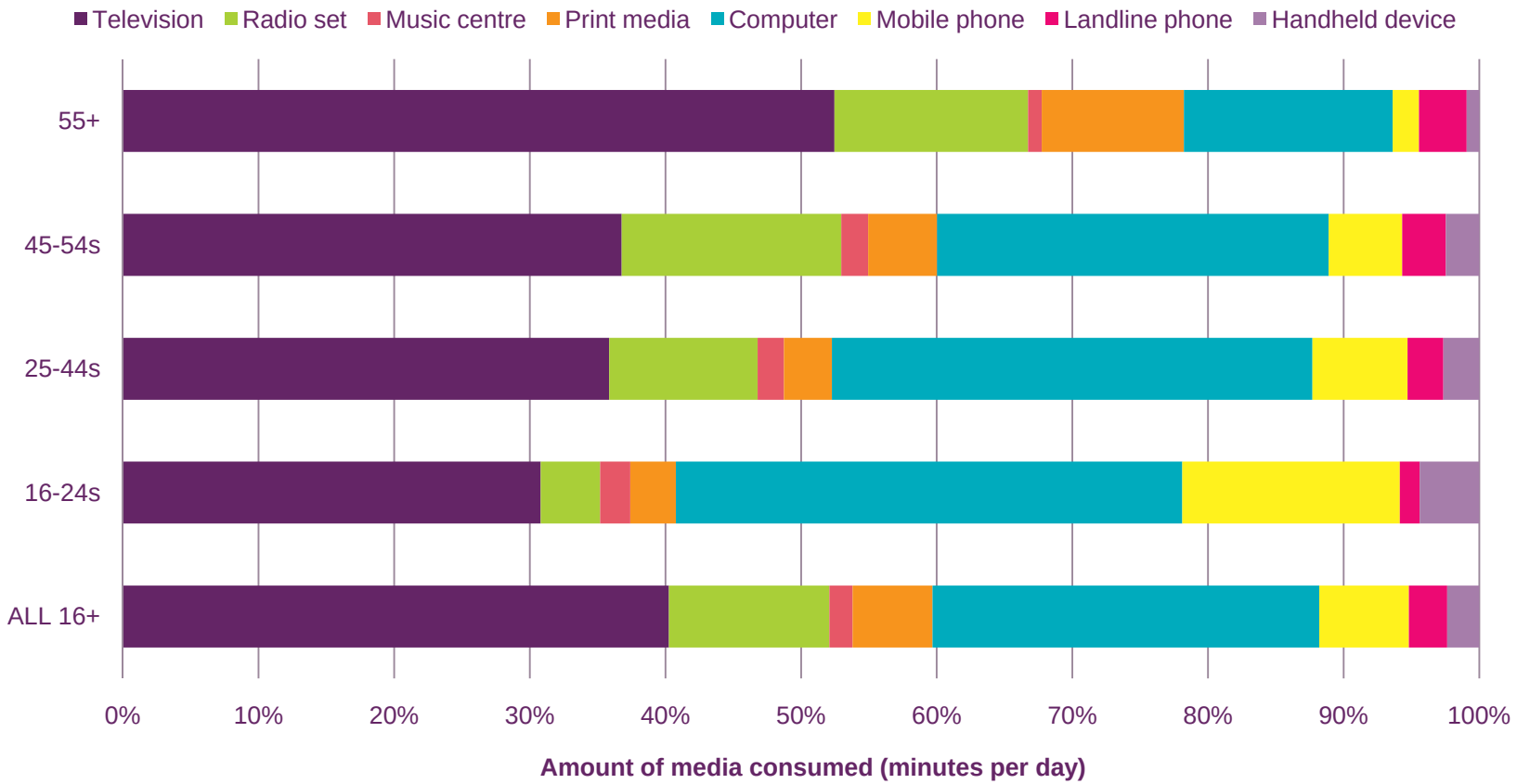
Daily reach of devices – adults 16+, 16-24, and 55+



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 55+ = 2373

Figure 1.19

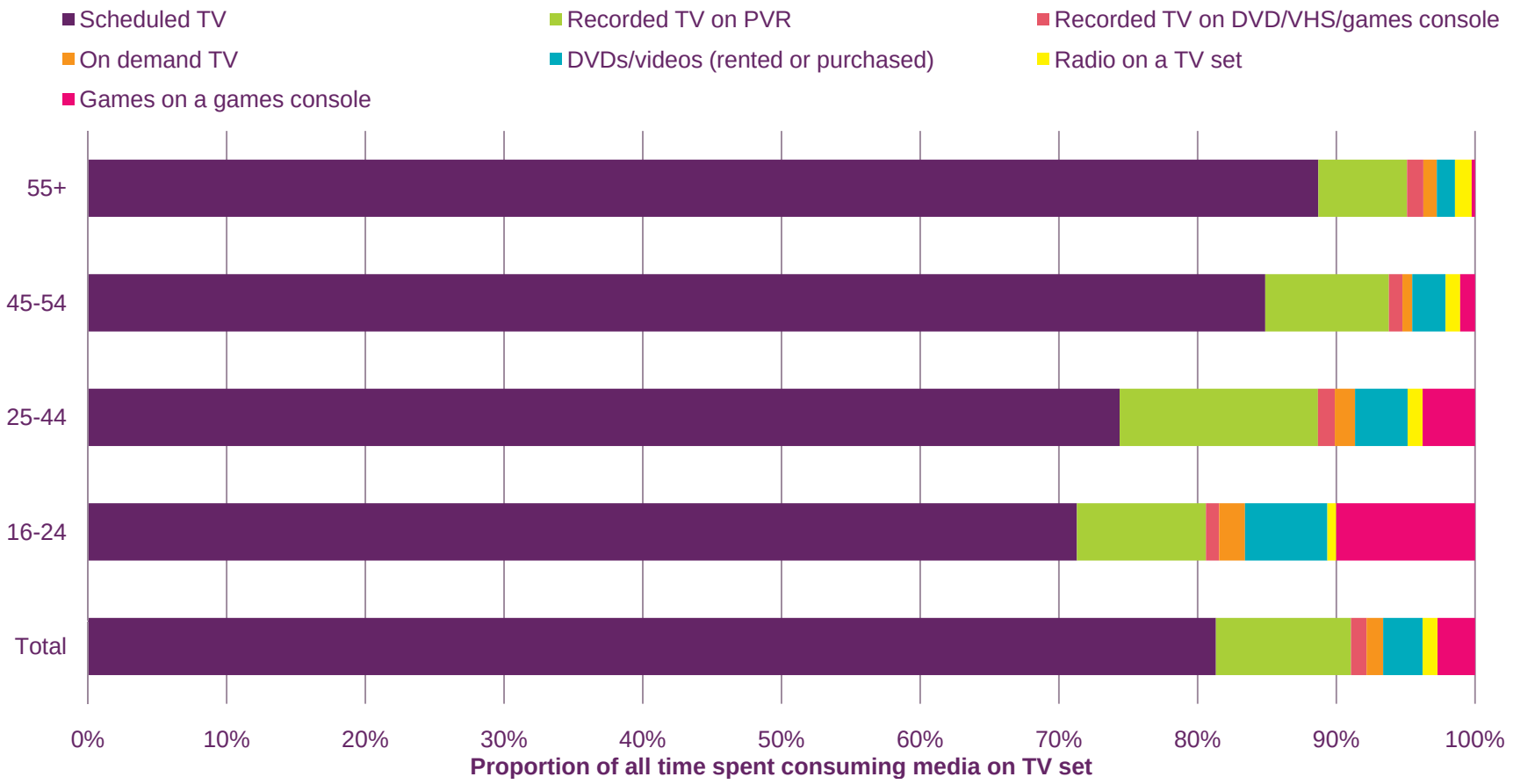
Proportion of all media use through each device, by age group



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.20

Proportion of TV use by activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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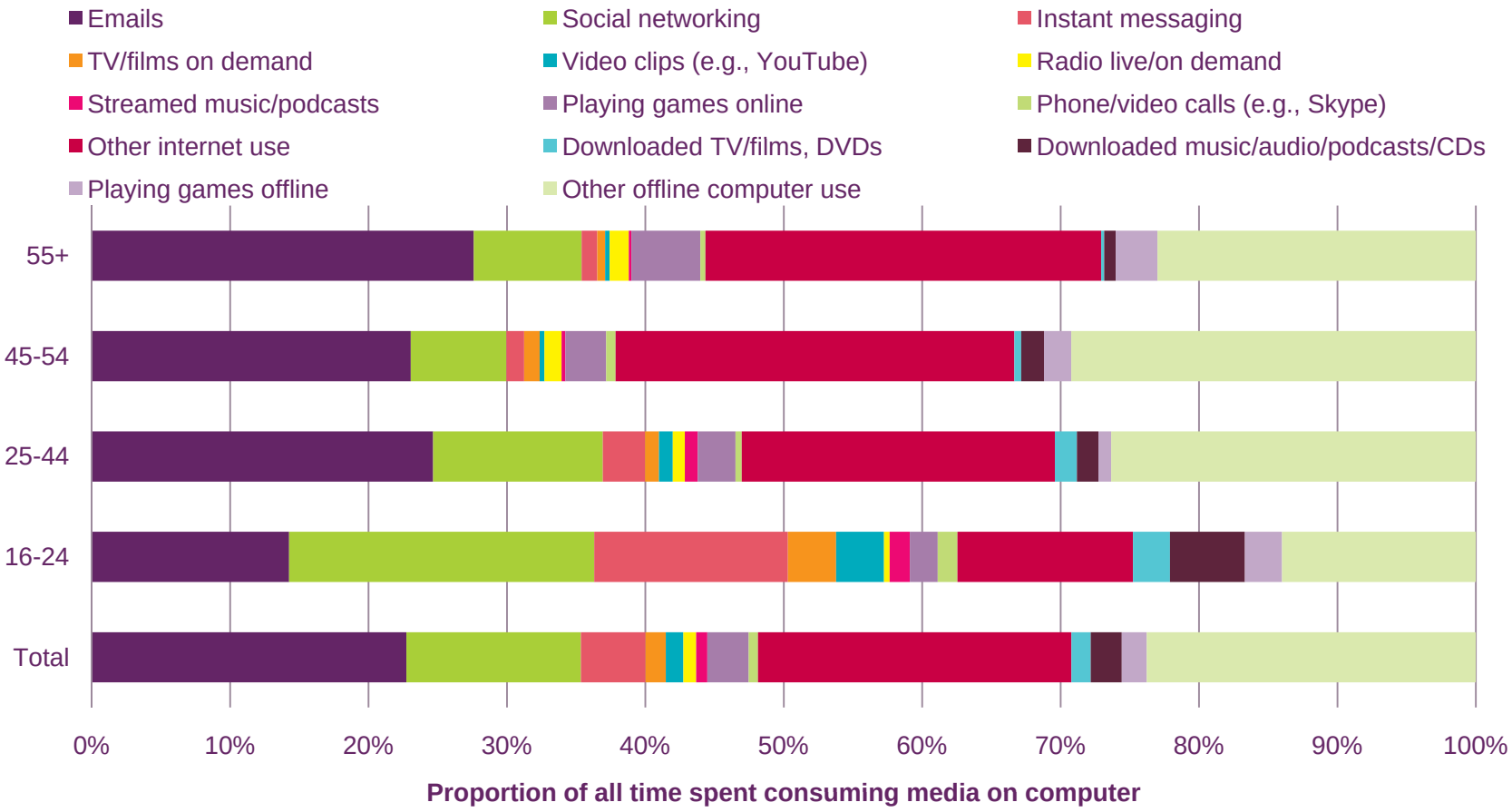
Figure 1.21

Proportion of computer use, by activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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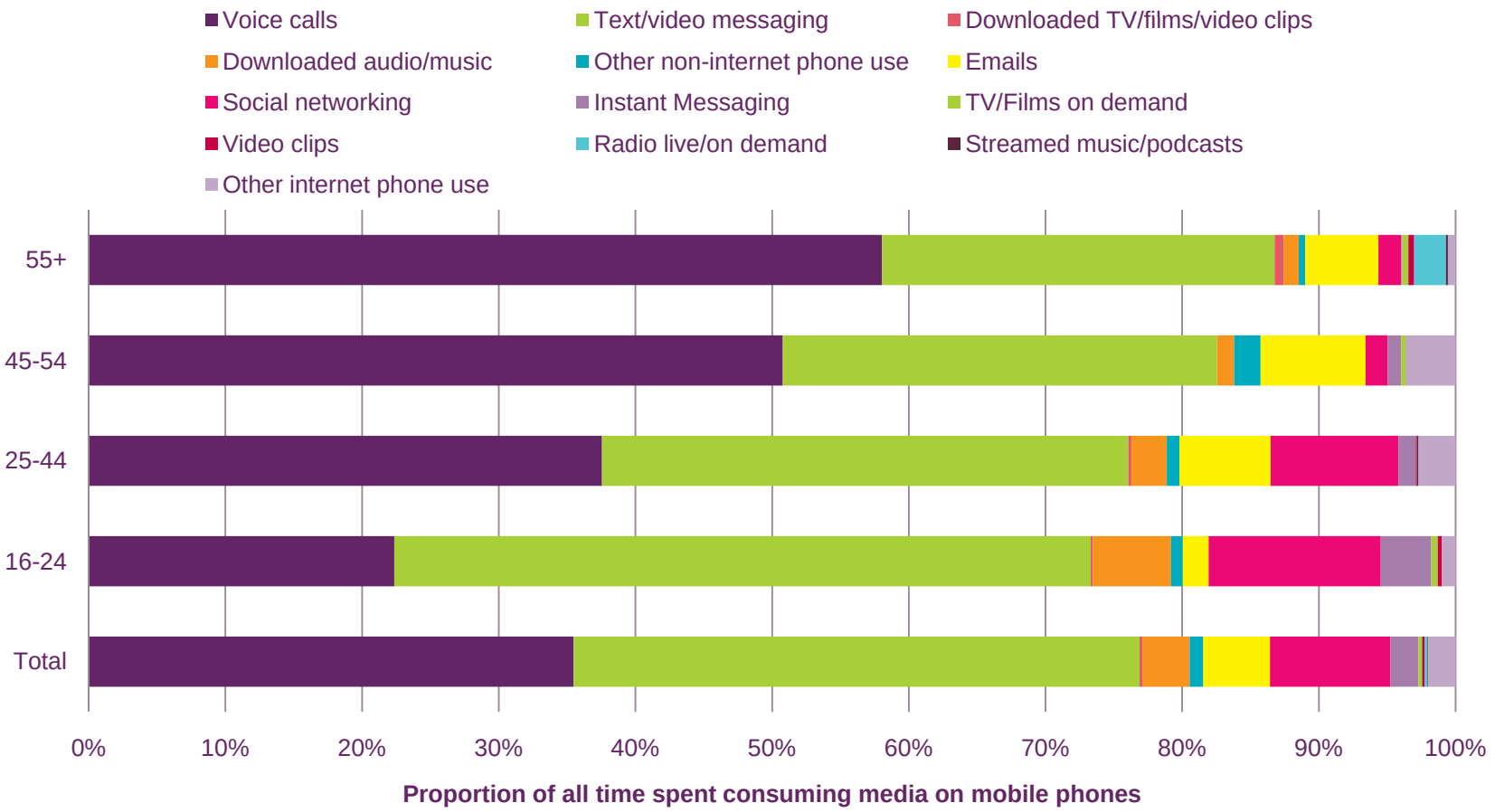
Figure 1.22

Proportion of mobile phone use, by activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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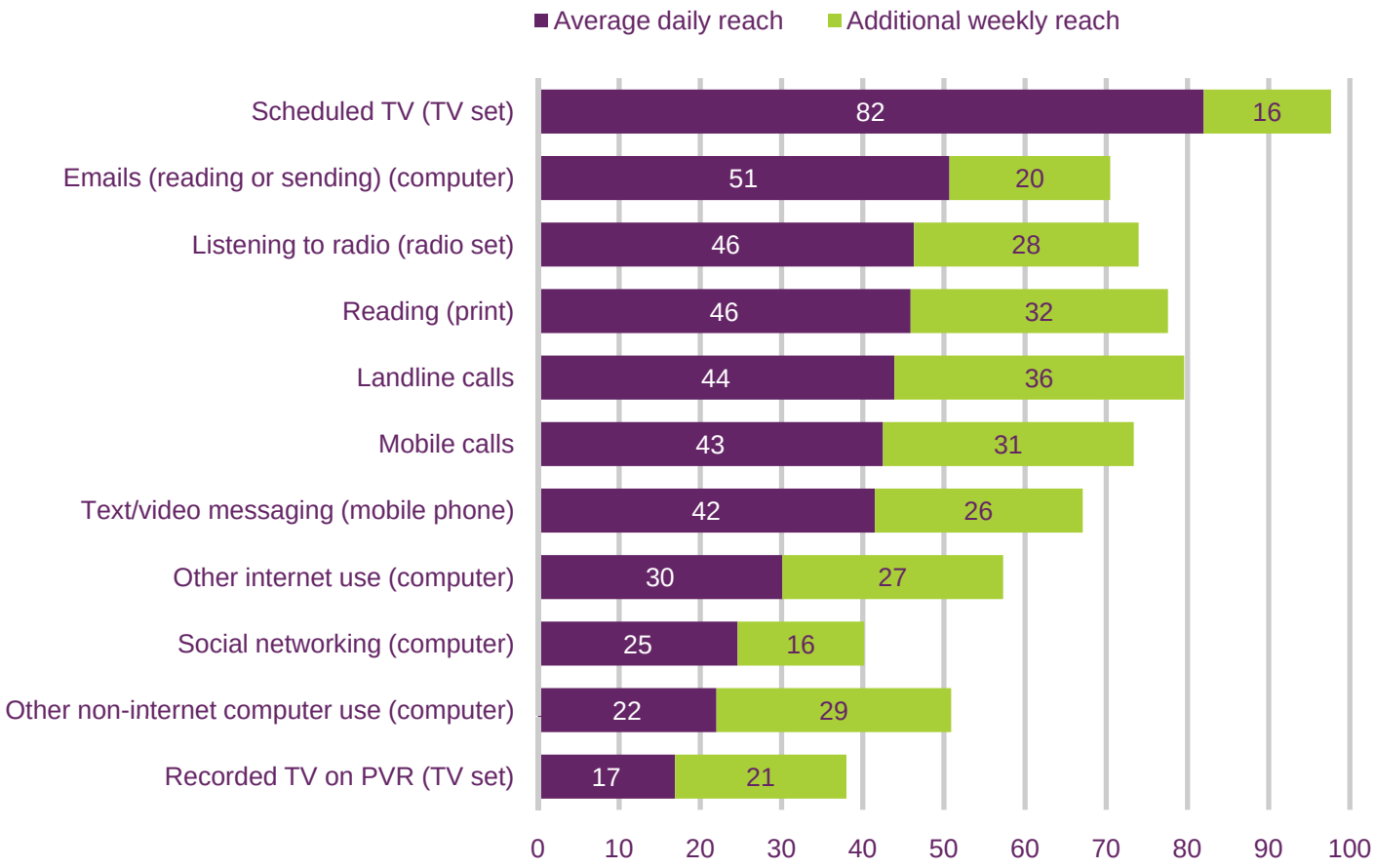
Figure 1.23

Media activities with the highest daily reach



Source: Ofcom research, base = All respondent days: 7966

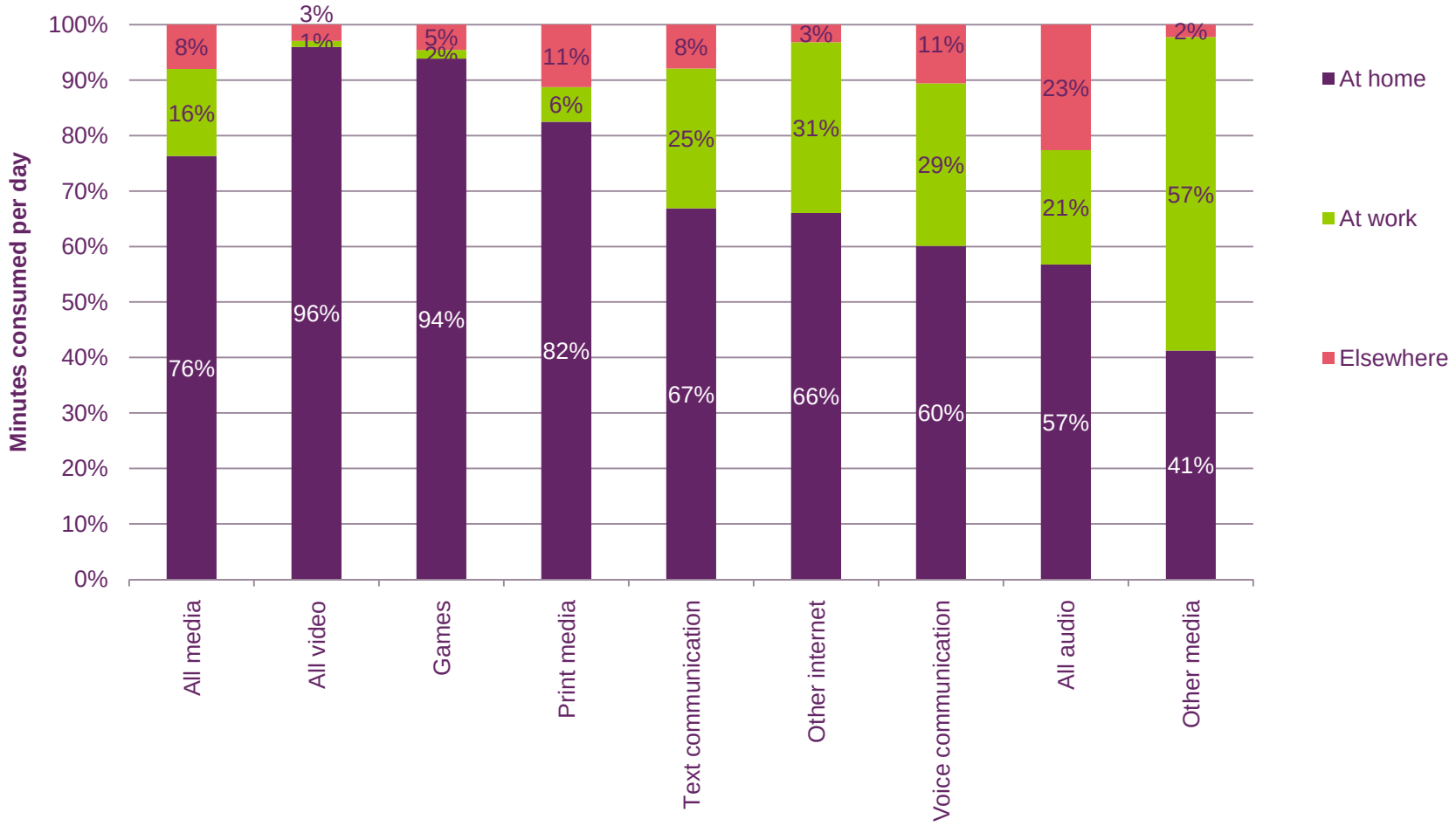
Figure 1.24

Proportion of media used, by age

Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 1.25

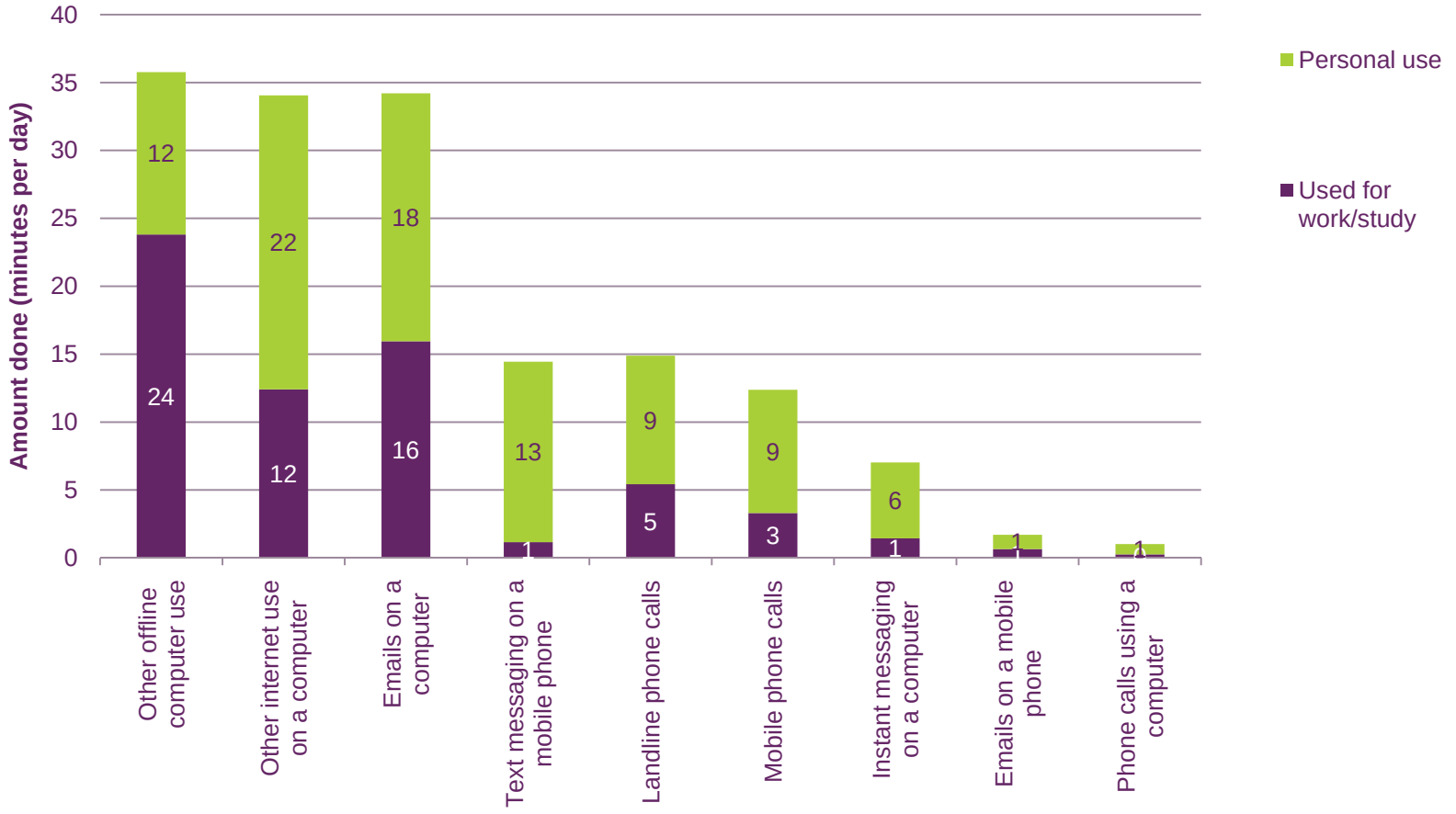
Proportion of media use, by location



Source: Ofcom research, base = All respondent days: 7966

Figure 1.26

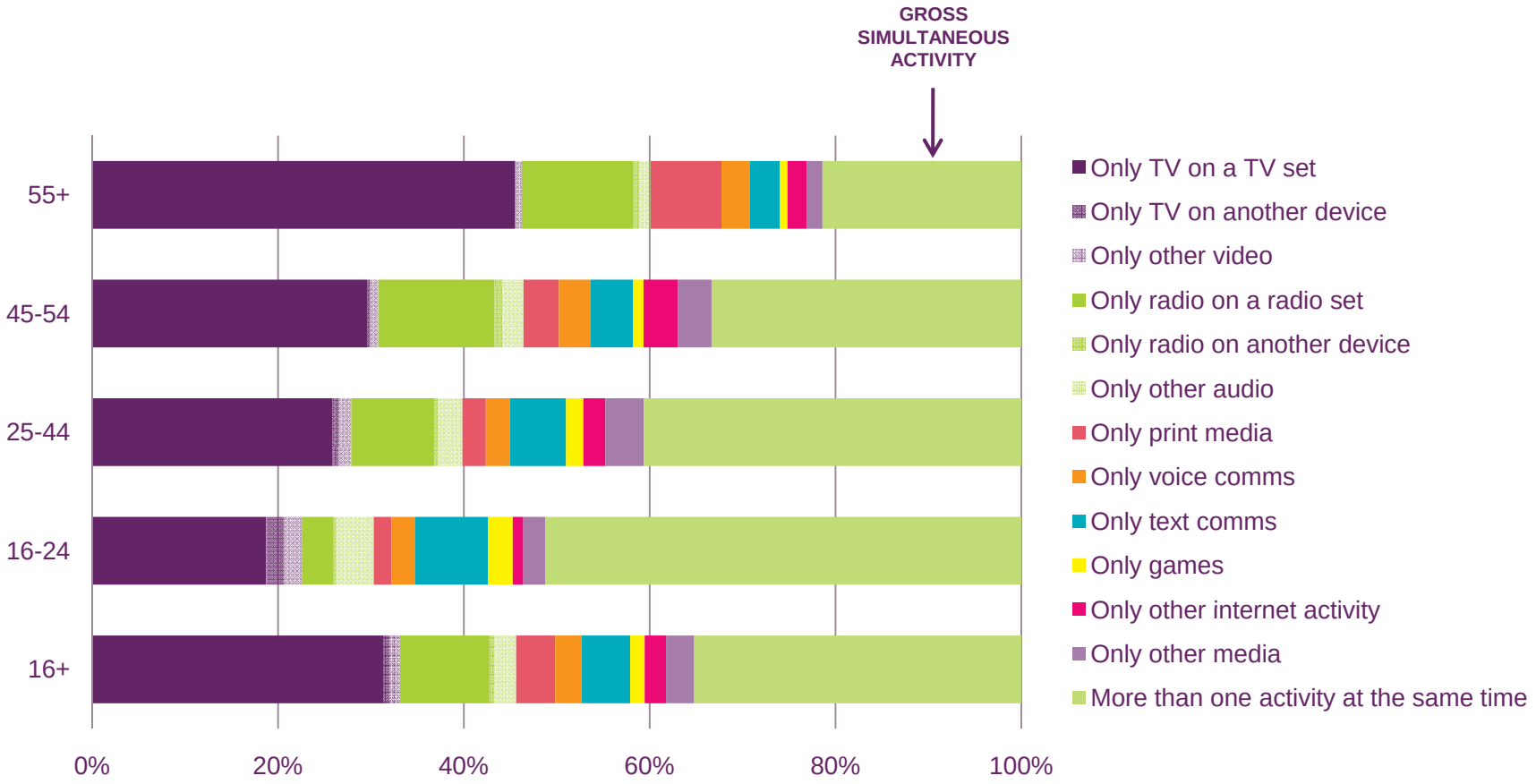
Amount of activity, by purpose



Source: Ofcom research, base = All respondent days: 7966

Figure 1.27

Proportion of all media used, split by individual solus activities and all simultaneous activity



Source: Ofcom research, base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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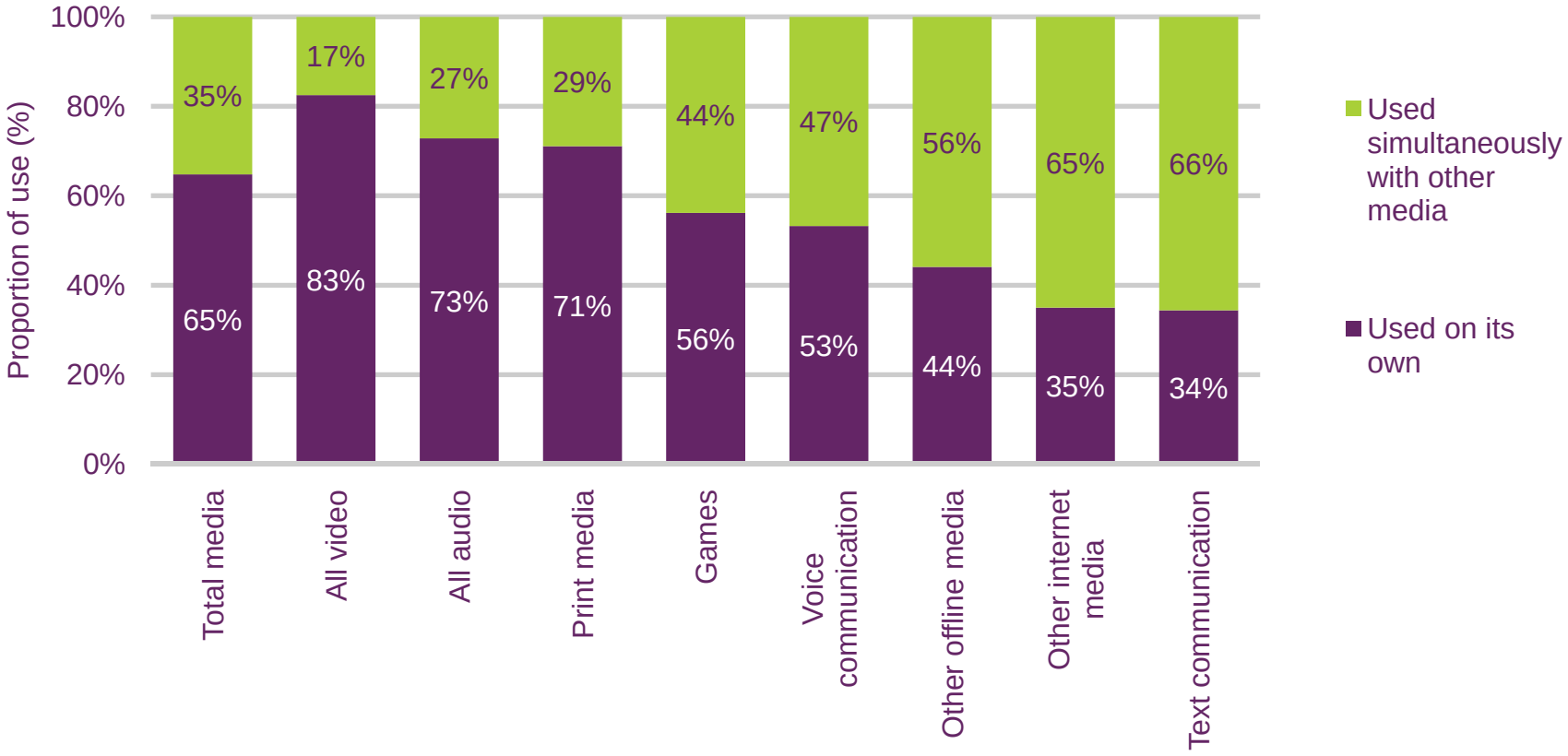
Figure 1.28

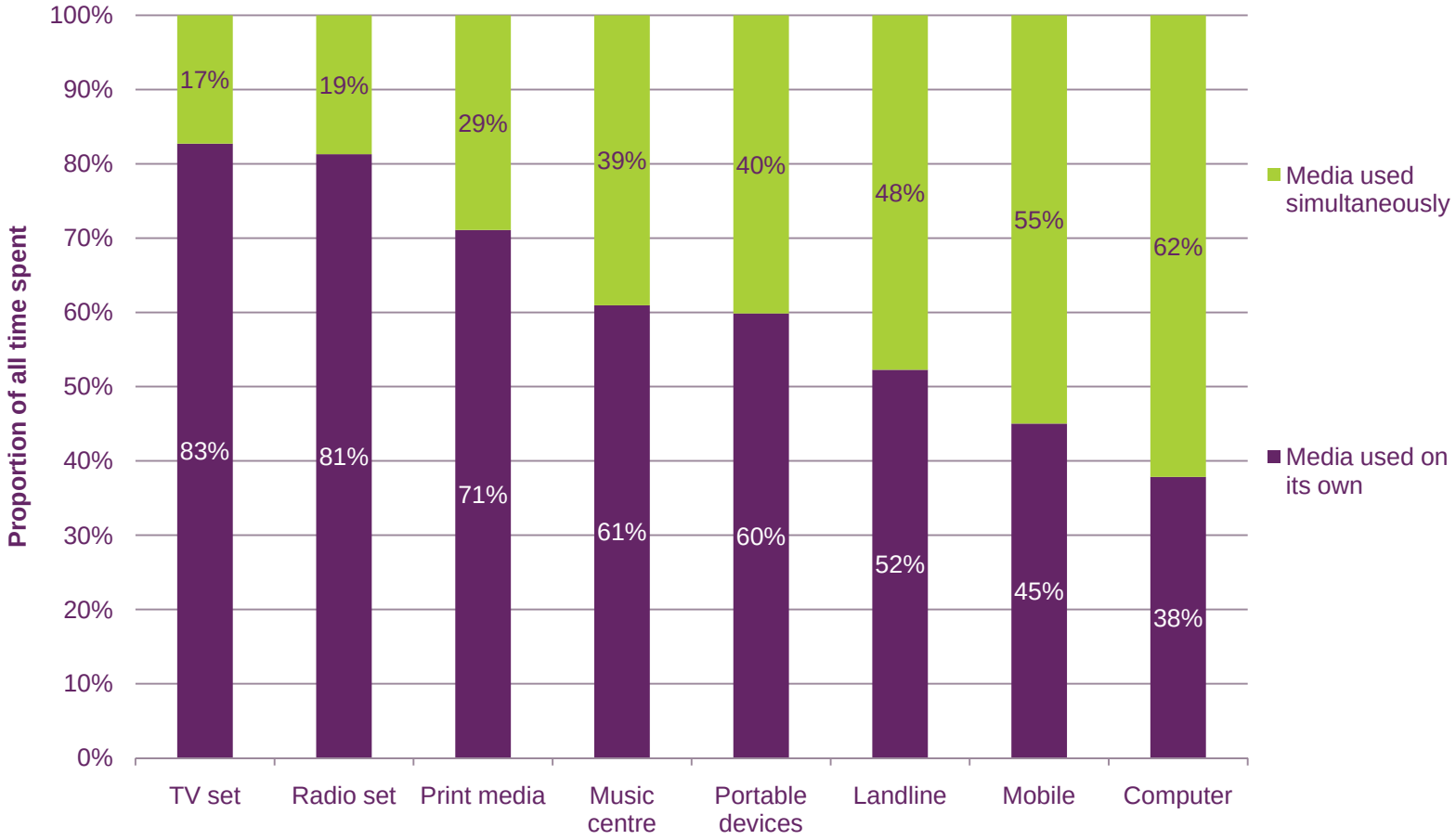
Proportion of media used per category, split by solus and simultaneous use



Source: Ofcom research, base = All respondent days: 7966

Figure 1.29

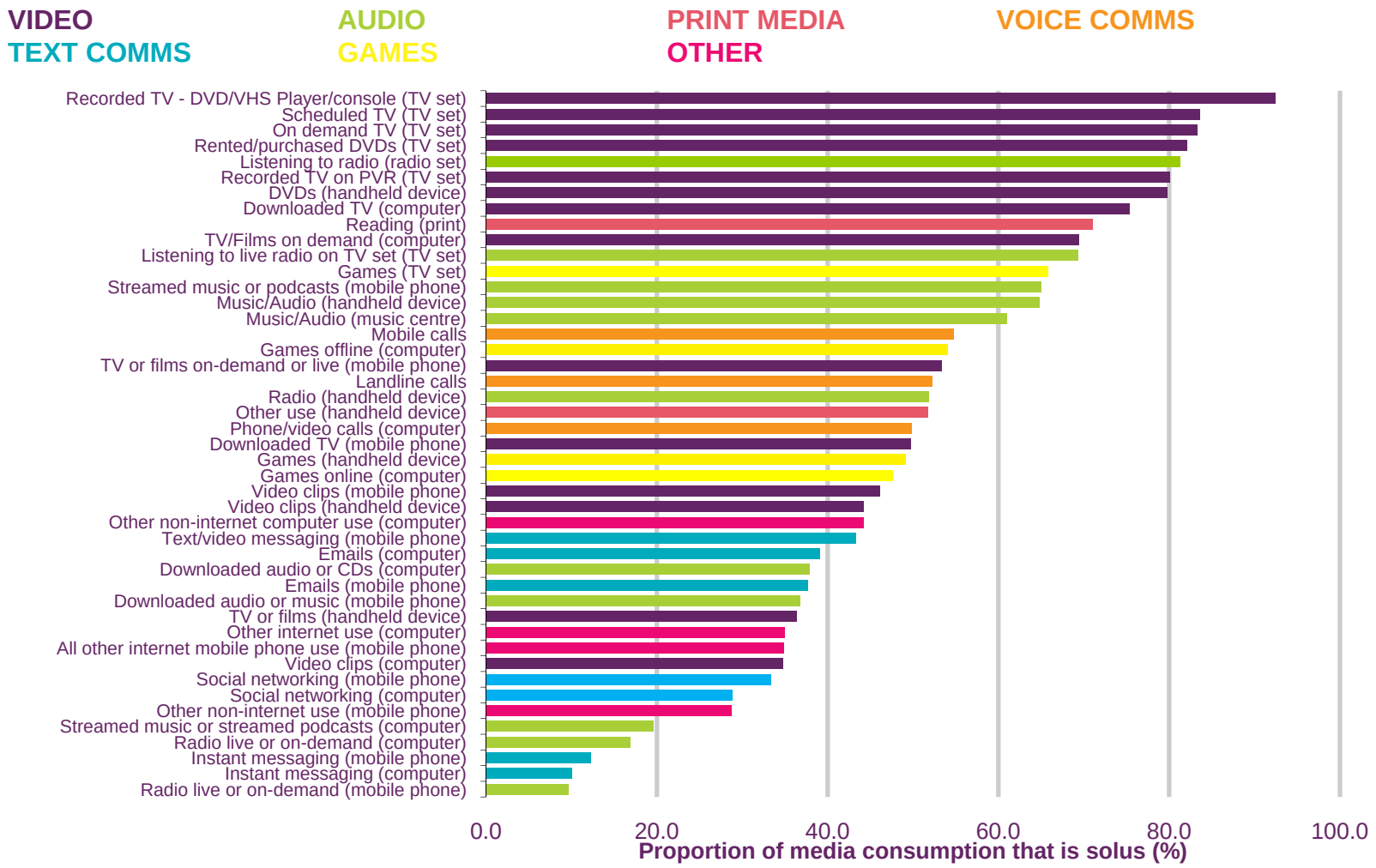
Proportion of solus and simultaneous media used, by device



Source: Ofcom research, base = All respondent days: 7966

Figure 1.30

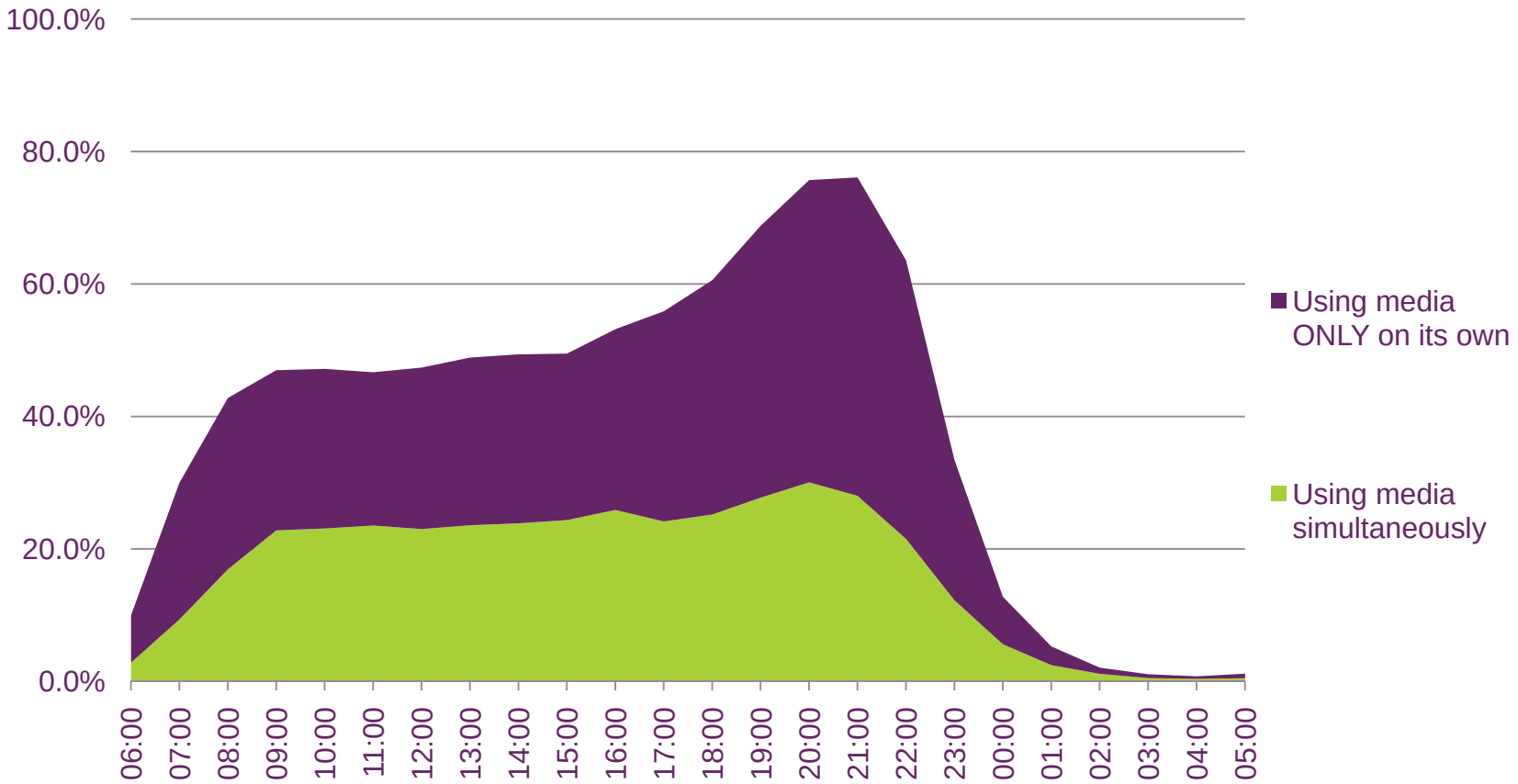
Proportion of specific media activities that is solus



Source: Ofcom research, base = All respondent days: 7966

Figure 1.31

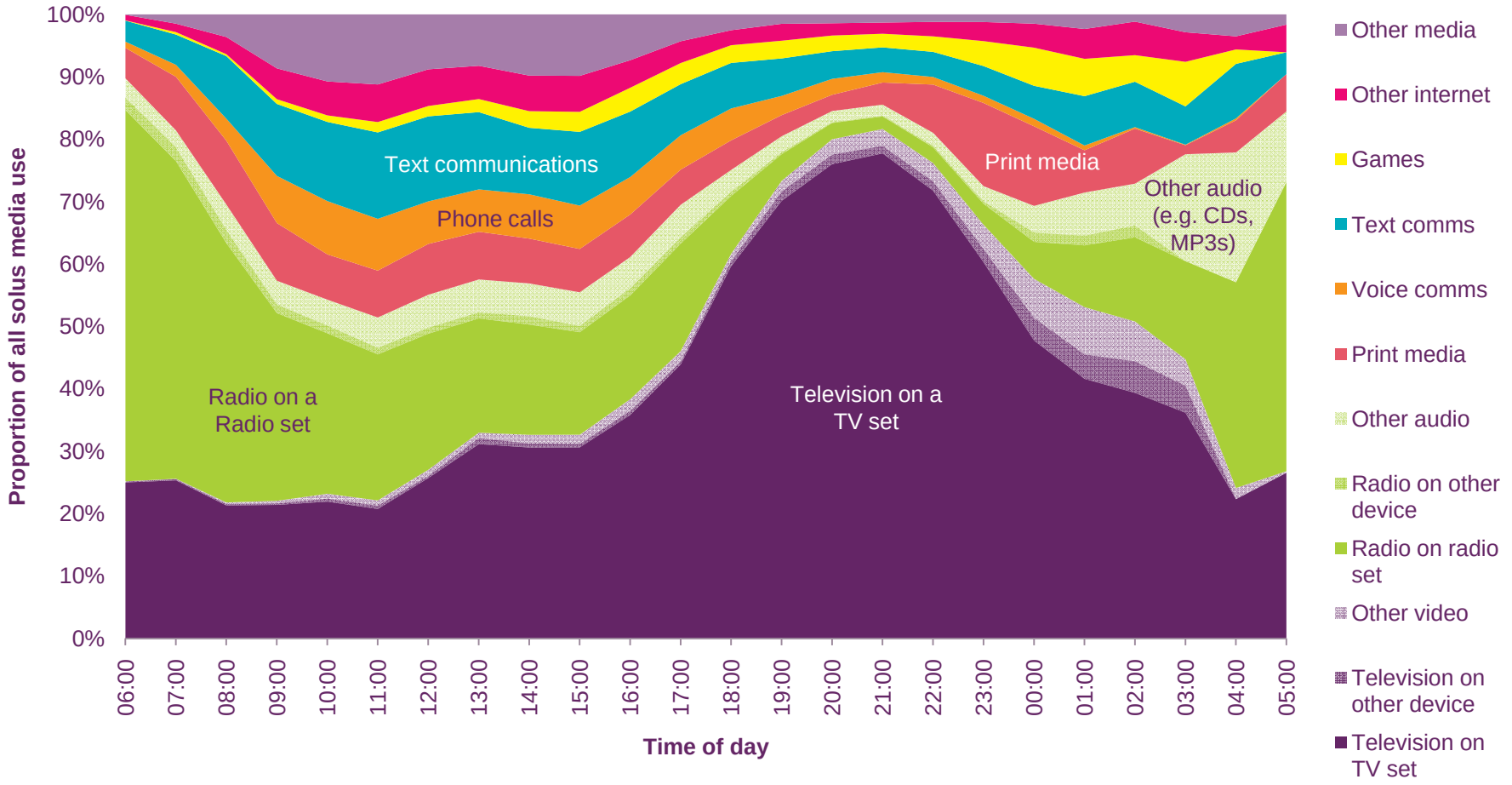
Hourly reach of media use throughout the day, profiled by solus and simultaneous activity



Source: Ofcom research, base = All respondent days: 7966

Figure 1.32

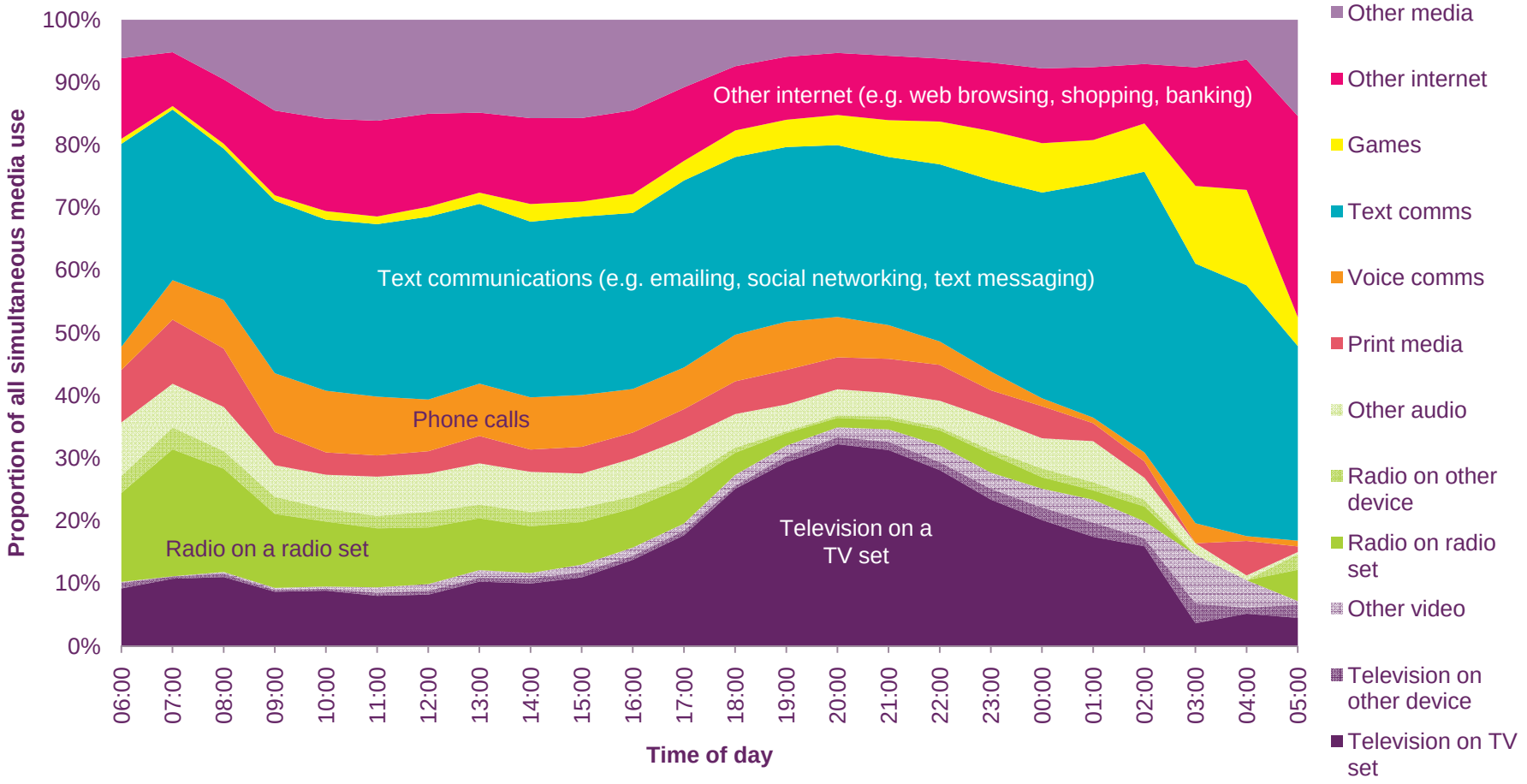
Proportion of solus media use throughout the day



Source: Ofcom research, base = All respondent days: 7966

Figure 1.33

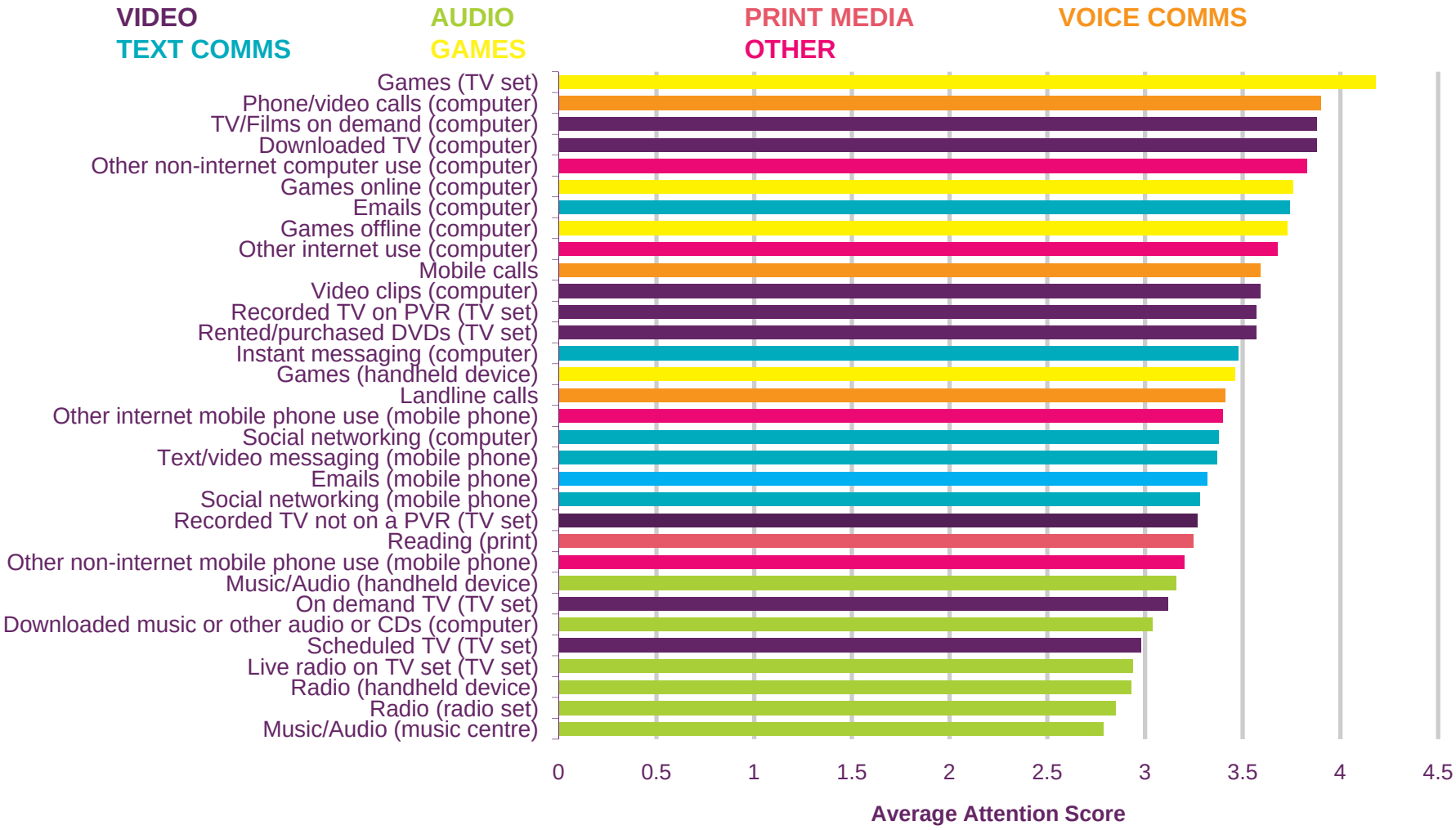
Proportion of simultaneous media use throughout the day



Source: Ofcom research, base = All respondent days: 7966

Figure 1.34

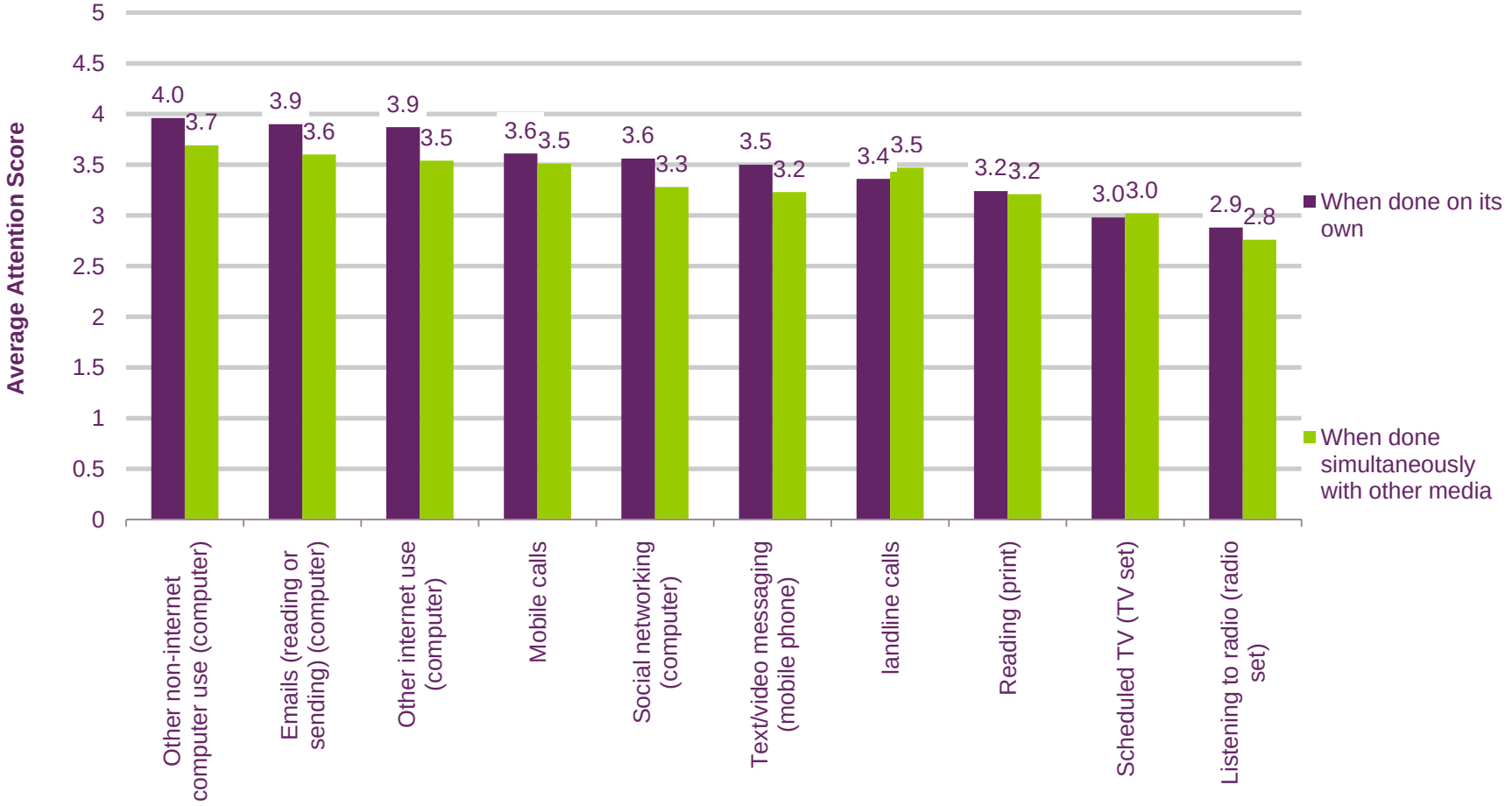
Attention level by activity, based on mean scores



Source: Ofcom research, base = All respondent days: 7966

Figure 1.35

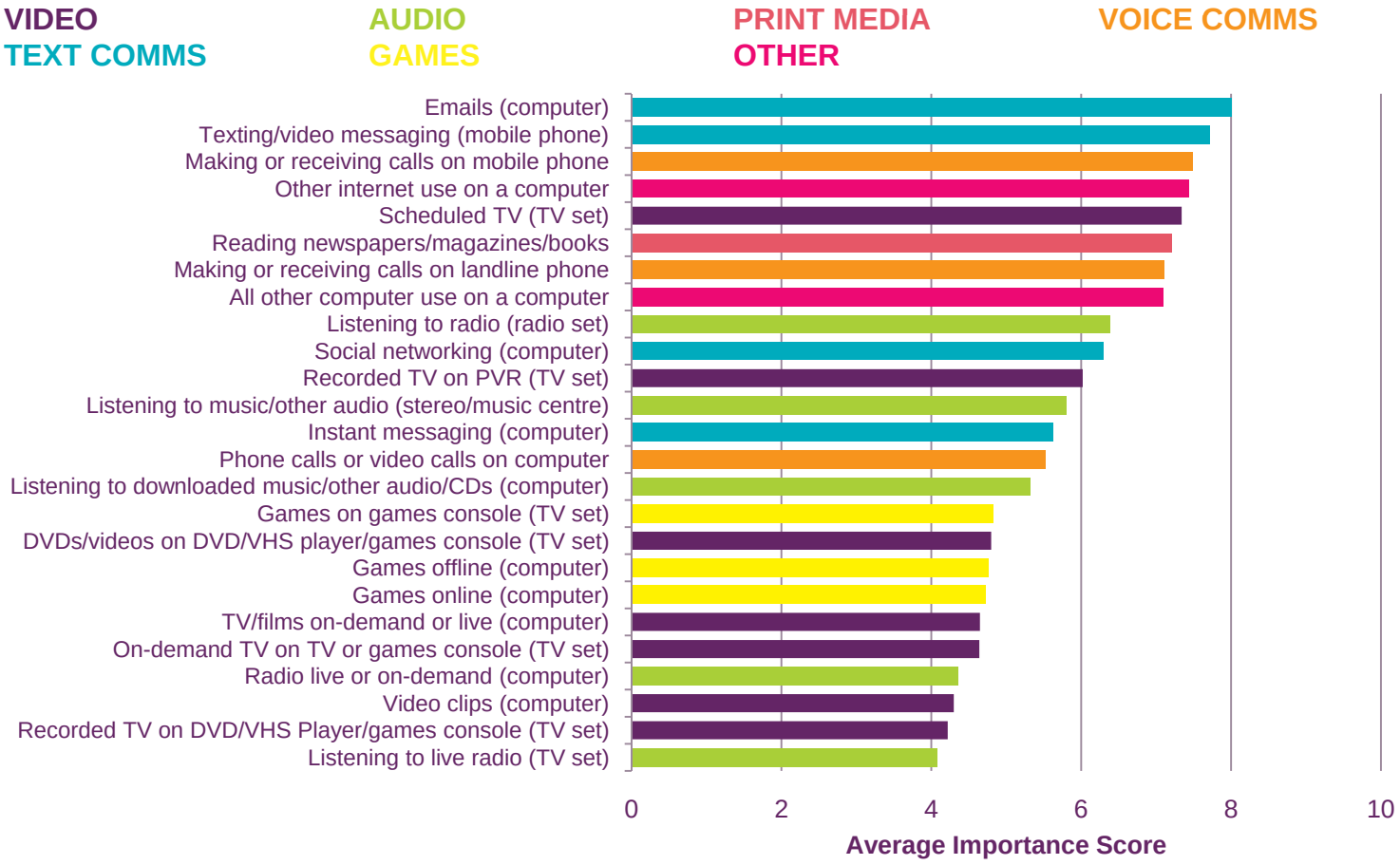
Solus and simultaneous attention scores, by activity



Source: Ofcom research, base = All respondent days: 7966

Figure 1.36

Importance of activities, based on mean scores



Source: Ofcom attitudinal research, activities with base>50 respondents, base: all who ever do activity

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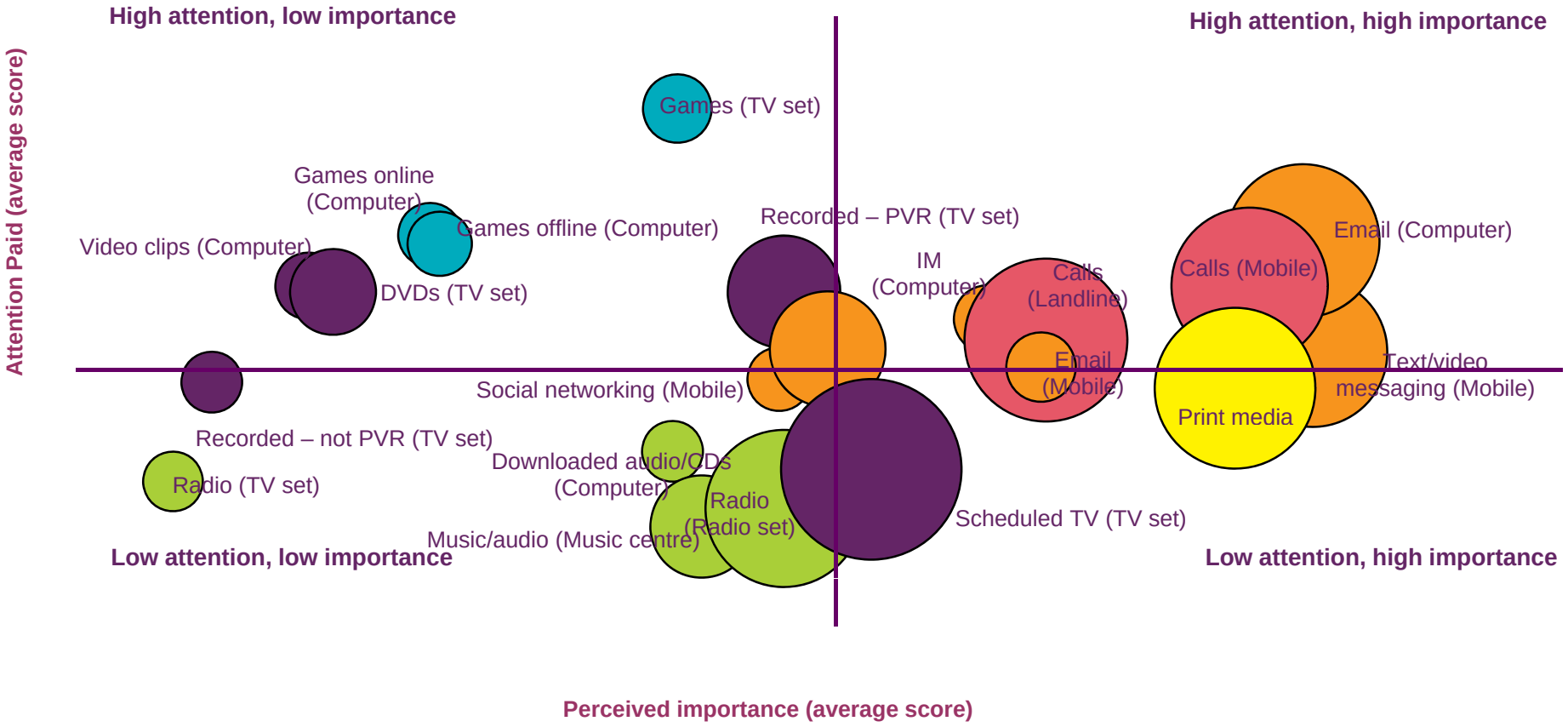
Figure 1.37

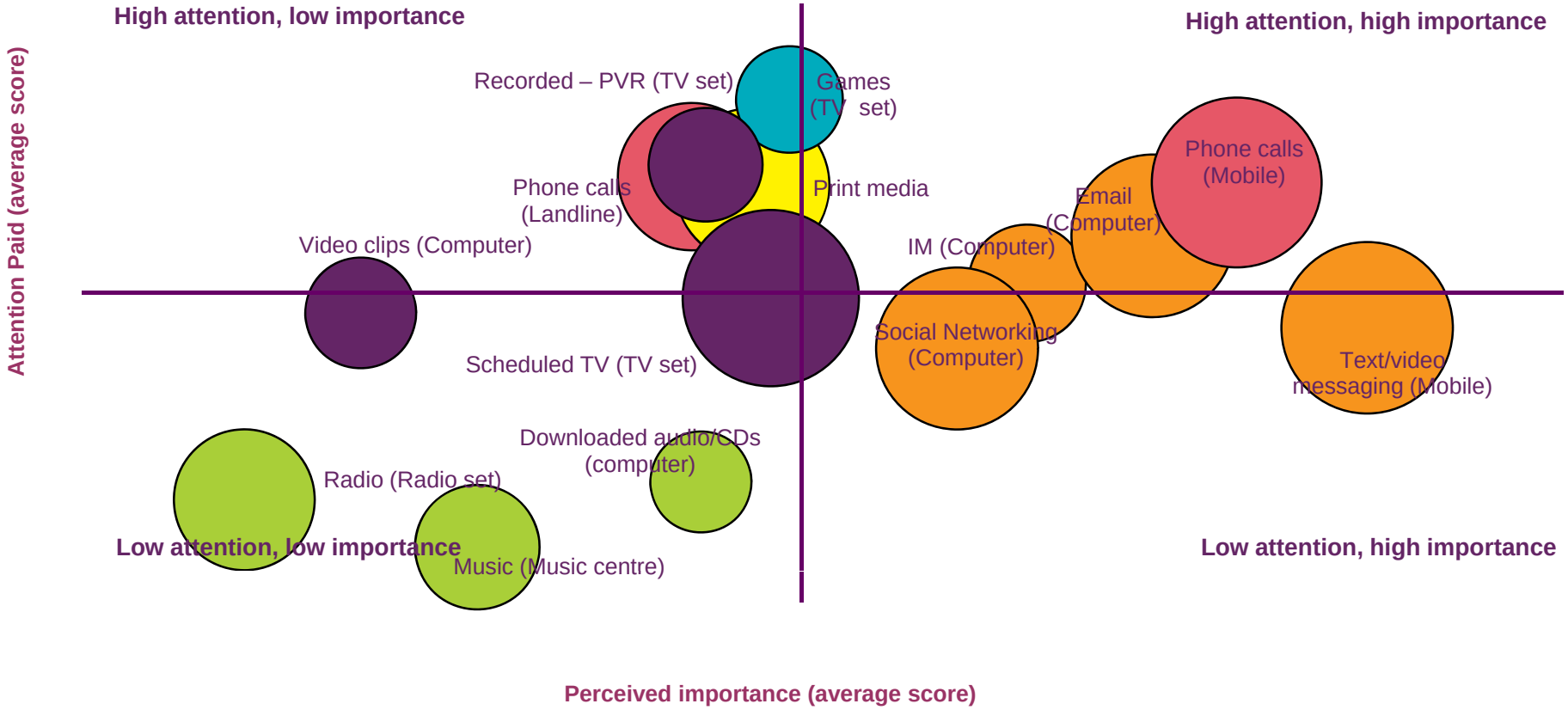
Importance and attention of activities – based on mean scores



Source: Ofcom research, base = all respondent days: 7966, all activities with base>50 respondent days for attention and base>50 respondents for importance; base: all who ever do activity and have undertaken it in week of research, size of bubble proportional to weekly reach.

Figure 1.38

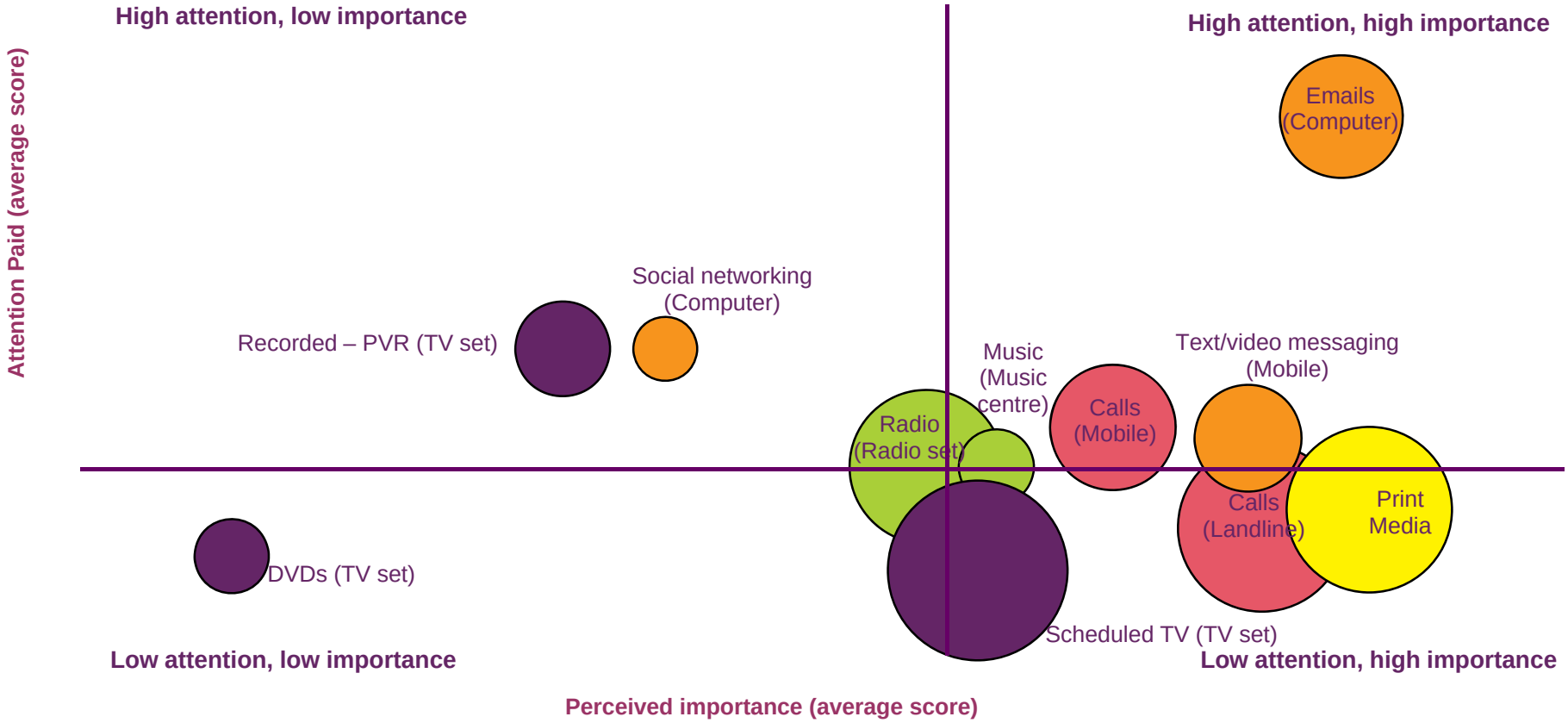
Importance and attention of activities for adults 16-24 – based on mean scores



Source: Ofcom research, base = all 16-24 respondent days: 1106, all activities with base>50 respondent days for attention and base>50 respondents for importance; base: all who ever do activity, and have undertaken it in week of research, size of bubble proportional to weekly reach.

Figure 1.39

Importance and attention of activities for adults 55+ – based on mean scores

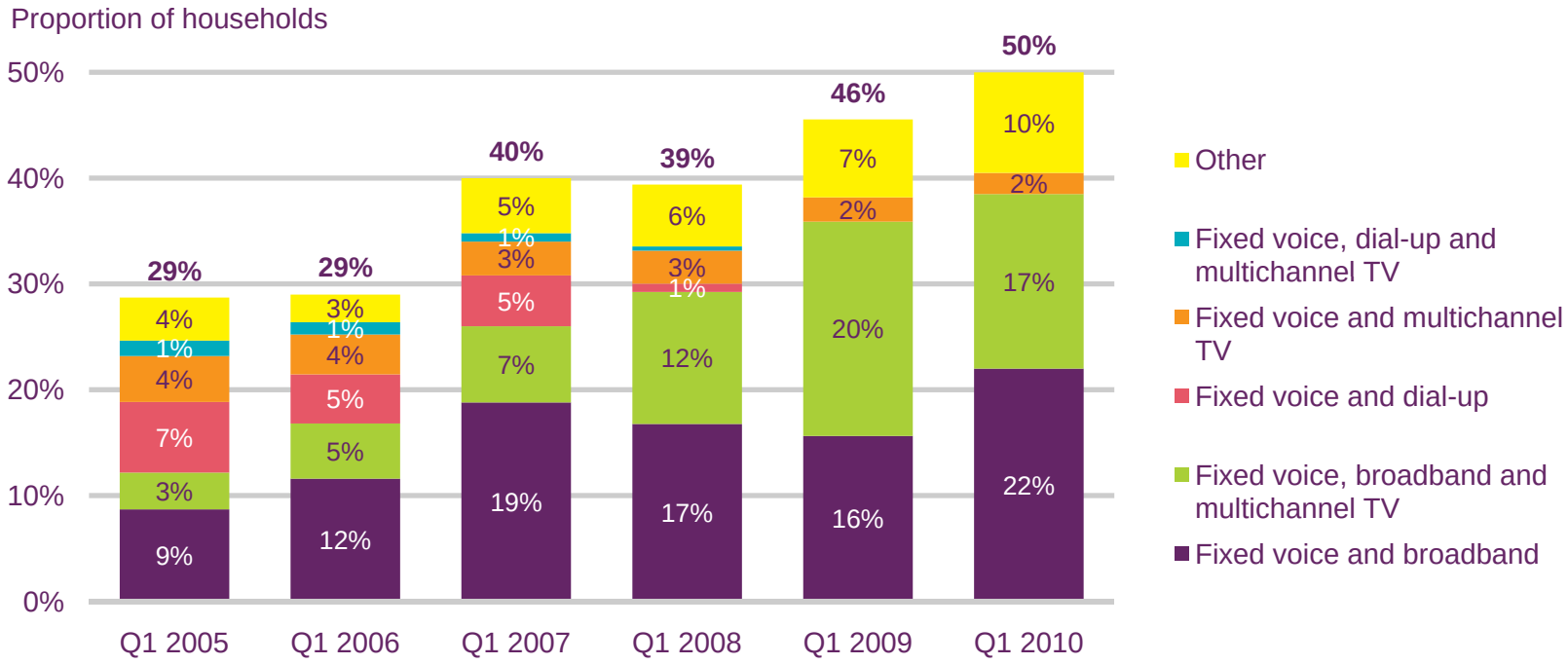


Source: Ofcom research, base = all 55+ respondent days: 2373, all activities with base>50 respondent days for attention and base>50 respondents for importance; base: all who ever do activity and have undertaken it in week of research, size of bubble proportional to weekly reach.

1.4 Bundling of communications services

Figure 1.40

Take-up of bundled services over time



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

Source: Ofcom technology tracker

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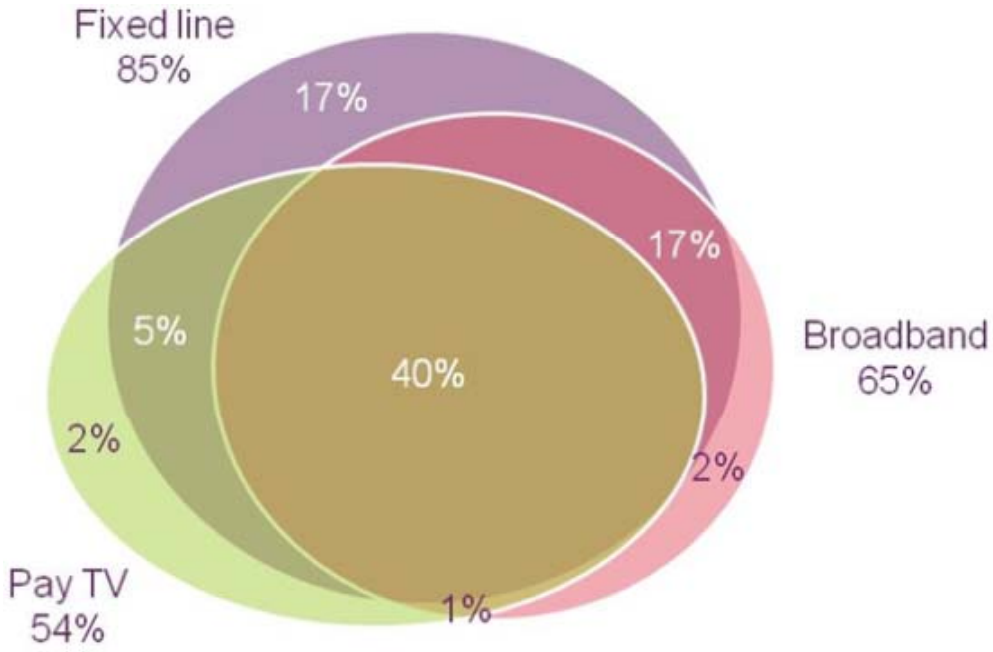
Figure 1.41

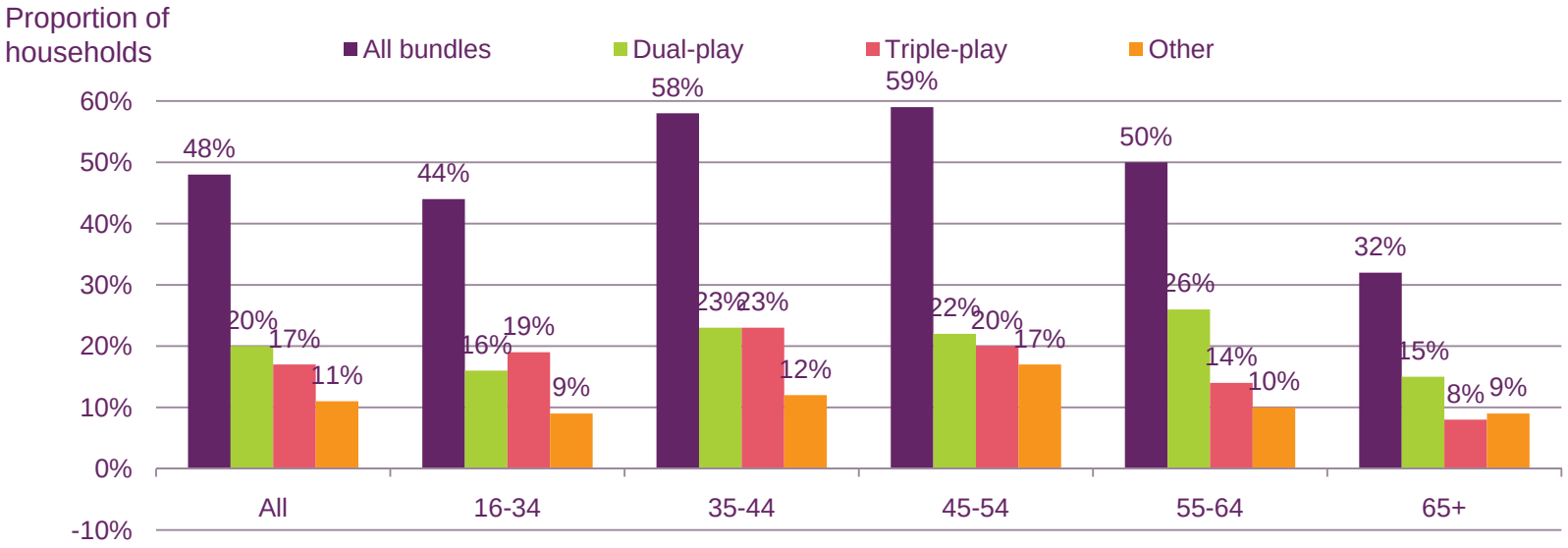
Proportion of all UK households taking communications services



Source: Ofcom industry analysis, Q1 2010

Figure 1.42

Take-up of bundled services, by age



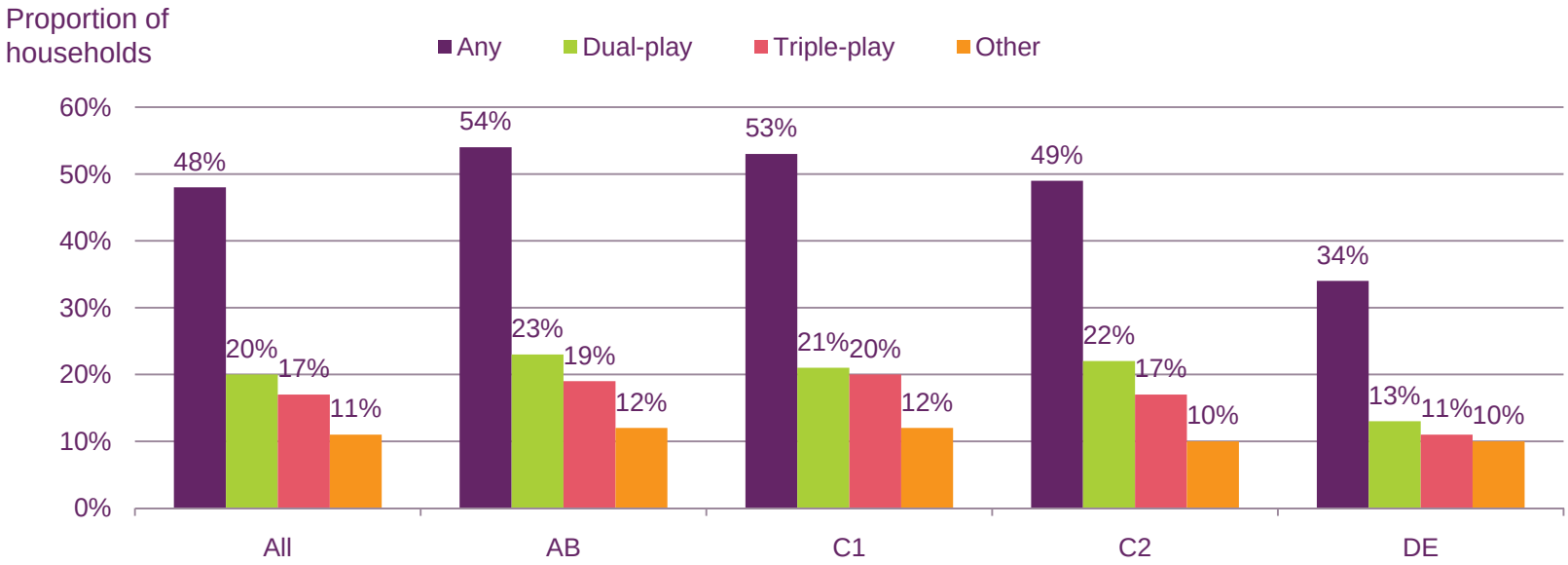
QA1/ QA6/ QA7/ QA7A/ QA8 – Which of these services are in your household?/ Which supplier do you use for [SERVICE]?/ Do you receive one bill or separate bills for your [SERVICES]?/ To confirm, which services do you receive covered by a single bill from that supplier?/ Do you get these services as a package or as separate services?

Base: All respondents (2871 aged 16+, 826 aged 16-34, 536 aged 35-44, 496 aged 45-54, 466 aged 55-64, 547 aged 65+).

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.43

Bundling take-up by socio-economic group



QA1/ QA6/ QA7/ QA7A/ QA8 – Which of these services are in your household?/ Which supplier do you use for [SERVICE]?/ Do you receive one bill or separate bills for your [SERVICES]?/ To confirm, which services do you receive covered by a single bill from that supplier?/ Do you get these services as a package or as separate services?

Base: All respondents (2871 aged 16+, 826 aged 16-34, 536 aged 35-44, 496 aged 45-54, 466 aged 55-64, 547 aged 65+).

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

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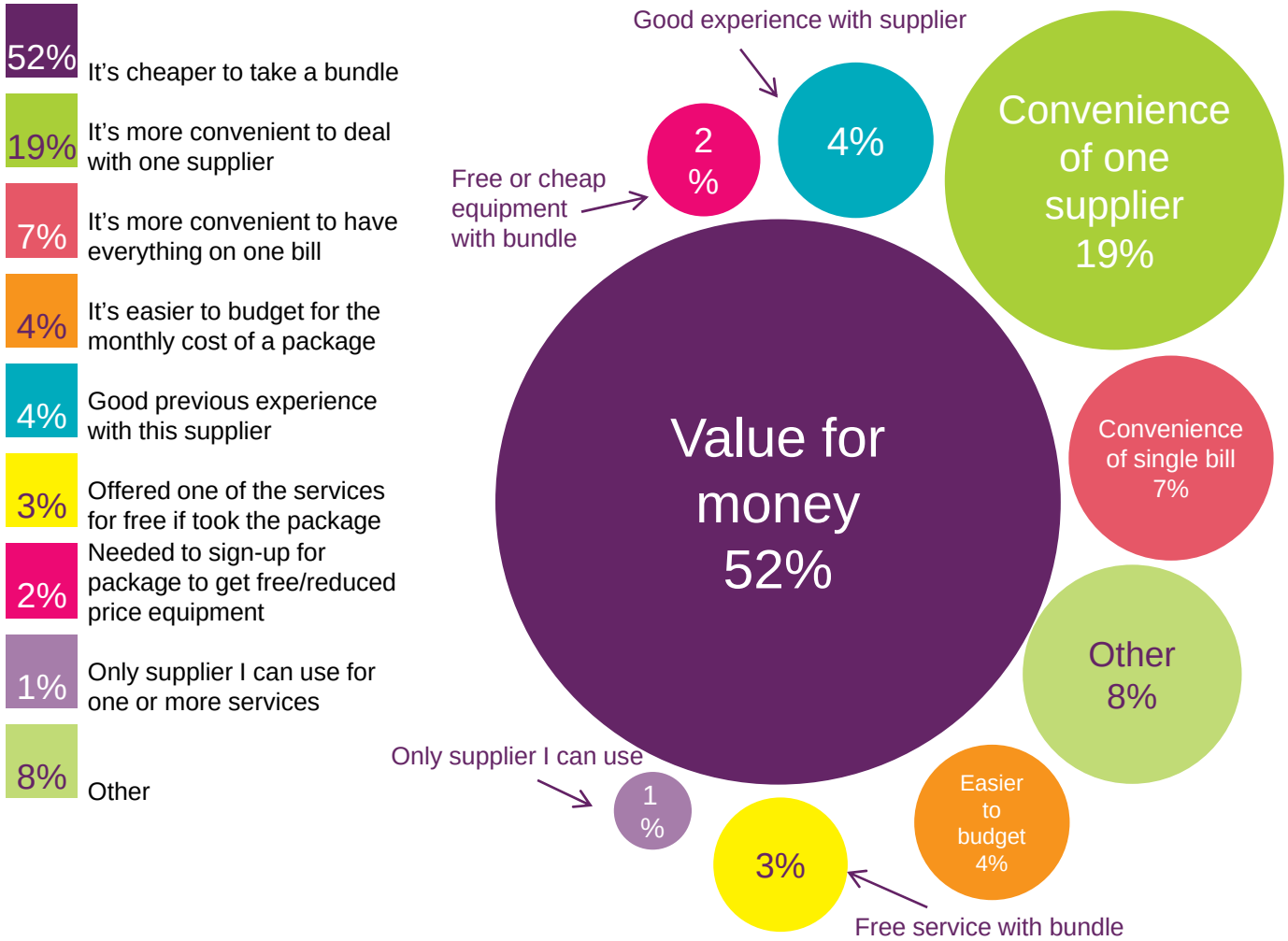
Figure 1.44

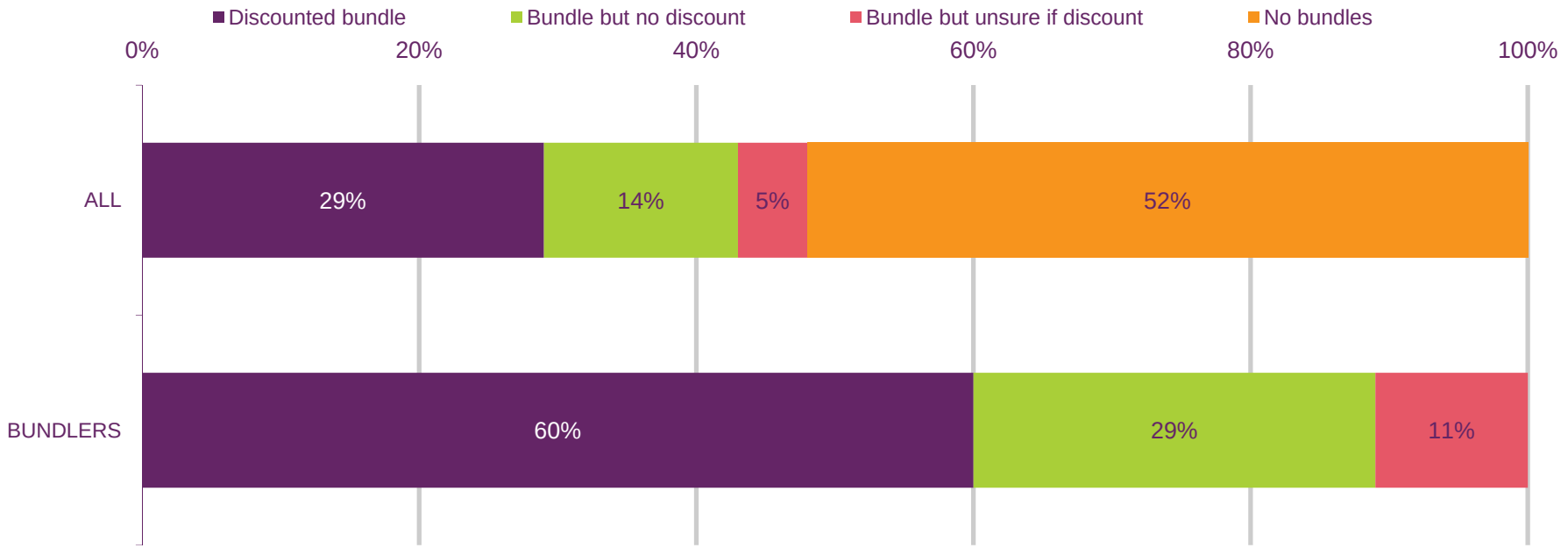
Main reason for taking a communications service bundle



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010
Which one was most important in your decision to take a package of services?
Base: Those who receive a package of services for which they receive one bill (1424 any bundle, 299 BT double play, 361 Other double play, 150 Sky triple play, 308 Virgin triple play)

Figure 1.45

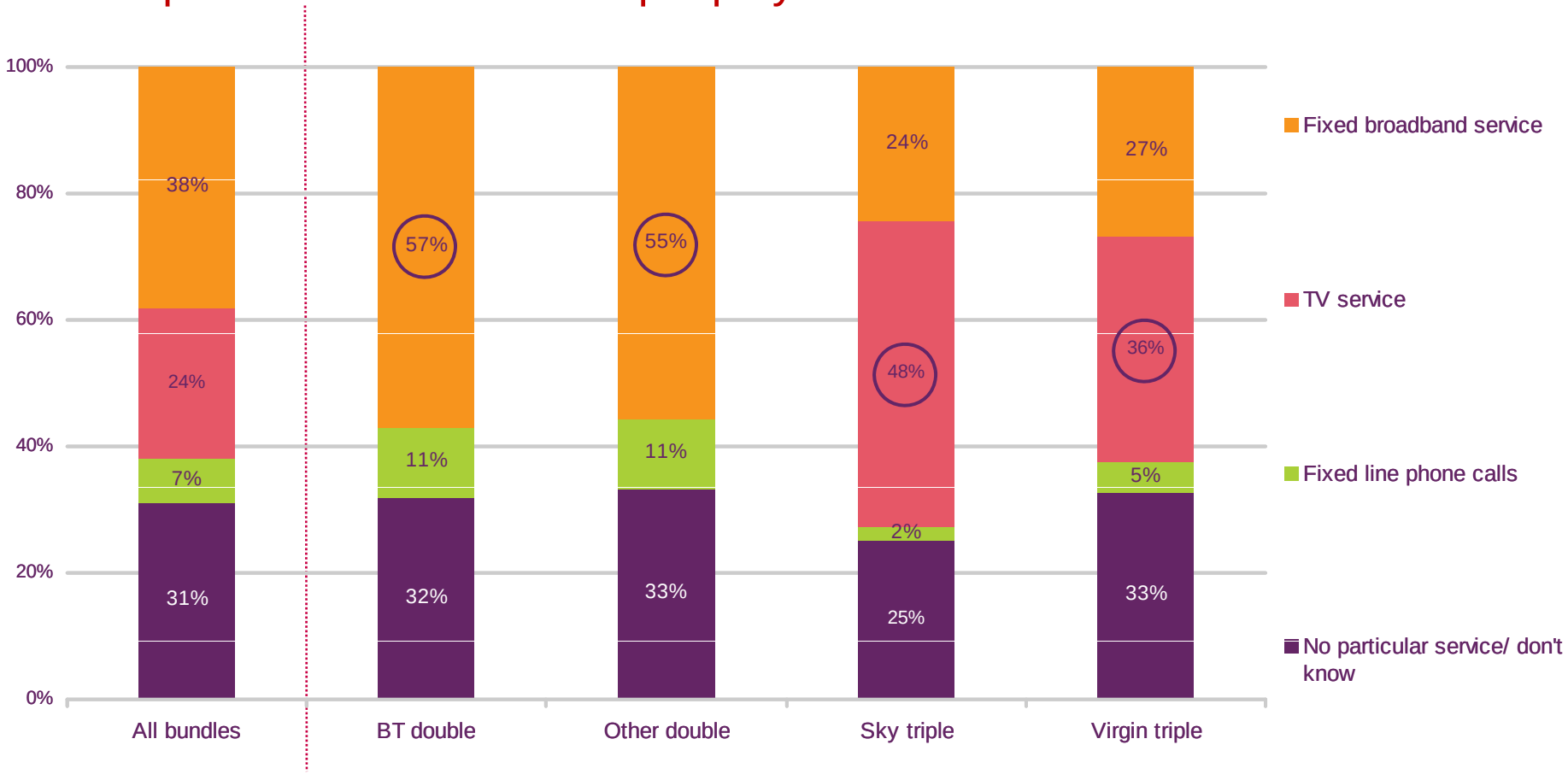
Whether customers receive a discount for buying a bundle



QA1/ QA6/ QA7/ QA13/ QA14 – Which of these services are in your household? Which supplier do you use for [SERVICE]? Do you receive one bill or separate bills for your [SERVICES]? Do you receive a discount or special deal for having this package of services? Do you think you pay less of having these services from the same supplier than you would if you had shopped around and bought the services separately from different suppliers?
Base: All respondents (2871). Those who receive a package of services for which they receive one bill (1424)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.46

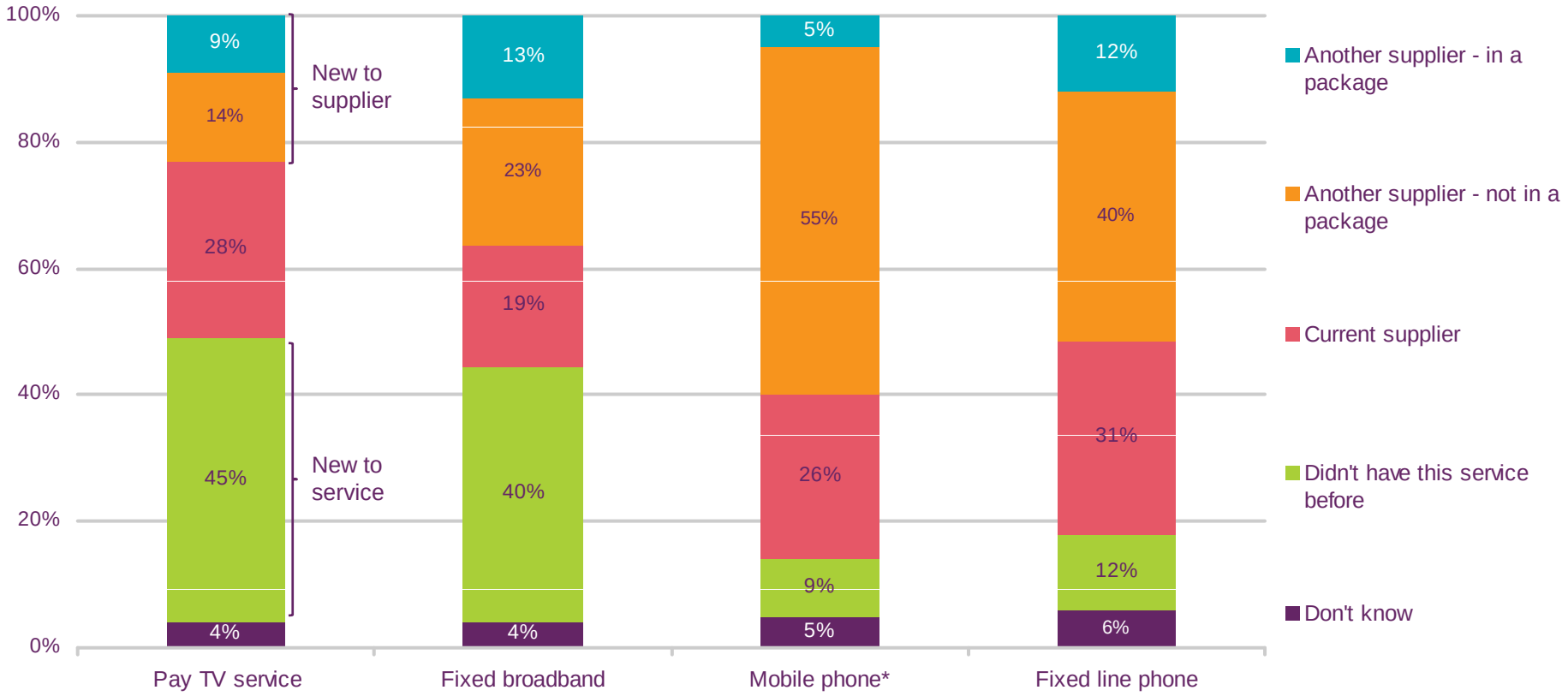
Anchor products in dual- and triple play bundles



QA18 – Is there one service in your package which you particularly wanted to use [SUPPLIER] for? Which service?
Base: Those who receive a package of services for which they receive one bill (1424 any bundle, 299 BT double play, 361 Other double play, 150 Sky triple play, 308 Virgin triple play)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.47

Consumers who did not have a service before taking it in a bundle



QA17B/C/E – Who did you use for your [SERVICE] before you had your package of services with [SUPPLIER]?
Base: Those who receive a package of services for which they receive one bill (725 with Pay TV in package, 1338 with Fixed broadband in package, 74 with mobile phone in package, 1295 with Fixed line phone in a bundle)
NB: *Low base for mobile phone in a package; treat as indicative only
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.48

Satisfaction with bundled and standalone communications services

QA21B-E – How satisfied are you with the overall service provided from your [SERVICE]?
Base: All respondents with each service (725 TV in a package, 996 TV standalone, 1338 fixed broadband in package, 714 fixed broadband standalone, 74 mobile in package, 2256 mobile standalone, 1295 fixed line in package, 1214 fixed line standalone)
NB: *Low base for mobile phone in a package; treat as indicative only
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

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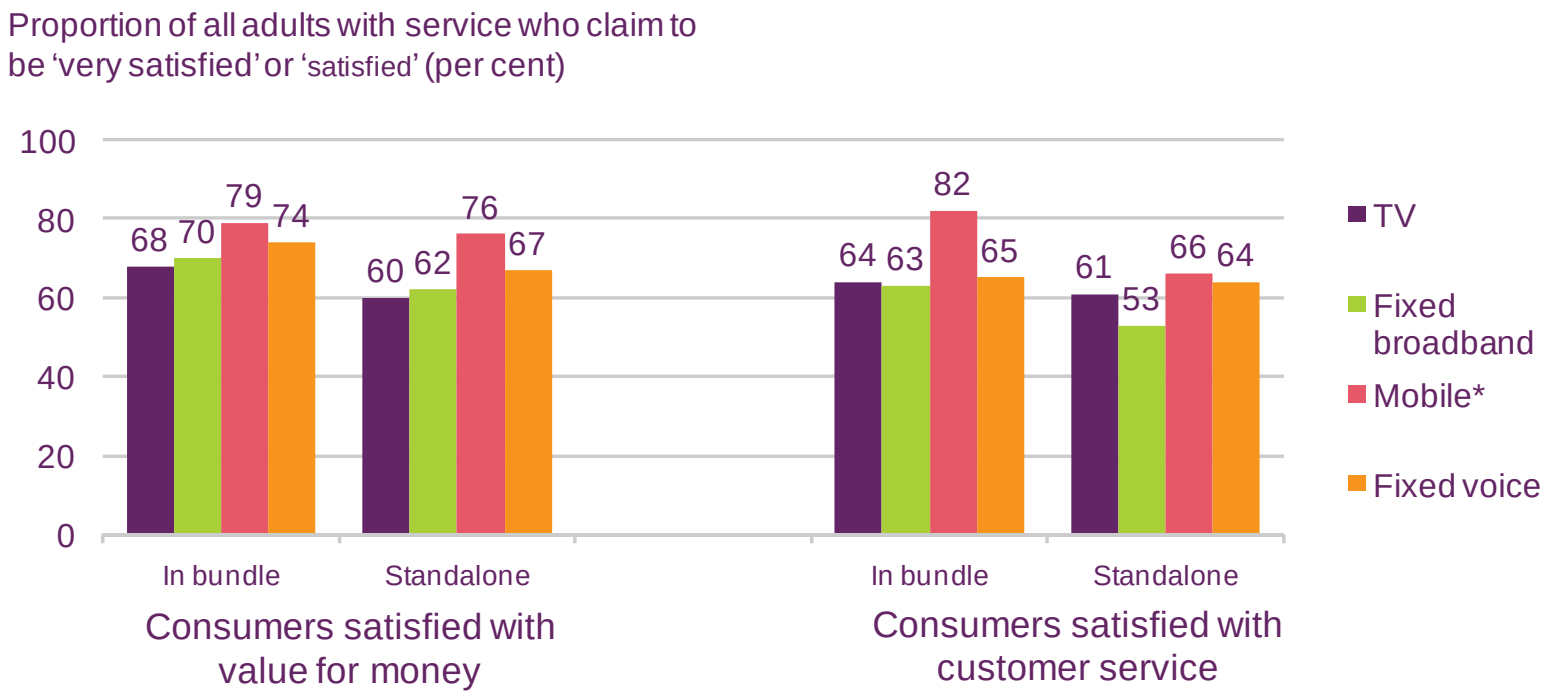
Figure 1.49

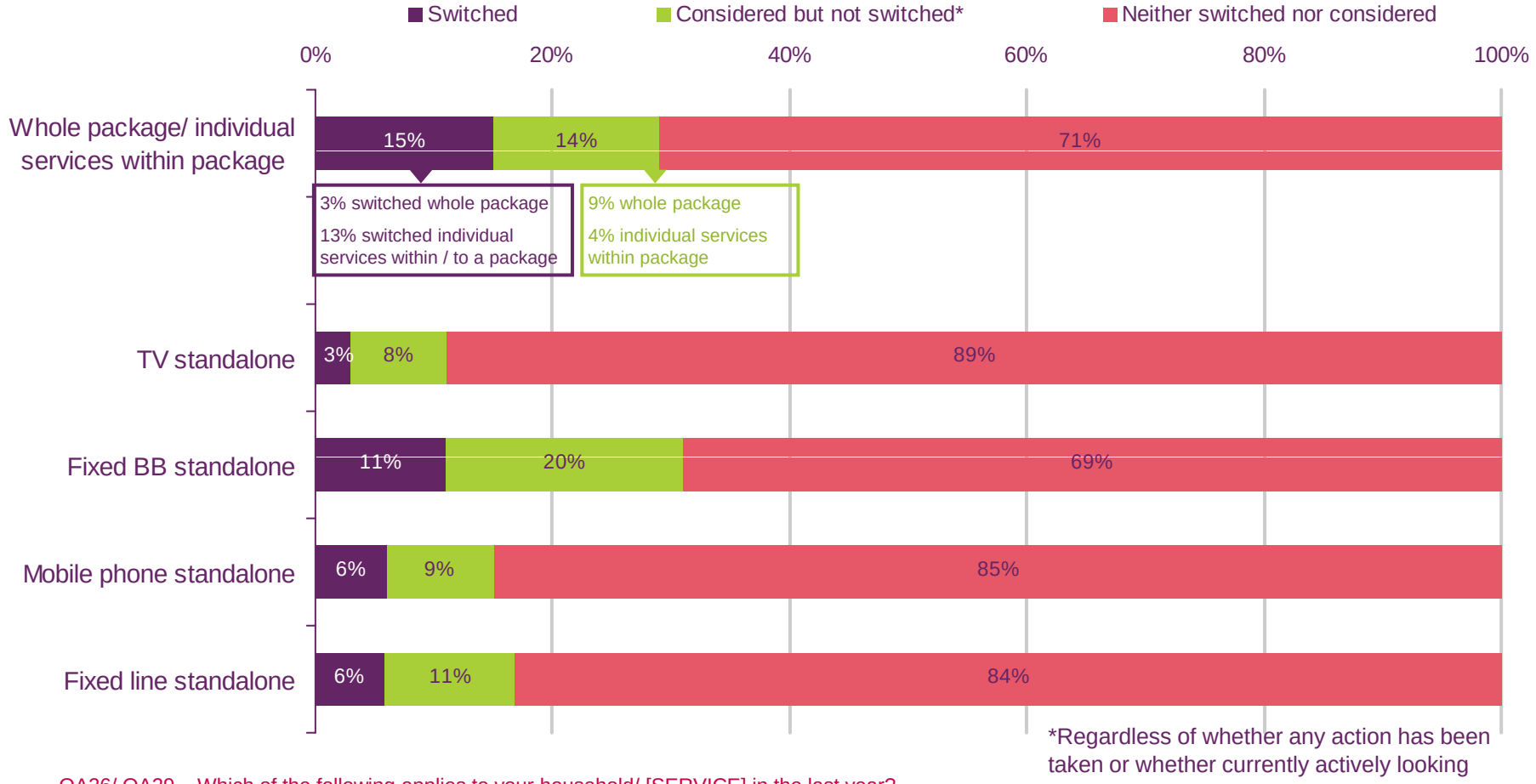
Satisfaction with bundled and standalone communications services



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010
How satisfied are you with your experience of dealing with the customer services for your [SERVICE]? Indicates all those who are satisfied or very satisfied, includes 'don't knows'
Base: All respondents with each service (725 TV in a bundle, 996 TV stand-alone, 1338 fixed broadband in bundle, 714 fixed broadband stand-alone, 74 mobile in bundle, 2256 mobile stand-alone, 1295 fixed line in bundle, 1214 fixed line stand-alone)
*Low base for mobile phone in a bundle; treat as indicative only

Figure 1.50

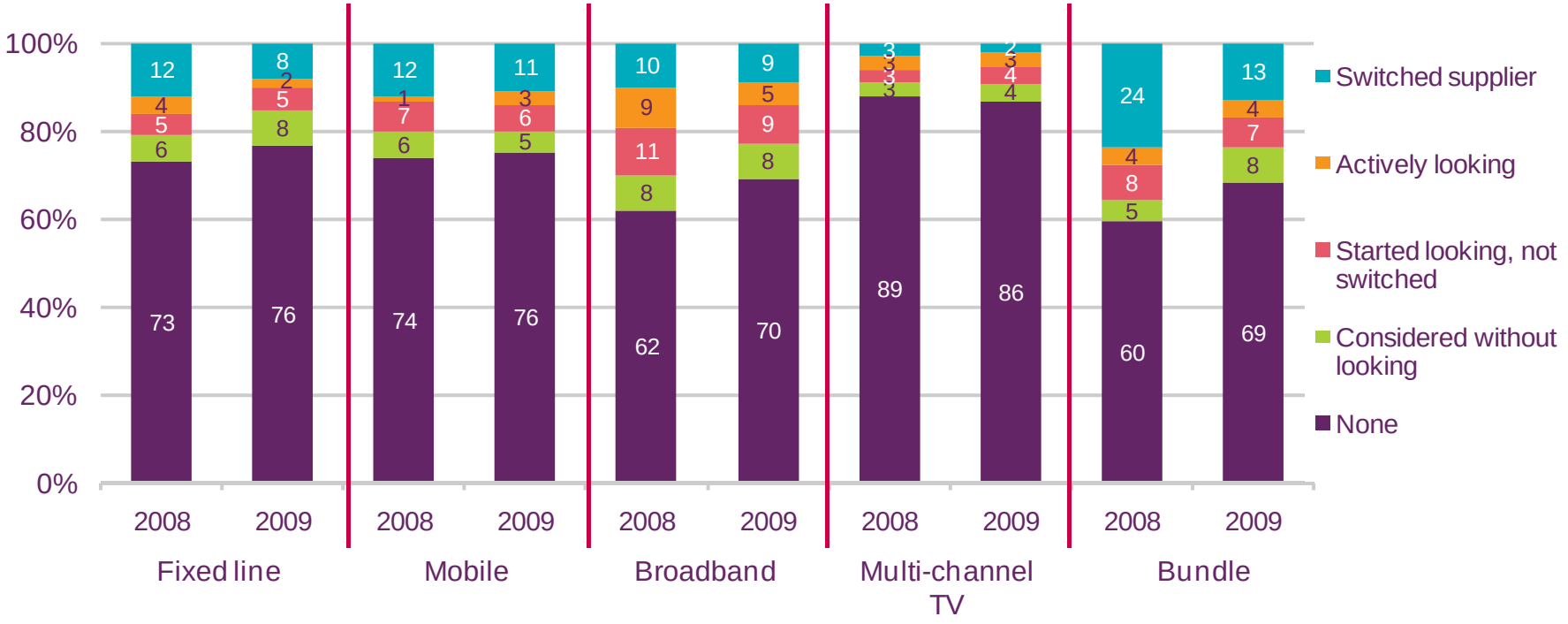
Consumers who have switched or considered switching communications services in the last 12 months



QA26/ QA29 – Which of the following applies to your household/ [SERVICE] in the last year?
Base: Those with a package of services for which they receive one bill (1424), Those with each service as a standalone service (996 TV, 714 fixed broadband, 2556 mobile phone, 1214 fixed line)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 1.51

Switching in communications market in the past 12 months

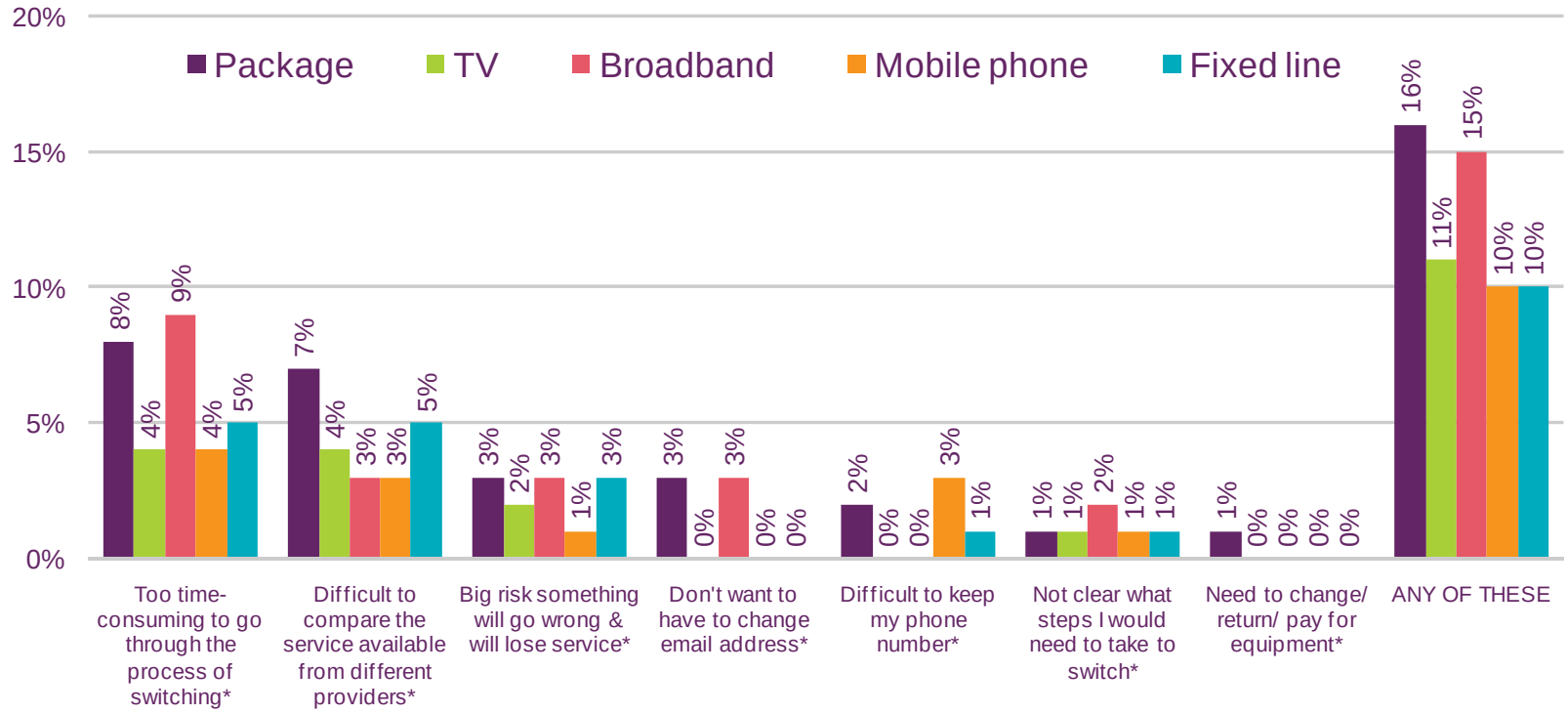


Source: Ofcom decision-making survey July 2007, July 2008 and July 2009

Base: All who are the decision-maker for each service; fixed line (2008, 941), (2009, 781), mobile (2008, 1270), (2009, 1231), broadband ((2008, 460), (2009, 388), multichannel TV) (2008, 896), (2009, 837), bundled services (2008, 534), (2009, 631)

Figure 1.52

Hassle-related barriers to considering switching communications provider

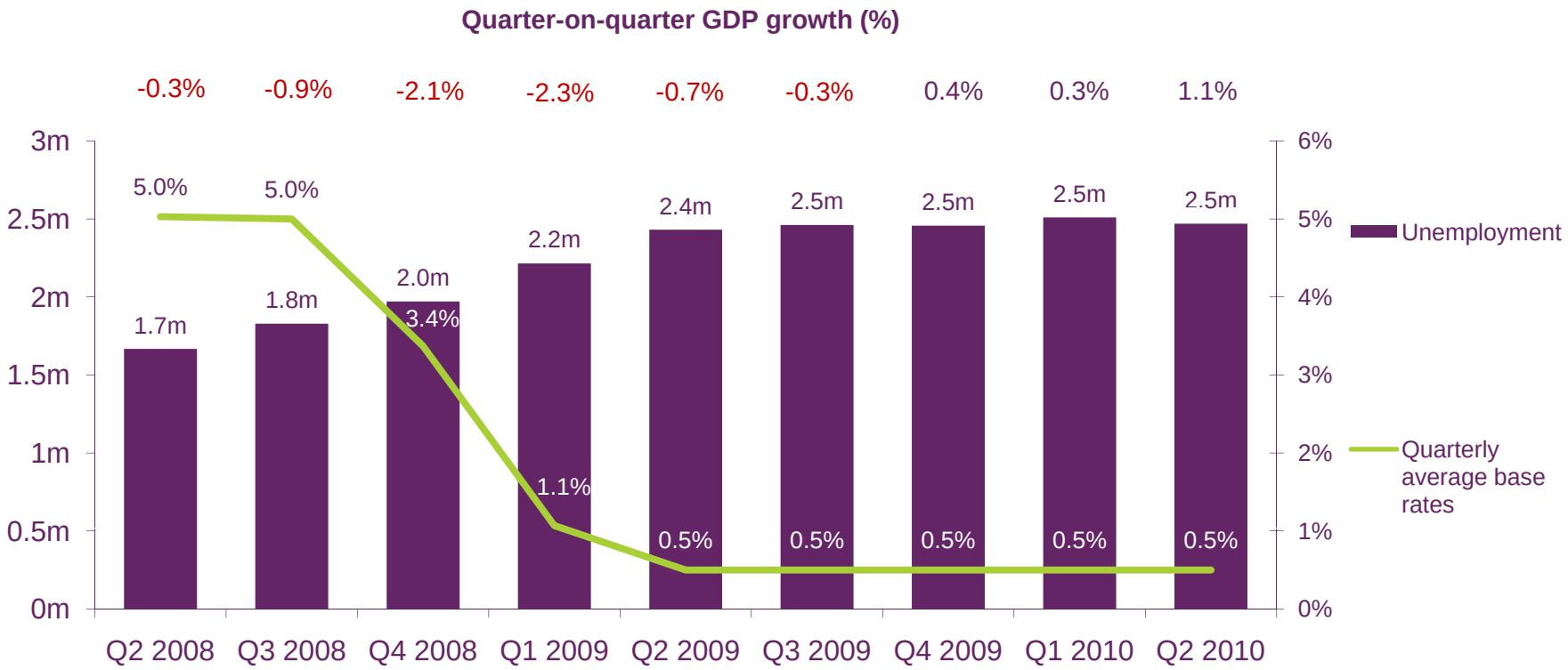


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010
Which, if any, of these are reasons why you have not considered switching to another supplier for your (SERVICE) in the last year? (Prompted responses, multi-coded)
*Denotes hassle obstacles related to the switching process
Base: Decision makers who have not switched or considered switching in the last 12 months (667 package of services, 551 pay TV, 243 fixed broadband, 1519 mobile phone, 686 fixed line voice)

1.5 Communications markets and the economy

Figure 1.53

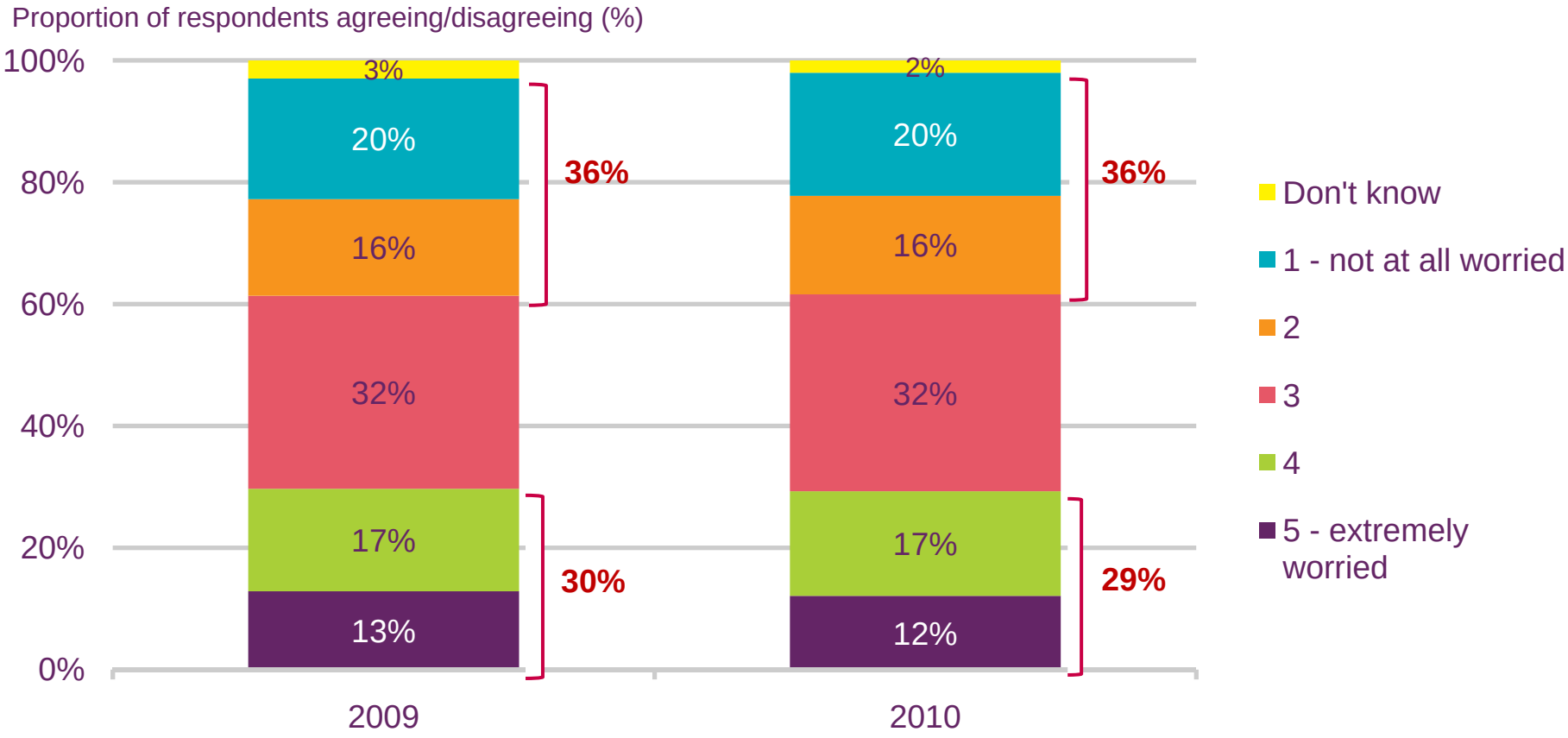
UK GDP quarterly growth, Bank of England base rates and unemployment



Source: Office for National Statistics and Bank of England

Figure 1.54

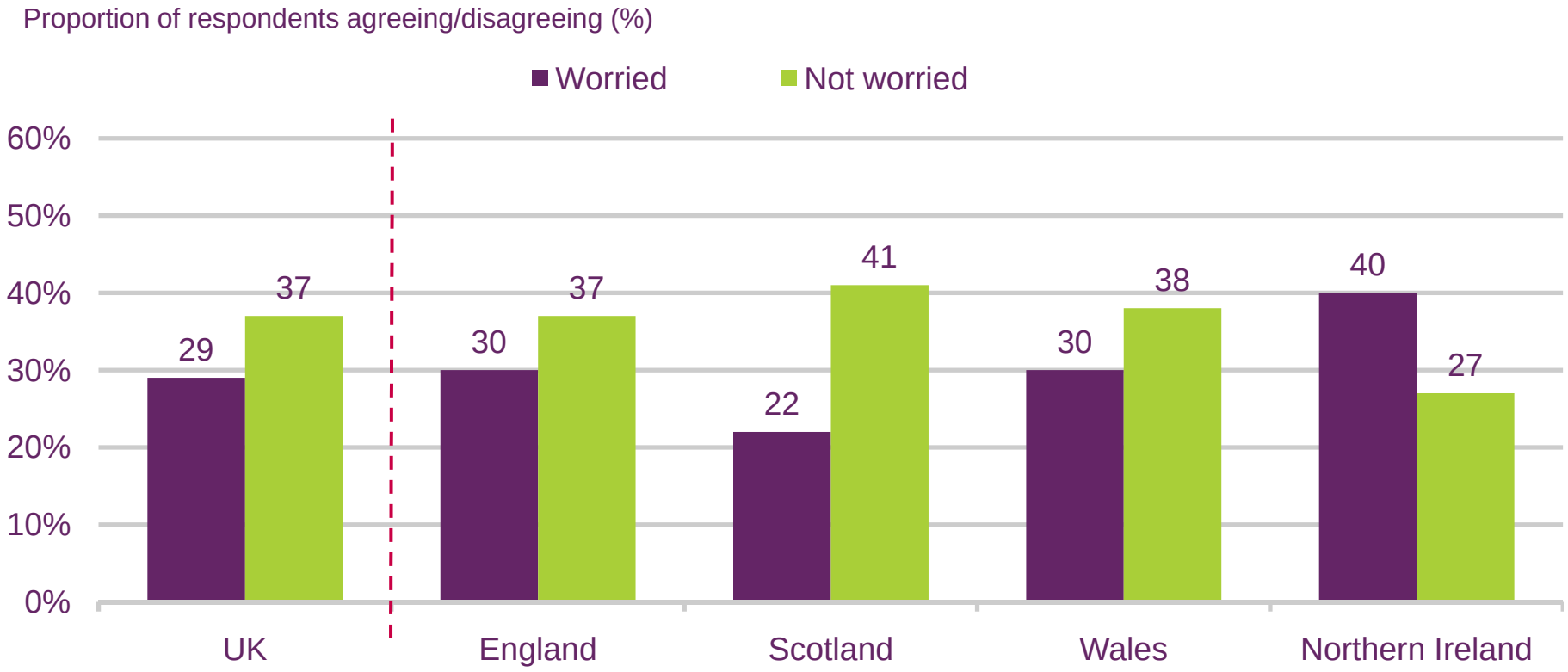
Consumer attitudes towards the recession



Source: Ofcom commissioned research
Base: Total sample (n=2444)
Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

Figure 1.55

Consumer attitudes towards the recession, by nation



Source: Ofcom commissioned research
Base: All respondents (n=2444 for UK, 1727 for England, 285 for Scotland, 203 for Wales, 229 for Northern Ireland)
Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

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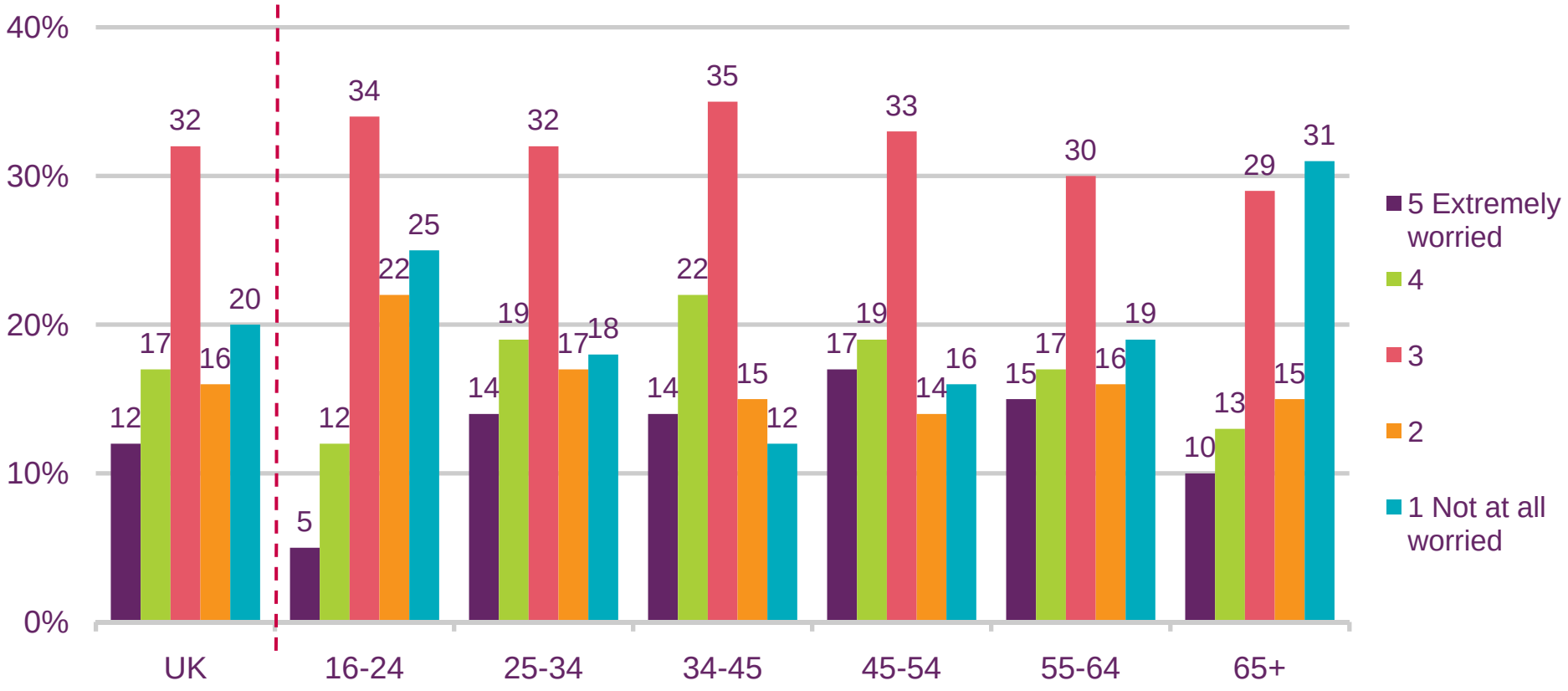
Figure 1.56

Consumer attitudes towards the economic downturn, by age

Proportion of respondents agreeing/disagreeing (%)

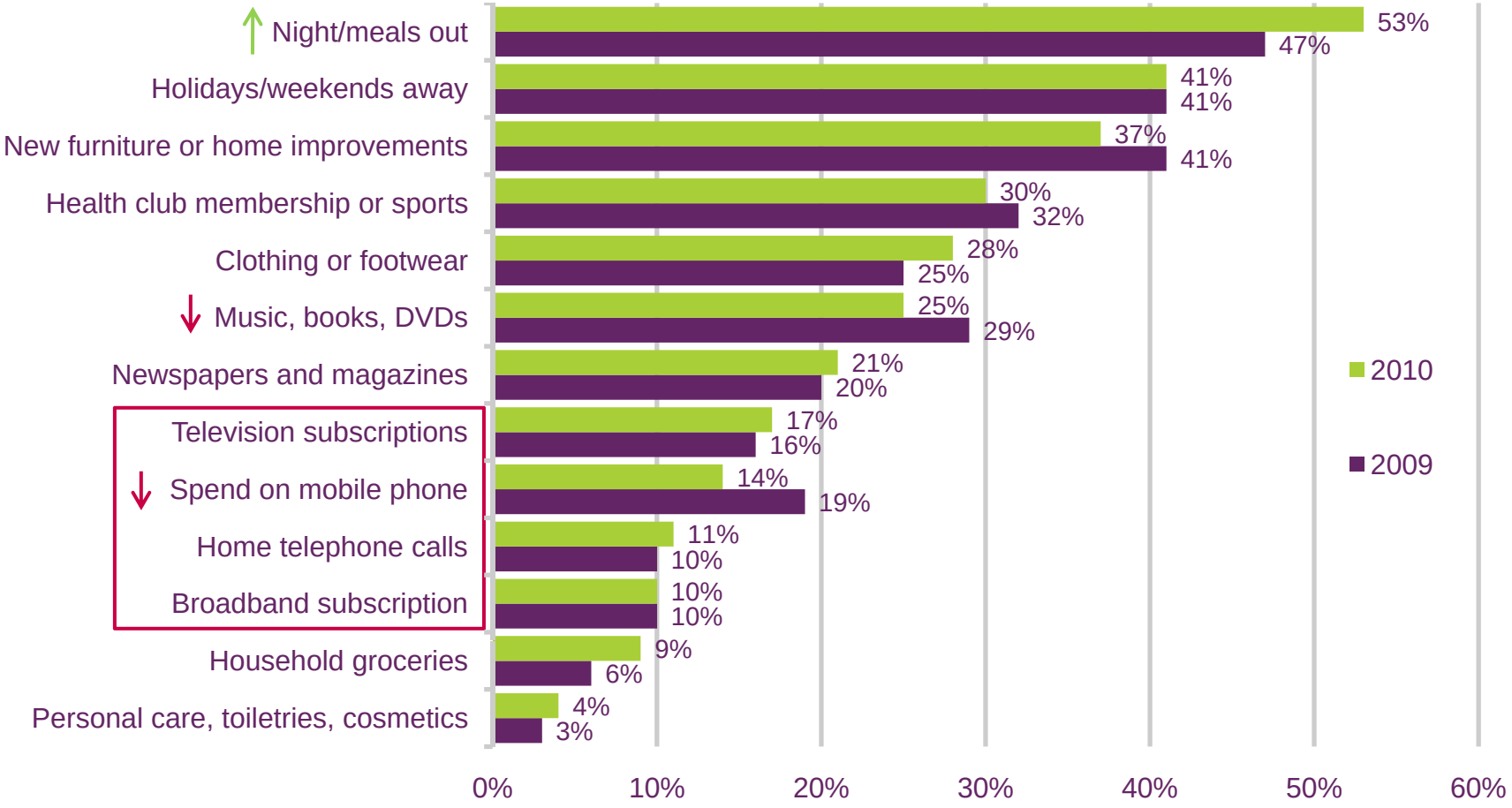


Source: Ofcom commissioned research
Base: All respondents (n=2444 for UK, 327 for 16-24, 375 for 25-34, 418 for 35-44, 382 for 45-54, 361 for 55-64, 581 for 65+)
Question: On a scale of 1 to 5, where 5 is extremely worried and 1 is not at all worried, how worried are you about being personally affected by the recession?

Figure 1.57

Items where consumers are most likely to cut back their spending

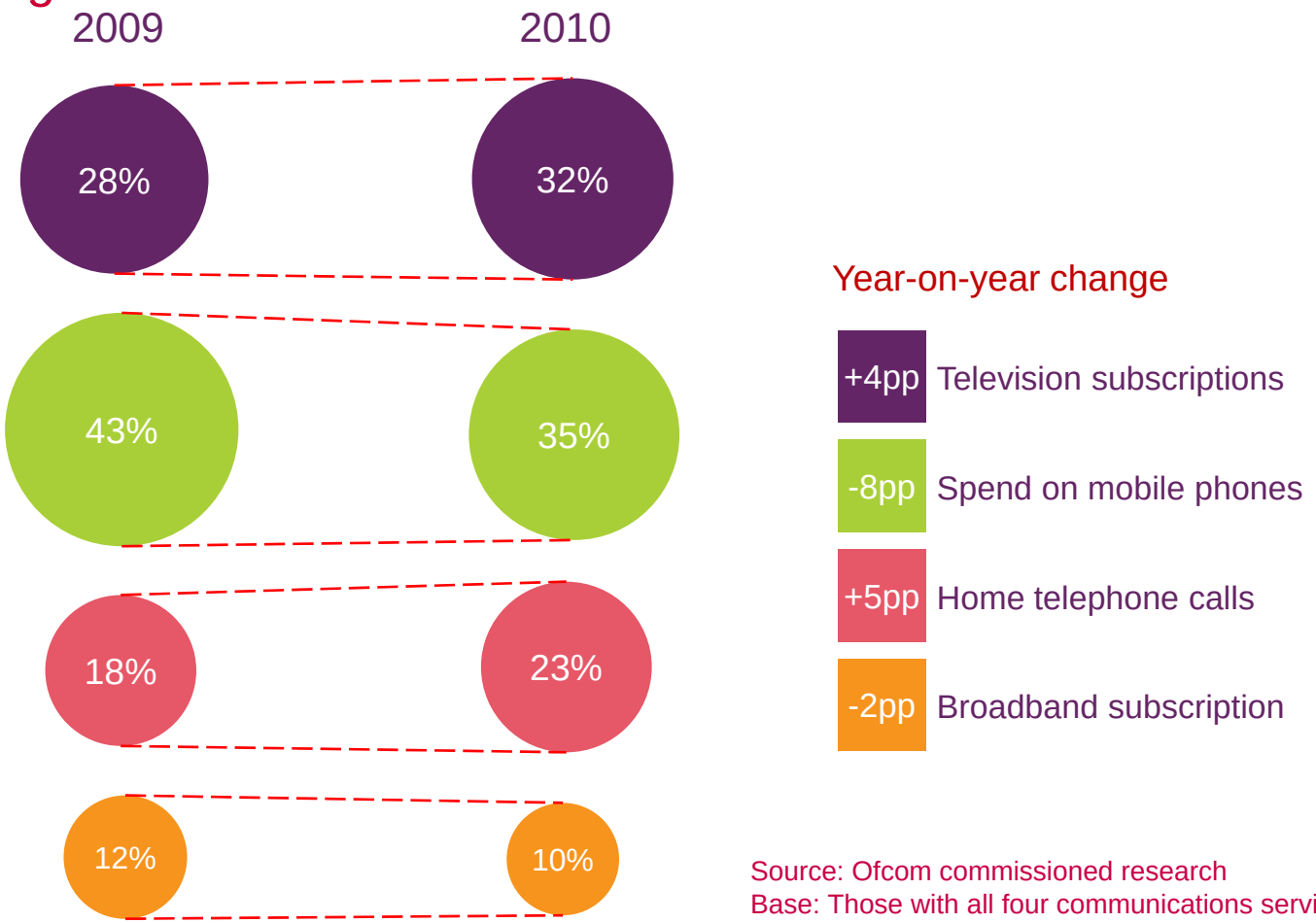
Items mentioned as first, second or third choice (%)



Source: Ofcom-commissioned research
Base: Those with all four services 2010 (n=823), 2009 (n=862)
Question: If you were forced to cut back on spending, which of the following items would you be most likely to spend less on?

Figure 1.58

The communication services on which consumers would be most likely to cut spending



Source: Ofcom commissioned research
Base: Those with all four communications services (n=823)
Question: Which ONE of the following would you be most likely to cut back spending on?

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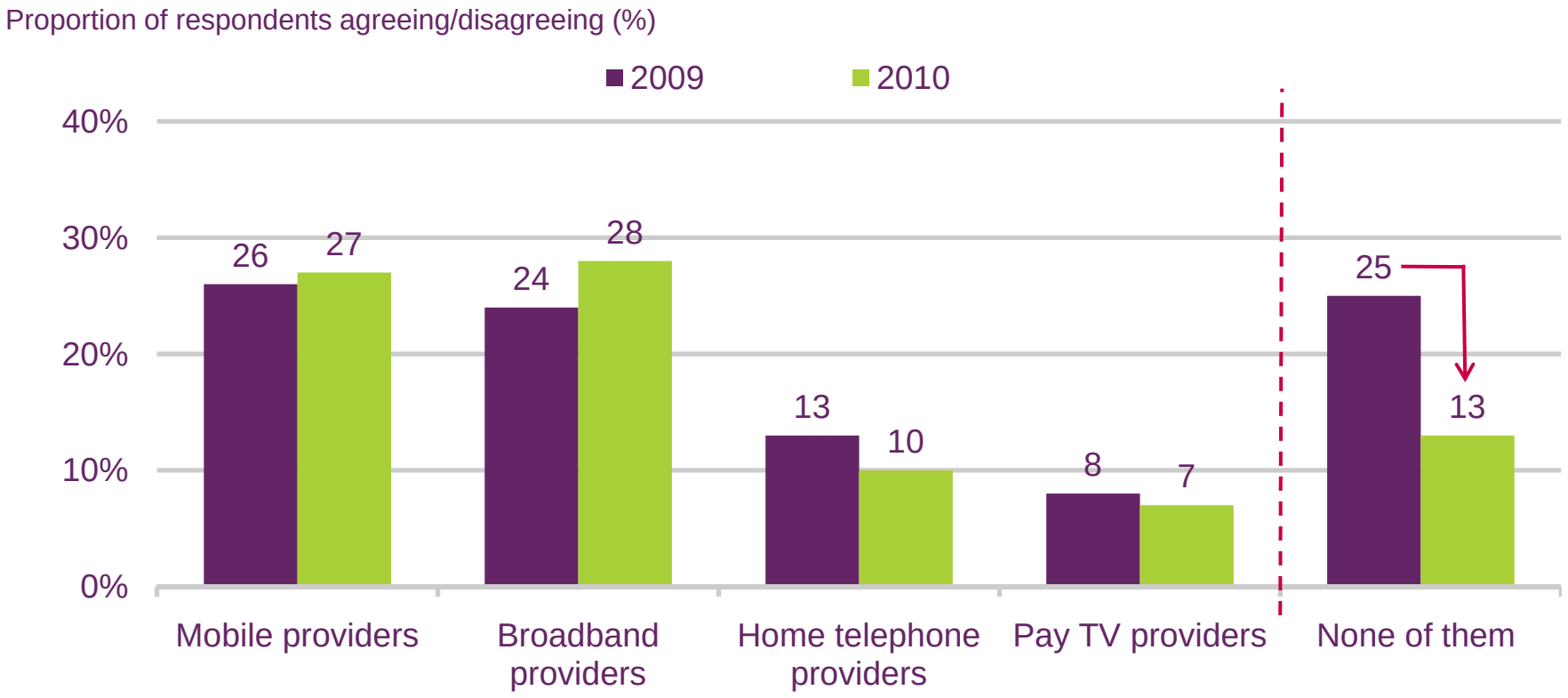
Figure 1.59

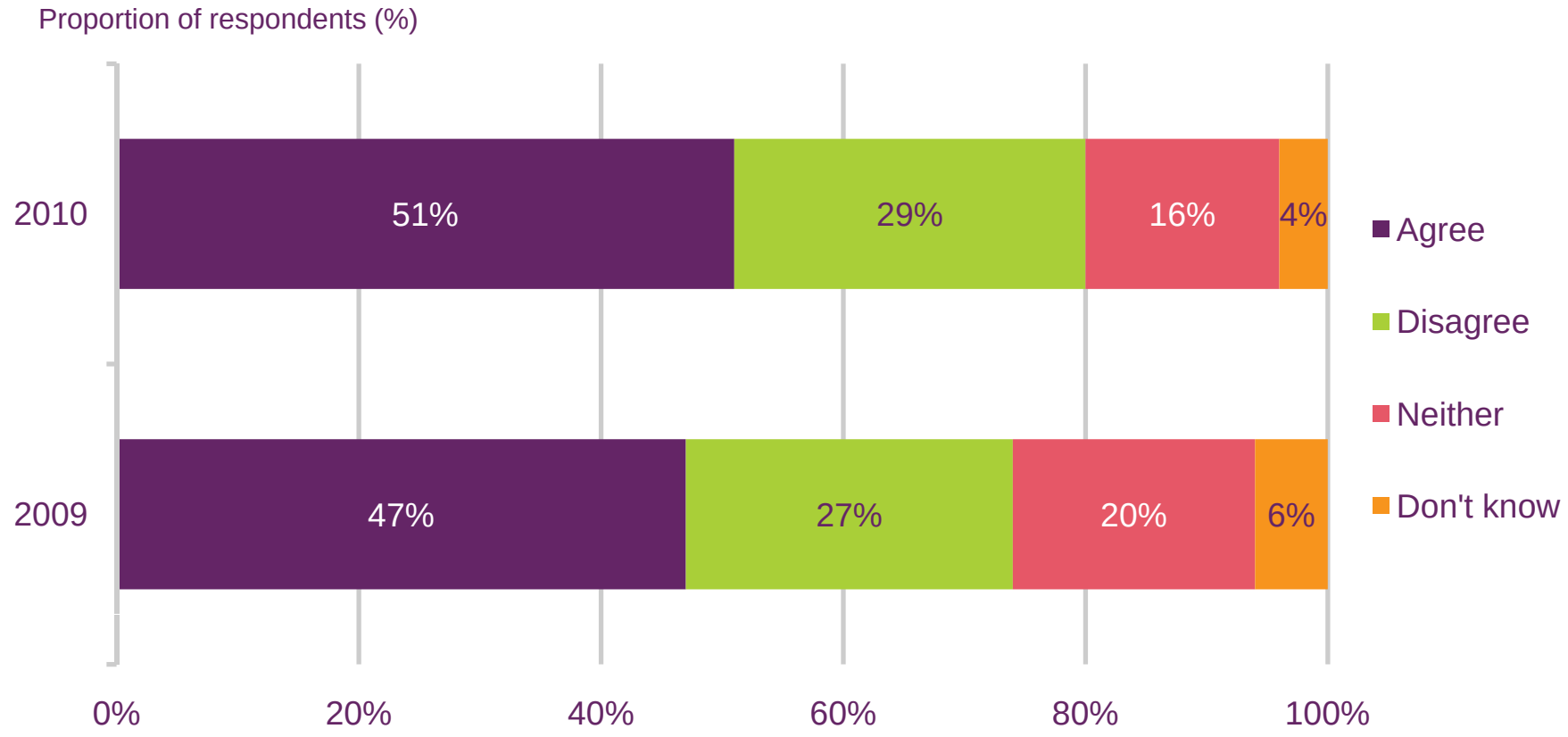
Proportion of consumers agreeing that providers offer better deals now than a year ago



Source: Ofcom-commissioned research
Base: Total sample (n = 2444)
Question: Which of the following providers, if any, do you think are offering better deals than they were 12 months ago?

Figure 1.60

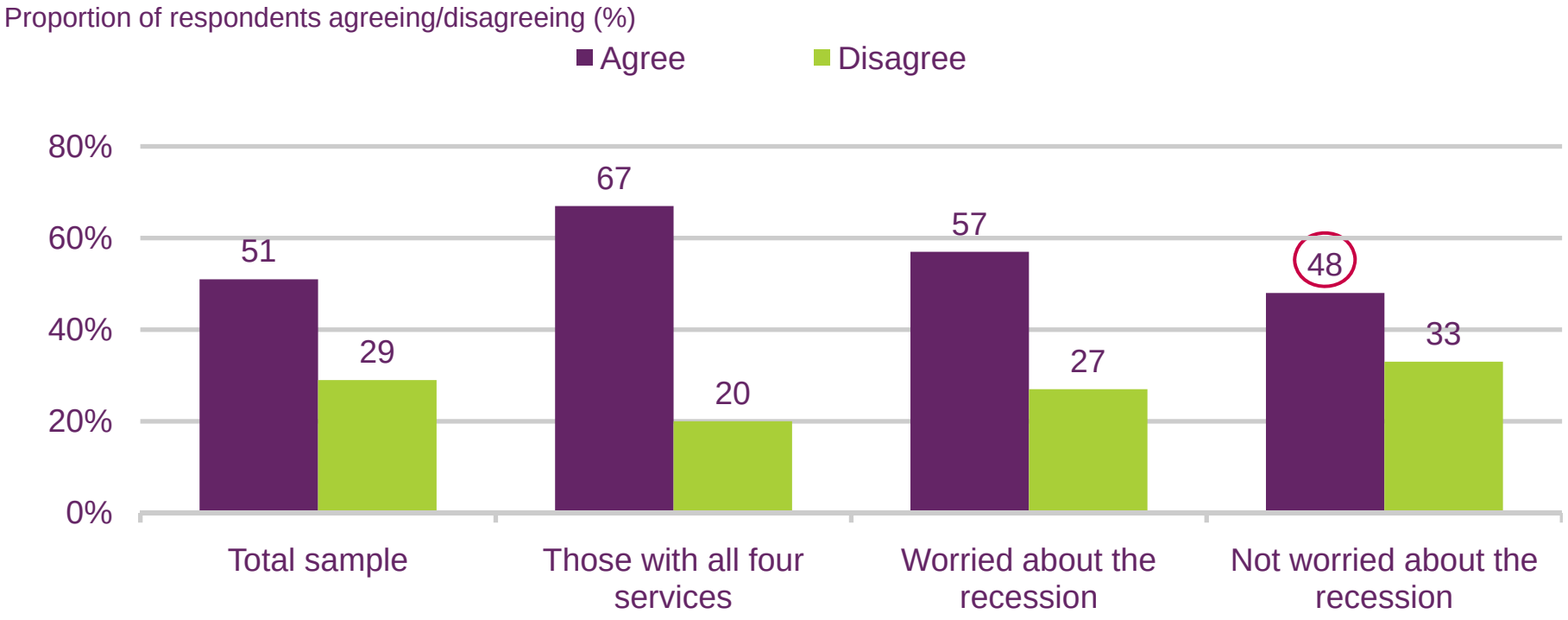
Consumers' agreement/disagreement that they were more likely to take communications services in a bundle



Source: Ofcom-commissioned research
Base: Total sample 2009 (n=2321) 2010 (n = 2444)
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.61

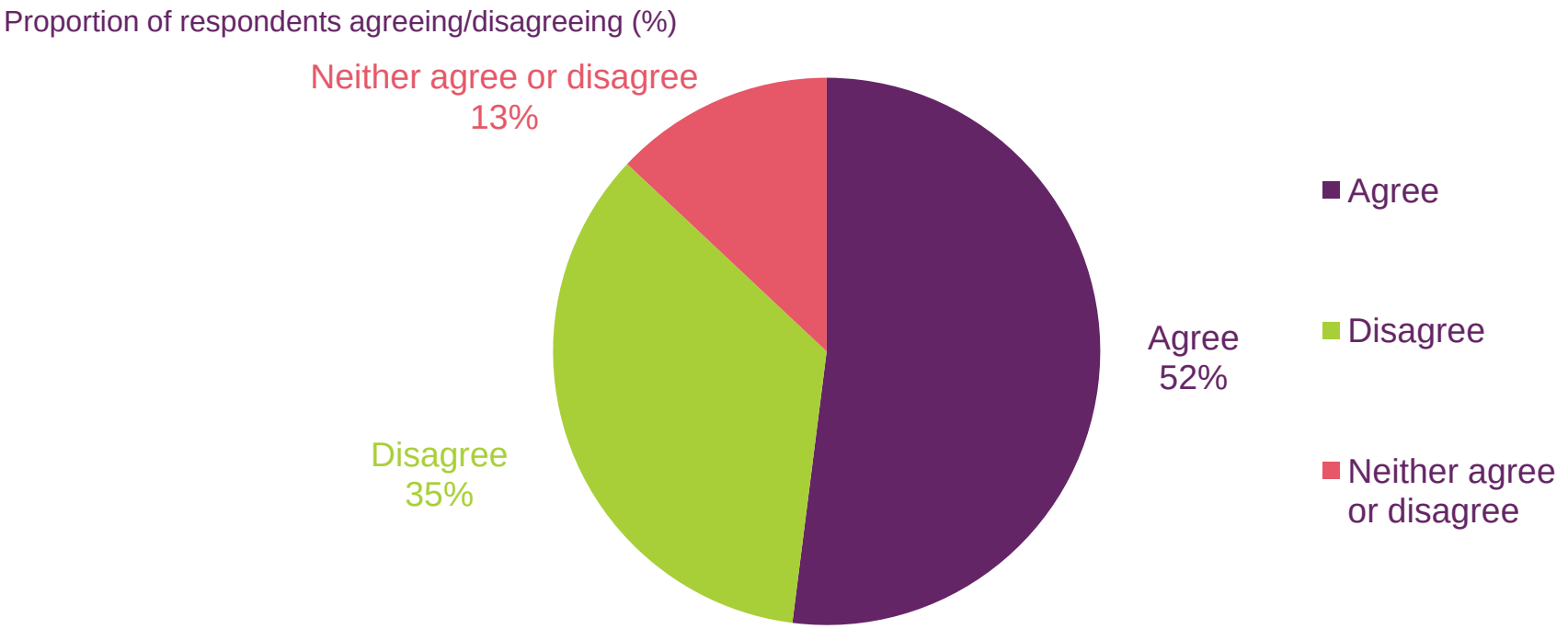
Consumers' agreement/disagreement that they were more likely to take communications services in a bundle



Source: Ofcom-commissioned research
Base: Total sample (n = 2444), those with all 4 services (823), worried about being personally affected by recession (722), not worried about being personally affected by recession (907)
Question: How much do you agree or disagree... I'm more likely to consider purchasing TV, broadband and phone services in a package from the same supplier as it offers better value for money

Figure 1.62

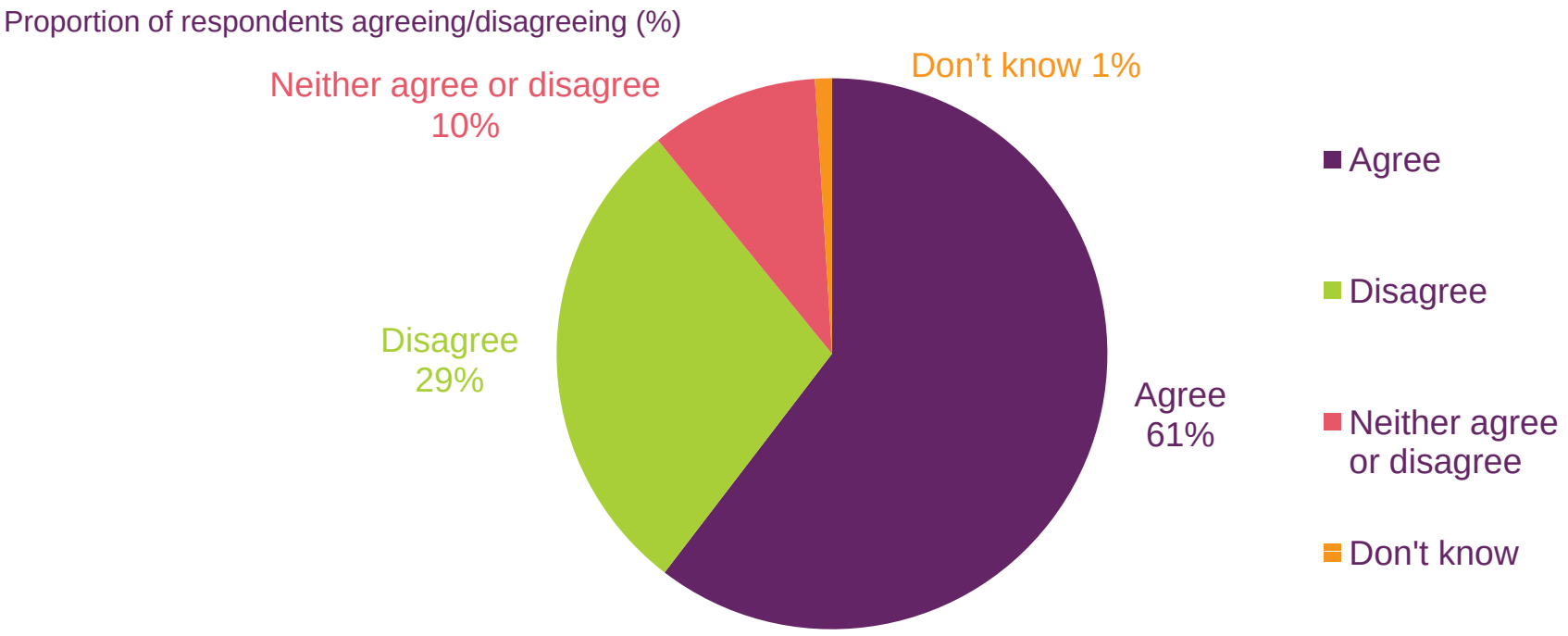
Consumers' agreement/disagreement that they were more likely to purchase goods over the internet in order to save money



Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)
Question: How much do you agree... I am more likely to purchase goods and services over the internet than in shops in order to save money

Figure 1.63

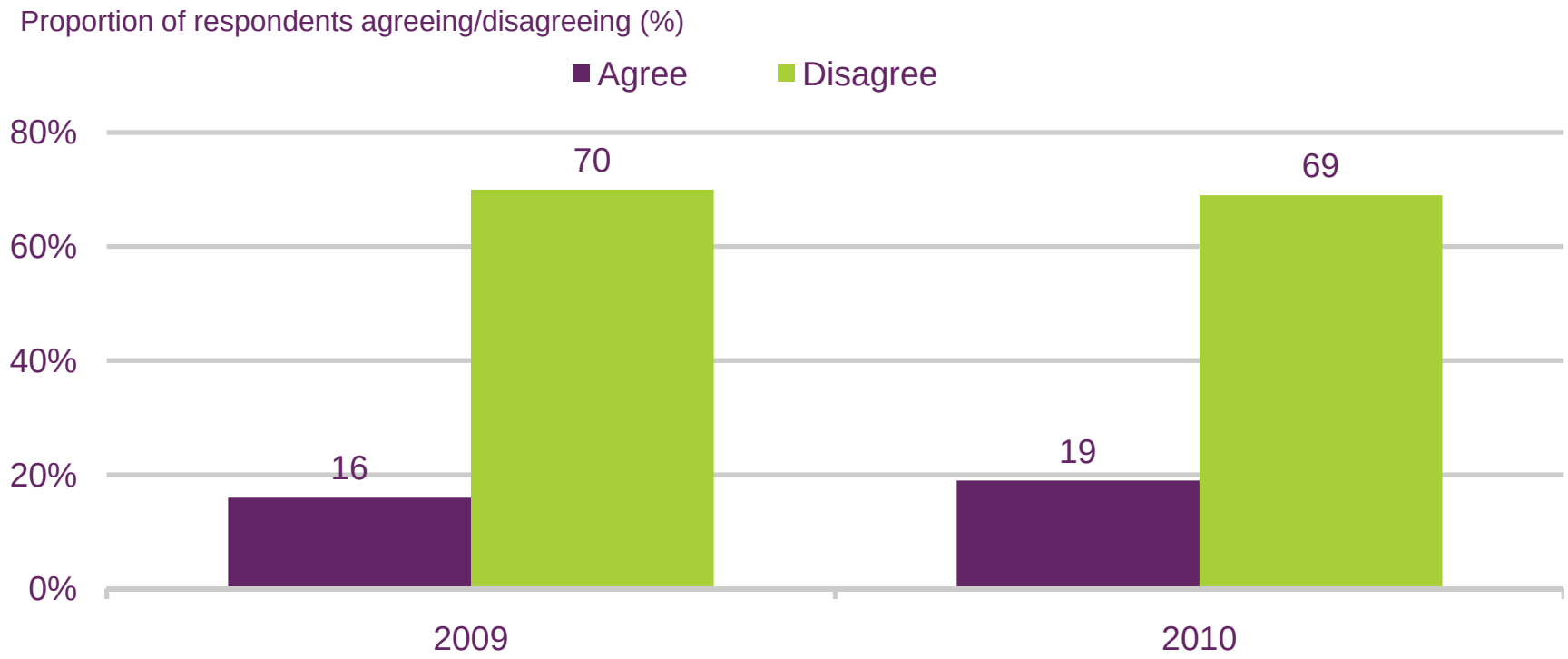
Consumers' agreement/disagreement that they were more likely to use price comparison websites in order to find the best deal



Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)
Question: How much do you agree... I am more likely to use price comparison websites (such as uswitch.com or pricerunner.co.uk) in order to find the best deal

Figure 1.64

Consumers' agreement/disagreement that they were more likely to make calls over the internet rather than using a home landline



Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)
Question: How much do you agree... I make more telephone calls over the internet, using services like Skype, rather than using my home phone

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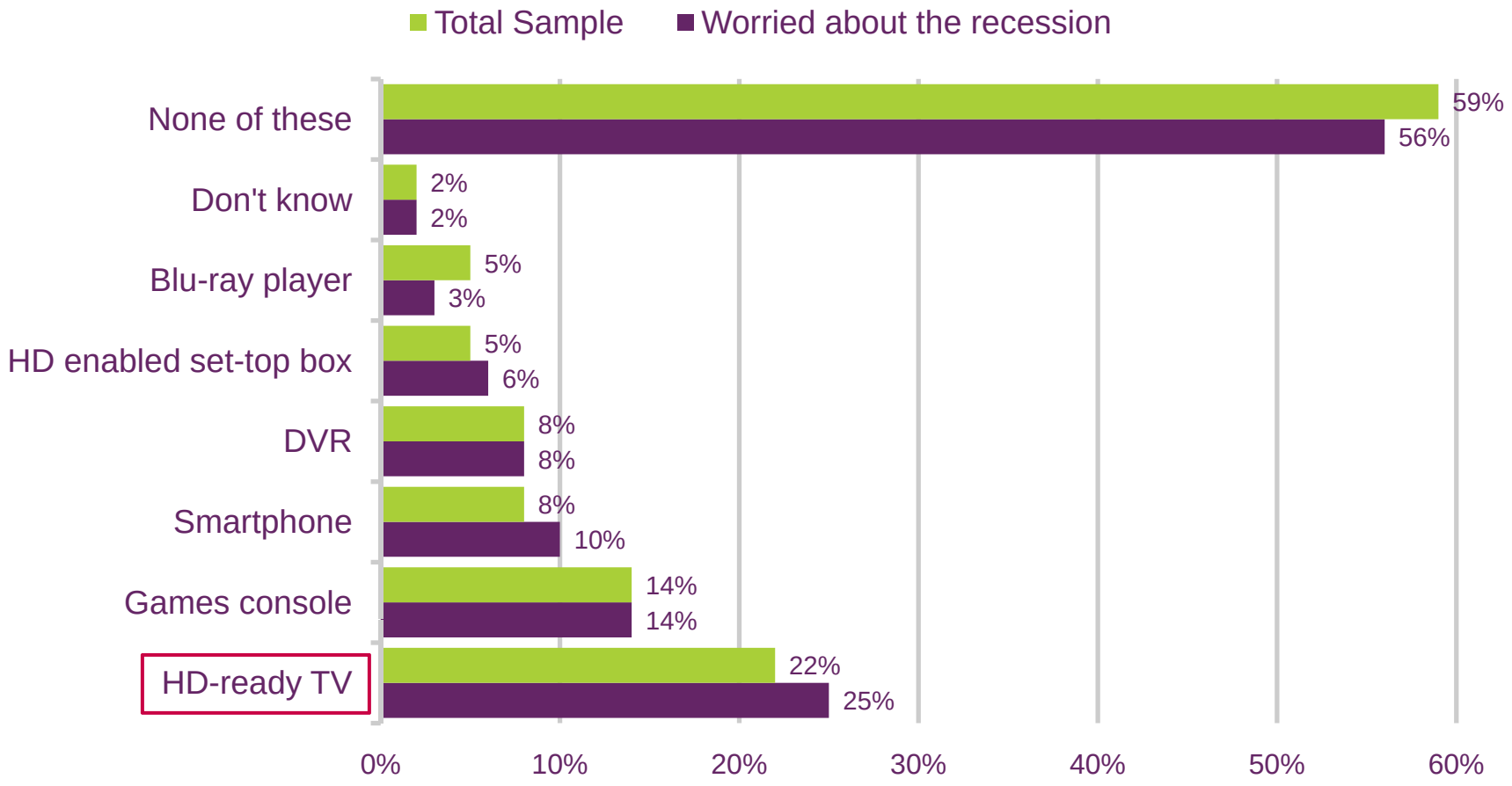
Figure 1.65

Selected communications devices bought in the last 12 months



Source: Ofcom commissioned research
Base: Total sample (n=2444), worried about being personally affected by recession (722)
Question: Which, if any, of these products or services have you or your household bought in the last 12 months.

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1.6 The nations' communications markets

Figure 1.66

UK communications markets fast facts

	UK	England	Scotland	Wales	NI	UK urban	UK rural	England urban	England rural	Scotland urban	Scotland rural	Wales urban	Wales rural	N Ireland urban	NI Ireland rural
Digital TV take-up among TV homes[1]	92 ↑+2	92 ↑+2	91	97* ↑+8	87	92 ↑+2	92	92 ↑+3	92	91	89	97*	99*	87	87
Broadband take-up[2]	71 ↑+3	73 ↑+3	61	64 ↑+6	70 ↑+6	70	75	72	78 ↑+10	61	60	62	69	69	72
Mobile broadband[2]	15 ↑+3	15 ↑+2	12 ↑+5	16 ↑+5	14 ↑+6	16	11	16 ↑+3	10	13	10	15	17	16	10
Mobile phone take-up[3]	89	90	85	89 ↑+4	88	89	90	90	91	93 ↑+3	80	87	93	87	90
Use mobile to access data, inc. internet[4]	23 ↑+3	24 ↑+3	15	23 ↑+5	21	26 ↑+6	19	24 ↑+3	20	15	15	24	19	21	23
3G handset take-up[5]	26 ↑+4	26 ↑+3	26 ↑+6	28	18 ↑+4	26	25	26 ↑+3	26	27	17	26	10	18	17
Fixed landline take-up[6]	85 ↓-2	86	79	79	81	84	91	85	93	77	88	79	81	79	87
Households taking bundles[7]	51 ↑+5	52 ↑+4	44	44 ↑+9	44	51	48	52	50 ↑+13	46	37	45	39	45	41
Watching video online[8]	38 ↑+4	40 ↑+4	28 ↑+7	28	38	38	41	39 ↑+3	44 ↑+11	29	30	28	30	39	36
Use of social networking[8]	40 ↑+10	42 ↑+11	27 ↑+7	37 ↑+12	37 ↑+9	40	42	42 ↑+10	45 ↑+19	26	24	37	36	37	36
Current use of VoIP[9]	15 ↑+3	16 ↑+3	10	15	15 ↑+6	15 ↑+3	18 ↑+5	15	20 ↑+7	10	12	16	12	15	15

XX **Figure is higher than the UK average**

XX **Figure is lower than the UK average**

XX ↑+xx **Figure has risen by xx percentage points since 2009**

XX ↓-xx **Figure has fallen by xx percentage points since 2009**

Ofcom research Q1 2010
Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural). Questions:
[1]Which, if any, of these types of television does your household receive at the moment?
[2]Which of these methods does your household use to connect to the Internet at home?
[3]Do you personally use a mobile phone?
[4]Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?
[5]Do you personally use a 3G mobile handset?
[6]Is there a landline phone in your home that can be used to make and receive calls?
[7]Do you receive any of these services as part of an overall deal or package from the same supplier?
[8]Which, if any, of these do you or members of your household use the Internet for whilst at home?
[9]Have you or anyone in your household ever used one of these services to make voice calls using the Internet at home?
**Digital television take-up figures in Wales are now likely to be higher, since the research set out in this table was conducted while digital switchover was underway.*

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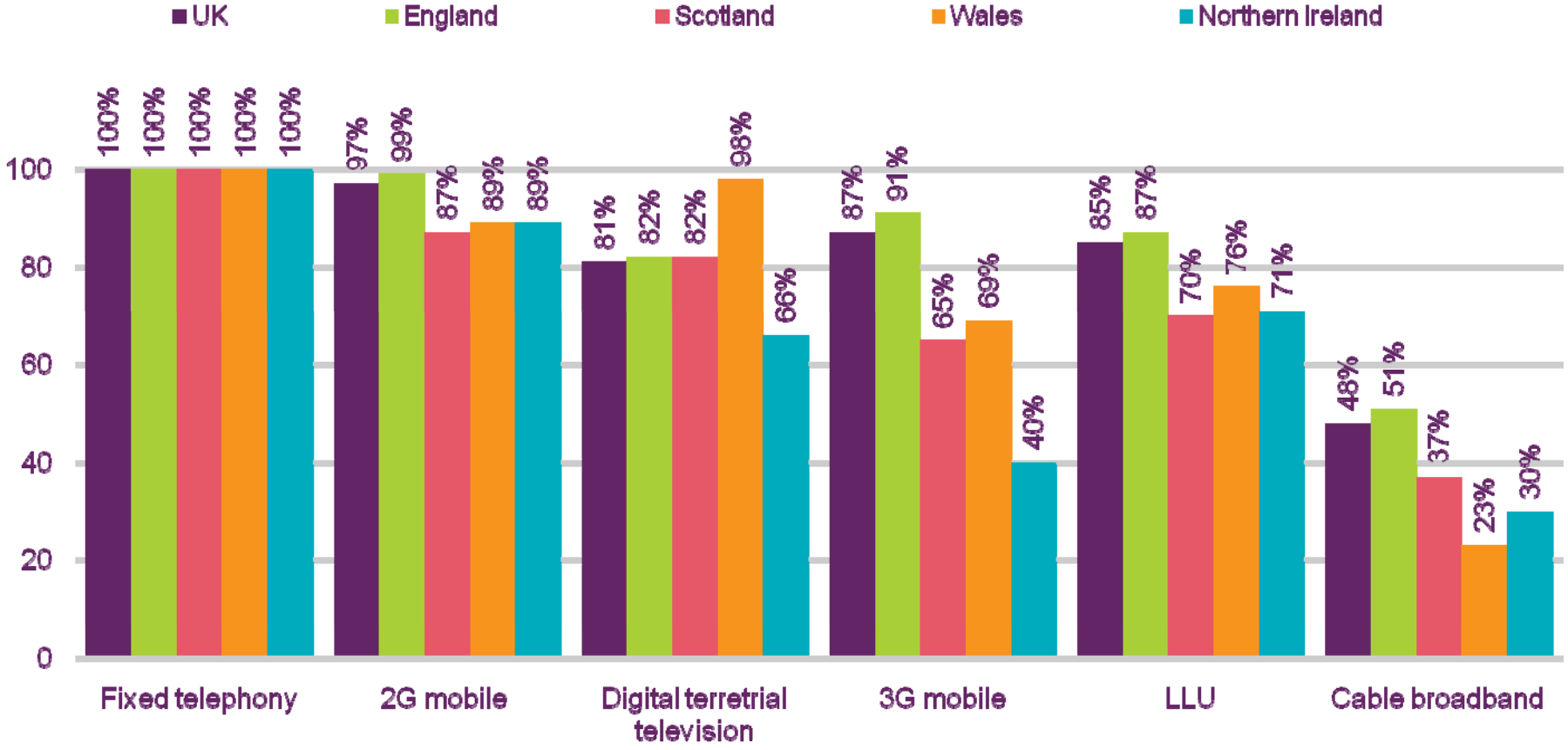
Figure 1.67

Communications infrastructure availability across the UK's nations



Sources: Ofcom and:1. Proportion of population living in postal districts where at least one operator reports at least 90% 2G area coverage. Sourced from GSM Association / Europa Technologies (Q1 2010).2. Proportion of population living in postal districts where at least one operator reports at least 90% 3G area coverage. Sourced from GSM Association / Europa Technologies (Q1 2008). Note we have raised this threshold from 75% in 2008; as a result we do not have time series data. Note that coverage data have been restated; this means that year-on-year comparisons are not possible.
3. Proportion of premises able to receive DSL services based on data reported by BT
4. Proportion of households passed by Virgin Media's broadband-enabled network
5. Proportion of households connected to an LLU-enabled exchange
6. Availability of 17 services. Ofcom estimates.

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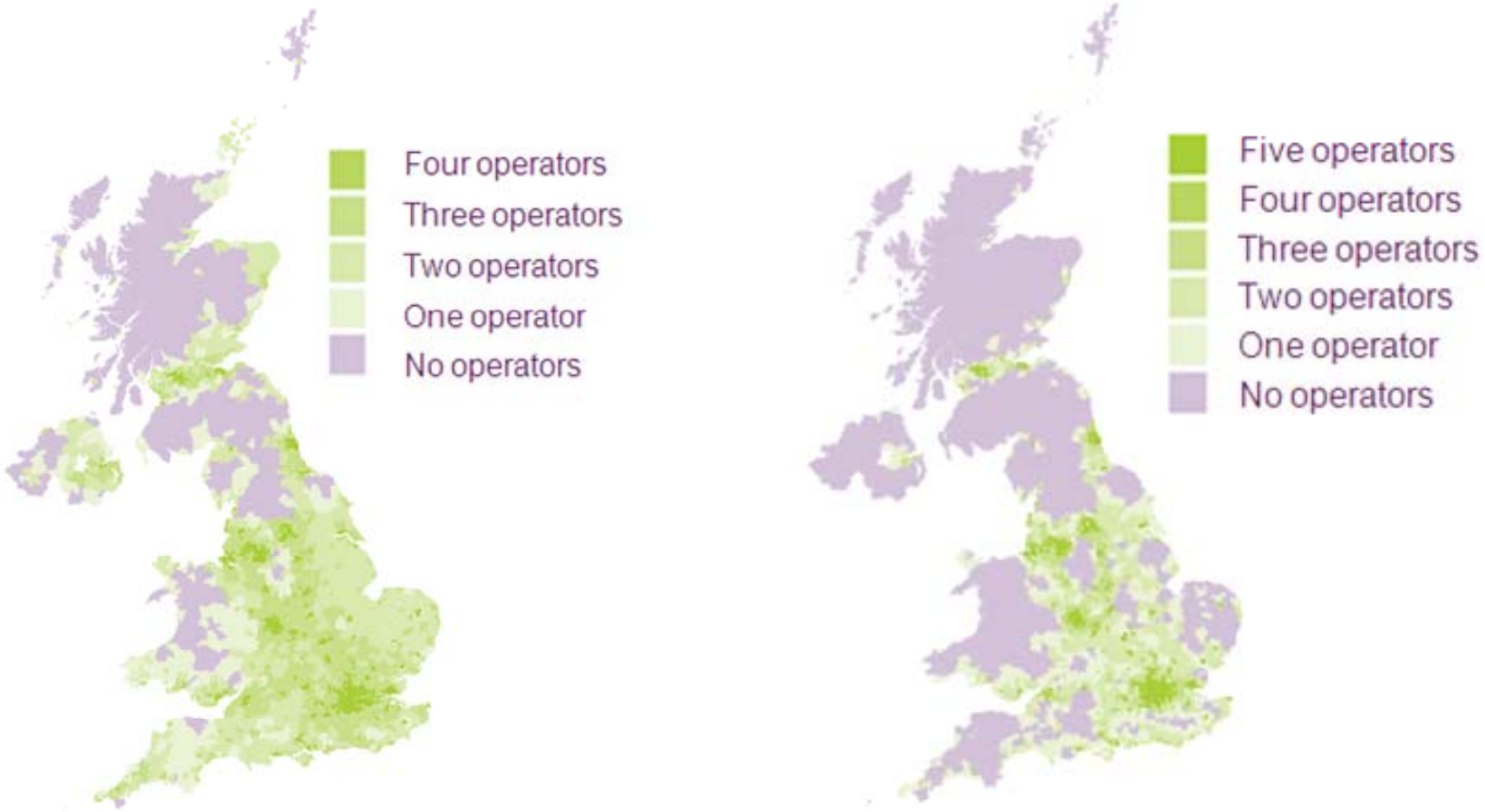
Figure 1.68

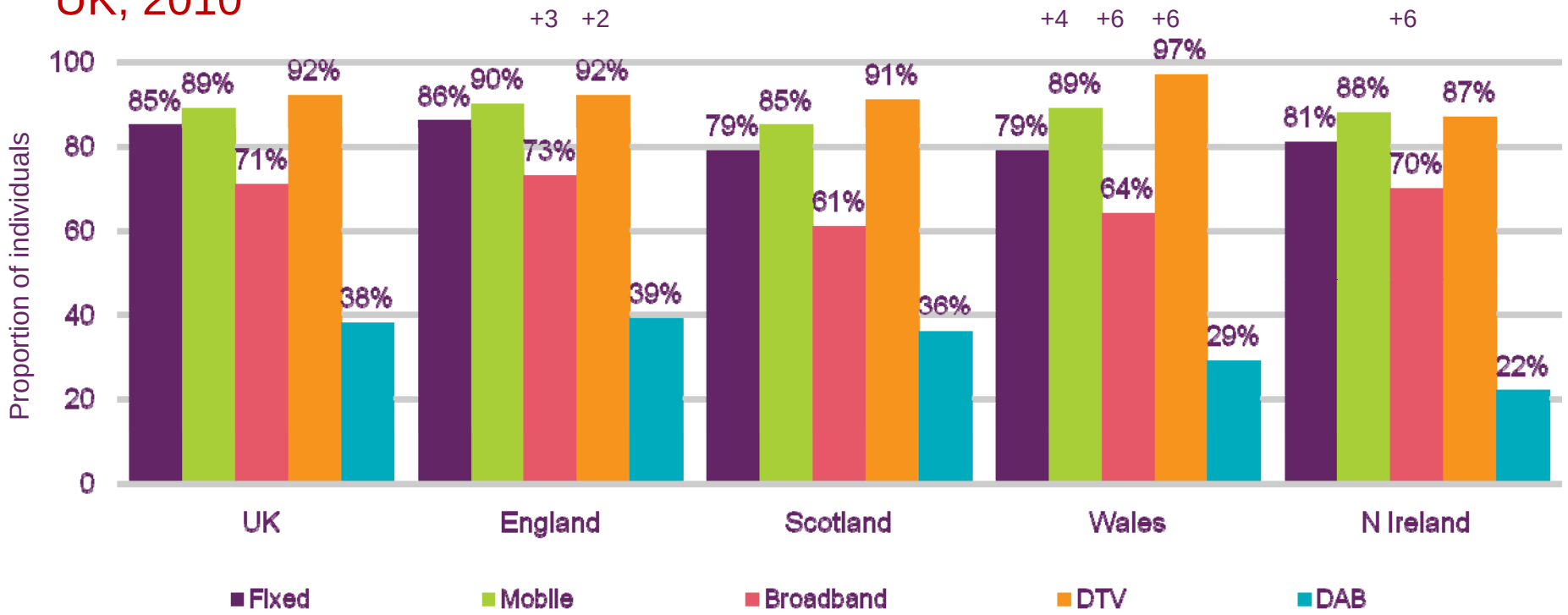
Coverage of 2G and 3G mobile services



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

Figure 1.69

Patterns of communications service adoption across the nations of the UK, 2010



Source: Ofcom research, Q1 2010
Fixed line base: All adults aged 15+ (n = 9013 UK, 5709 England, 1468 Scotland, 1075 Wales, 761 Northern Ireland)
Fixed line question: Is there a landline phone in your home that can be used to make and receive calls?
DTV base: Adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 970 Wales, 640 Northern Ireland)
DTV question. Which, if any, of these types of television does your household use at the moment?
Broadband base: All adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 970 Wales, 640 Northern Ireland)
Broadband question: Which of these methods does your household use to connect to the internet at home?
DAB base: Adults aged 15+ who listen to radio (n= 7017 UK, 4476 England, 1034 Scotland, 854 Wales, 653 Northern Ireland)
DAB question: How many DAB sets do you have in your household? Response represents those with one or more sets.
Note: Remaining percentages are 'Don't know' responses
Mobile base: All adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 970 Wales, 640 Northern Ireland)
Mobile question: Do you personally use a mobile phone ?
Note: The DTV take-up figures in this chart will differ from those presented in the 'Fast facts' table. The different is explained by the base of households over which the two figures are calculated. In this chart, is it all homes with television; in the fast facts, it is all homes (including those that do not have a television).

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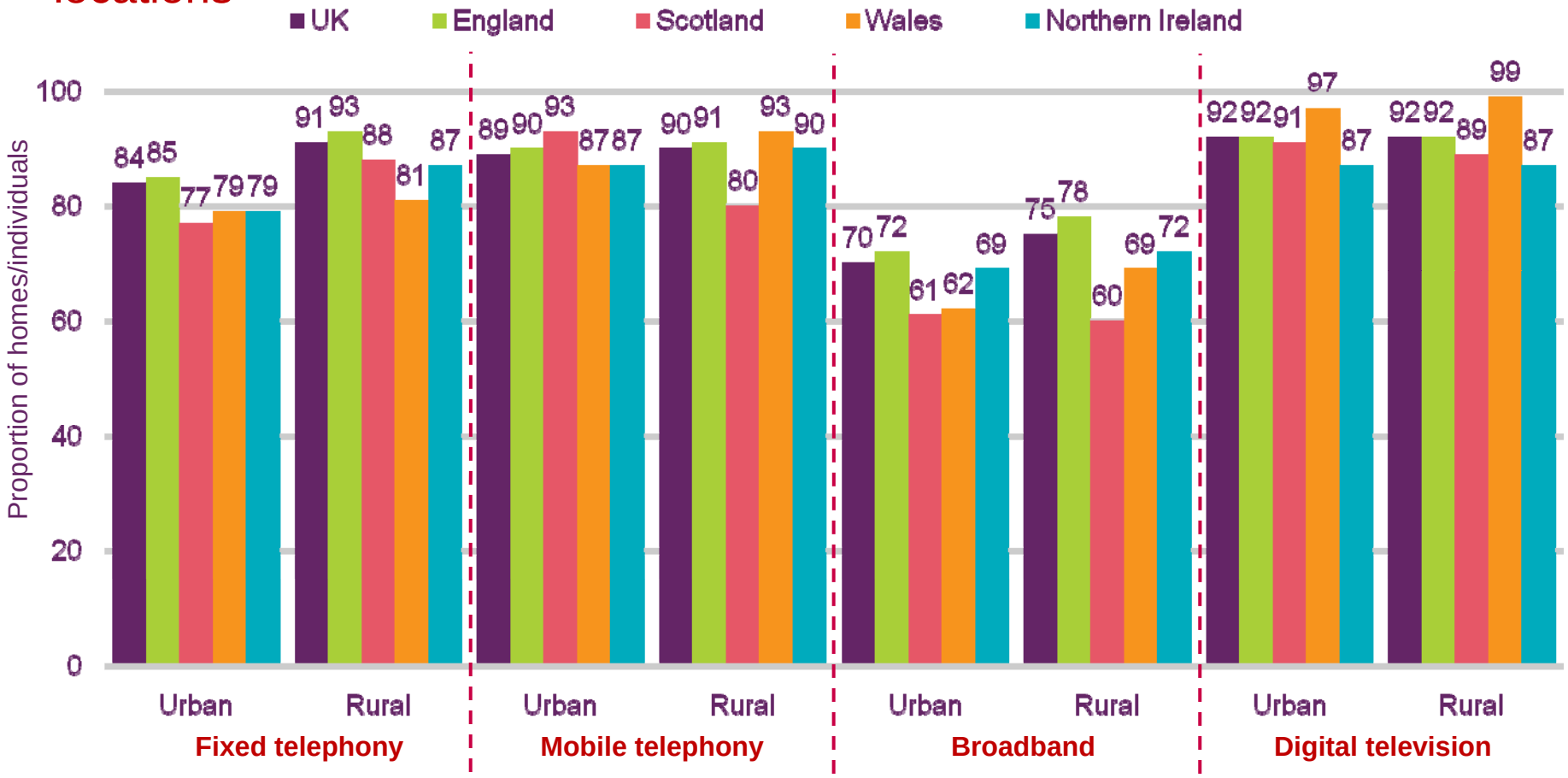
Figure 1.70

Adoption of communications technology/services in urban and rural locations



Source: Ofcom research, Q1 2010. For questions see Figure 1.69.

Figure 1.71

Mobile-only households in the UK

QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?
Source: Ofcom research, Quarter 1 2010
Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)

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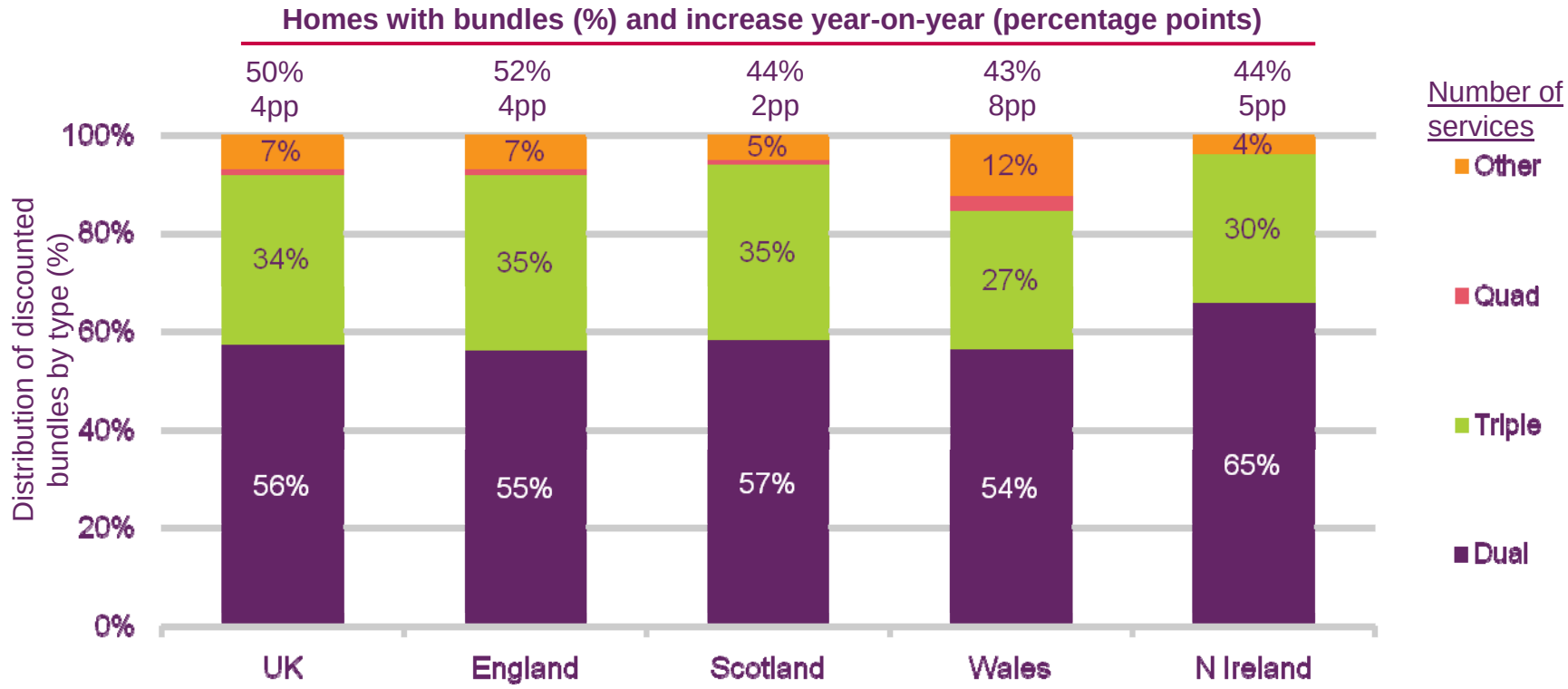
Figure 1.72

Take-up of bundles, by nation



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

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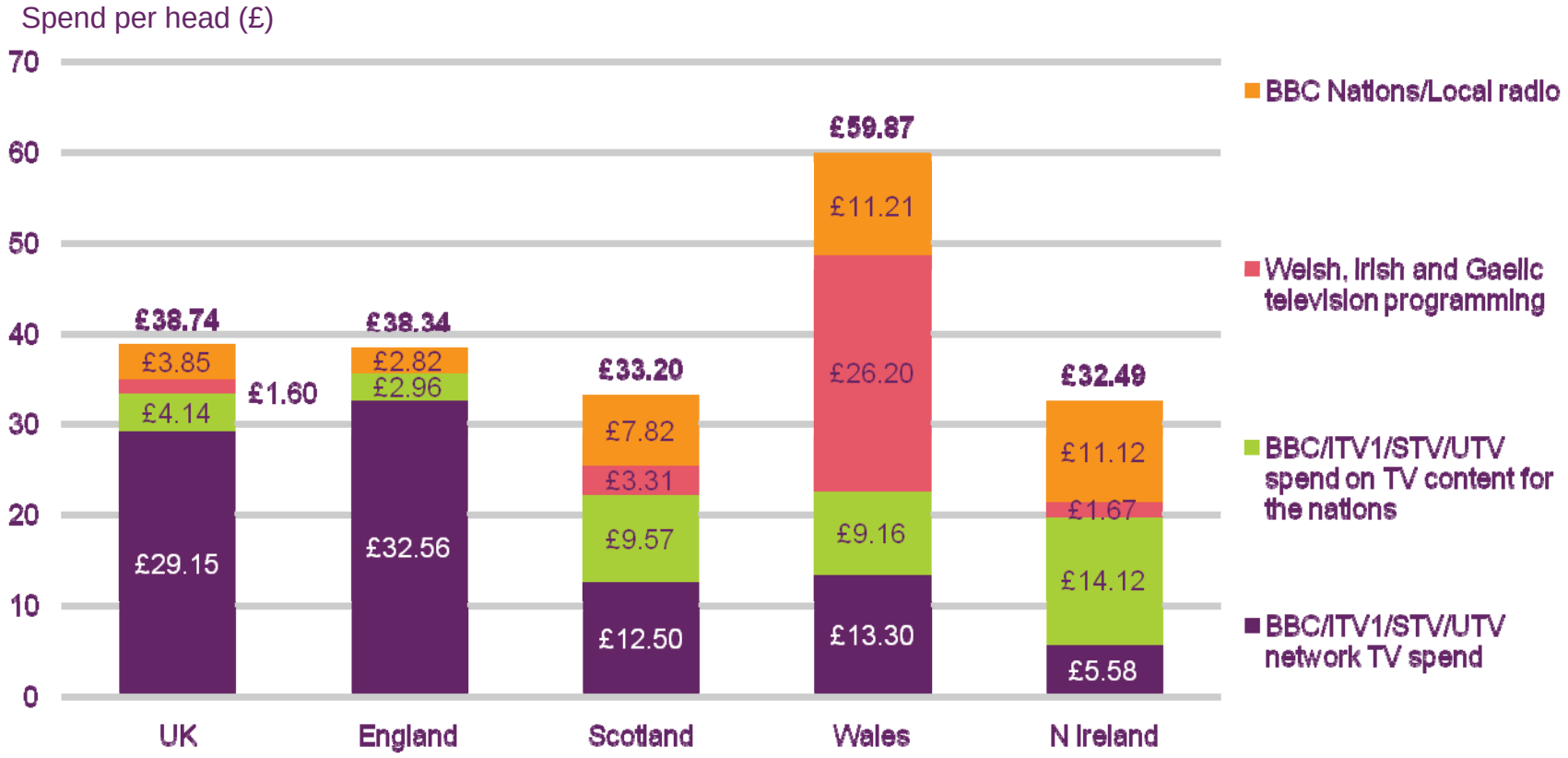
Figure 1.73

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



Source: Operators, Annual Reports and Ofcom calculations

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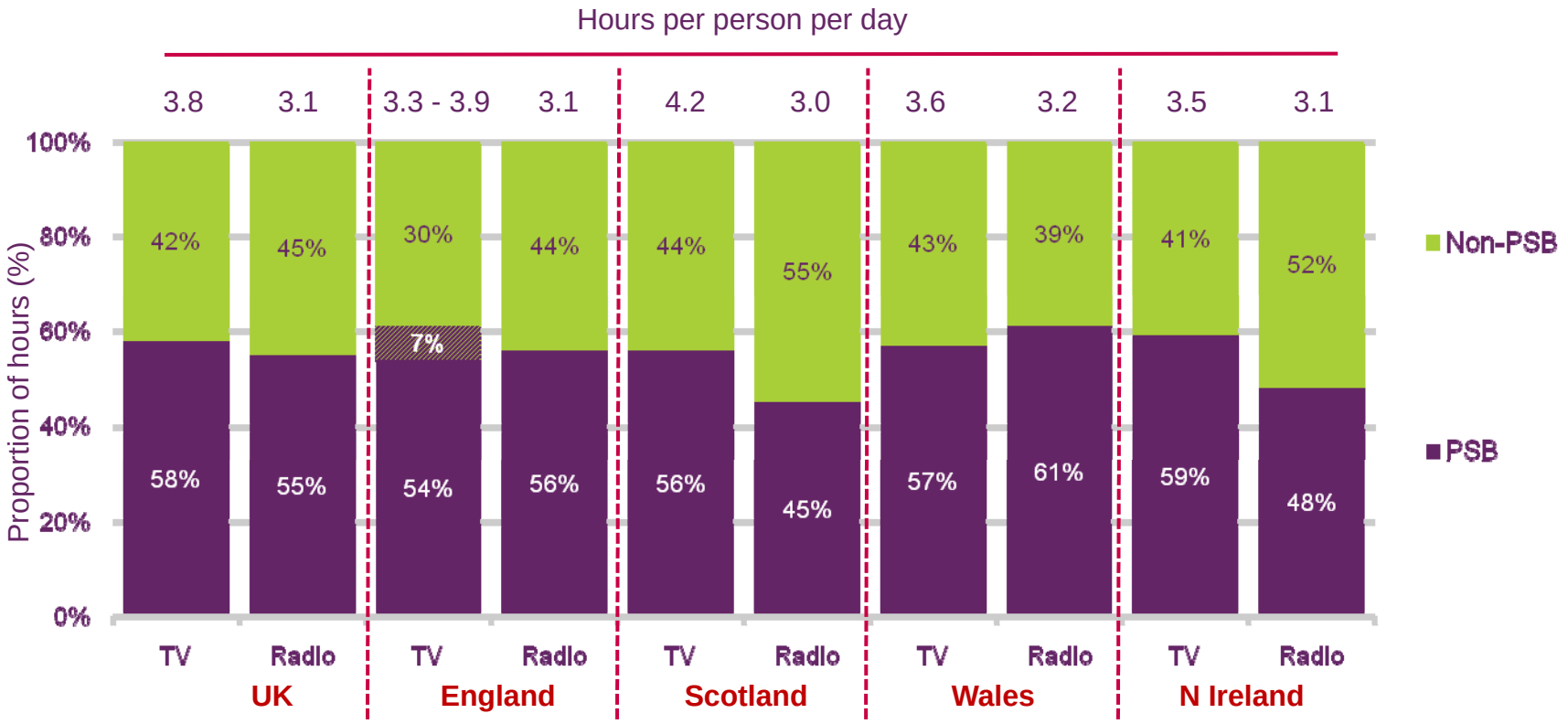
Figure 1.74

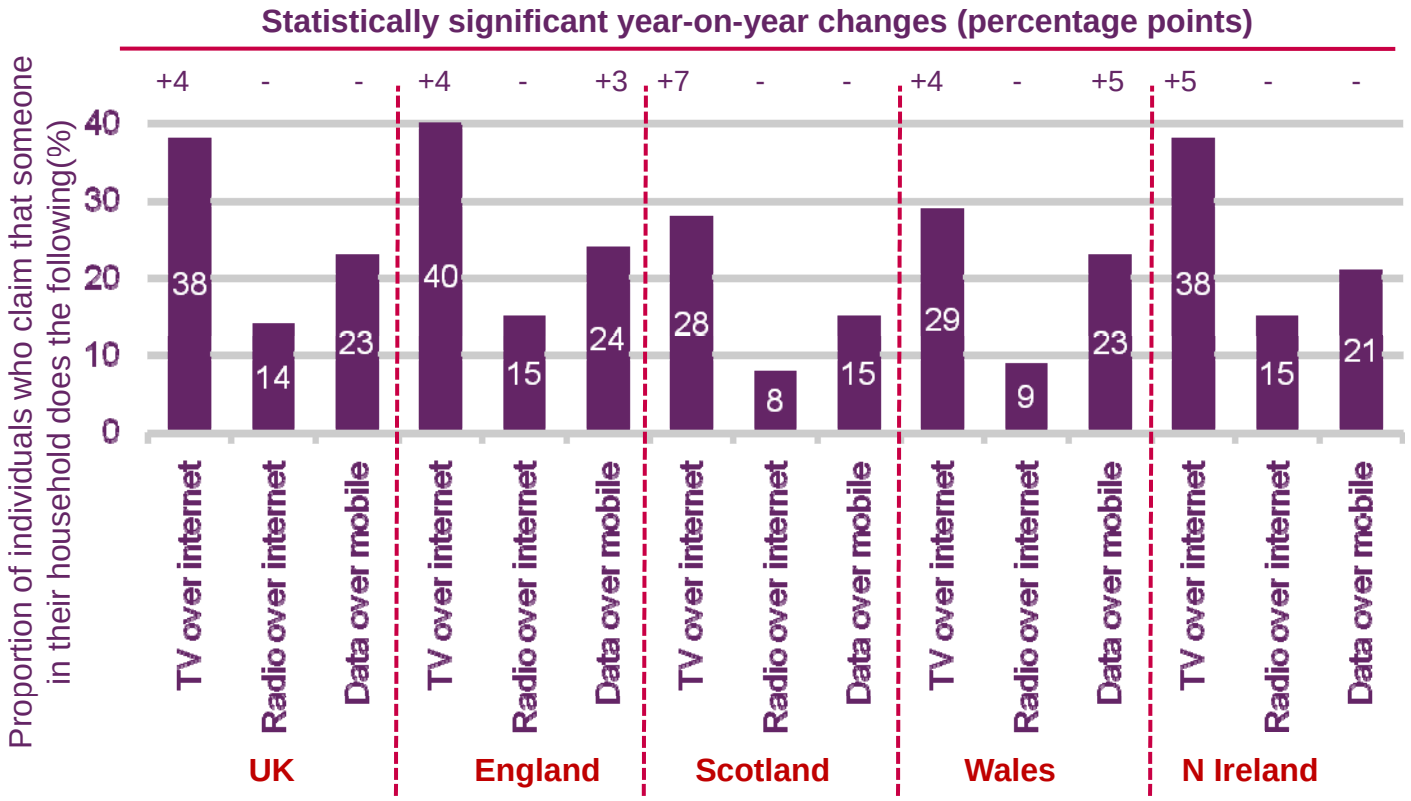
Hours of daily viewing of television and radio, by nation, 2010



Source: BARB and RAJAR

Figure 1.75

Consumers' use of converging platforms



Source: Ofcom research, Quarter 1 2010
Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland)
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?
QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-fi,, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging

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2. Television and audio visual

Figure 2.1

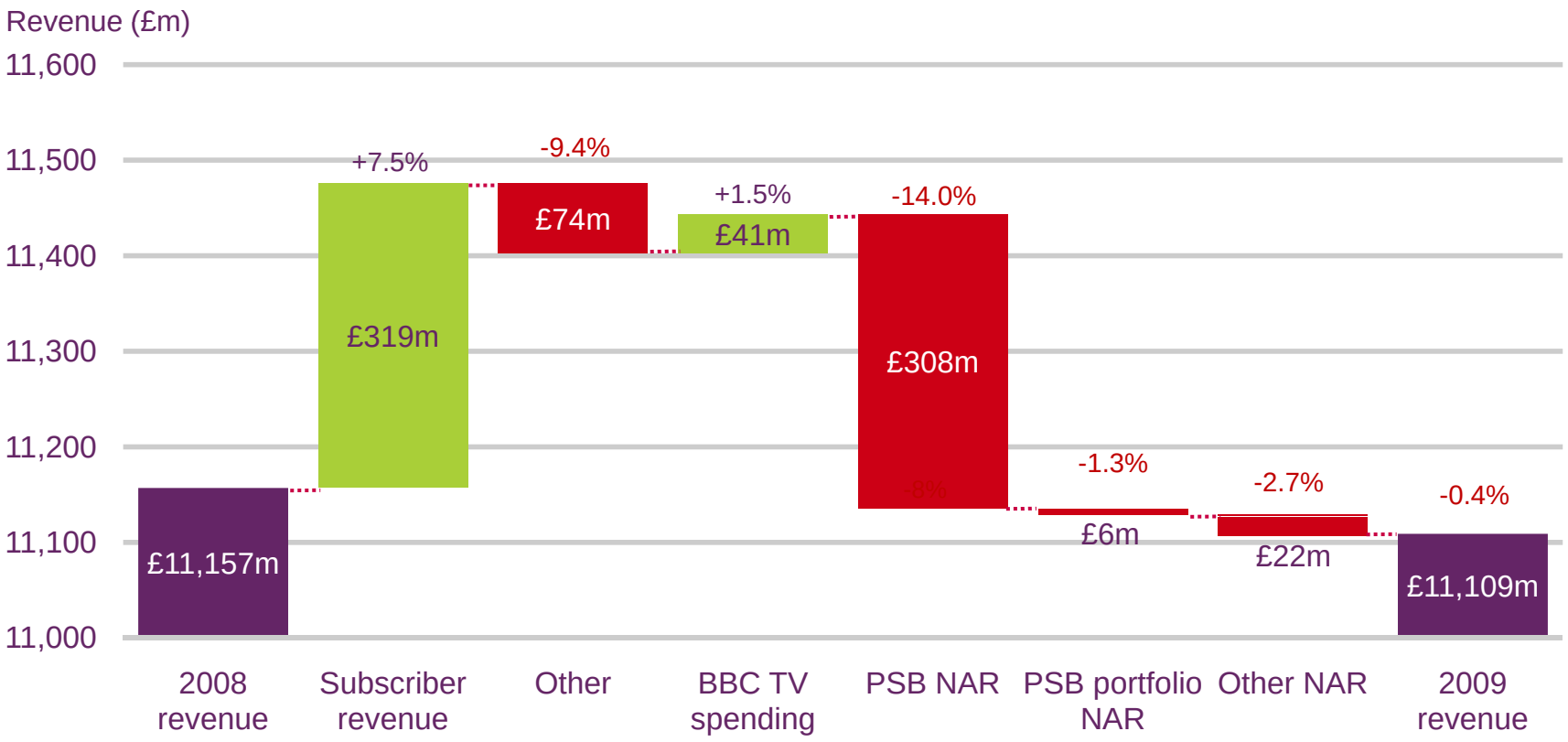
Industry metrics

UK television industry	2004	2005	2006	2007	2008	2009
Total TV industry revenue (£bn)	10.0	10.5	10.6	11.1	11.2	11.1
Proportion of revenue generated by public funds	24%	25%	25%	25%	24%	25%
Proportion of revenue generated by advertising	35%	35%	33%	32%	31%	28%
Proportion of revenue generated by subscriptions	34%	35%	36%	37%	39%	41%
TV as a proportion of total advertising spend	29.6%	29.6%	27.9%	26.9%	26.5%	27.5%
Spend on originated output by 5 main networks (£bn)	3.1	3.0	2.8	2.7	2.6	2.4
Digital TV take-up	53.0%	61.9%	69.7%	86.3%	87.1%	91.4%
Proportion of DTV homes paying for TV (Q1)	71.7%	64.3%	60.0%	55.0%	53.1%	54.6%
Viewing per head, per day (hours) in all homes	3.70	3.65	3.60	3.63	3.74	3.75
Share of the five main networks in all homes	73.8%	70.4%	66.7%	63.5%	60.8%	57.8%
Number of channels broadcasting in the UK	379	416	433	470	495	490

Source: Ofcom/broadcasters/Advertising Association/Warc/BARB/GfK. Note: Public funds include the DCMS grant to S4C and BBC funding that is allocated to TV; TV as a proportion of total advertising spend excludes direct mail and is based on © Advertising Association/Warc Expenditure Report (www.warc.com/expenditurereport); spend on originations includes spend on nations and regions programming (not Welsh and Gaelic language programmes but some Irish language). Note that digital television take-up in Q1 2010 had reached 92%.

Figure 2.2

Changes in TV industry revenue, 2008 - 2009



Source: Ofcom/broadcasters

Note: Figures expressed in nominal terms. PSB NAR comprises Channel 3 licensees (including GMTV1), Channel 4, Five and S4C. PSB portfolio NAR includes the commercial channels owned by the PSBs. 'Other NAR' comprises the rest of the multichannel market. Platform operator revenues do not include any installation costs, equipment sales or subsidies. BBC TV spending represents the amount of BBC revenue that is allocated to TV.

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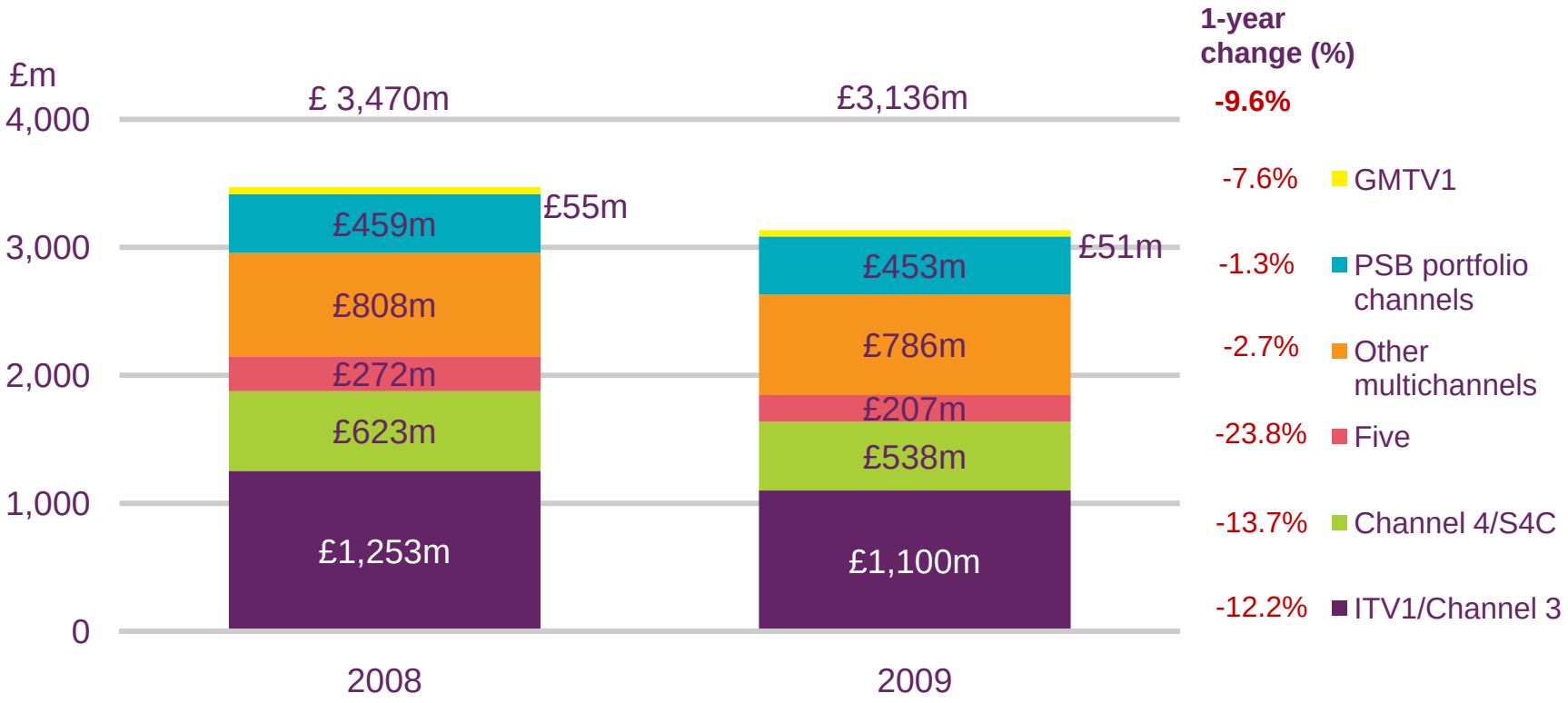
Figure 2.3

TV net advertising revenues



Source: Ofcom/broadcasters.
Note: Totals may not equal the sum of the components due to rounding. ITV1/Channel 3 includes ITV1, STV, UTV and Channel Television.

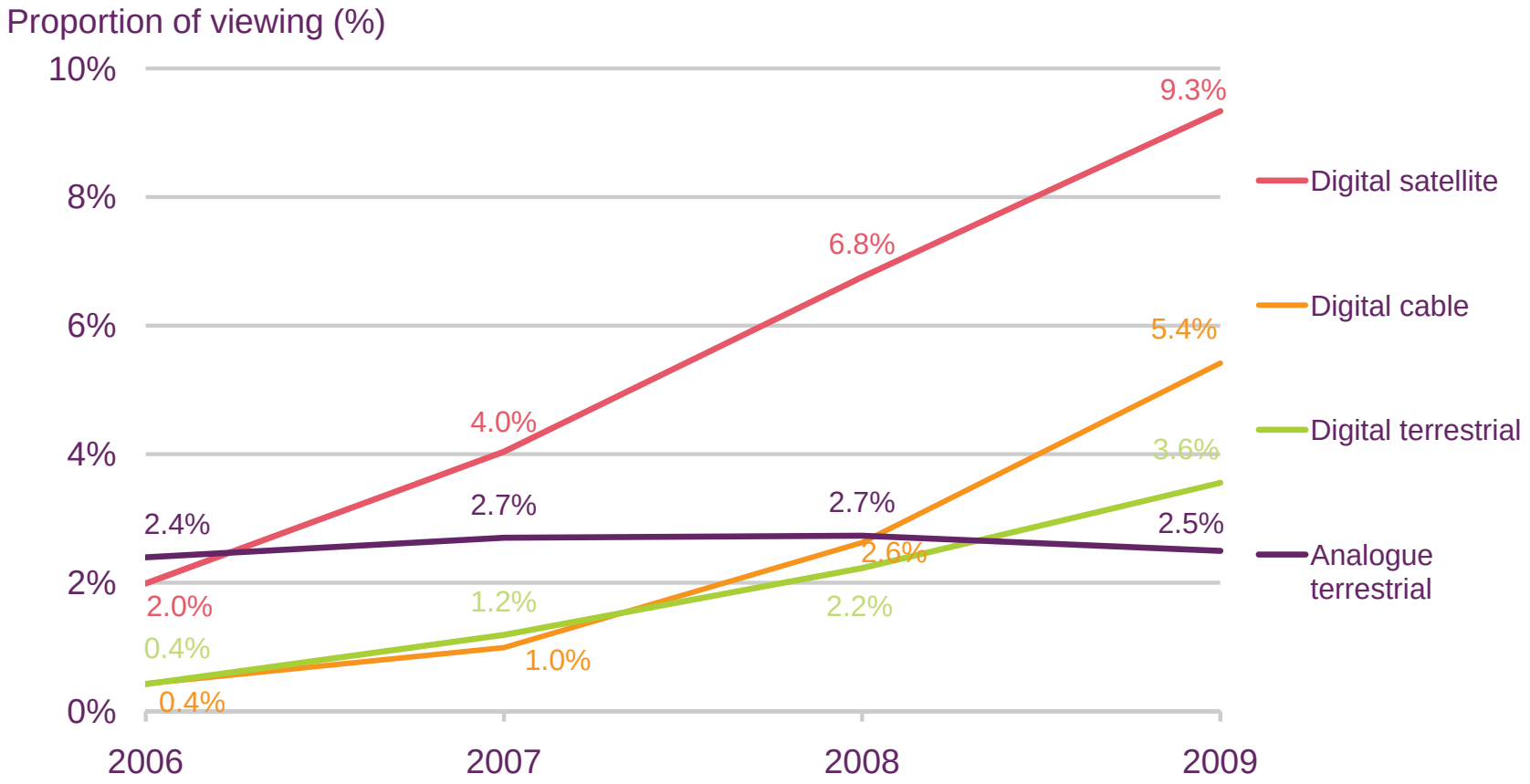
Figure 2.4

Live versus time-shifted TV viewing, all individuals, all homes

Source: BARB

Figure 2.5

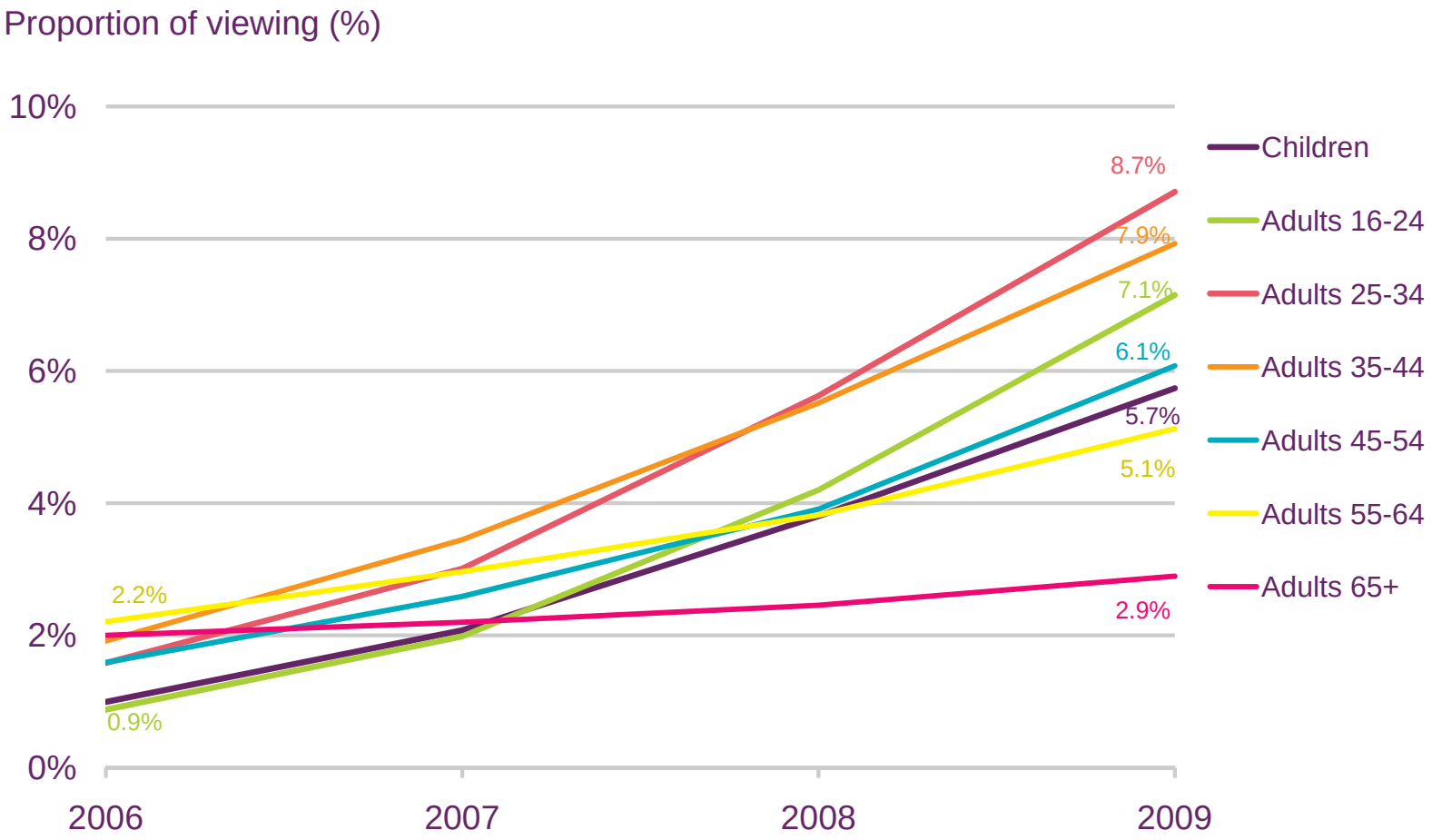
Proportion of viewing that is time-shifted, by platform



Source: BARB

Figure 2.6

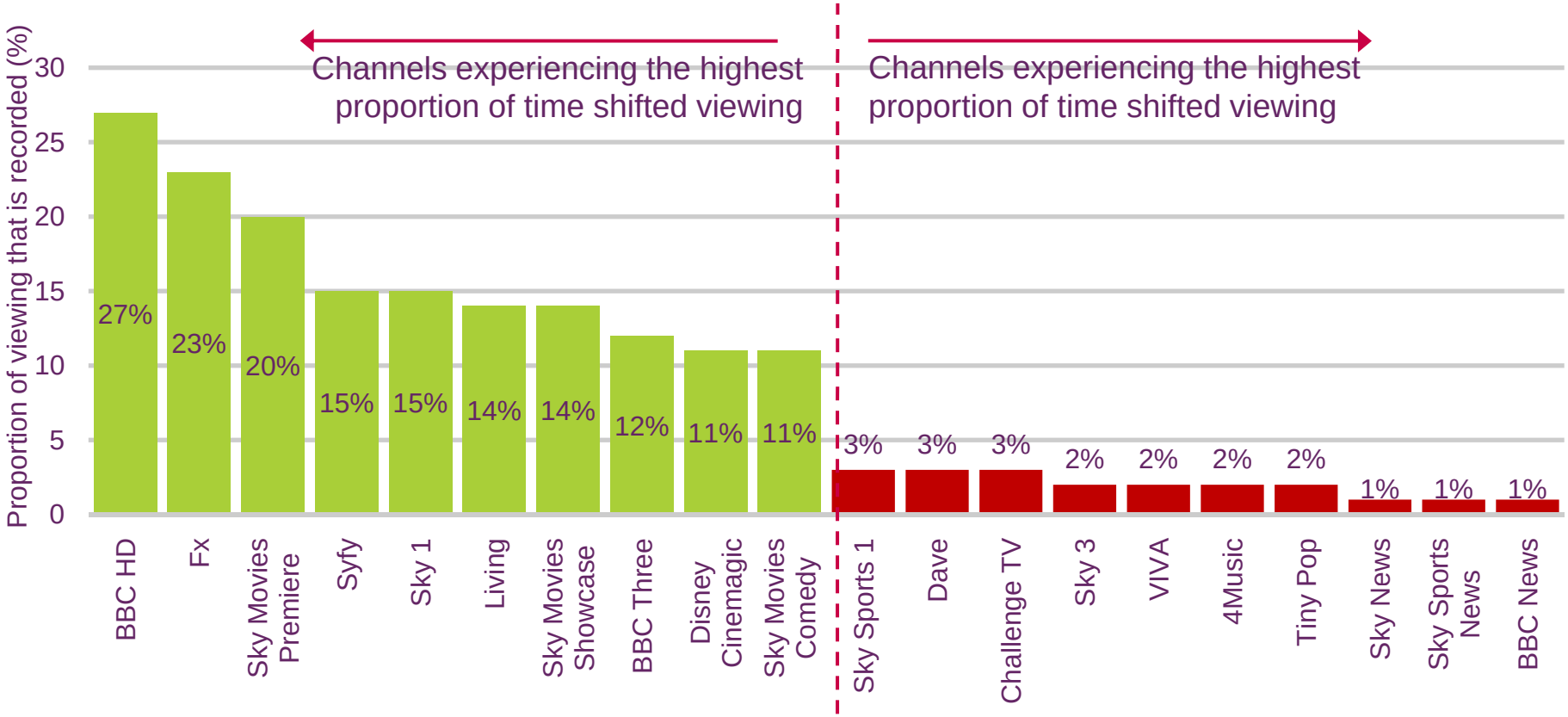
Proportion of viewing that is time-shifted, by age



Source: BARB

Figure 2.7

Channels with highest and lowest proportion of recorded viewing, 2009



Source: BARB. Includes +1 channels, viewing in multichannel homes, excluding channels with <0.1% share

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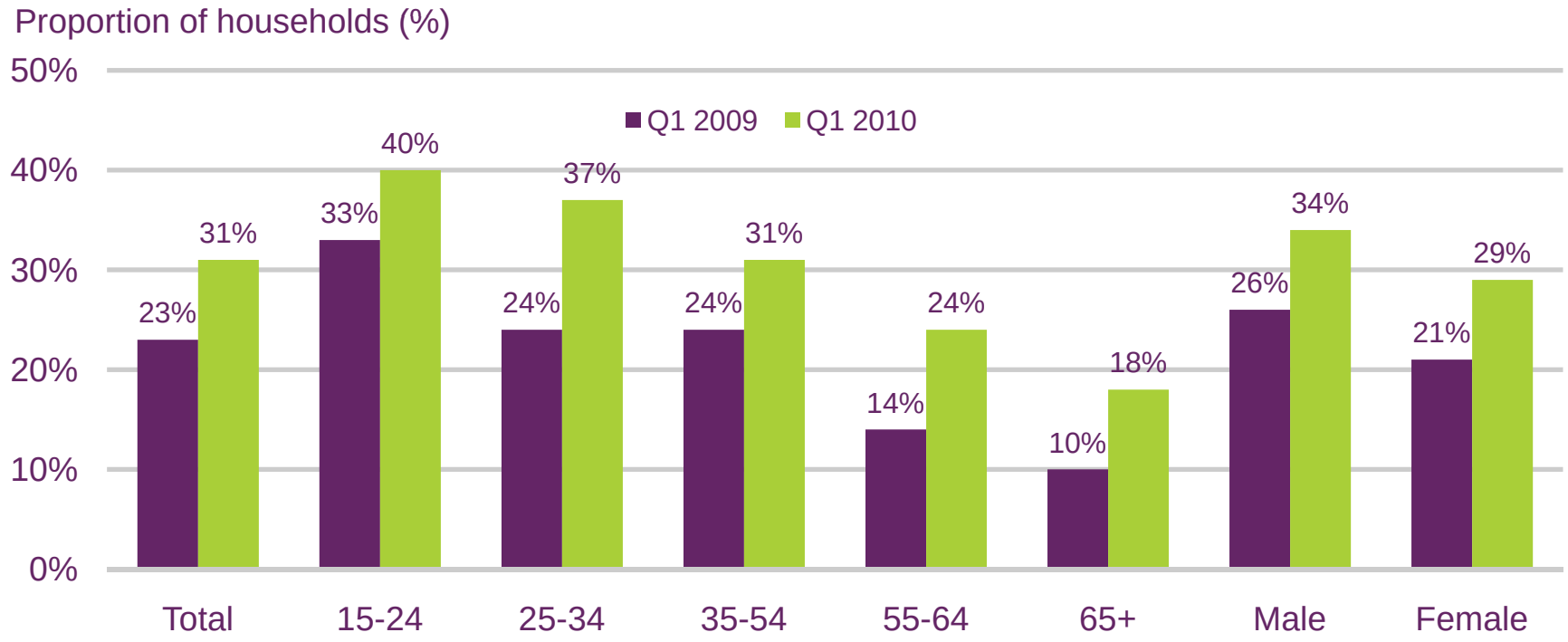
Figure 2.8

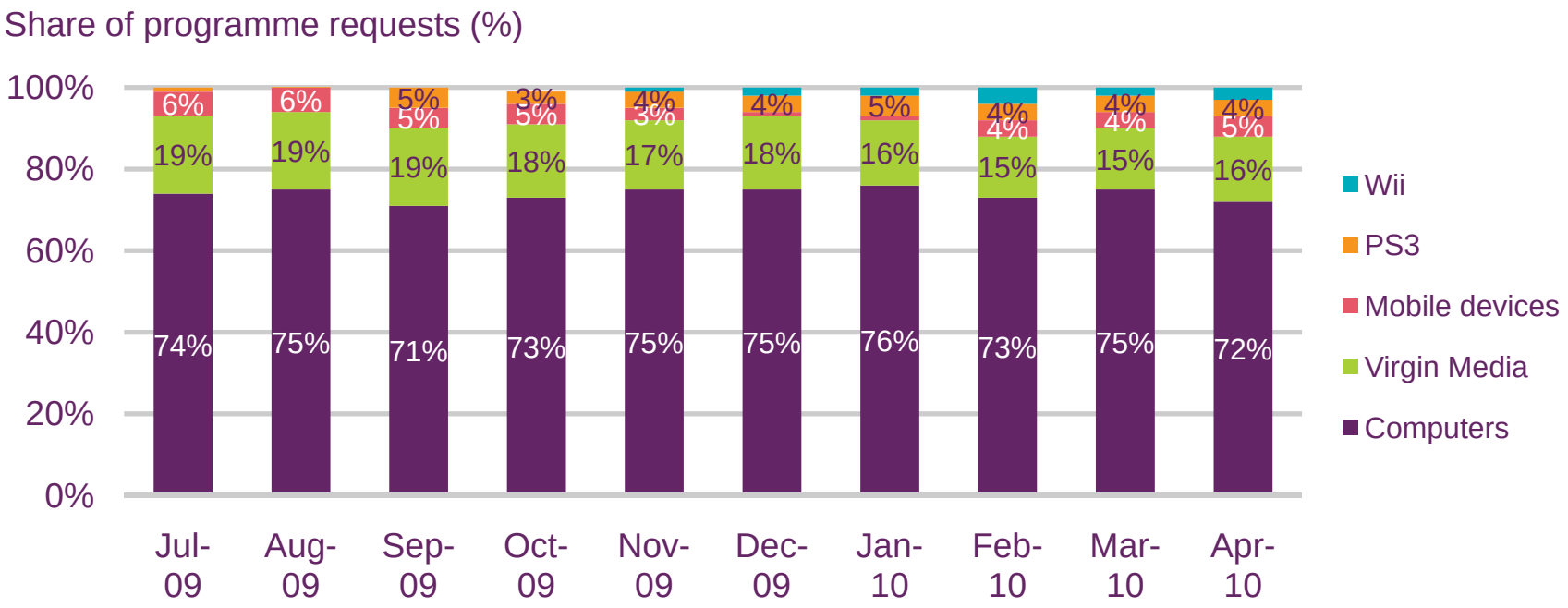
Proportion of adults with home internet who watch online catch-up TV



Source: Ofcom research Q1 2010
QE12. Which, if any, of these do you or your household use the internet for whilst at home?
Base: All adults who have the internet at home (n=6163 UK, 1048 15-24, 1100 25-34, 2464 35-54, 860 55-64, 691 65+, 3015 Male, 3148 Female)

Figure 2.9

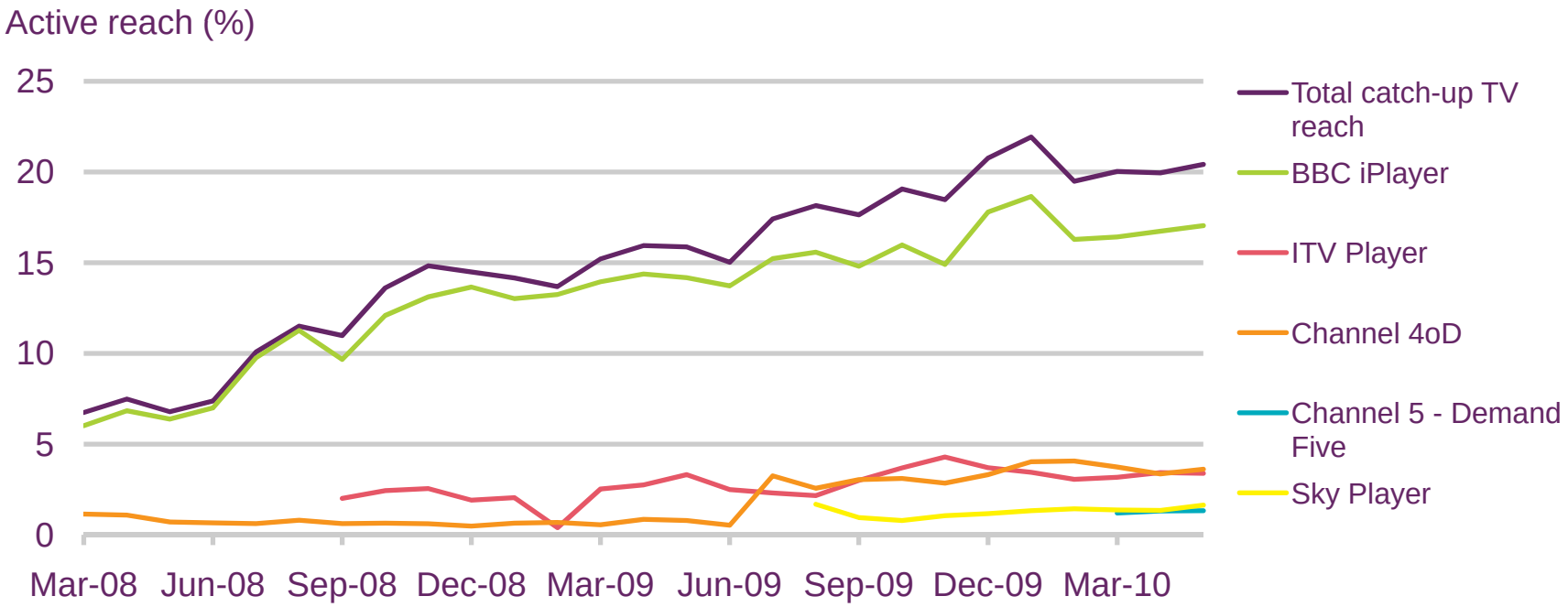
BBC iPlayer share of programme requests, by device type



Source: BBC iStats.
Note: Includes requests for radio programmes. Data from iPhones not available from 10 November to 2 February and data from Wii not available from 22 to 31 March, due to technical problems.

Figure 2.10

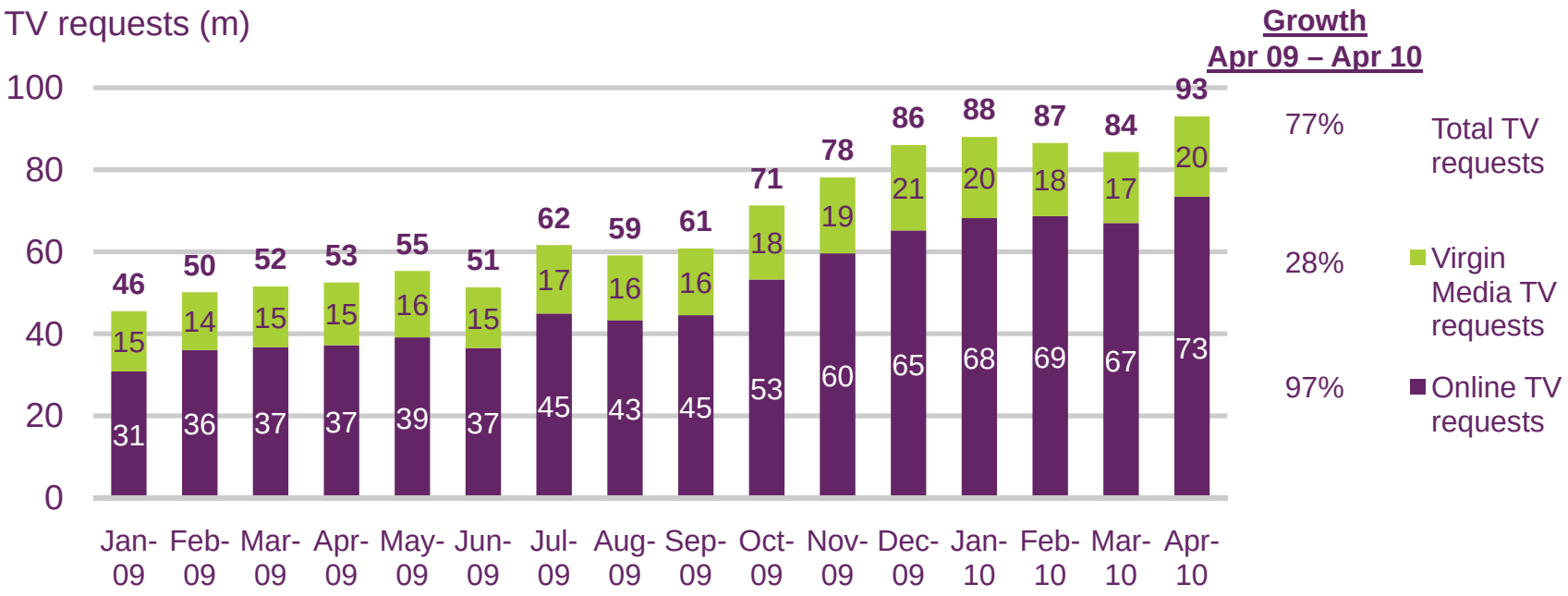
Active reach of major online catch-up TV services



Source: UKOM/Nielsen, home and work panel.
Note: 'Active reach' is the percentage of all active unique persons aged 2+ who visited the site or used the application. 'Active is defined as anyone who used an internet-enabled computer within the time period. 'Demand Five trend data not available prior to March 2010 due to change in UKOM definitions. Total catch-up TV reach is the unduplicated reach of all five services.

Figure 2.11

Total monthly iPlayer TV requests across all platforms

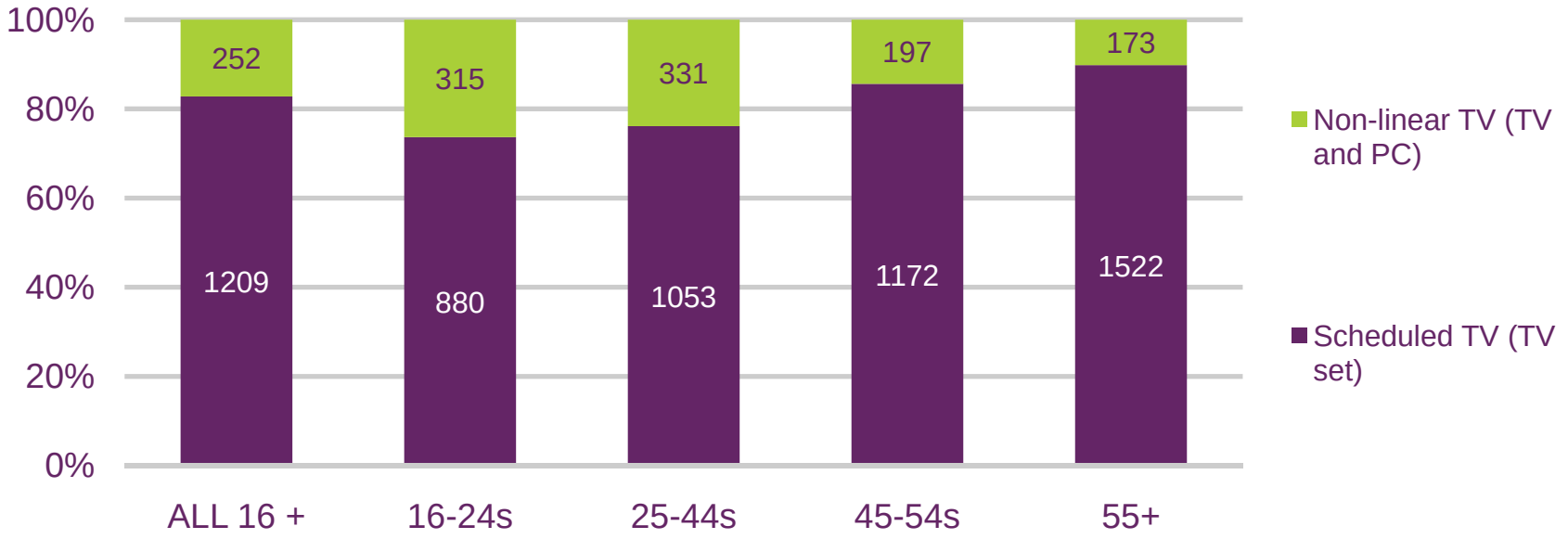


Source: BBC iStats.
Note: Does not include radio. Includes both simulcast and on-demand.

Figure 2.12

Linear/non-linear split of weekly time spent consuming audio-visual content on TV and computers

Proportion of time (% / minutes)



Source: Ofcom research
Base: All respondent days - 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373
Note: Scheduled TV does not include live online TV streaming; content consumed via mobile devices is also not included. Non-linear TV includes content consumed on DVRs, rented/purchased DVDs/VHS, recorded TV on DVDs/VHS/games consoles/on demand TV through a TV set or PC, and content downloaded from the internet.

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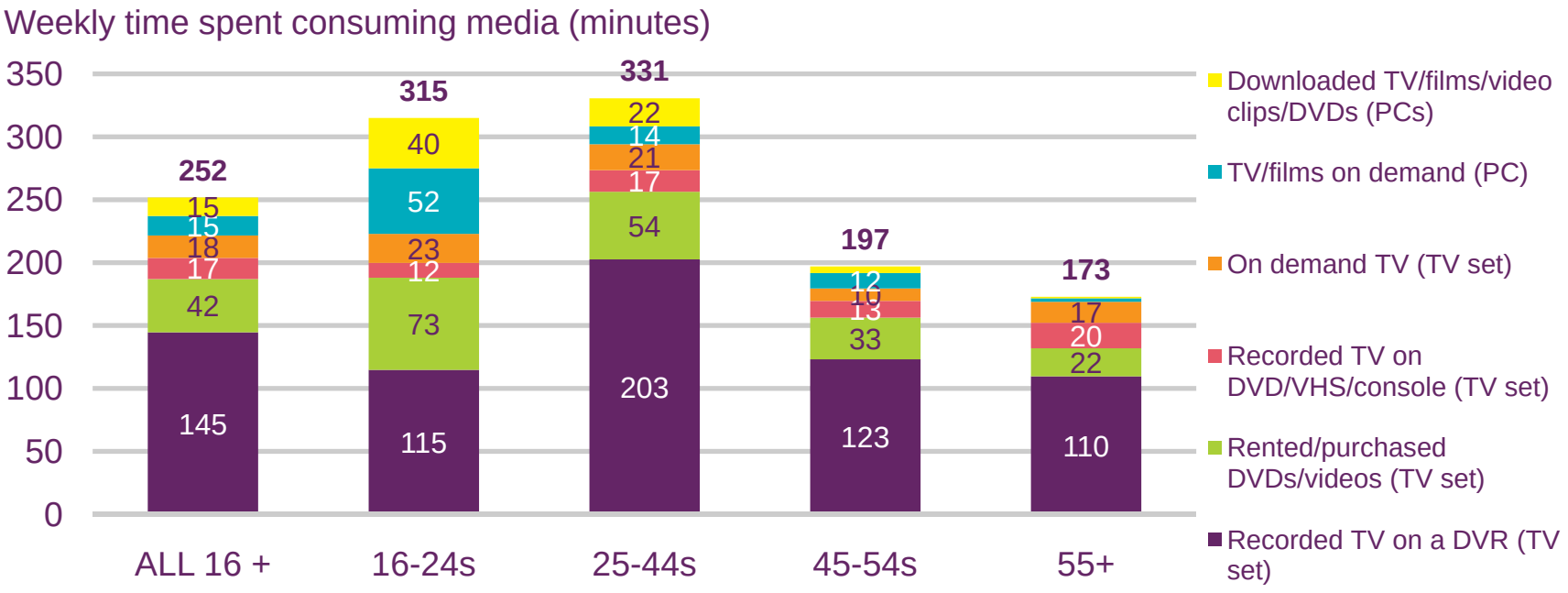
Figure 2.13

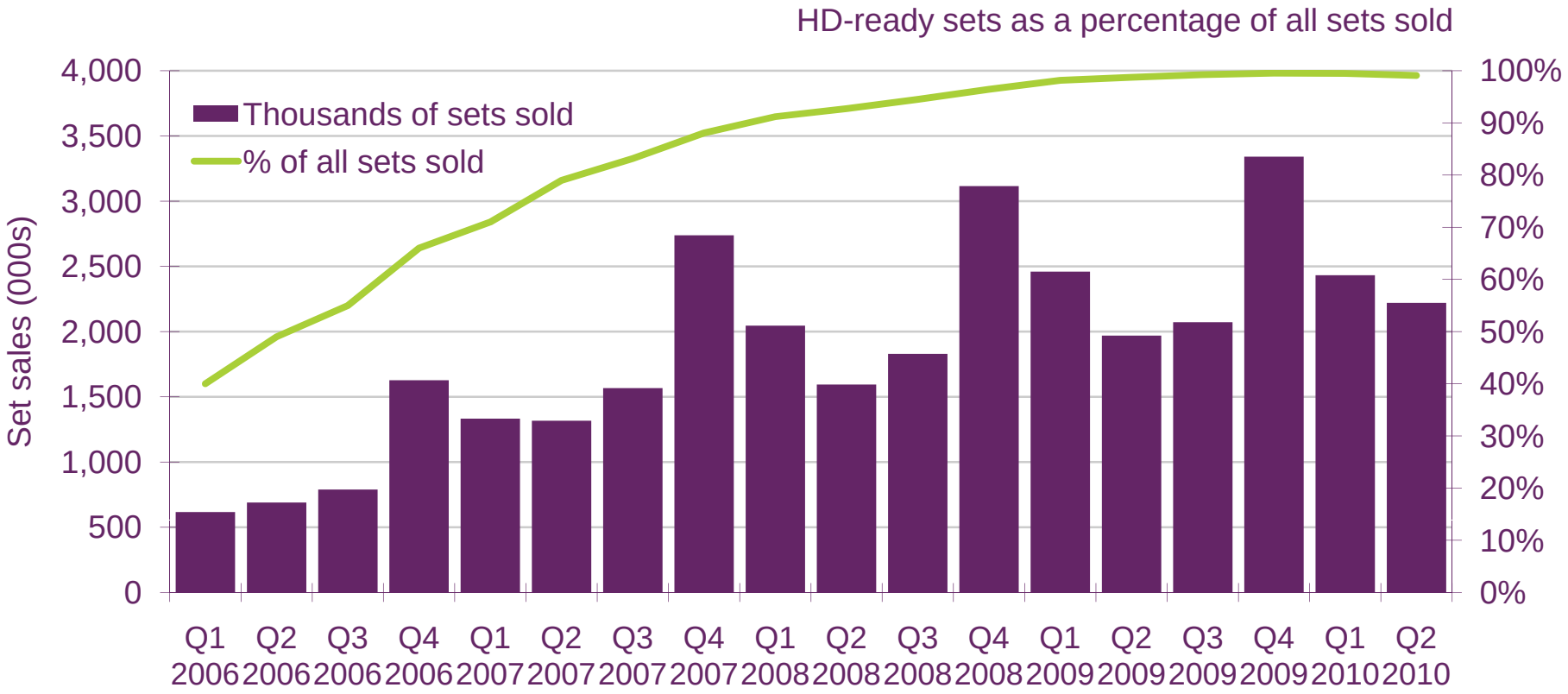
Weekly time spent consuming selected non-linear video content



Source: Ofcom research
Base: All respondent days - 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 2.14

HD-ready sets: sales



Source: GfK sales data

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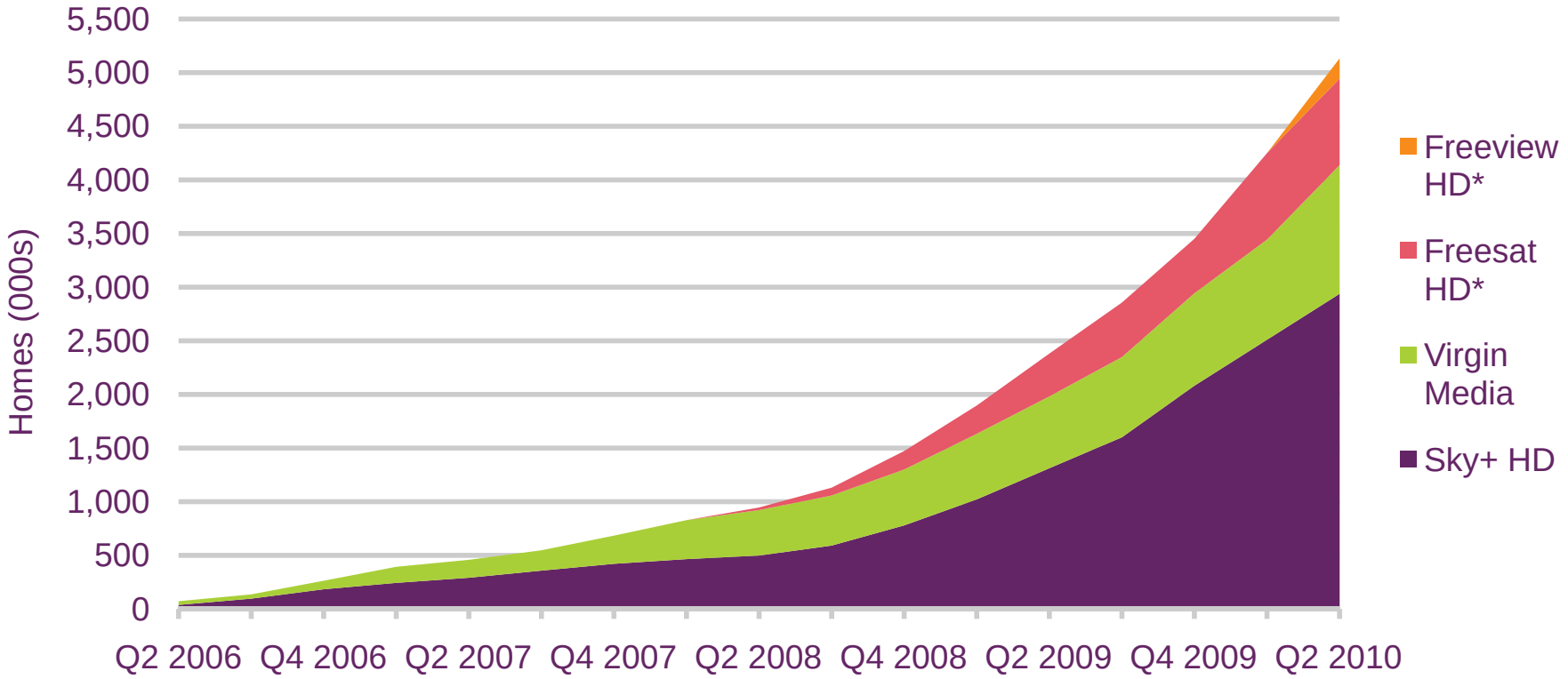
Figure 2.15

Number of broadcast HD homes: BSkyB, Virgin Media, Freesat and Freeview



Source: Operators/GfK

Note: Figures represent latest available data. Freesat HD and Freeview HD figures based on HD device sales, therefore the cumulative number of HD homes is indicative only.

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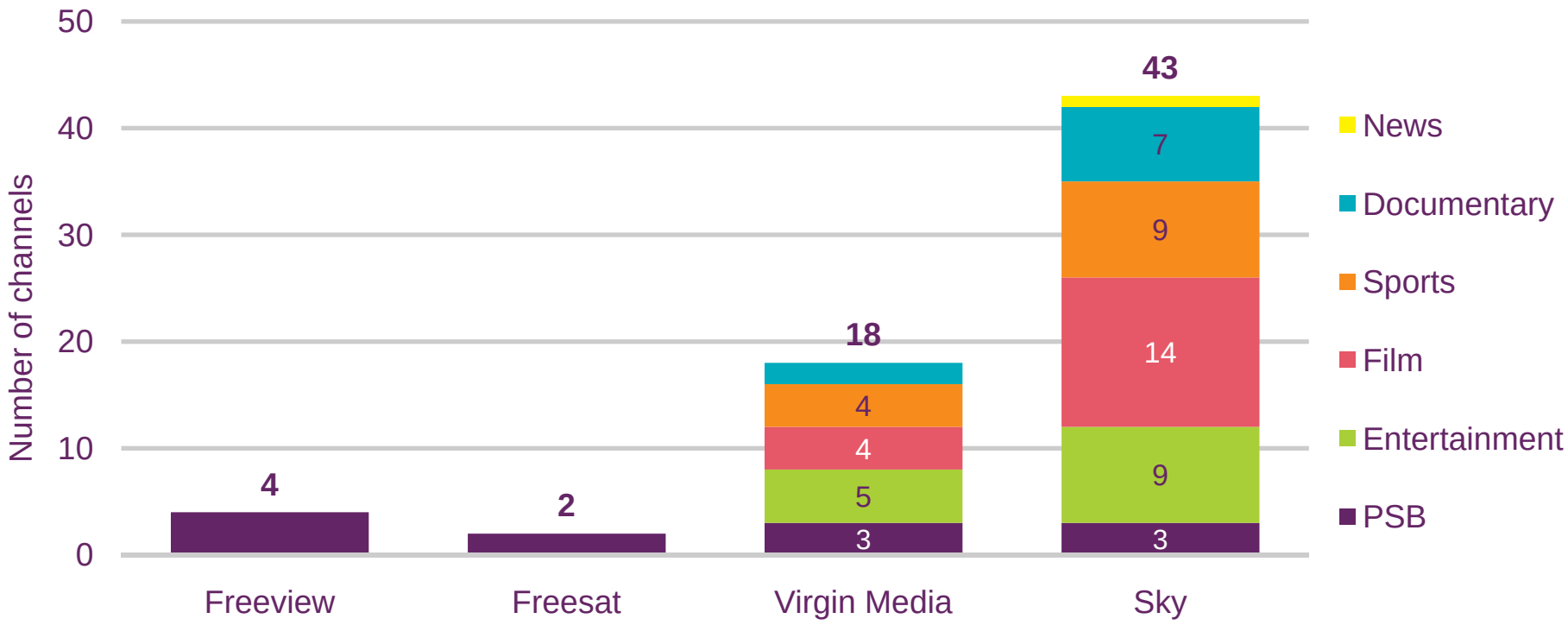
Figure 2.16

HD channel line-up by platform and genre, 2010



Source: Ofcom/Operators

Notes: Sky includes two PPV HD channels. Does not include HD VoD available from Virgin Media, BT Vision, Talk Talk TV, Fetch TV and iPlayer on Freesat. Data correct as of August 2010.

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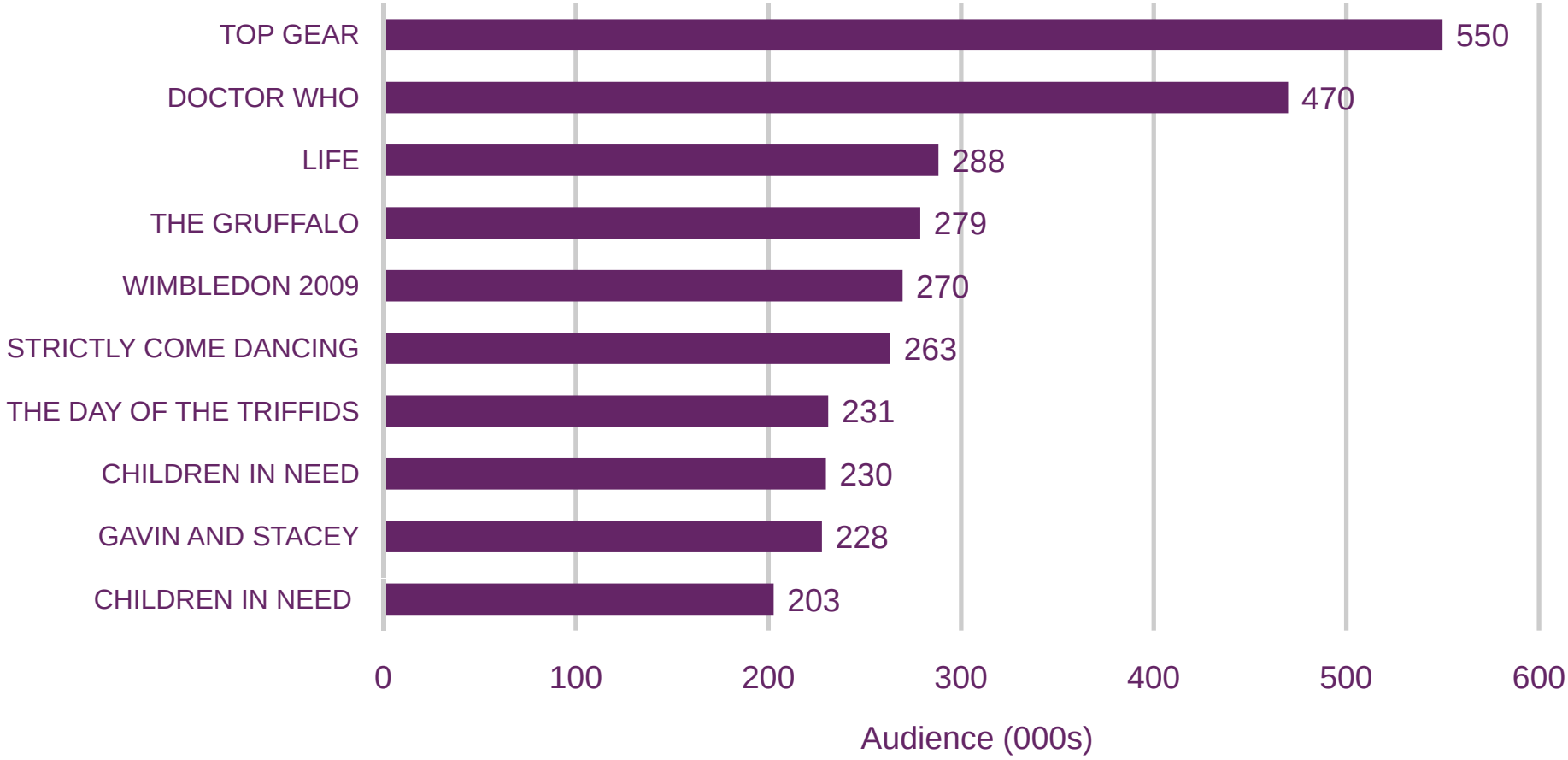
Figure 2.17

Top 10 most-viewed programmes on BBC HD in 2009



Source: BARB, all individuals 4+, highest occurrence per title

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Figure 2.18

Selected international 3DTV services

Operator	Platform	Product	Launch date	Content	Business model
BSkyB (UK)	Satellite	Sky 3D channel	April 2010 (commercial) Autumn 2010 (residential)	Launched with Premier League football; intends to add movies, documentaries and arts programmes by late 2010	Residential: Free with a premium subscription to Sky + HD Commercial: appointment to view sports events
Canal + (France)	Satellite	3D events channel	By end of 2010	Sports events, including the World Cup and French Open	Linear programmes and VoD
DirecTV (US)	Satellite	3 DirecTV 3D channels and ESPN 3D channel	June 2010	Movies, sports, special events, arts, music and documentaries	Channels 1 & 3 based on PPV model, Channel 2 showing linear broadcasts available to all subscribers
Numericable (France)	Cable	3D VoD channel	Autumn 2010	Mixed content	Available to subscribers, pricing and packaging to be confirmed in 2010
J:Com (Japan)	Cable	3D linear and VoD channels	April 2010	Content provided by existing channel providers, as well as outside production companies,	Linear programmes and VoD, via existing set-top boxes.

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Figure 2.19

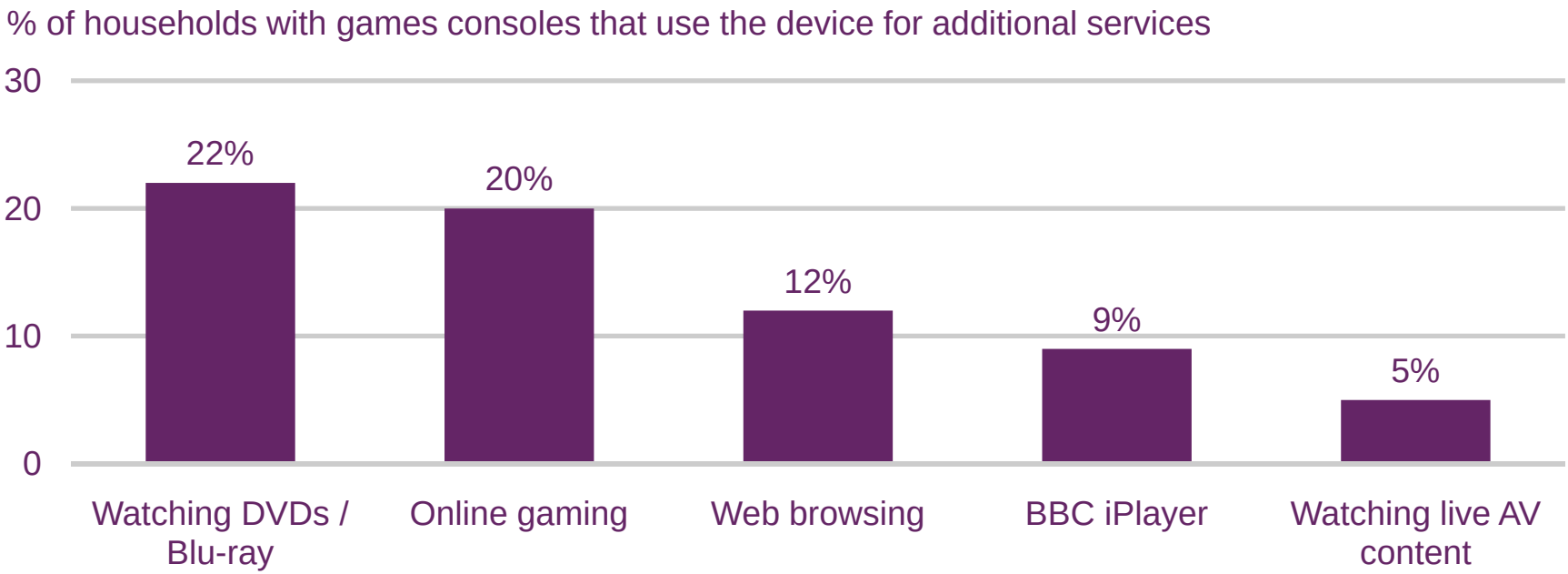
Comparison of 3DTV television sets

Manufacturer	Launch date	Price	Panel type	3D viewing technology
Sony	June 2010	£1,799	LCD	Active shutter glasses
LG	May 2010	£2,799	LCD	Polarised glasses
Toshiba	Q4 2010	TBC	LCD	Active shutter glasses
Panasonic	May 2010	£2,295	Plasma	Active shutter glasses
Samsung	April 2010	£2,300	Plasma, LCD	Active shutter glasses

Source: Manufacturers, prices at launch

Figure 2.20

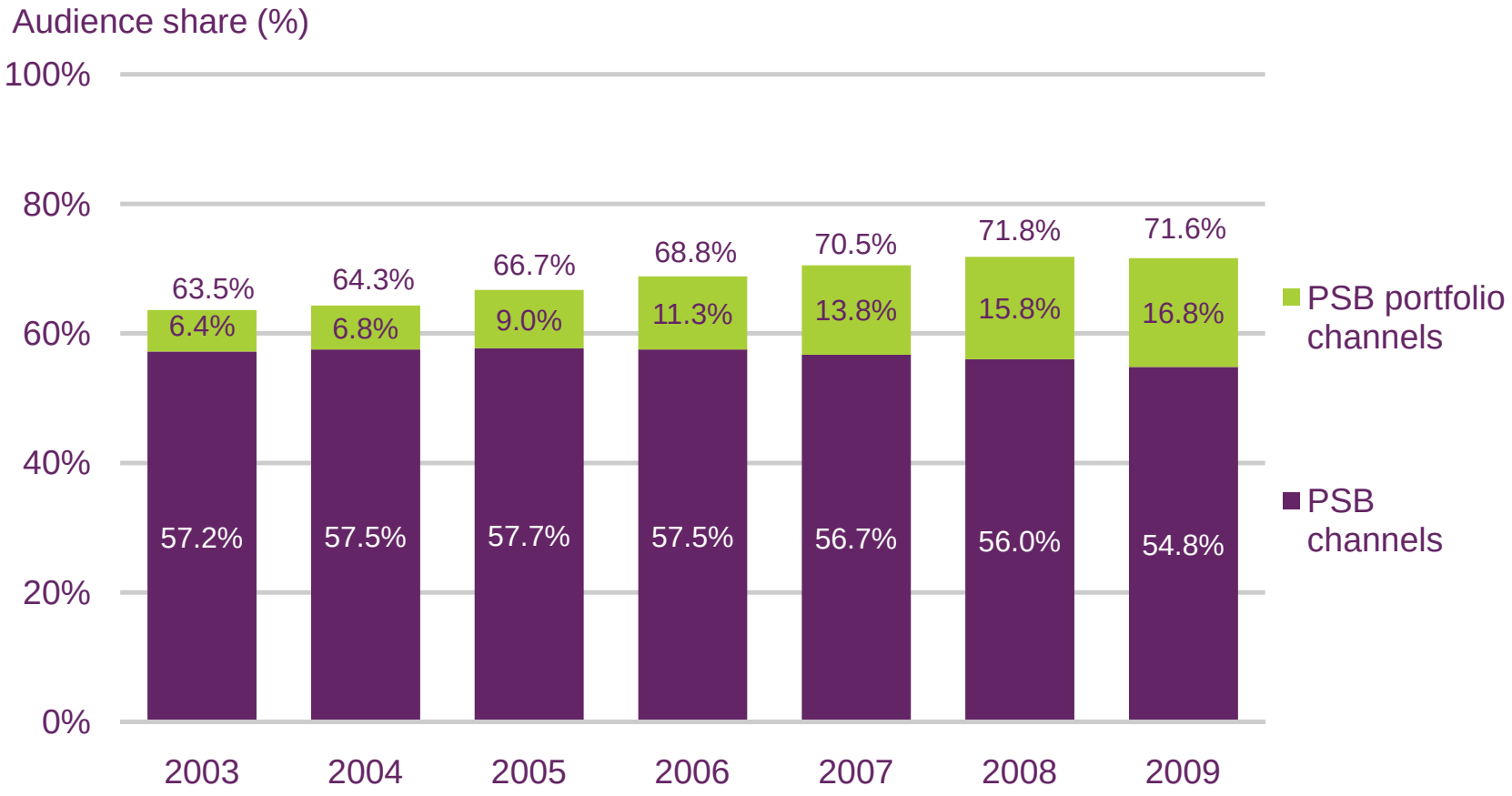
Additional use of games consoles



Source: Ofcom research, Q1 2010
Base: UK adults 15+ who have access to a games console at home (n=4374)
QB4 Which, if any, of these do you use your games console for?

Figure 2.21

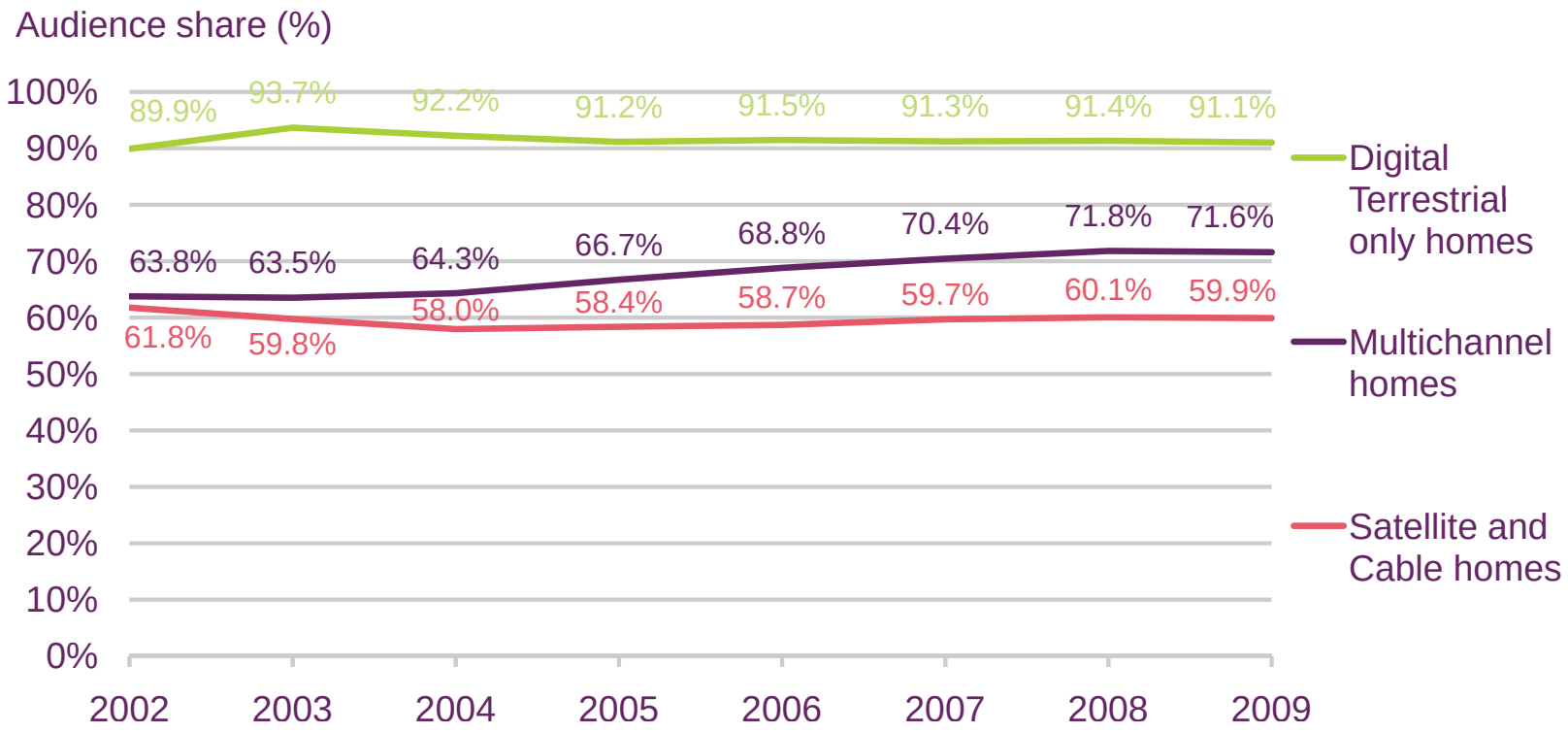
PSB portfolios' share in multichannel homes



Source: BARB

Figure 2.22

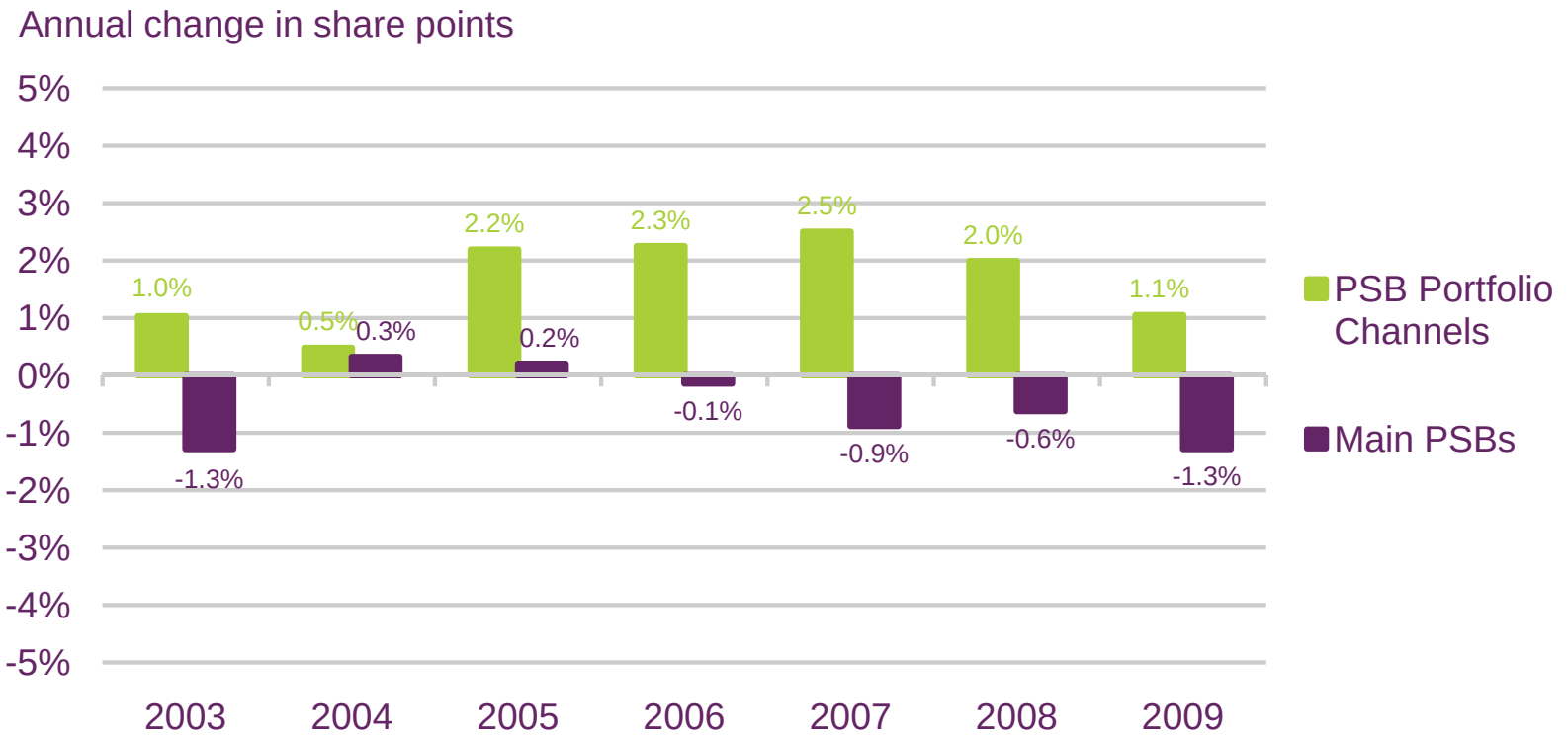
PSB portfolios' combined share



Source: BARB

Figure 2.23

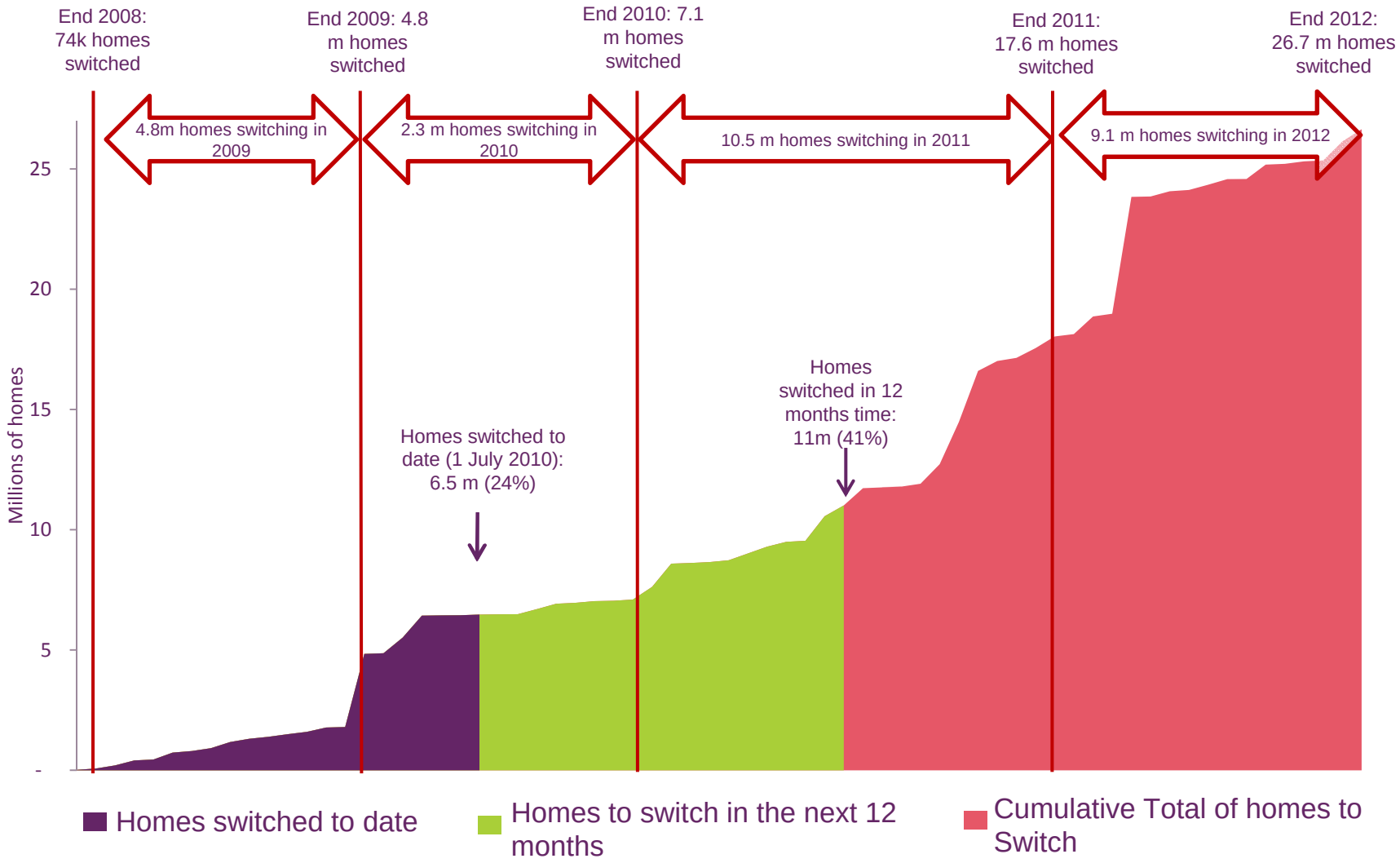
Annual growth in share of the main PSBs and their channels



Source: BARB

Figure 2.24

Digital switchover programme status to end of June 2010



Source: Digital UK

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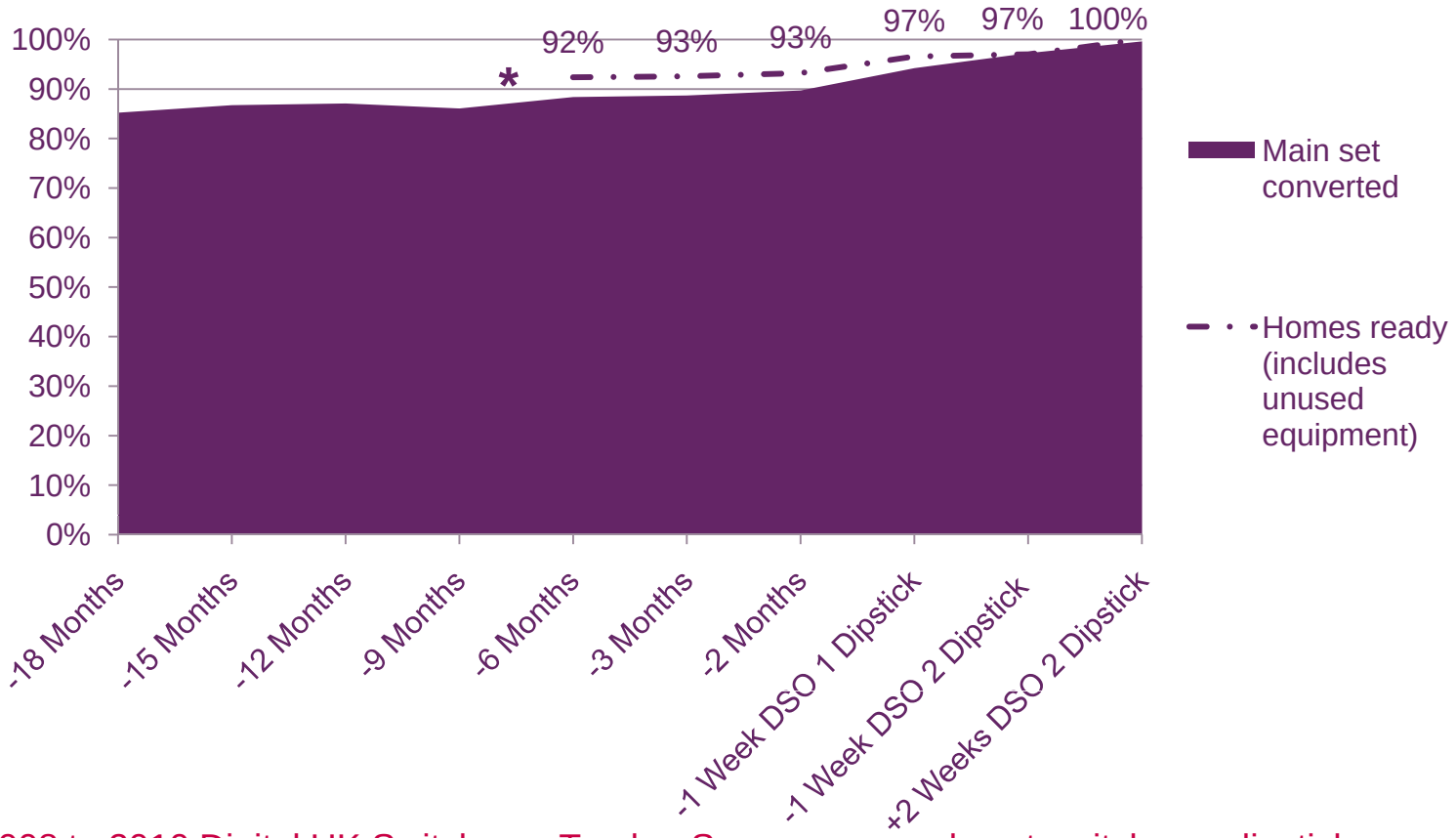
Figure 2.25

Average main TV set take-up across regions switched (Border, Wales, West Country, Granada and West)

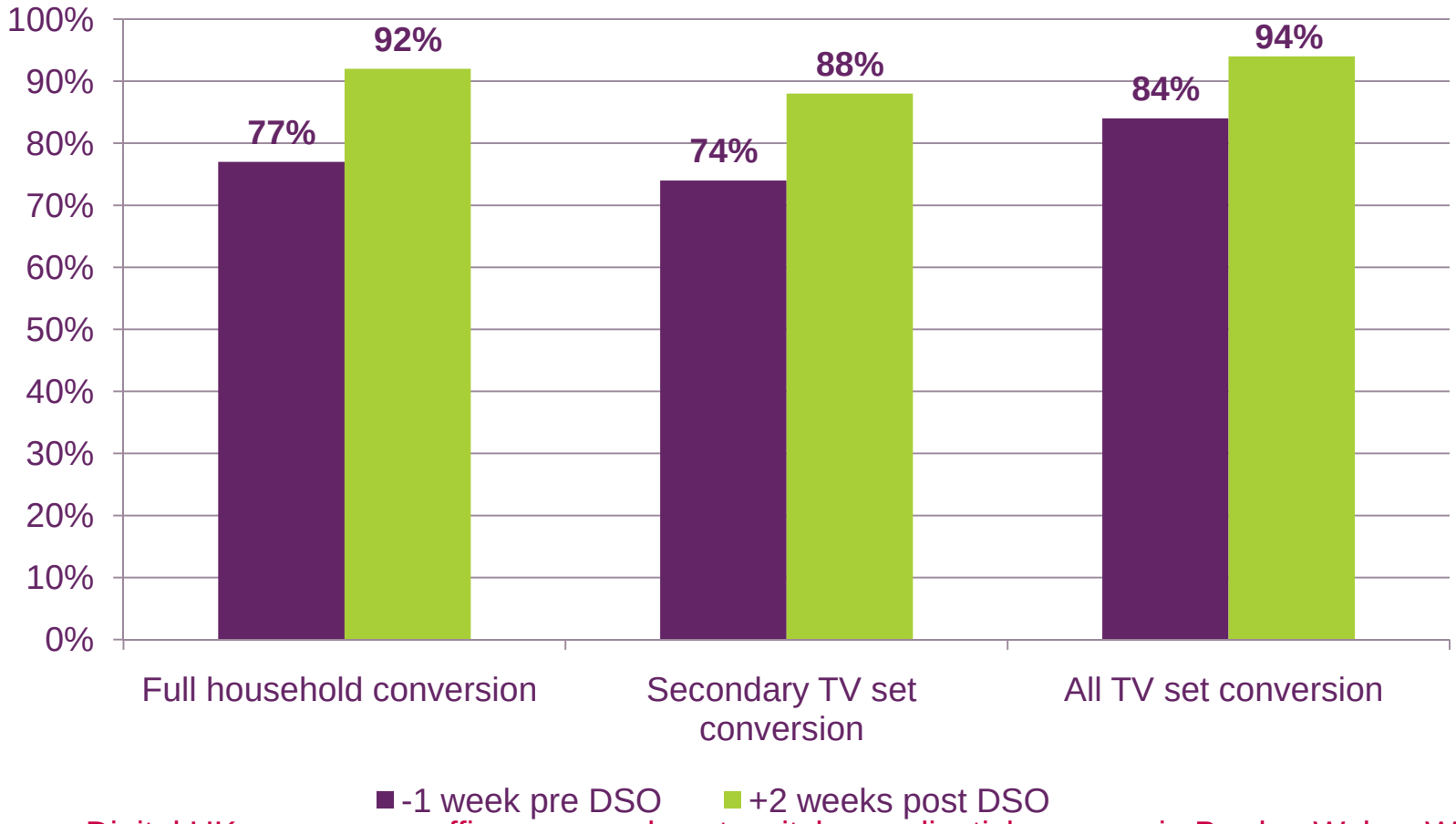


Source: 2008 to 2010 Digital UK Switchover Tracker Survey, pre- and post-switchover dipstick surveys in Border, Wales, West Country Granada and West. Sample sizes n>150 respondents for all data points. *Owning equipment in preparation for switchover was only tracked from 6 months out point. Q Which, if any, of these types of television does your household receive at the moment?

Figure 2.26

Digital TV growth on secondary sets, before and after switchover

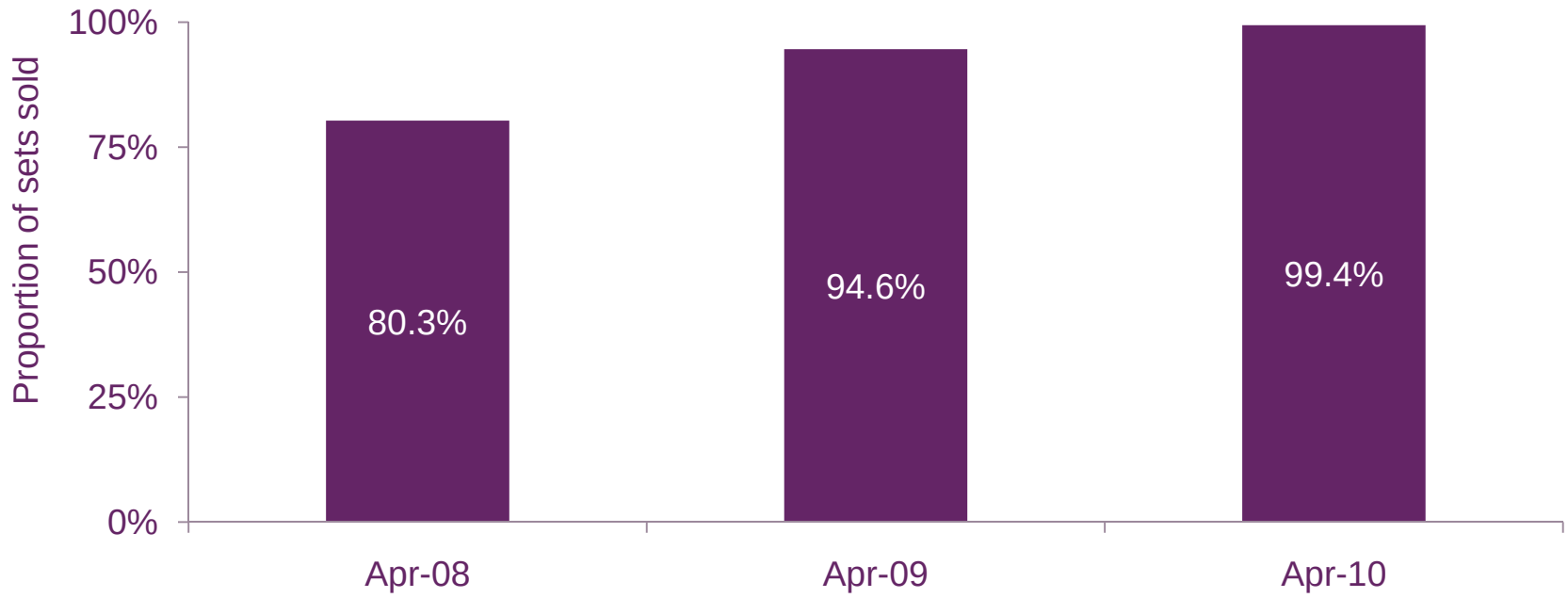
Conversion (%)



Source: Digital UK programme office, pre- and post-switchover dipstick surveys in Border, Wales, West Country Granada and West, sample size n>150 respondents on each survey. Q Which, if any, of these types of television does your household receive at the moment?

Figure 2.27

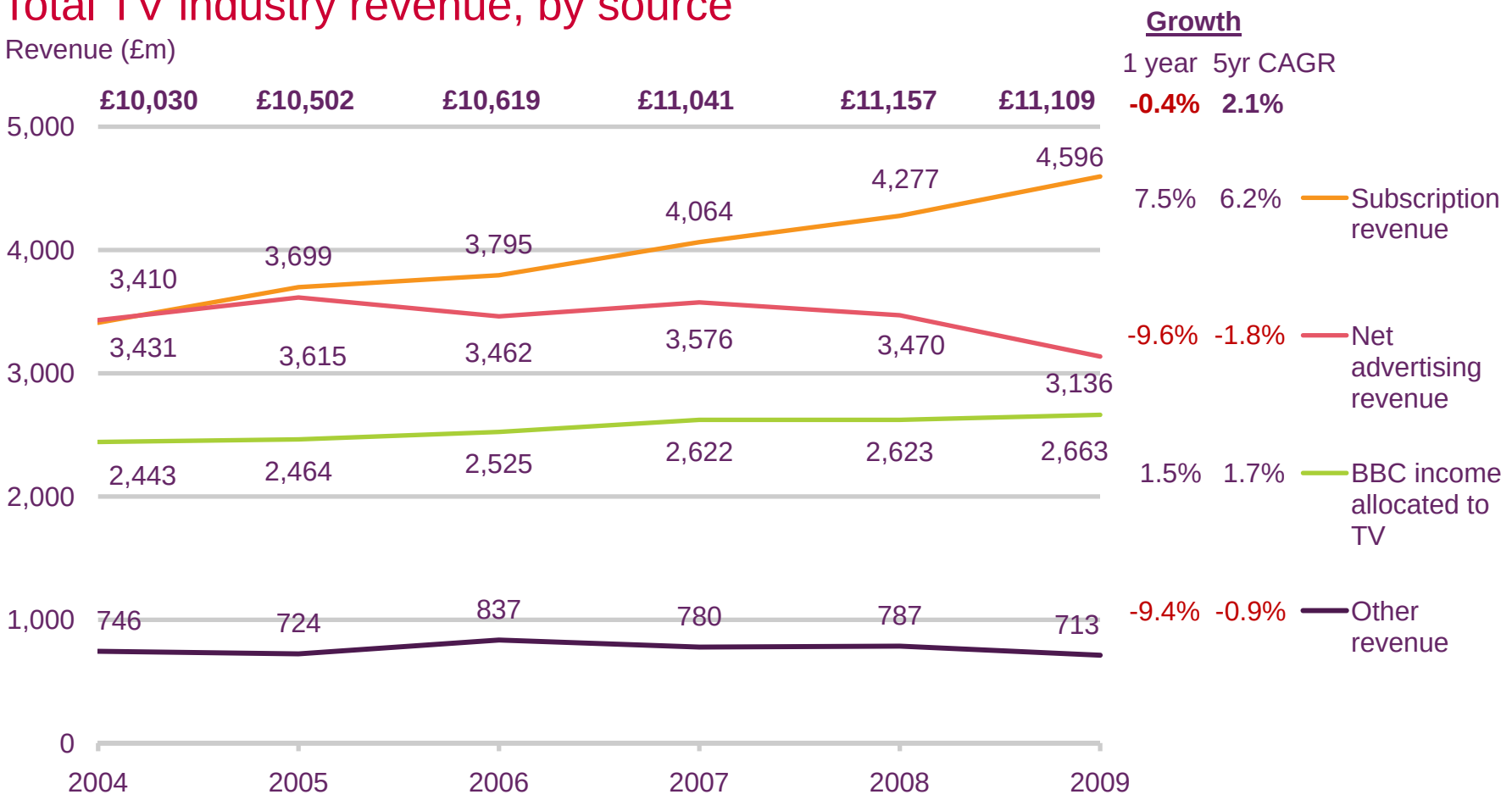
Sales of integrated digital TV sets as a proportion of all TV sets sold



Source: GfK Retail and Technology equipment sales data

Figure 2.28

Total TV industry revenue, by source

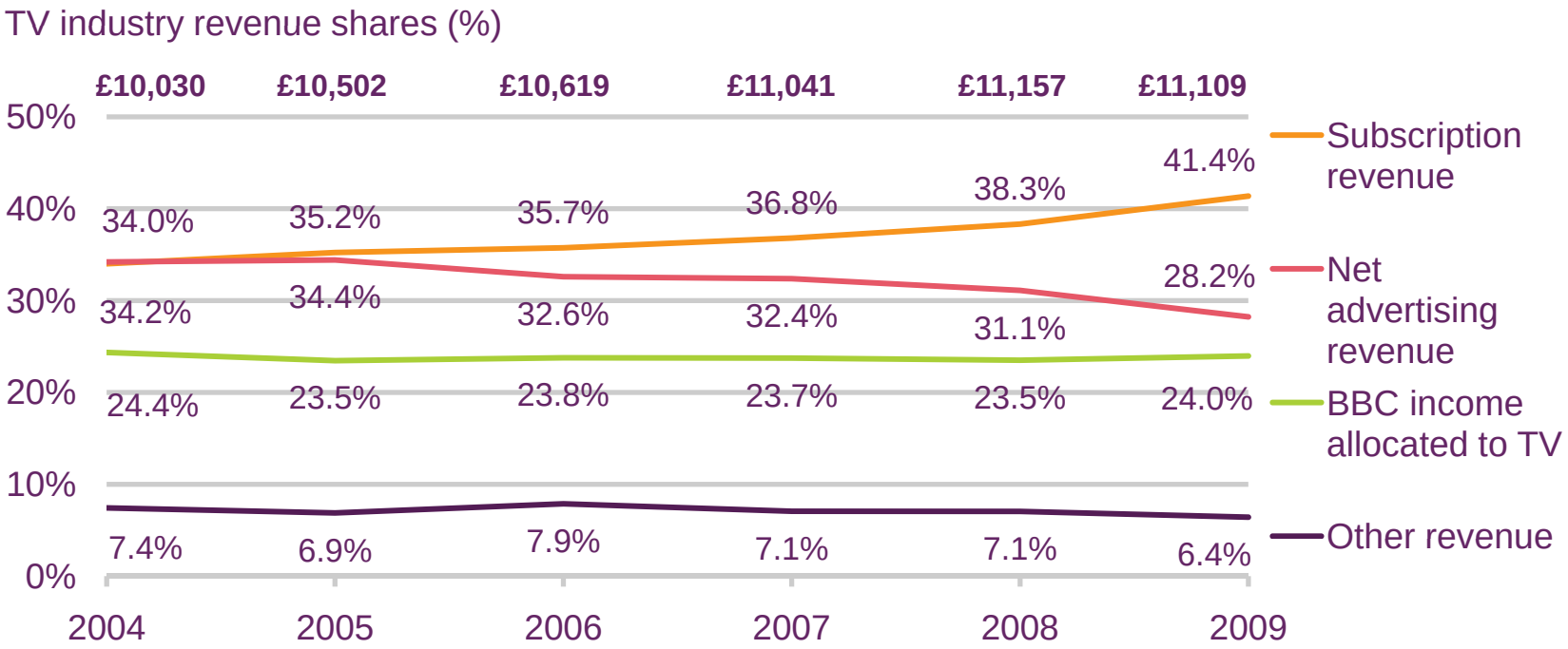


Source: Ofcom/broadcasters

Note: Figures expressed in nominal terms and replace previous Ofcom revenue data for TV industry, owing to restatements and improvements in methodologies. 'Subscription revenue' includes Ofcom's estimates of BSkyB, Virgin Media, BT Vision, TalkTalkTV, Setanta Sports (until its closure), ESPN and Top Up TV television subscriber revenue in the UK (Republic of Ireland revenue is excluded). It also excludes revenue generated by broadband and telephony. 'Other' includes TV shopping,

Figure 2.29

TV industry revenues, by share



Source: Ofcom/broadcasters

Note: Figures expressed in nominal terms and replace previous Ofcom revenue data for TV industry, owing to restatements and improvements in methodologies. 'Subscription revenue' includes Ofcom's estimates of BSkyB, Virgin Media, BT Vision, TalkTalkTV, Setanta Sports (until its closure), ESPN and Top Up TV television subscriber revenue in the UK (Republic of Ireland revenue is excluded). It also excludes revenue generated by broadband and telephony. 'Other' includes TV shopping, sponsorship, interactive (including premium-rate telephony services), programme sales and S4C's grant from the DCMS. The BBC restated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

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Figure 2.30

Total TV industry revenue by sector

Source: Ofcom/broadcasters

Note: Figures expressed in nominal terms. Main commercial PSB channels comprise ITV1, STV, UTV, Channel Television, GMTV1, Channel 4, Five and S4C. Commercial multichannels comprise all multichannels other than those owned by ITV1, Channel 4 and Five. Publicly-funded channels comprise BBC One, BBC Two, the BBC's portfolio of digital-only television channels and S4C. S4C is listed under publicly-funded and commercial analogue channels because it has a mixed advertising and public funding model. The BBC restated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

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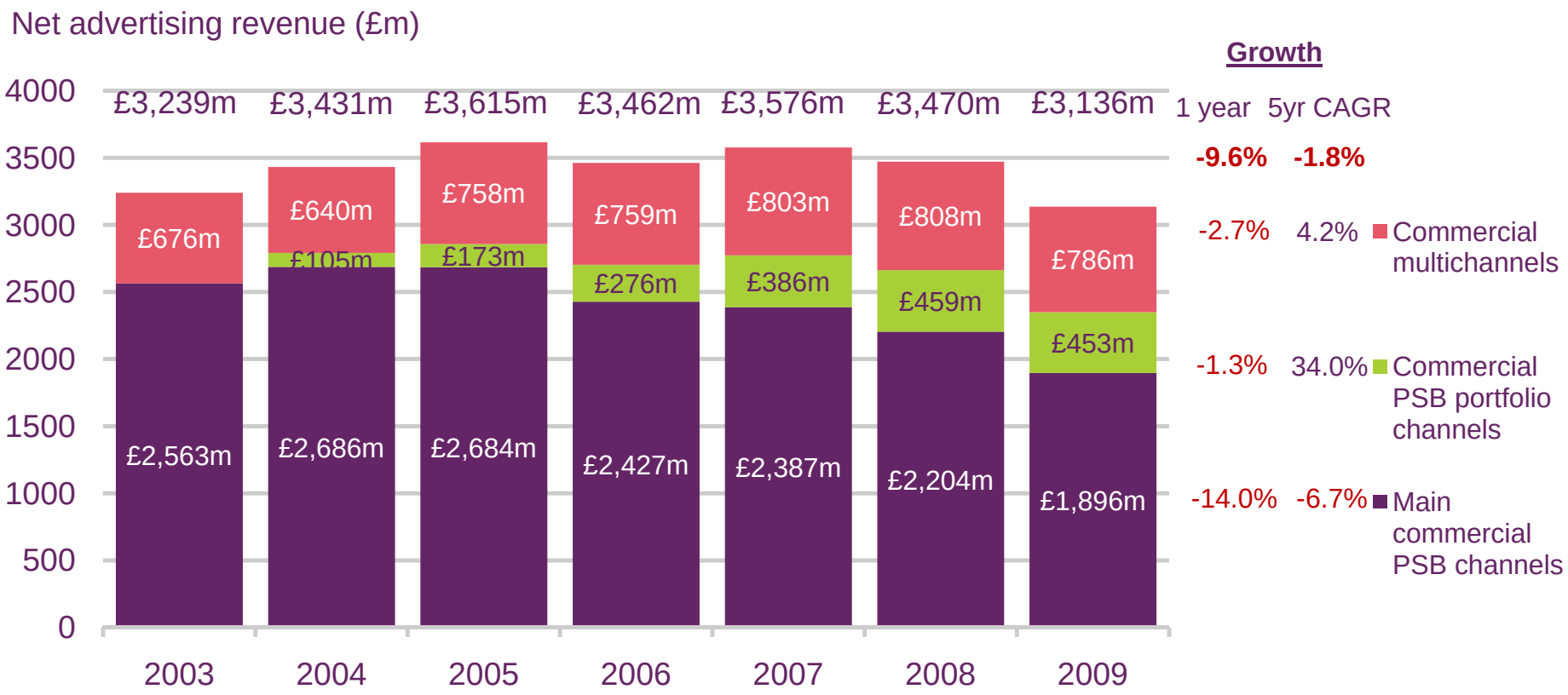
Figure 2.31

Net TV advertising revenue, by source



Source: Ofcom/broadcasters. Note: Figures expressed are in nominal terms and replace previous data published by Ofcom. Main commercial PSB channels comprise ITV1, STV, UTV, Channel Television, GMTV1, Channel 4, Five and S4C; Commercial PSB portfolio channels include ITV2, 3, 4, Men & Motors, CiTV, E4, More 4, Film 4, 4Music, Five USA and Fiver (plus their '+1' channels). For previous years closed channels have also been included. Sponsorship revenues are not included. Totals may not equal the sum of the components due to rounding.

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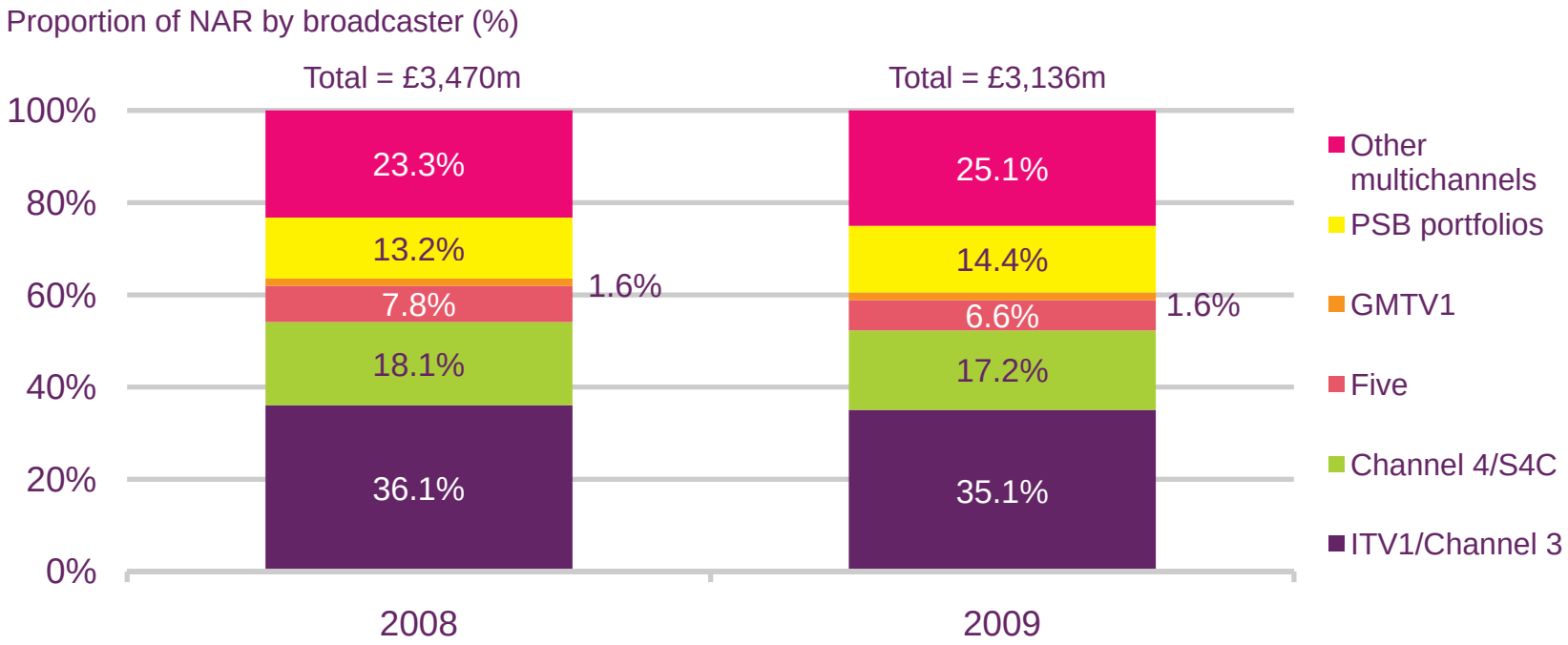
Figure 2.32

TV net advertising revenue market shares, 2008 - 2009

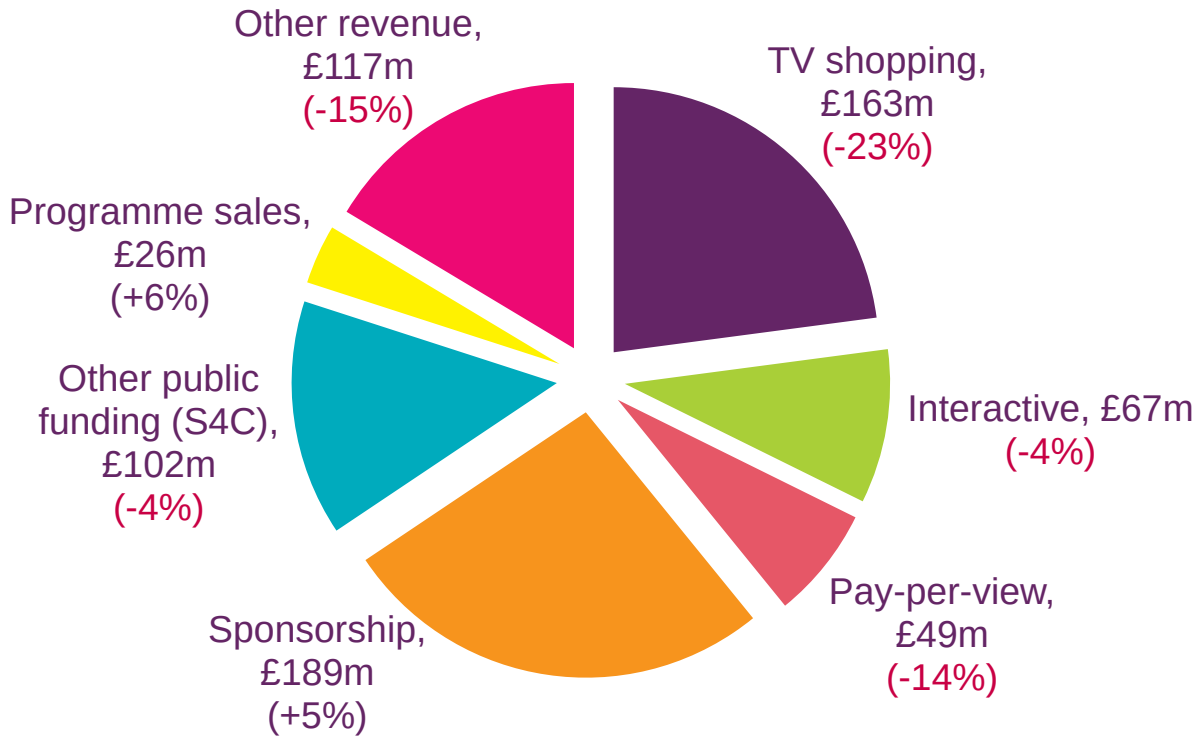


Source: Ofcom/broadcasters. Note: ITV1/Channel 3 includes ITV1, STV, UTV and Channel Television.

Figure 2.33

Breakdown of other/non-broadcast revenue, 2009

Total non-broadcast revenue = £713m (-9%)

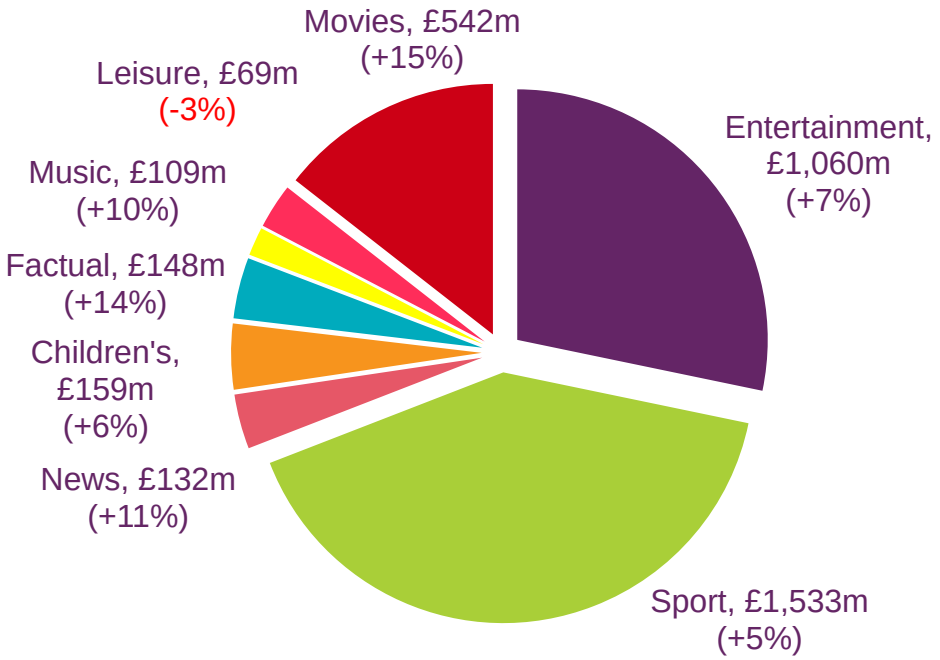


Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change. TV shopping represents aggregate operating margin of products sold via television. Totals may not equal the sum of the components due to rounding.

Figure 2.34

Revenue generated by multichannel broadcasters, by genre, 2009

Total revenue = £ 3,751m across the eight genres included (+7%)



Source: Ofcom/broadcasters

Note: Percentage figures in brackets represent year-on-year change. The figures in this chart include all sources of revenue accruing to multichannels and are expressed in nominal terms. This includes those set out in Figure 2.28 plus wholesale subscriber payments from platform operators.

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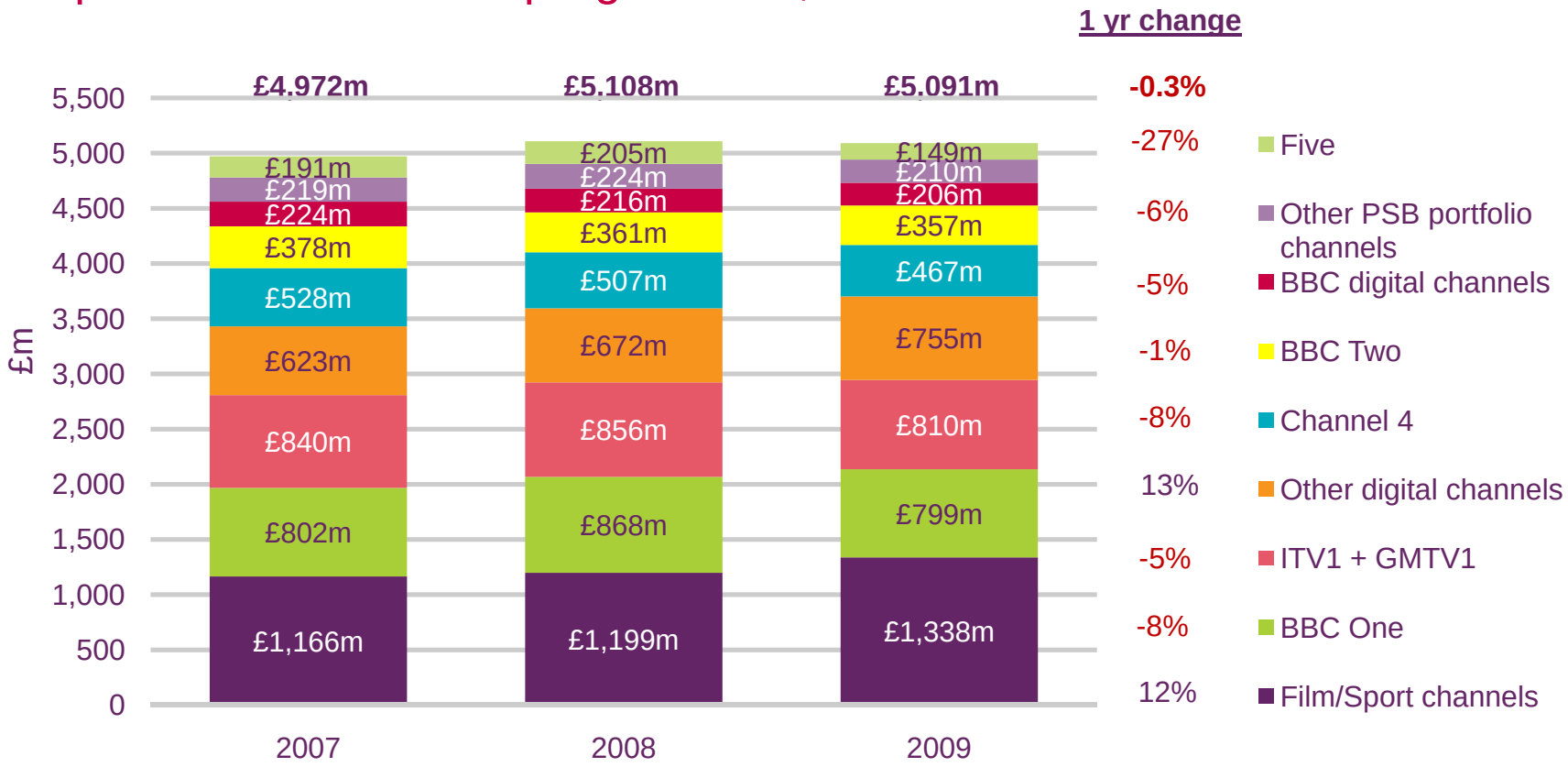
Figure 2.35

Spend on network TV programmes, 2007 - 2009



Source: Ofcom/broadcasters.

Note: Figures expressed in nominal terms. Figures do not include spend on nations and regions output. BBC digital channels includes BBC Three, BBC Four, BBC News Channel, BBC Parliament, CBBC and CBeebies (but not BBC HD). 'Other digital channels' include all genres (excluding Sports and Films). Programme spend comprises in-house commissions, productions, commissions from independents, spend on acquired programmes, spend on rights and repeats.

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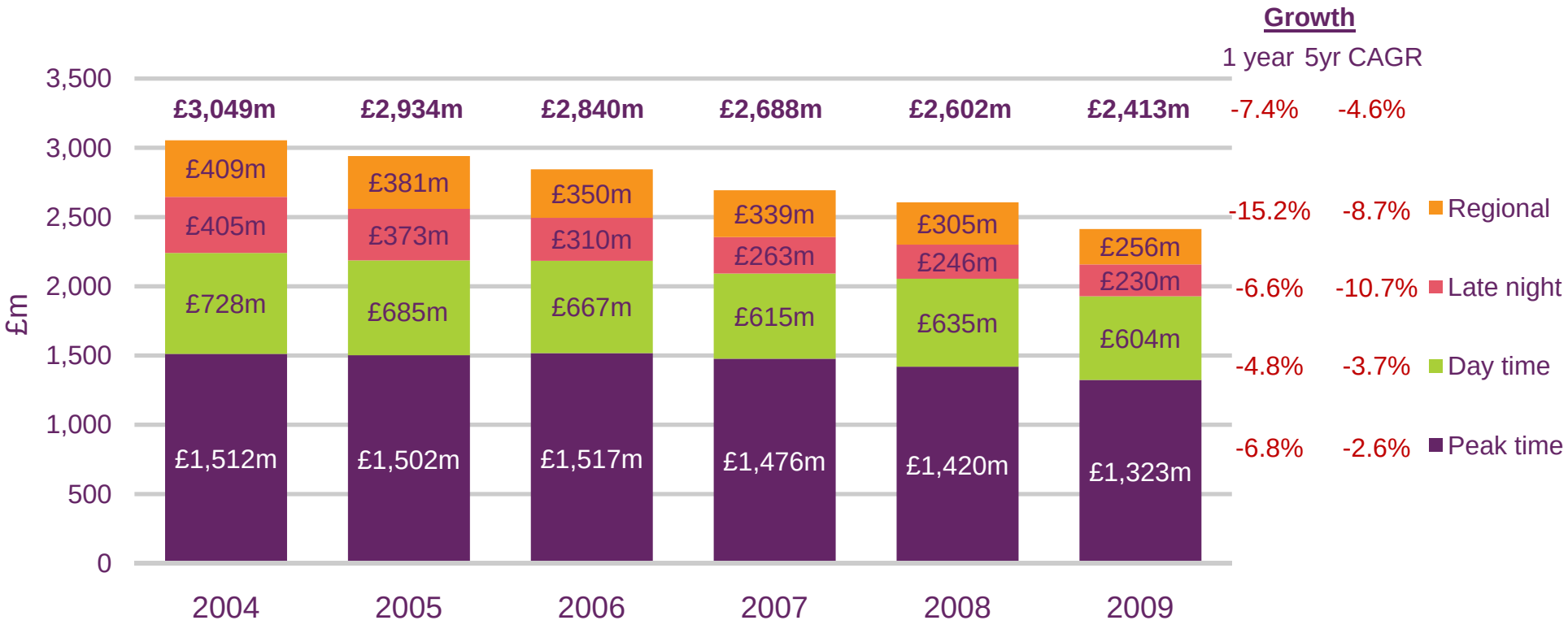
Figure 2.36

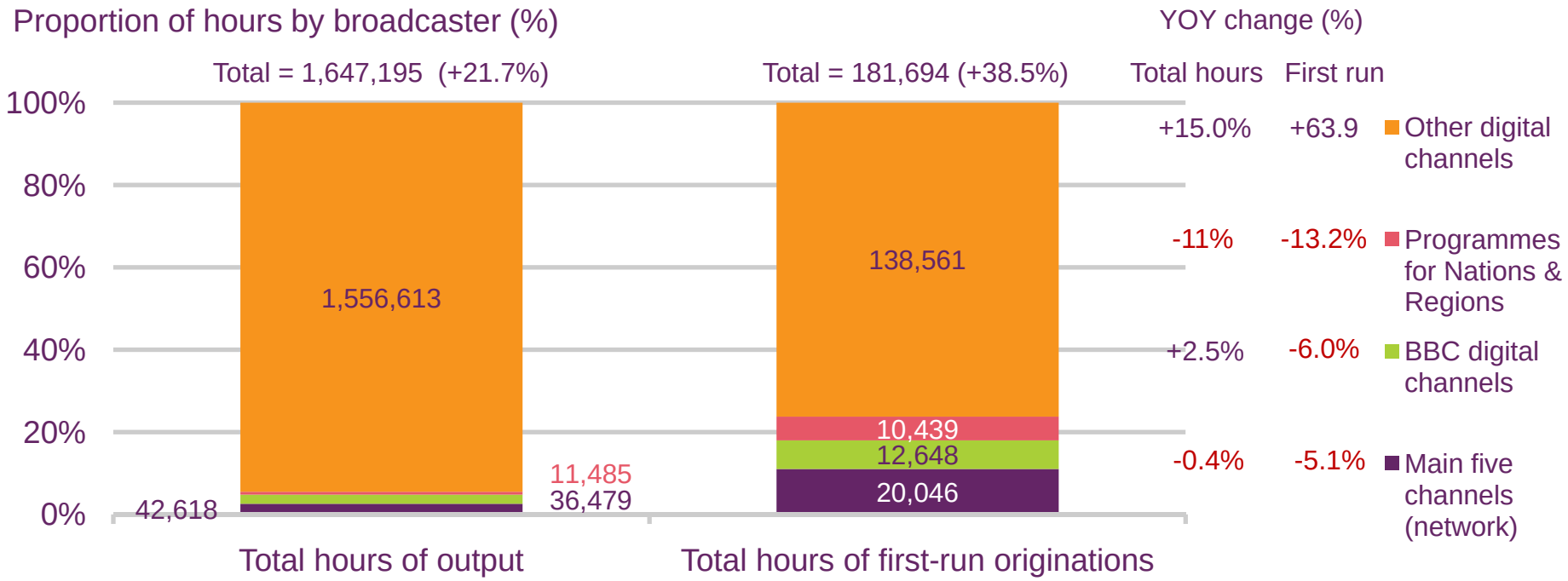
Spend on first-run originated output on the five main networks



Source: Ofcom/broadcasters.
Note: Figures are expressed in 2009 prices. They include GMTV1, spending in the nations and regions on English-language programming (and a small amount of Irish-language programmes) but do not include the BBC's digital channels.

Figure 2.37

Total and first-run originated hours of output, all day, 2009



Source: Ofcom/broadcasters

Note: Percentage figures in brackets represent year-on-year change. The first-run figures include in-house productions and external commissions, not first-run acquisitions. GMTV1 is included within the figures for the five main channels. 'Other digital channels' includes Entertainment, Sports, Film, Factual, Children's, News, Leisure and Music genres. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

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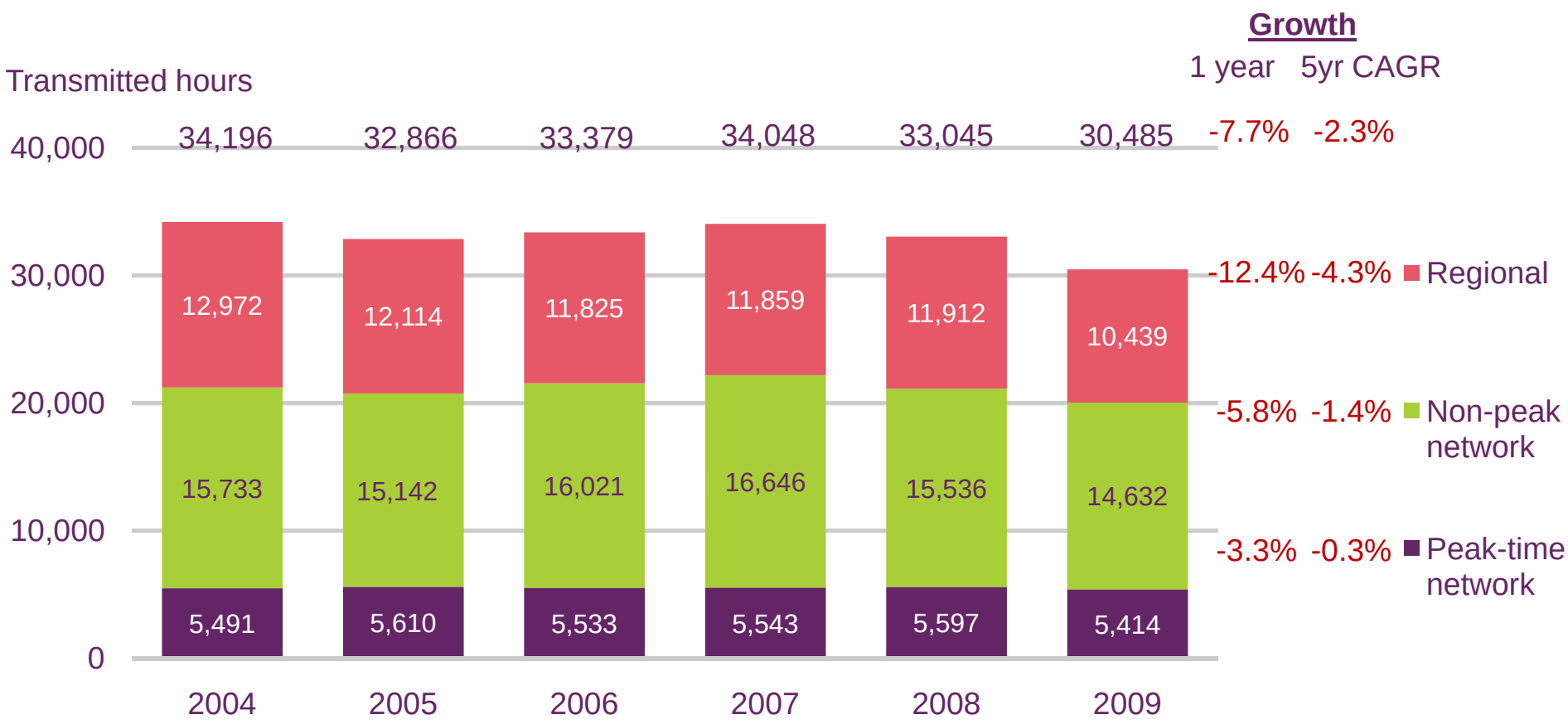
Figure 2.38

Hours of first-run originated output on the five main channels



Source: Ofcom/broadcasters. Note: Figures include GMTV1 but do not include the BBC's digital channels. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

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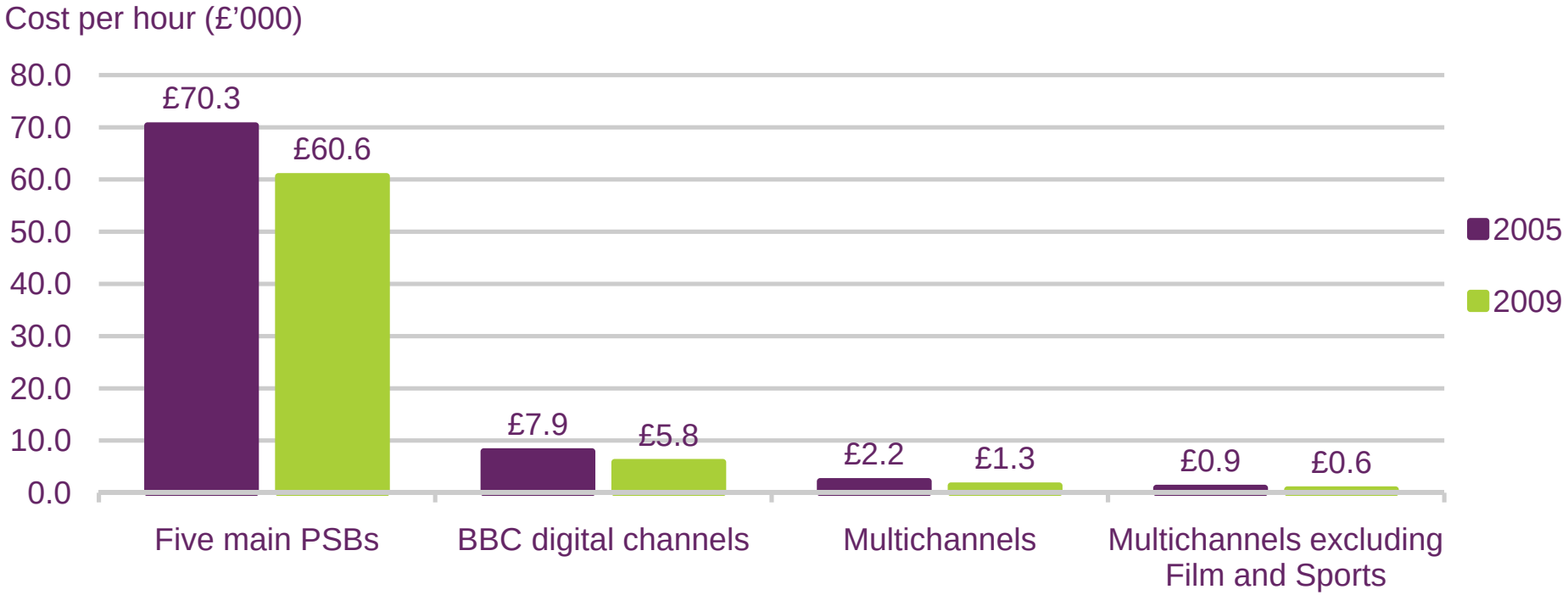
Figure 2.39

Cost per hour for five main PSB networks and multichannel broadcasters



Source: Ofcom/broadcasters. Note: Figures are expressed in real terms. Data for five main PSBs include GMTV1 and are for network channels. BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, CBeebies and BBC HD. Multichannels include commercial channels in the eight key genre categories of Entertainment, Children's, Factual, Sports, News, Leisure, Music and Film.

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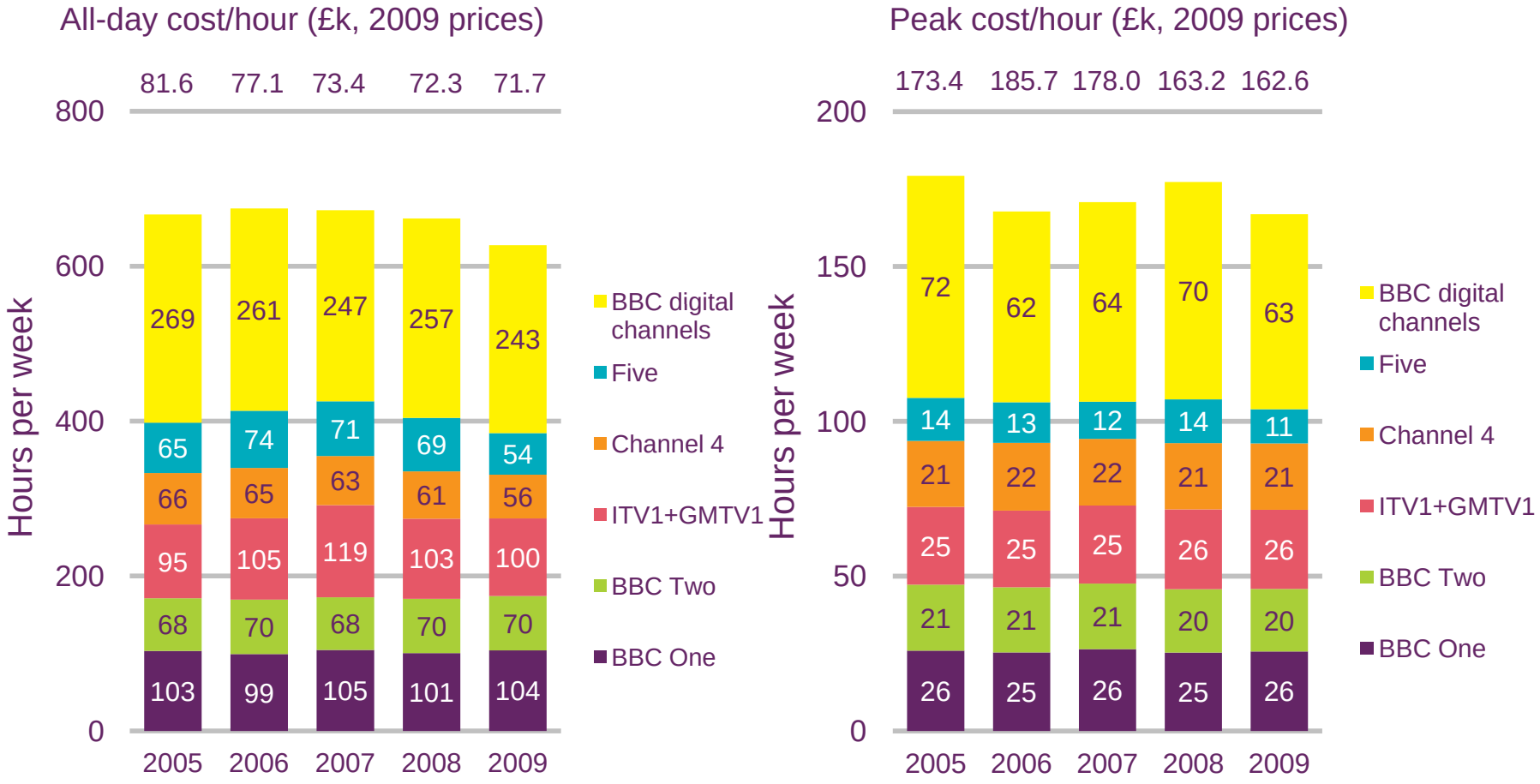
Figure 2.40

Cost per hour for first-run originated content on the five main networks

Source: Ofcom/broadcasters. Note: Figures are expressed in 2009 prices. They include GMTV1 but do not include the BBC's digital channels.

Figure 2.41

First-run originated output by the PSBs, all day and peak time



Source: Ofcom/broadcasters.

Note: Figures do not include spend on nations and regions output.

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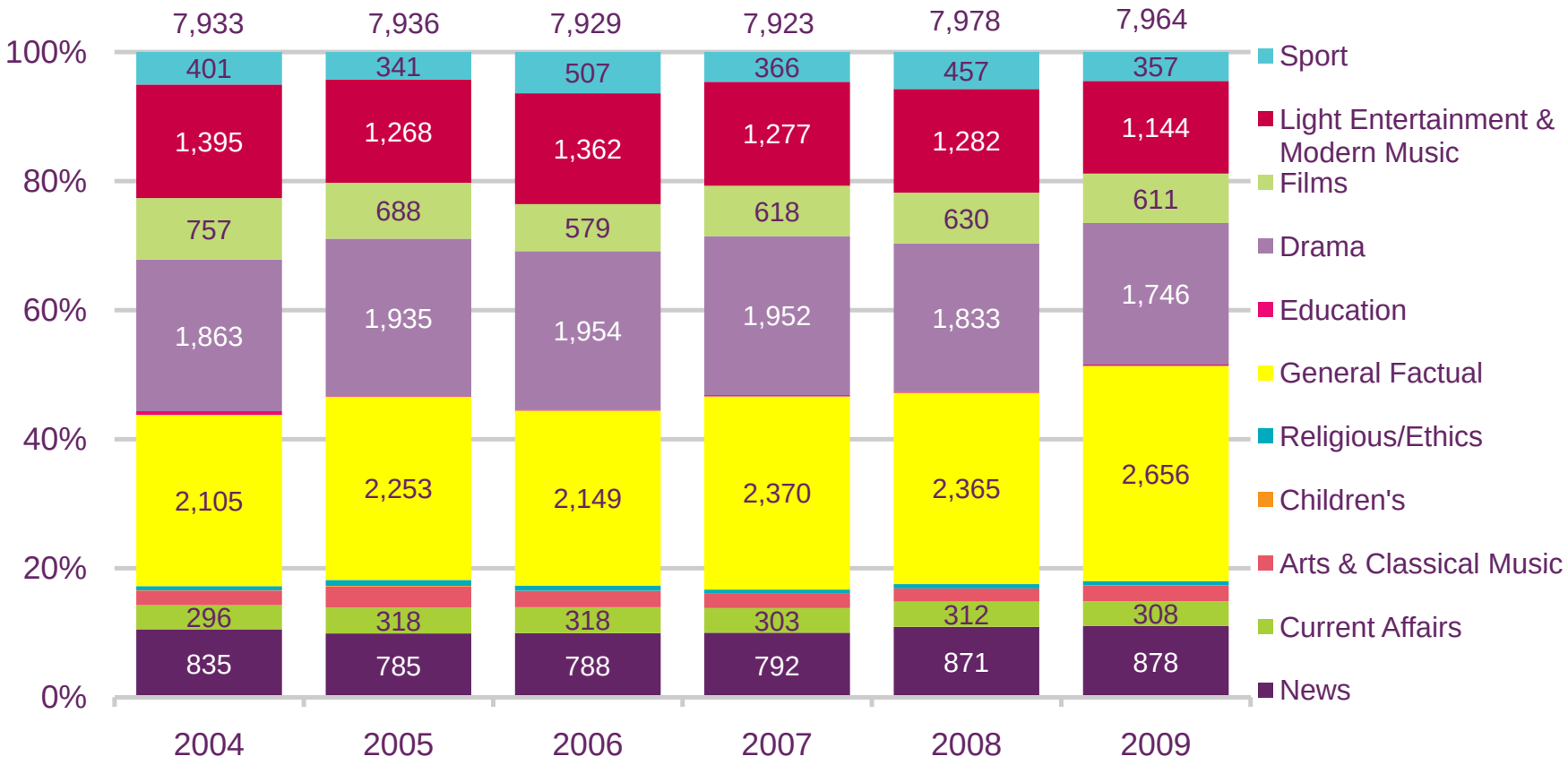
Figure 2.42

Genre mix on five main PSB channels in peak time, by hours

Proportion of total hours

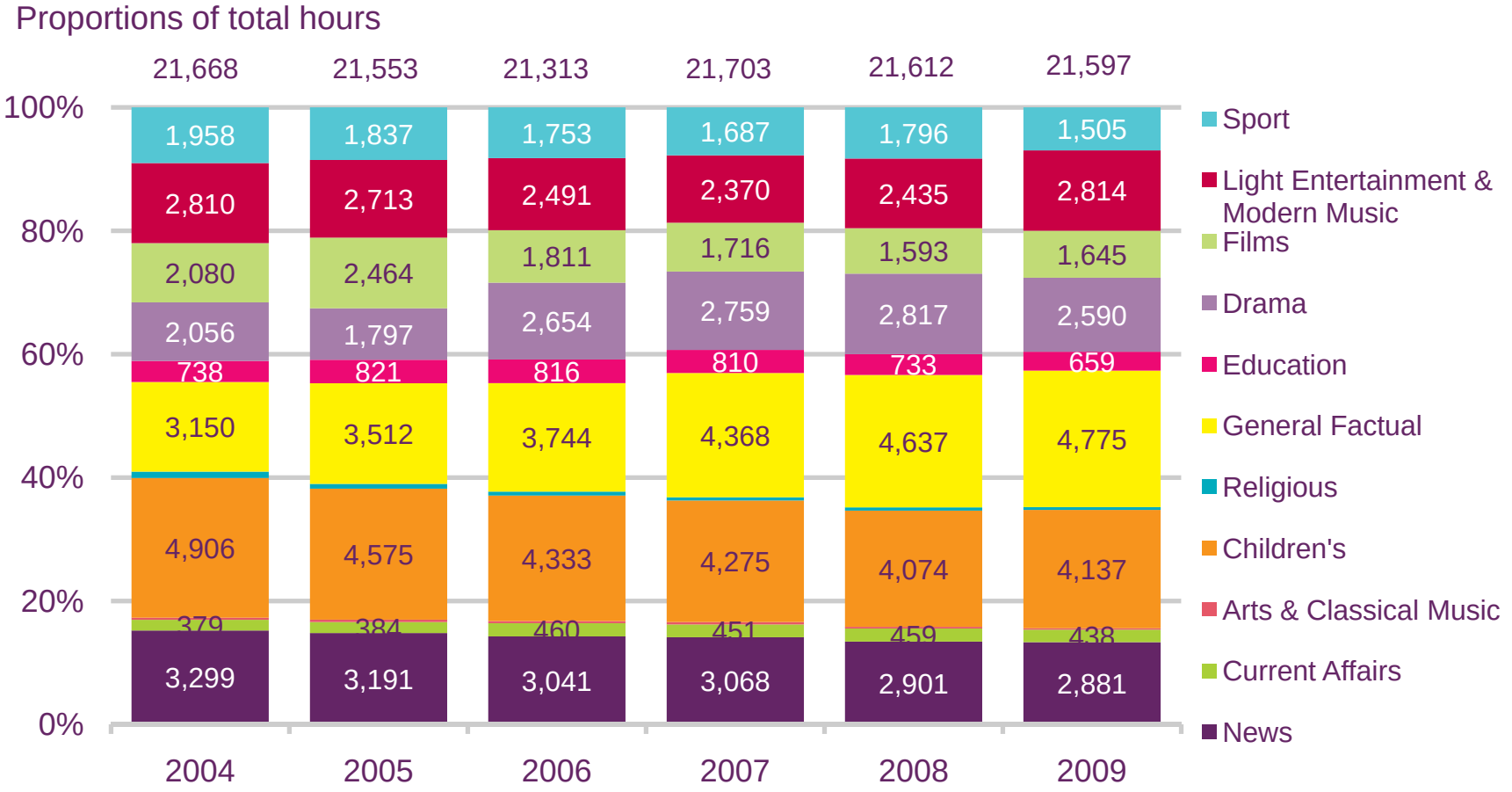


Source: Ofcom/Broadcasters.

Note: Figures do not include spend on nations and regions output.

Figure 2.43

Genre mix on five main PSB channels in daytime

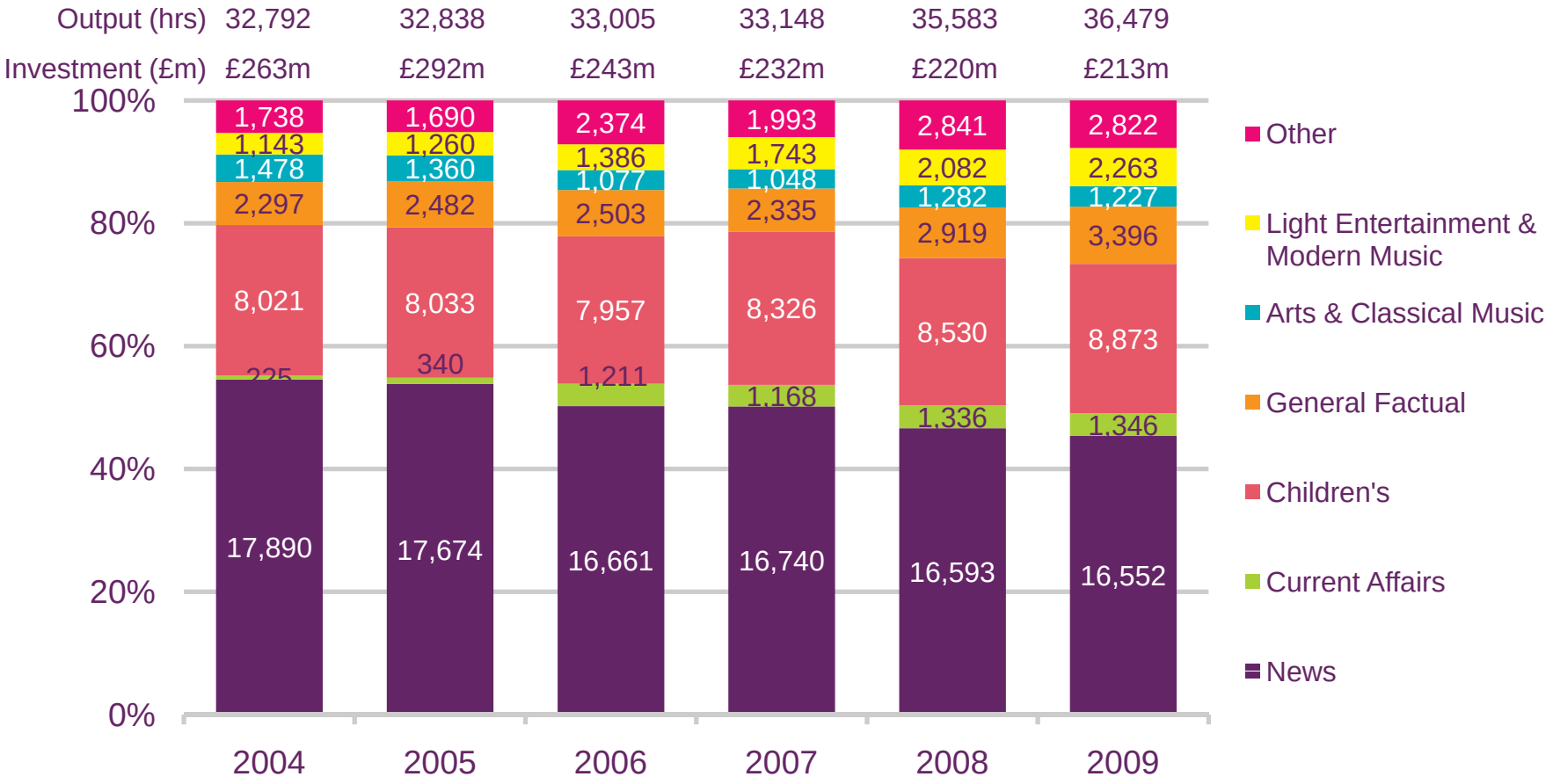


Source: Ofcom/Broadcasters

Note: Includes five main channels plus GMTV1. Figures do not include spend on nations and regions output.

Figure 2.44

The BBC's digital channels genre mix by hours (all day)



Source: Ofcom/broadcasters. Note: BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, CBeebies and BBC HD. Investment figures are in 2009 prices. Other includes: Education, Drama, Film, Religion and Sports. The BBC allocated Parliamentary coverage to the Current Affairs genre in the data for 1998 to 2003. From 2004, it has been allocated to either News or Current Affairs.

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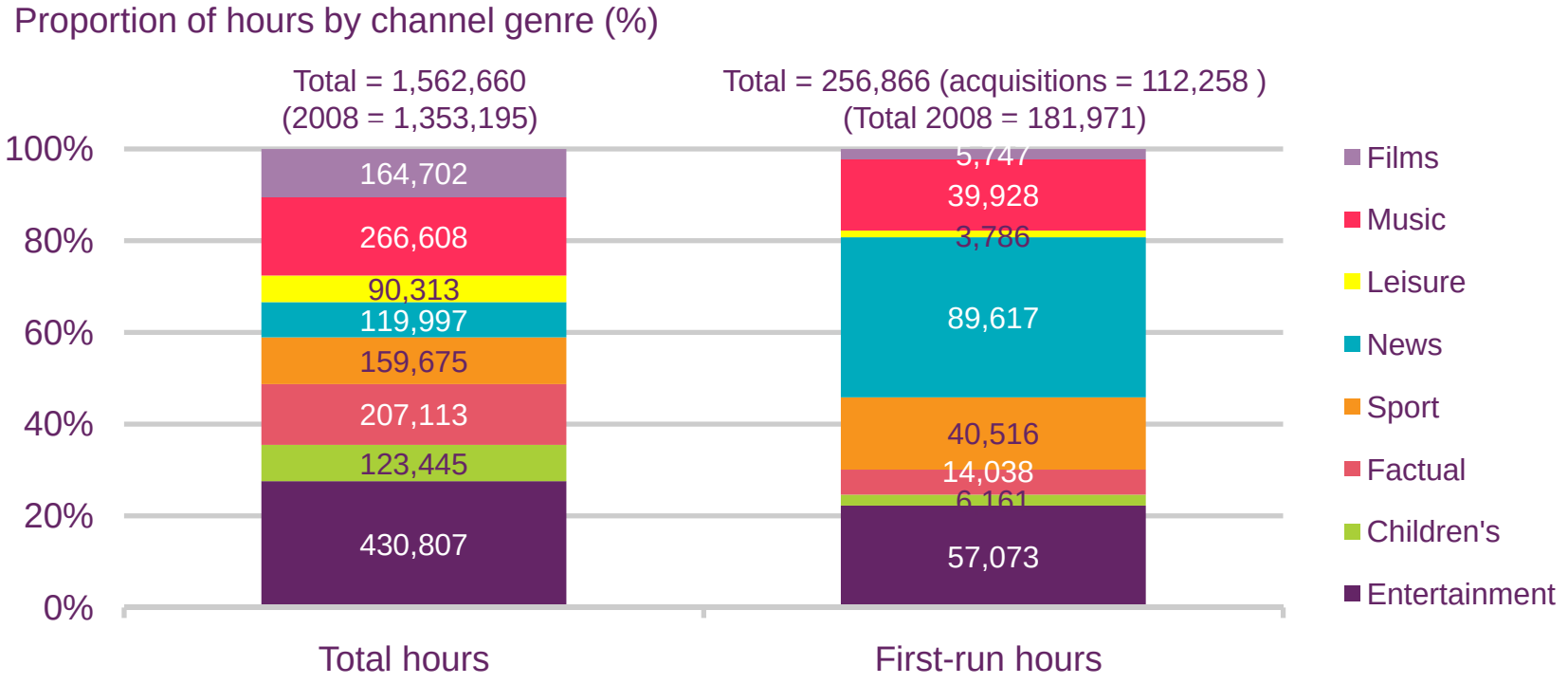
Figure 2.45

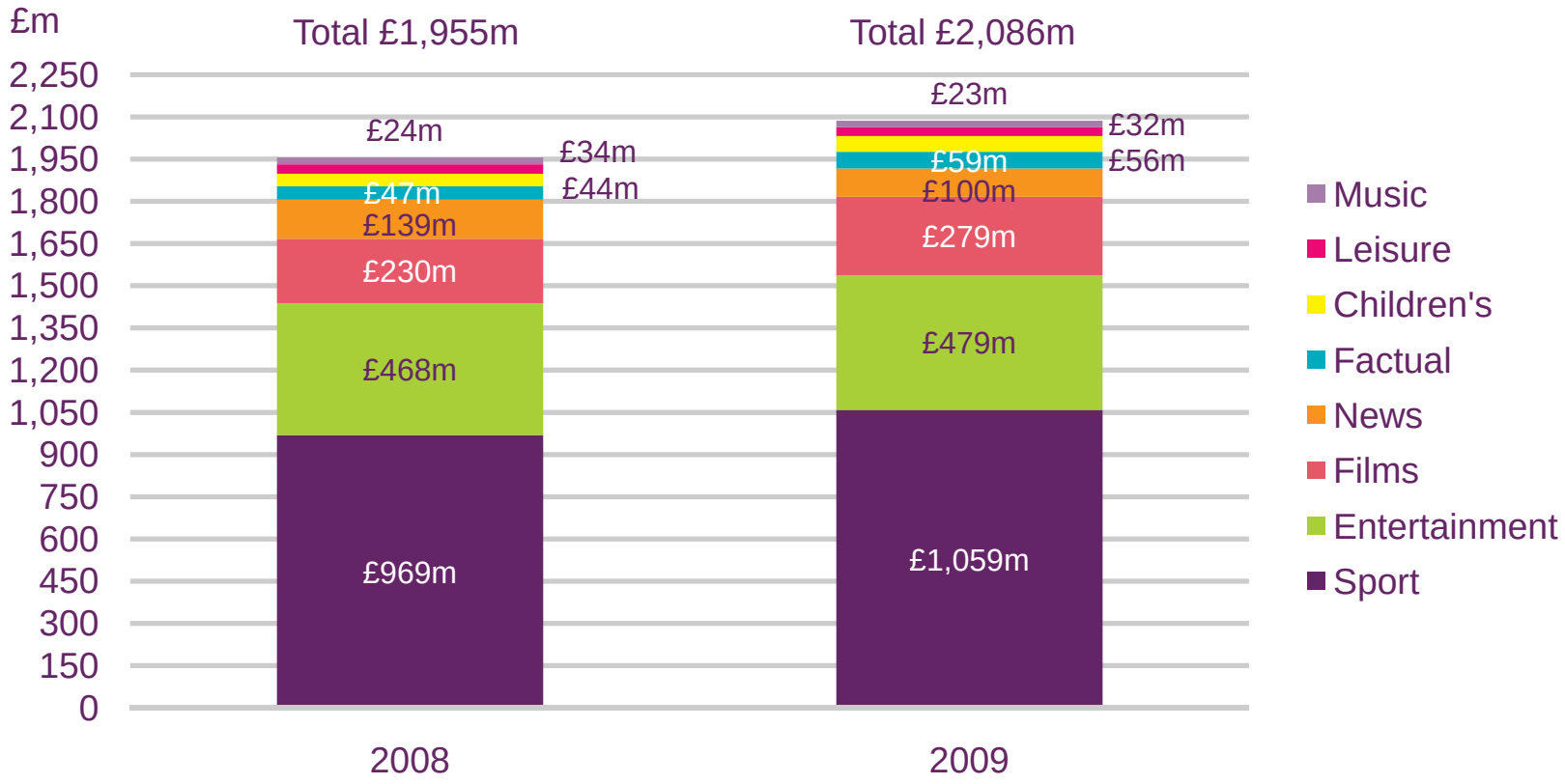
Total multichannel hours and first-run originations/acquisitions, 2009



Source: Ofcom/broadcasters
Note: Broadcast hours exclude Sky Box Office and 'barker' channels, which promote TV content. First-run hours include first-run in-house, commissioned and acquired content.

Figure 2.46

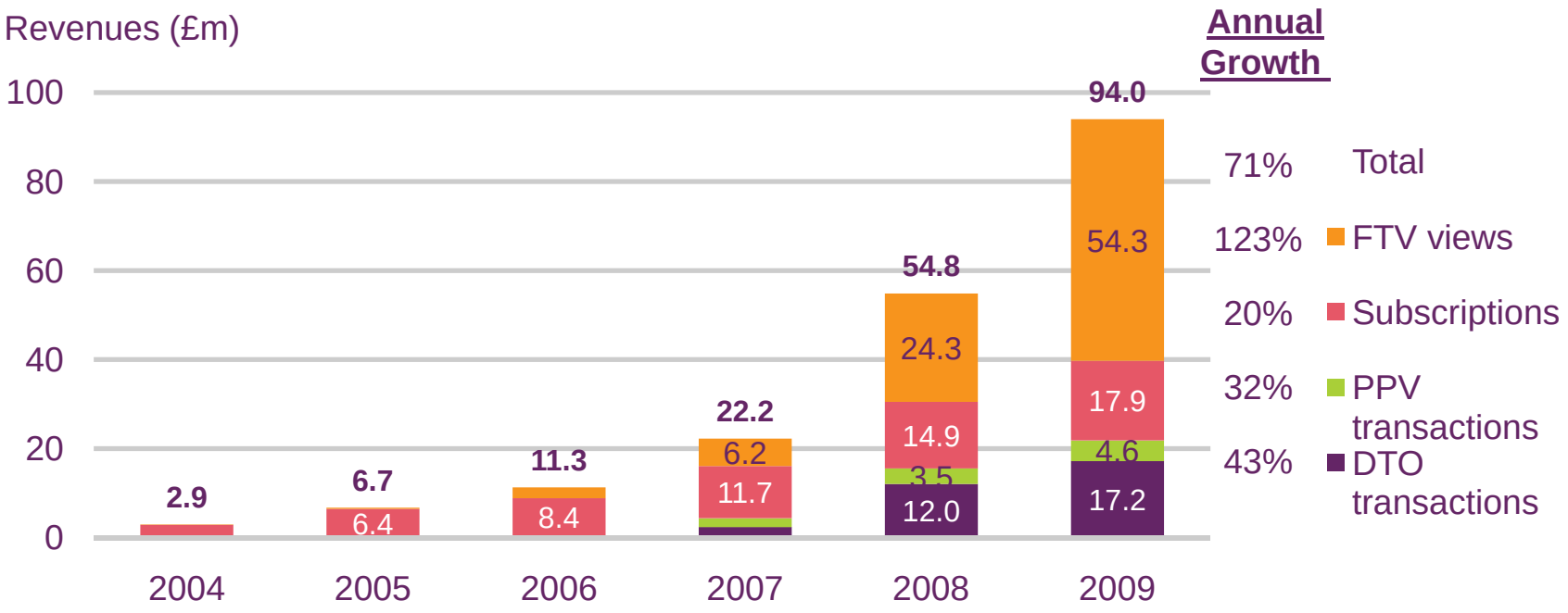
Content spend by commercial multichannels in key genres, 2008 - 2009



Source: Ofcom/broadcasters.
Note: Excludes BBC digital channels.

Figure 2.47

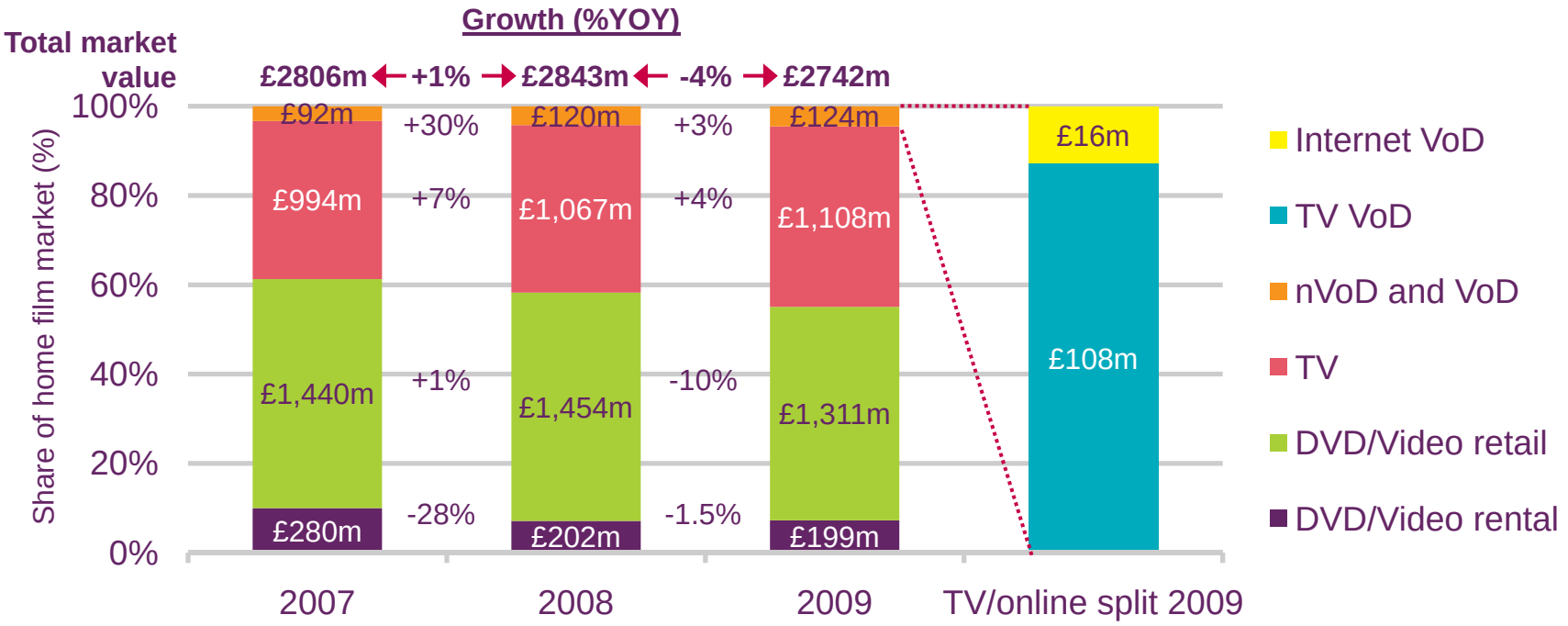
Online TV revenues



Source: Screen Digest.
Note: FTV = free to view; PPV = pay per view; DTO = download to own.

Figure 2.48

Value of UK home film market, and online revenue split



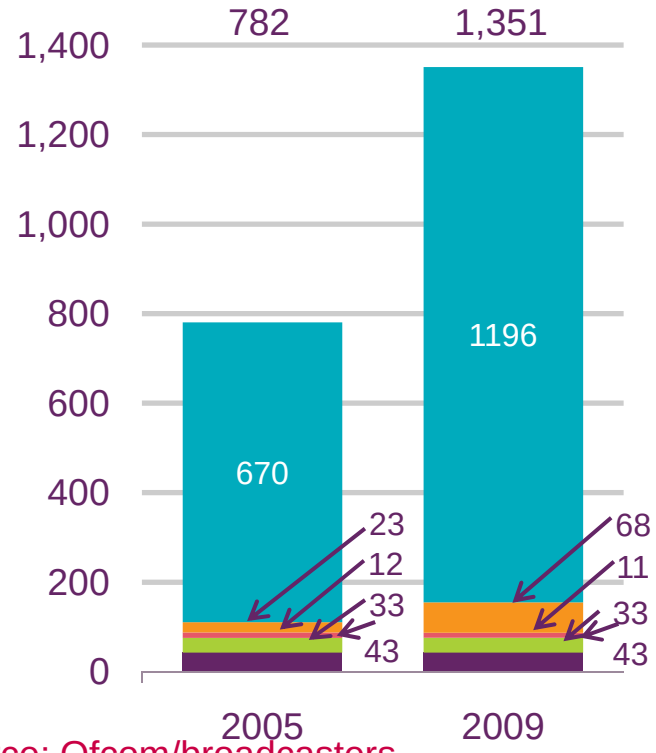
Source: UK Film Council/Ofcom based on Nielsen EDI, MRIB, BVA, Official Charts Company, Attentional, Screen Digest, RSU Analysis.

Note: 'TV' is the market value of film content shown on pay-TV, terrestrial TV and free-multichannel TV. Pay-per-view is included in 'nVoD'.

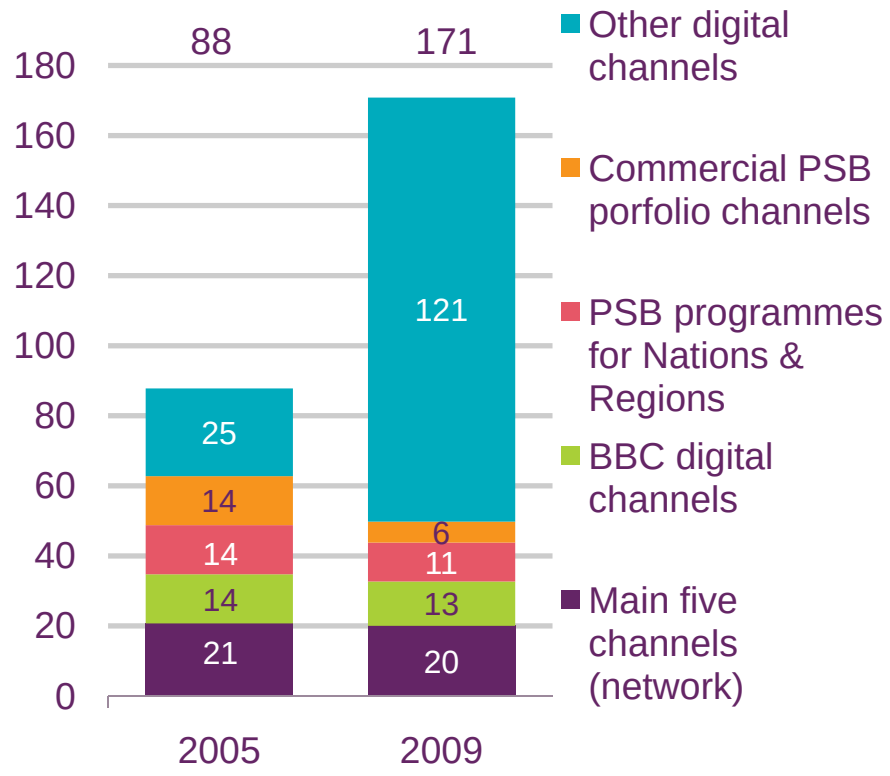
Figure 2.49

Total broadcast hours and first-run originated hours on all channels, 2005 – 2009

All hours of originated/acquired/repeated output ('000s)



First-run originated hours ('000s)

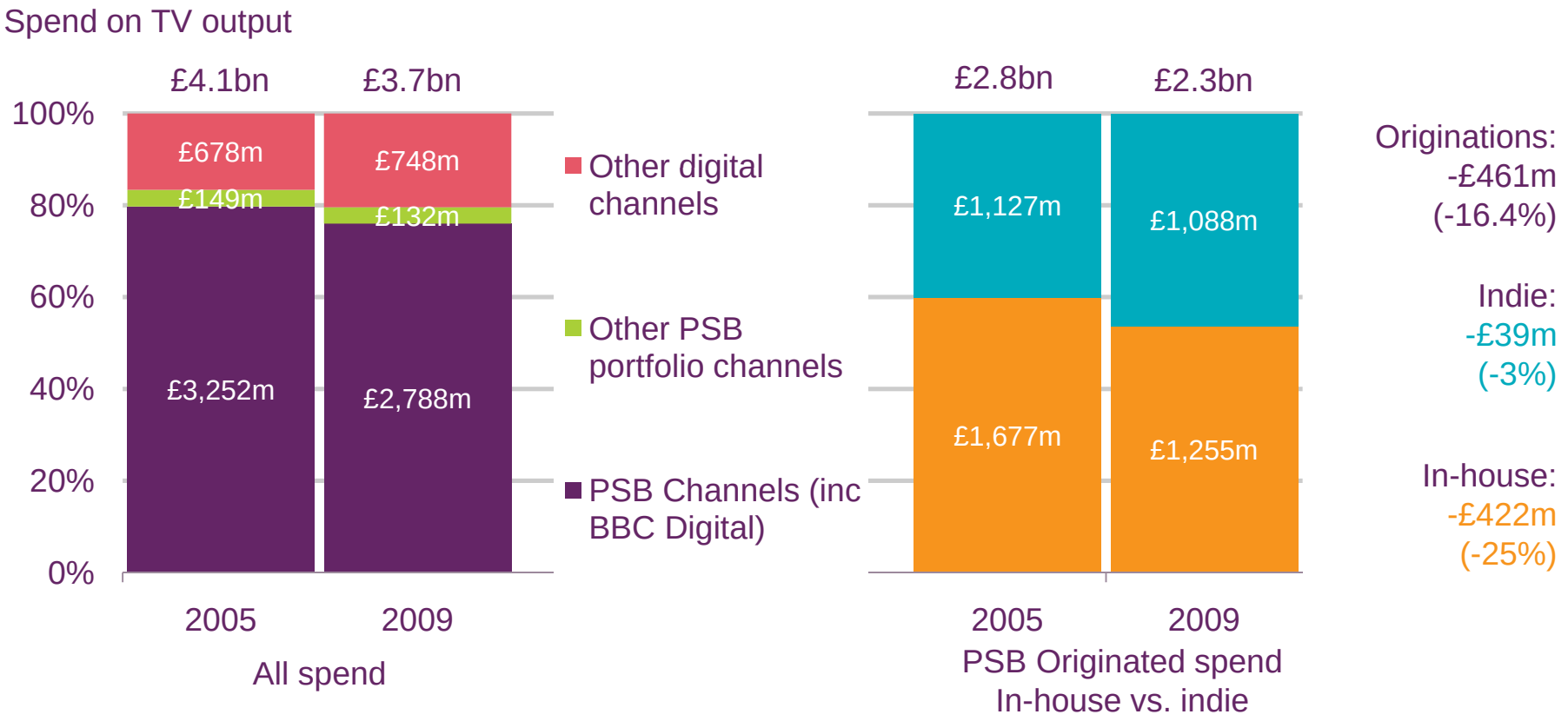


Source: Ofcom/broadcasters.

Note: The first-run figures include in-house productions and external commissions, not first-run acquisitions. 'Other digital channels' includes Entertainment, Factual, Children's, News, Leisure and Music genres.

Figure 2.50

Total broadcast spend on all channels, 2005 – 2009



Source: Ofcom/broadcasters.

Note: Figures do not include nations & regions. BBC digital channels include BBC Three, BBC Four, BBC News, BBC Parliament, CBBC and CBeebies. GMTV included. 'Digital-only commercial channels' include all genres (excluding Sports and Film). Programme spend comprises in-house commissions, independent commissions, acquired programmes, rights and repeats. Figures expressed in 2009 prices.

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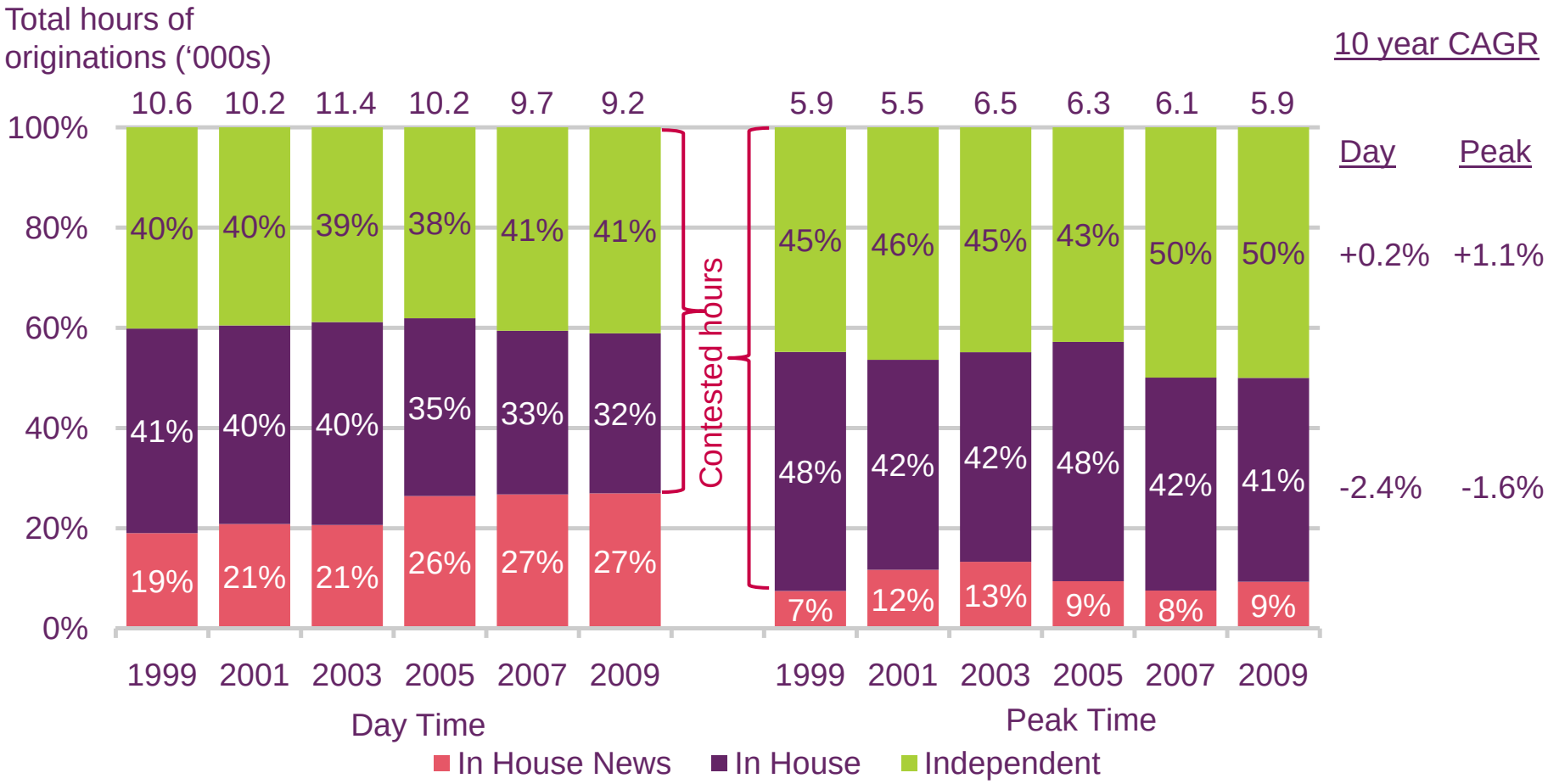
Figure 2.51

PSB Originations volume by hours - daytime and peak time 1999 – 2009



Source: Ofcom/broadcasters.

Chart Includes five main networks, BBC Three, BBC Four, CBBC and Cbeebies only. News is shown separately as its hours are not included when calculating the independent quota.

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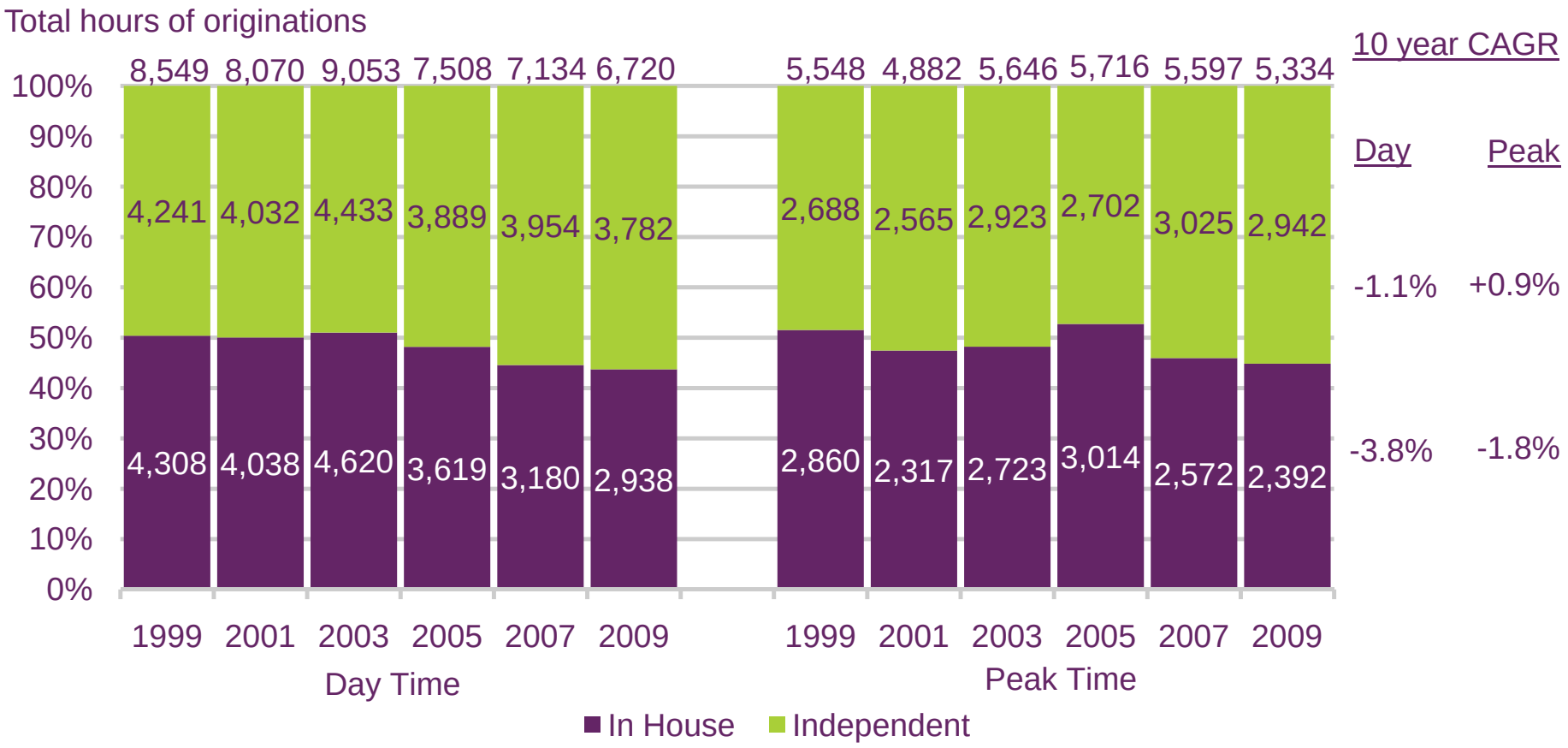
Figure 2.52

PSB originations volume, excluding News: daytime and peak time, 1999 – 2009



Source: Ofcom/broadcasters.

Chart Includes five main networks, BBC Three, BBC Four, CBBC and Cbeebies only. News is excluded in order to show contested hours only.

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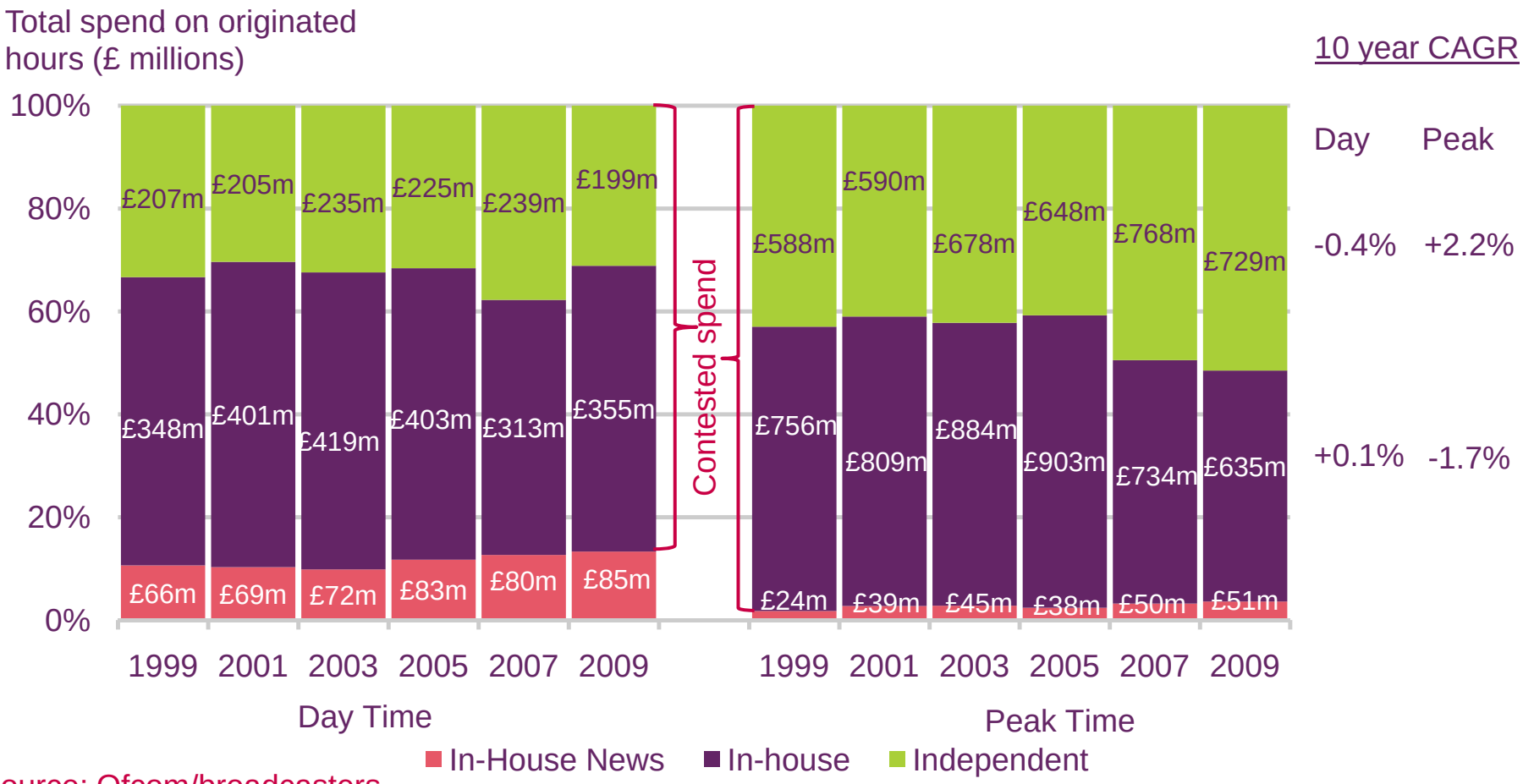
Figure 2.53

PSB originations – daytime and peak time, 1999 - 2009



Source: Ofcom/broadcasters.

Note: Chart includes five main networks and BBC Three, BBC Four, CBBC and CBeebies only. News is shown separately as its hours are not included when calculating the independent quota. Figures expressed in 2009 prices.

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Figure 2.54

PSB Originations spend and hours - daytime and peaktime 1999 - 2009

Source: Ofcom/broadcasters.

Chart Includes five main networks and BBC Three, BBC Four, CBBC and Cbeebies only. News is excluded in order to show contested hours only. Figures expressed in 2009 prices.

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Figure 2.55

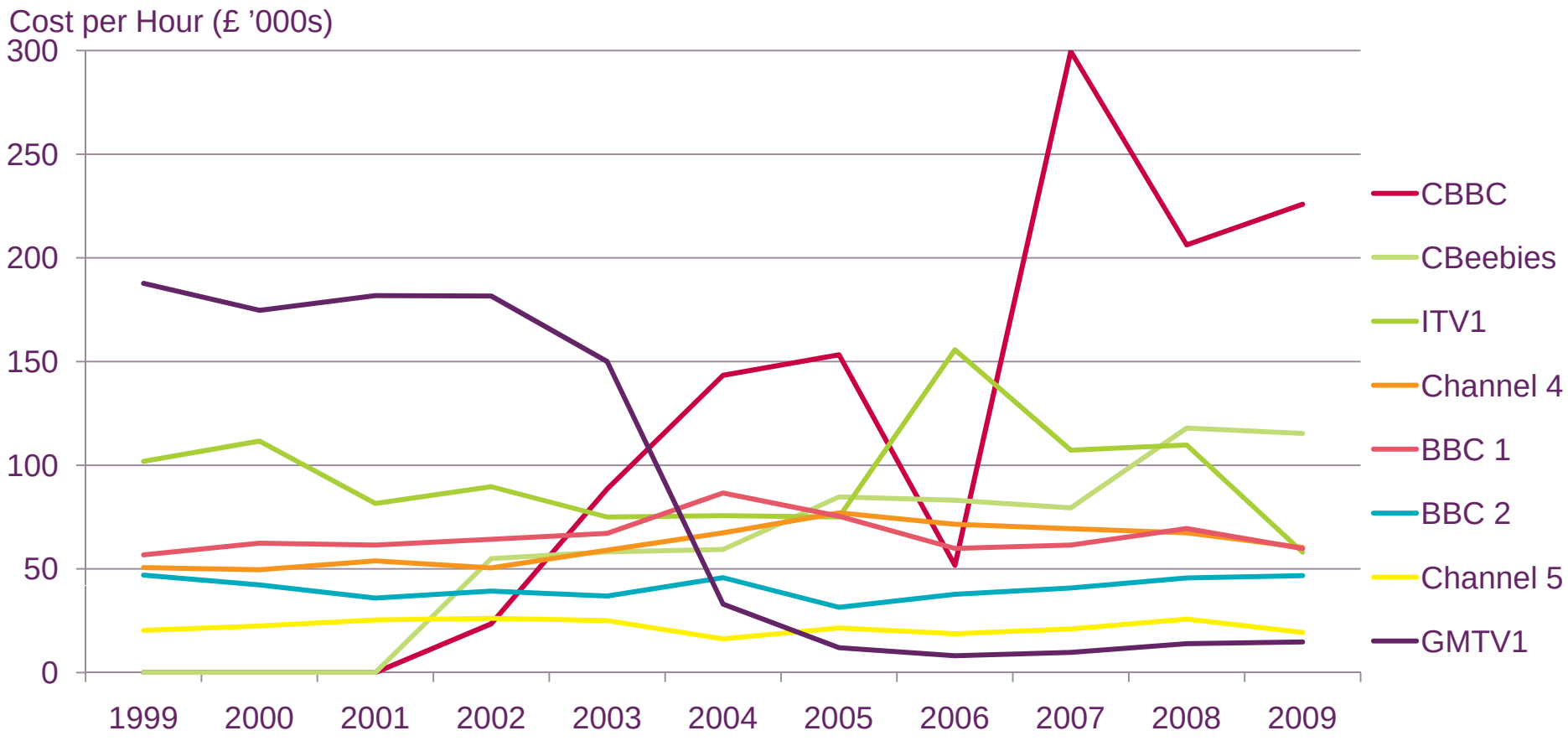
PSB cost per hour for first run origination content – daytime and peak time, ten - year comparison

Source: Ofcom/broadcasters.

Note: Chart Includes five main networks and BBC Three, BBC Four, CBBC and CBeebies only. Figures exclude News. Figures expressed in 2009 prices.

Figure 2.56

PSB cost per hour for first-run origination content - daytime independent commissions by channel, ten-year comparison



Source: Ofcom/broadcasters.

Chart Includes five main networks, GMTV, CBBC and CBeebies only. Figures exclude News. Figures expressed in 2009 price.

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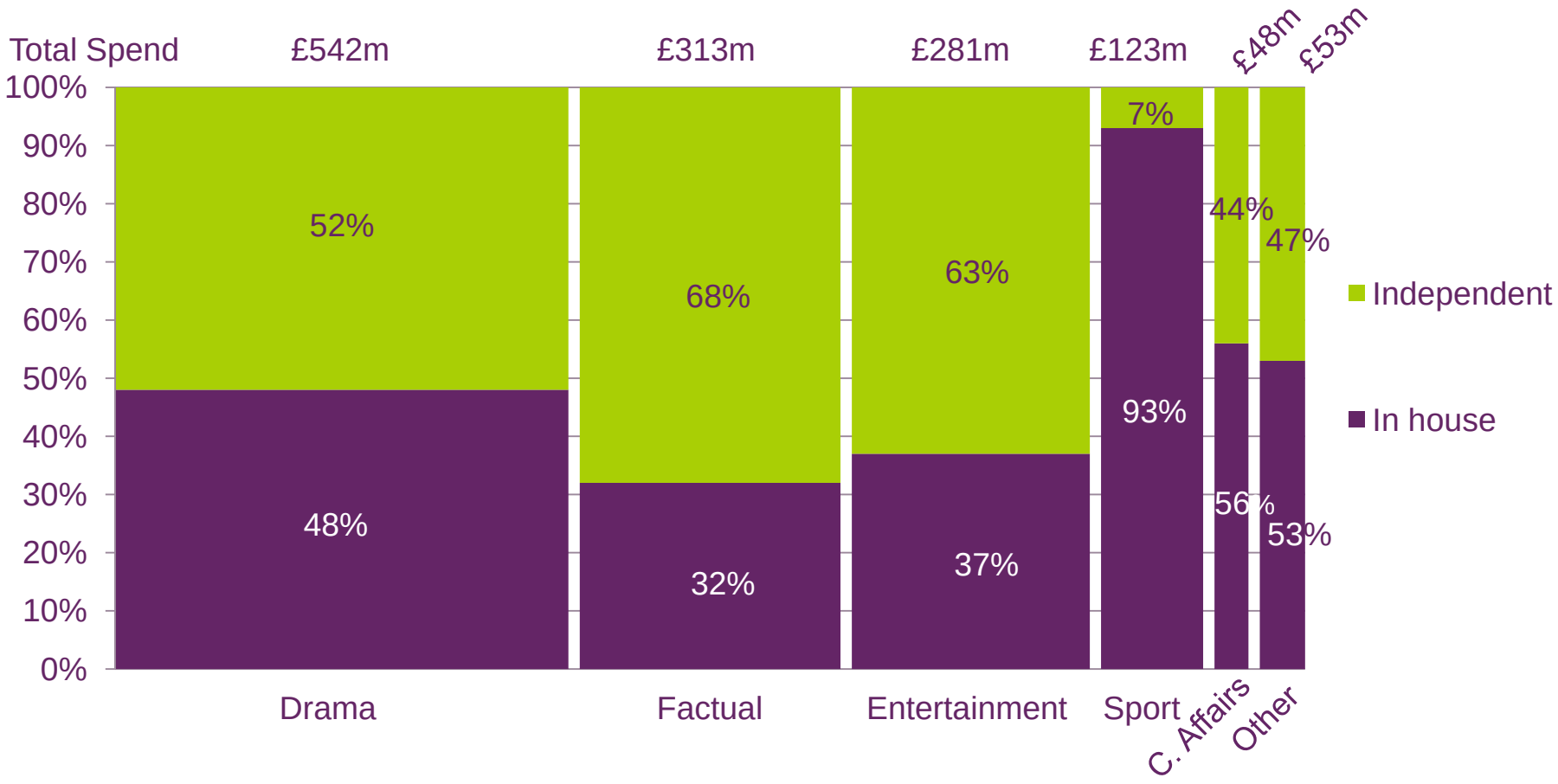
Figure 2.57

PSB originations spend by genre – peak time, 2009



Source: Ofcom/broadcasters.

Chart Includes five main networks and BBC Three, BBC Four, CBBC and Cbeebies only.

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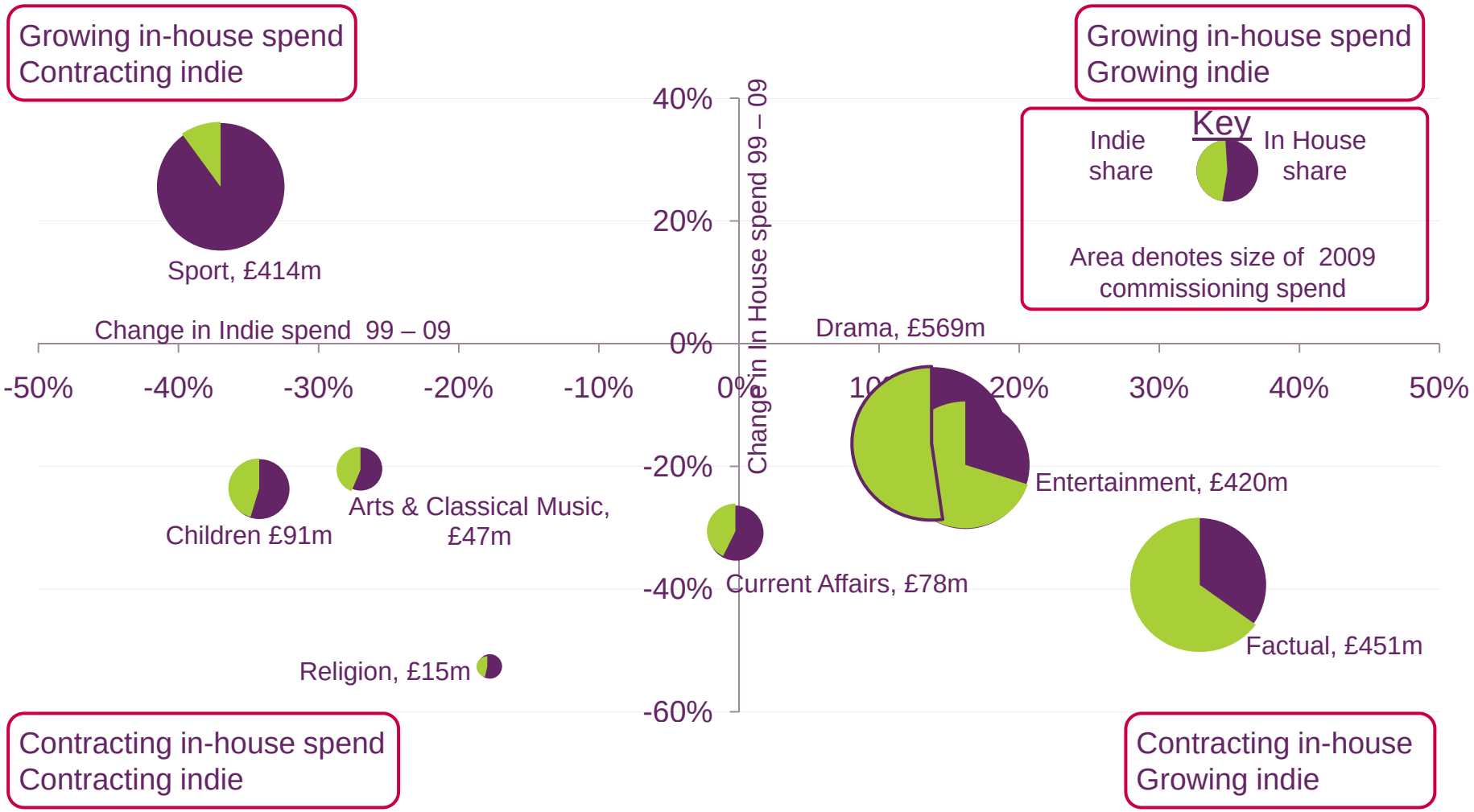
Figure 2.58

2009 distribution of PSB peak time spend and change over 10 year period 1999 – 2009 by genre

Source: Ofcom/Broadcasters.

Figure 2.59

2009 distribution of PSB all-day originations' spend and change over 10-year period, by genre: 1999 – 2009



Source: Ofcom/broadcasters.

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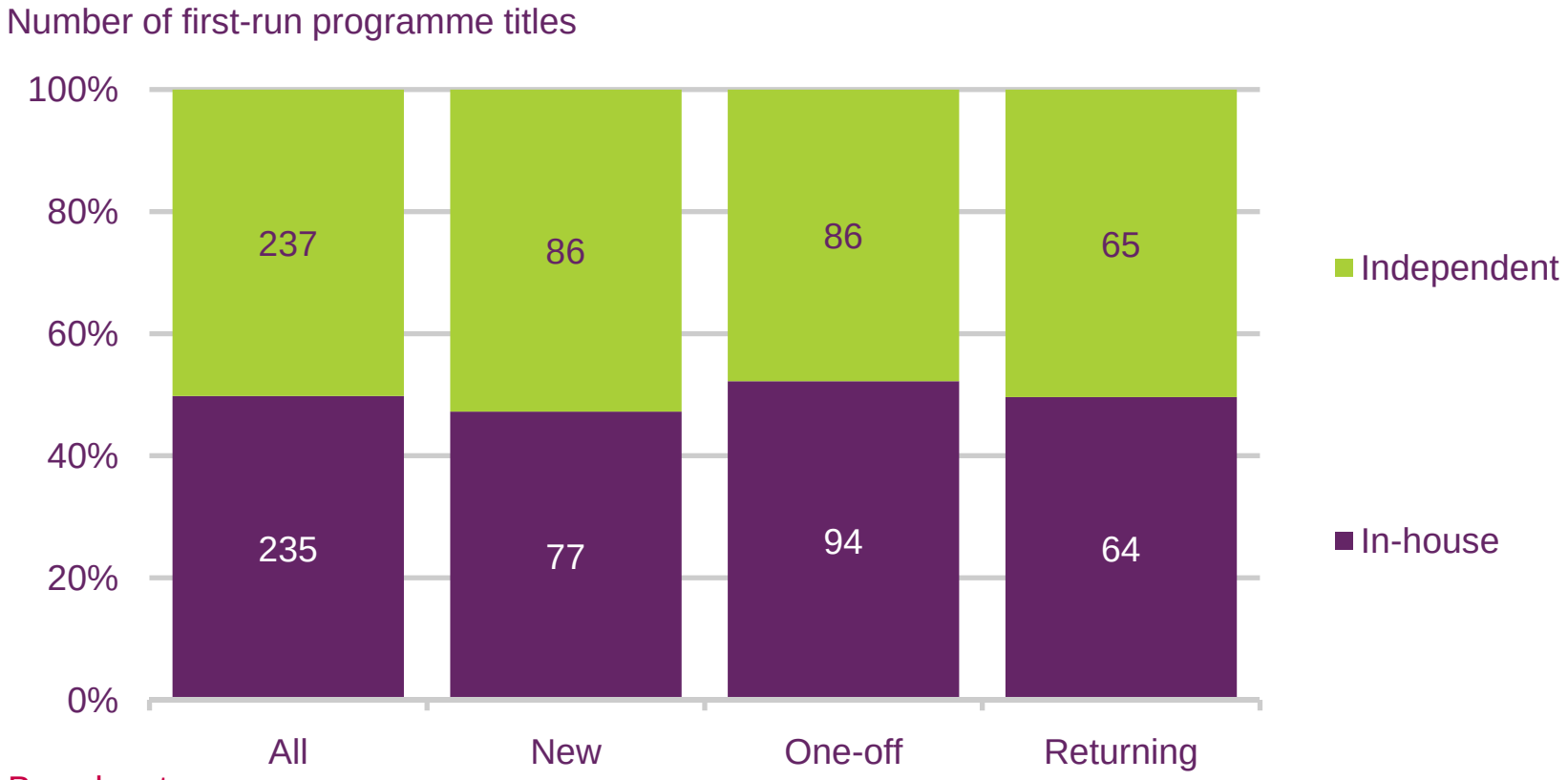
Figure 2.60

BBC One and Two and ITV1 new, one-off and returning series, peak time: 2009



Source: Broadcasters

'New series' includes brand-new series and mini-series. 'One-off' includes one-off programmes and one-offs within series such as Panorama and Dispatches programmes. Programmes which form part of the core schedule, such as Eastenders, Coronation Street, News have been excluded. Sports programmes and feature films have also been excluded.

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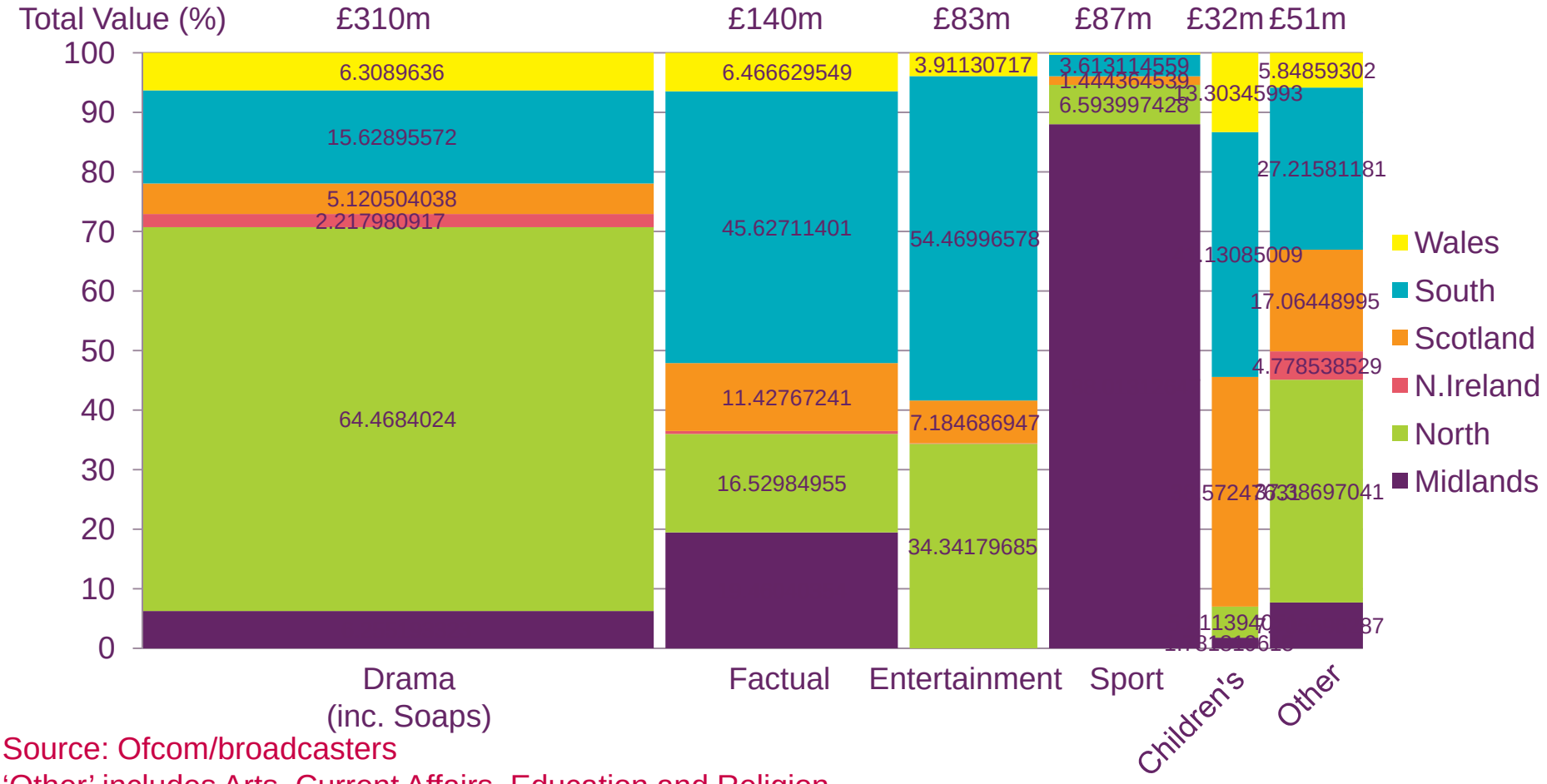
Figure 2.61

In-house and independent PSB production spend outside London by genre, 2009

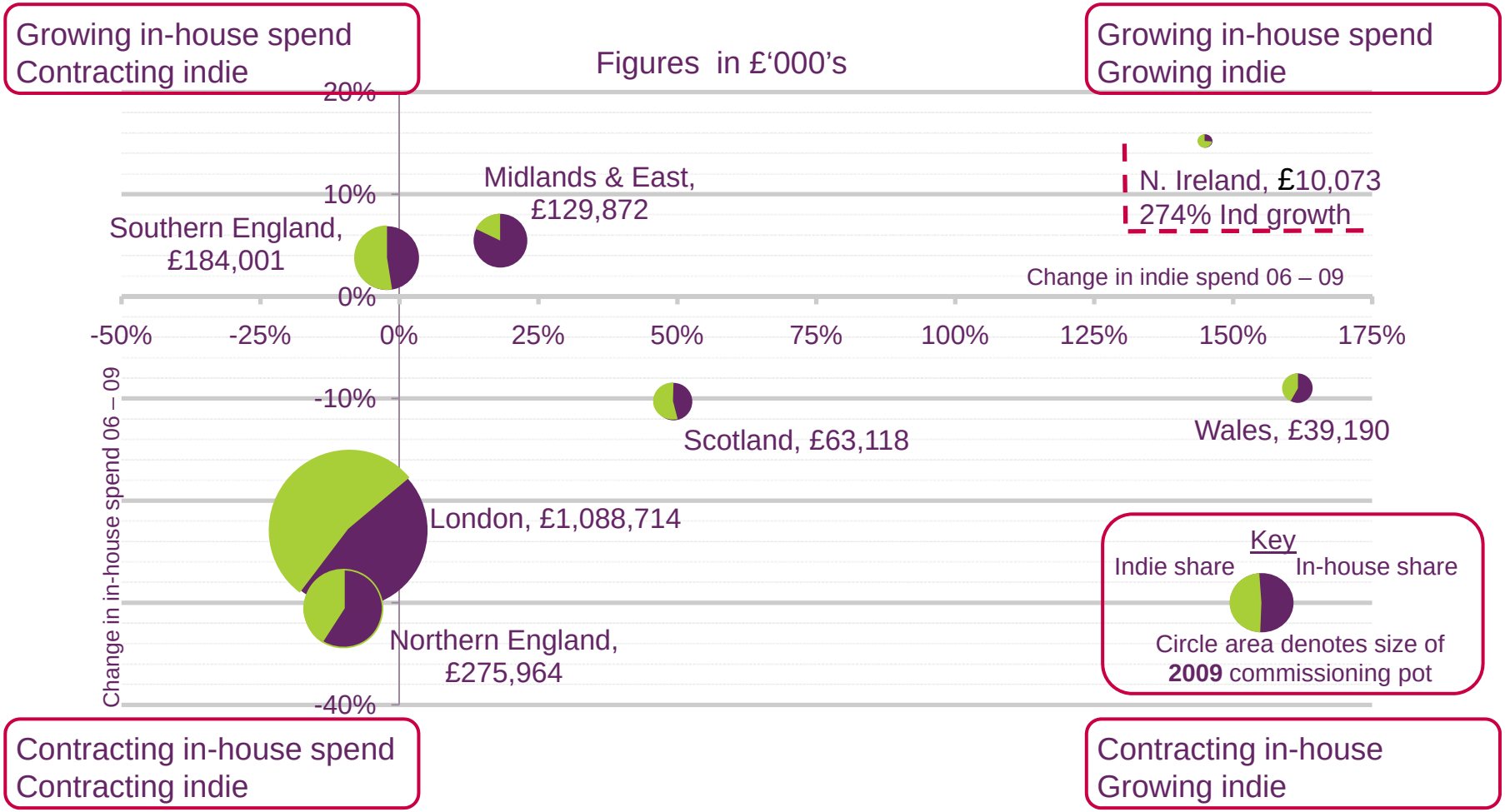


Source: Ofcom/broadcasters

'Other' includes Arts, Current Affairs, Education and Religion

Figure 2.62

2009 distribution of PSB production spend, by region, and change in spend: 2006 - 2009



Source: Ofcom/broadcasters.

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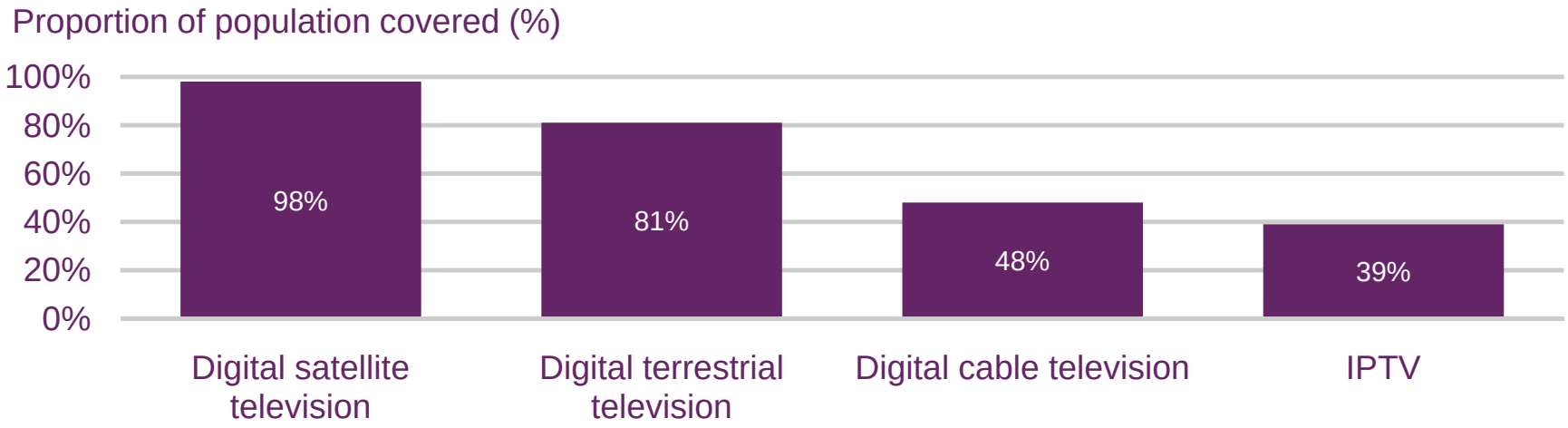
Figure 2.63

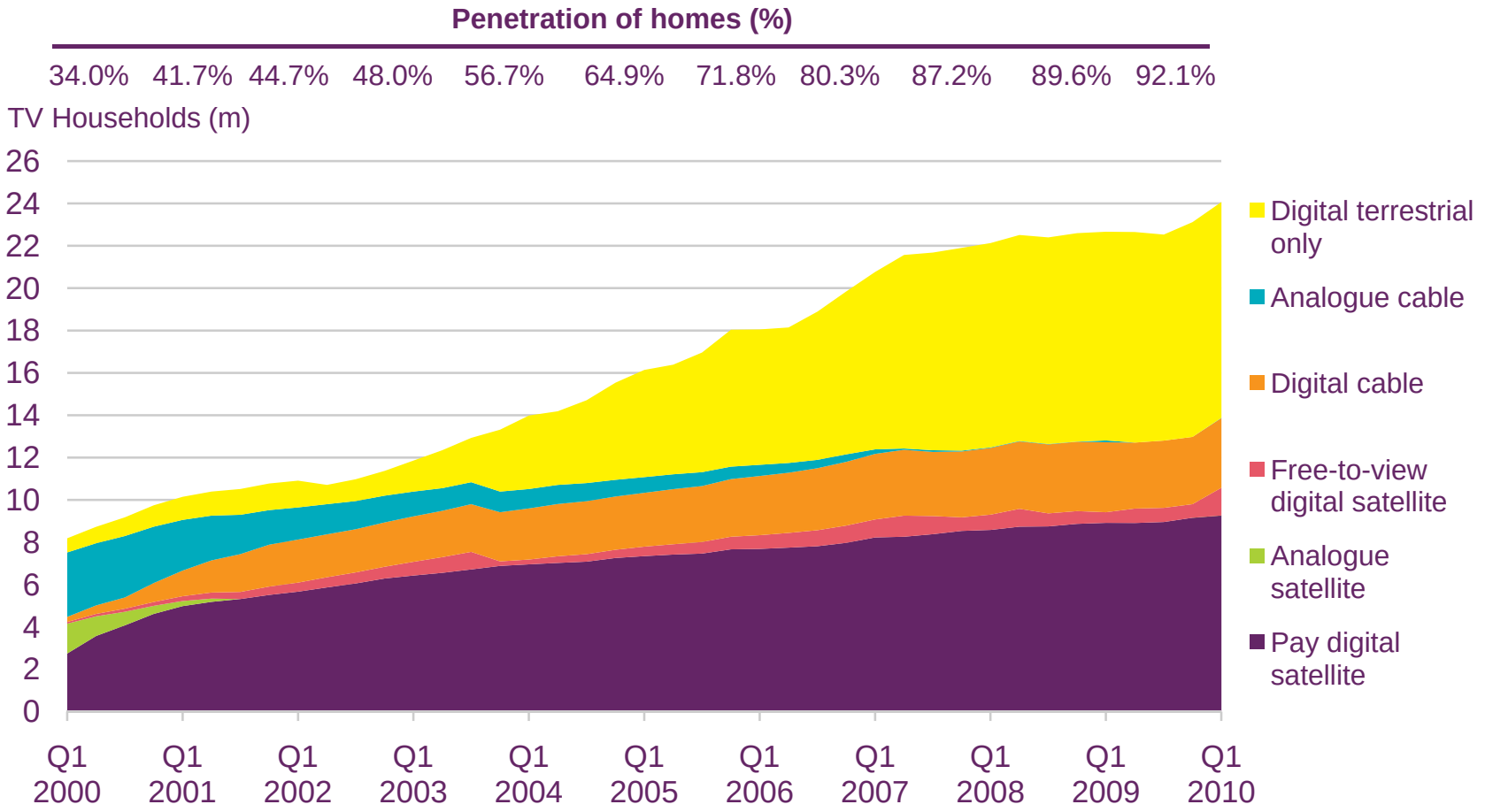
Availability of digital television platforms



Source: Ofcom research/operators. Note that the DTT coverage figures represent the availability of a service of 17 television channels. DTT coverage levels represent Ofcom estimates. Data correct as of June 2010.

Figure 2.64

Take-up of multichannel TV on main sets



Source: Ofcom, GfK, Sky, Virgin Media. Data from Q1 2007 is based on consumer research, previous quarters use platform operator data, research and Ofcom estimates. Note: Digital terrestrial relates to DTT-only homes.

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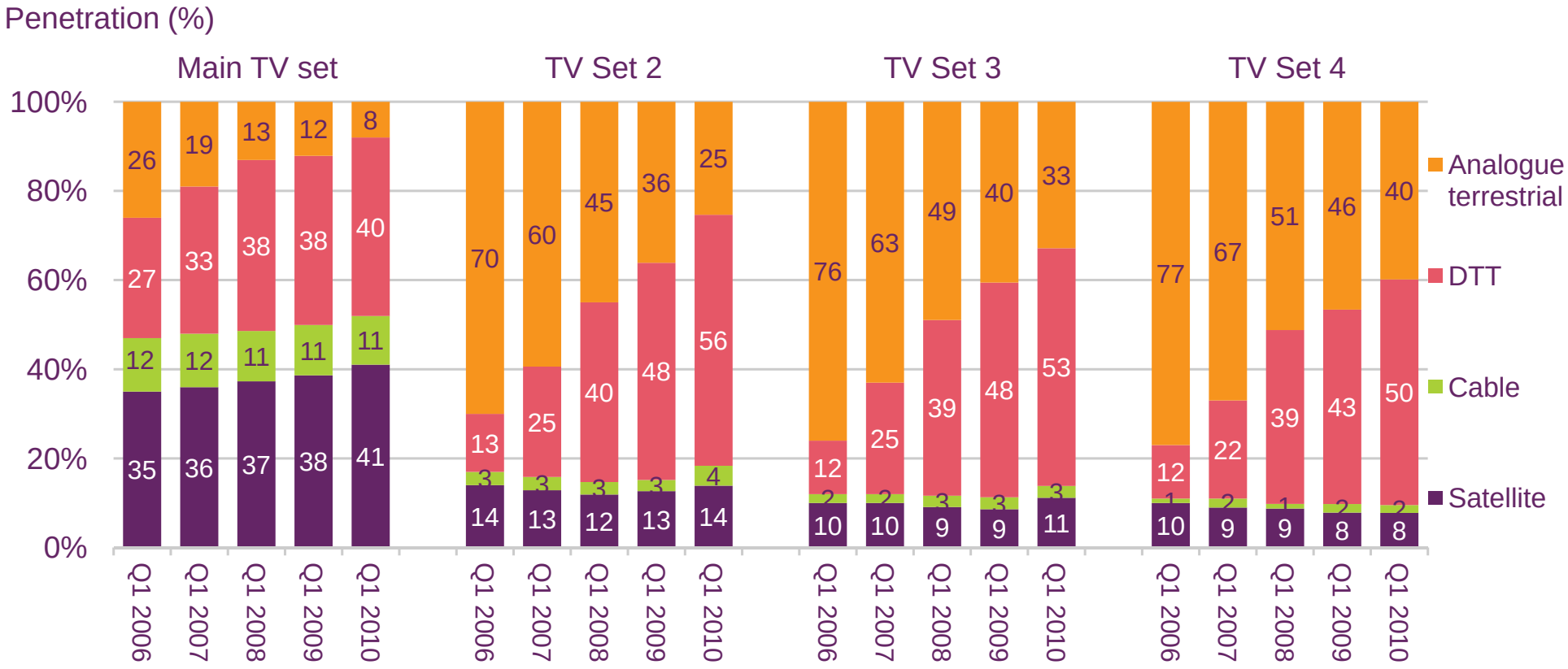
Figure 2.65

Platform share, by TV set



Source: GfK consumer research

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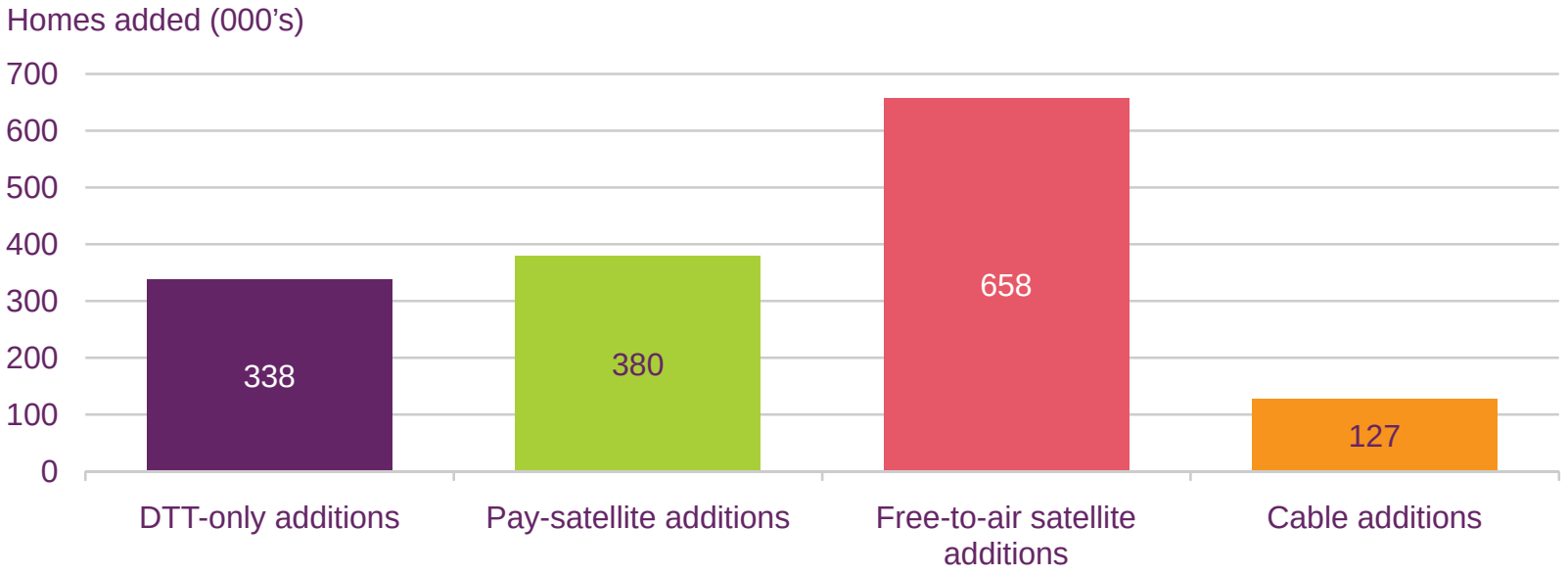
Figure 2.66

DTT, satellite and cable net additions, year to Q1 2010



Source: Pay platform additions based on Virgin Media reported results and Ofcom estimates based on BSkyB results. Free satellite additions based on BBC/ITV Freesat sales figures. DTT additions based on Q1 2010 and Q4 2009 consumer survey results. Note: Chart uses multiple sources and is therefore intended to be considered only as a general indication of performance.

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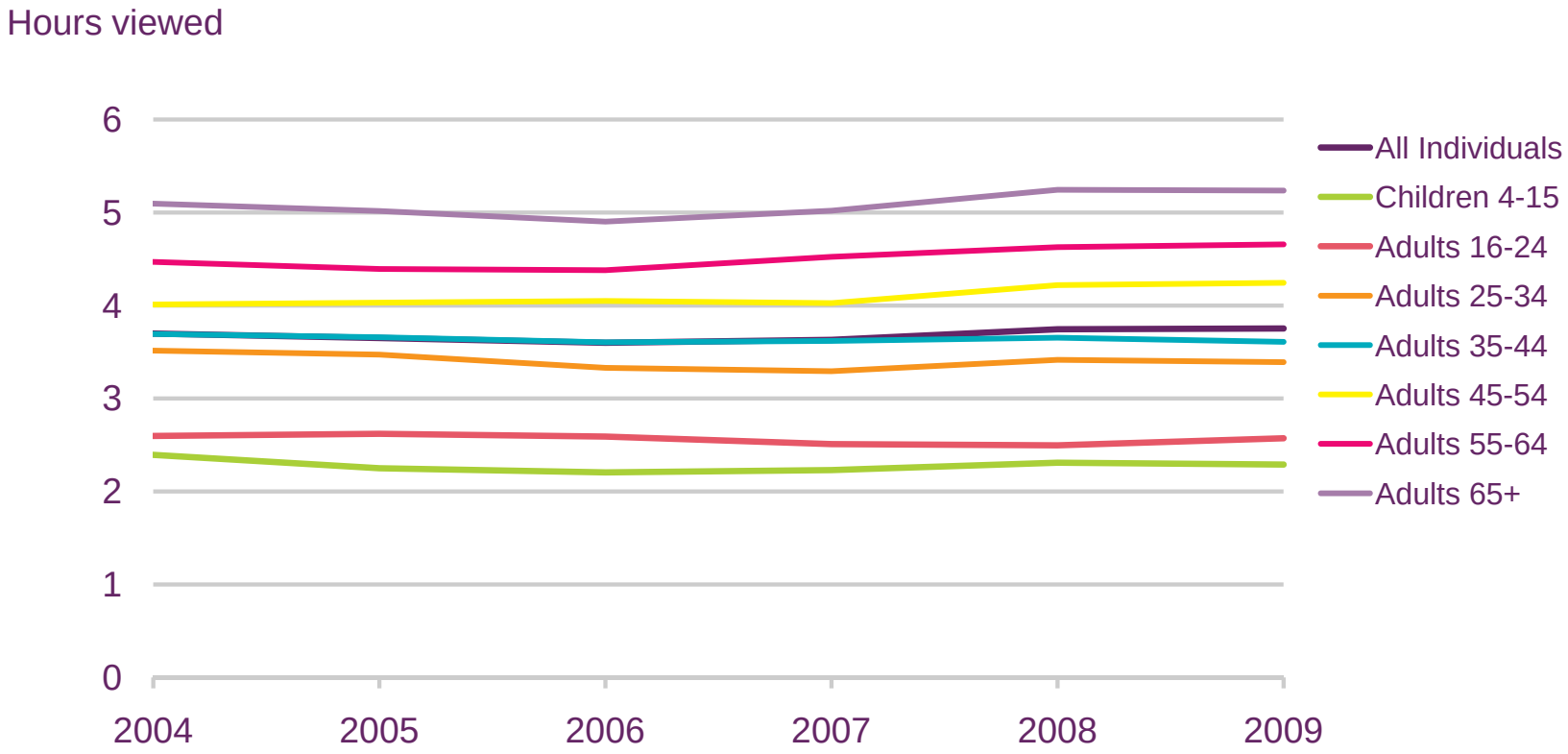
Figure 2.67

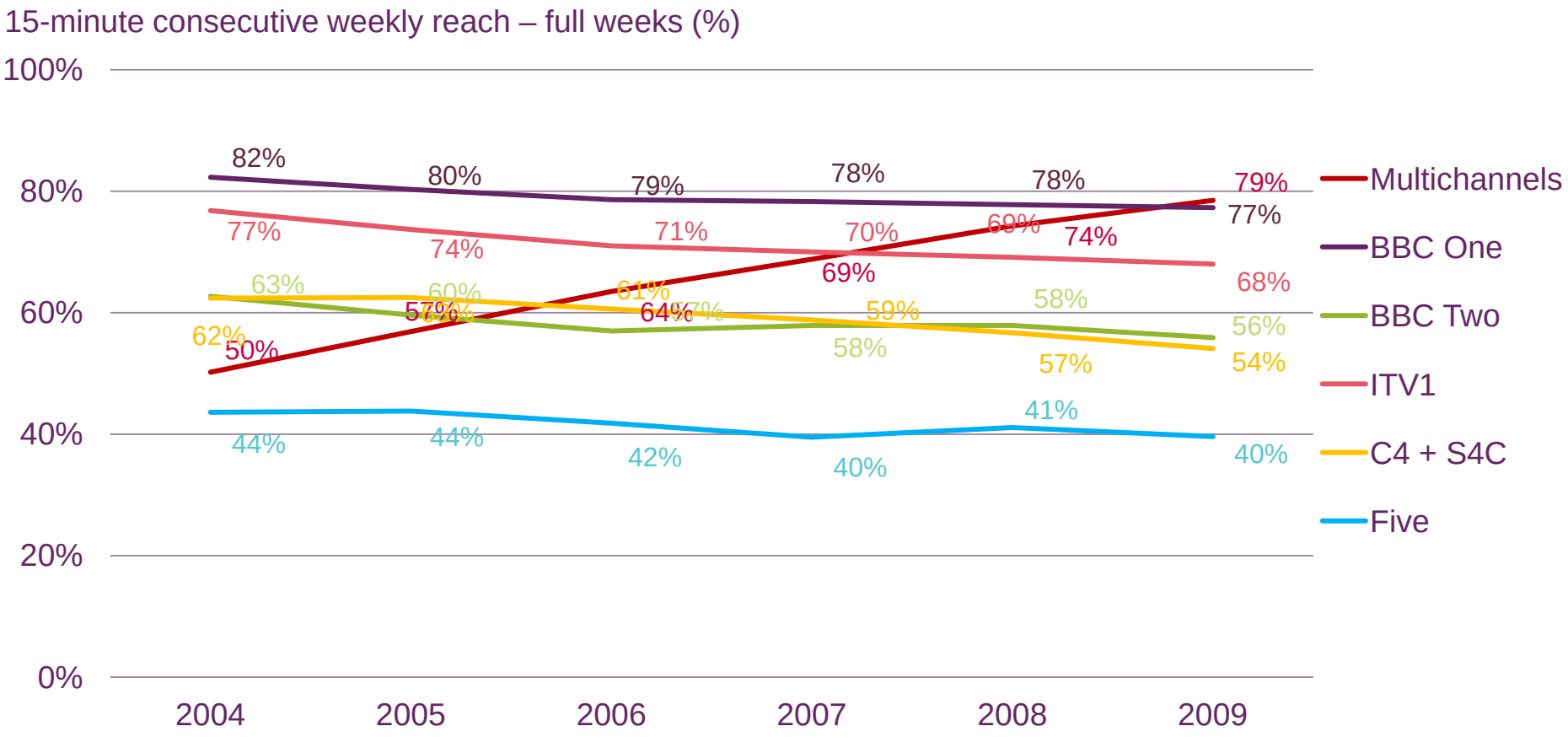
Average hours of television viewing per day, by age, all homes



Source: BARB

Figure 2.68

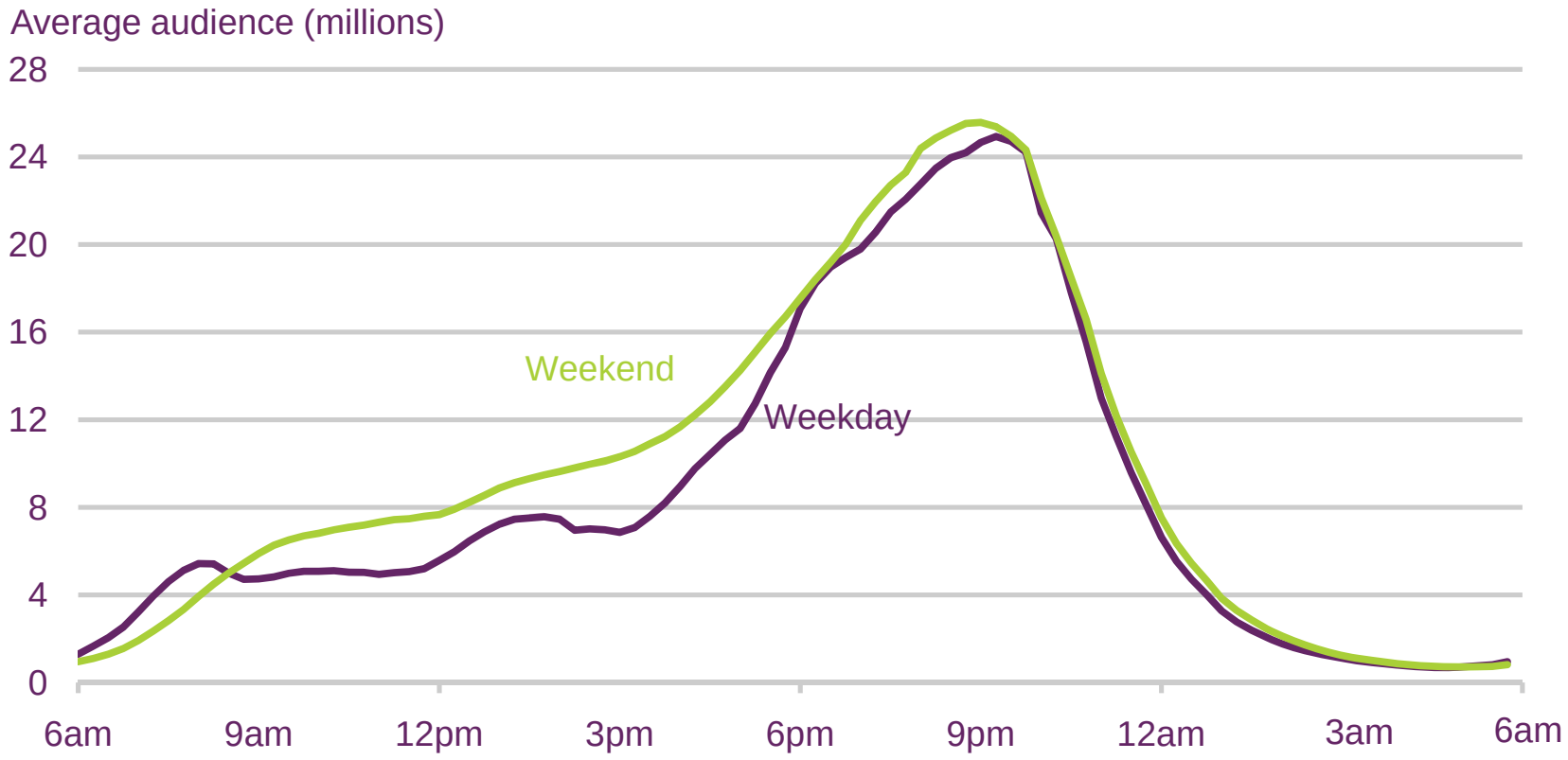
Average weekly TV reach in all homes, by channel



Source: BARB. Full weeks used.

Figure 2.69

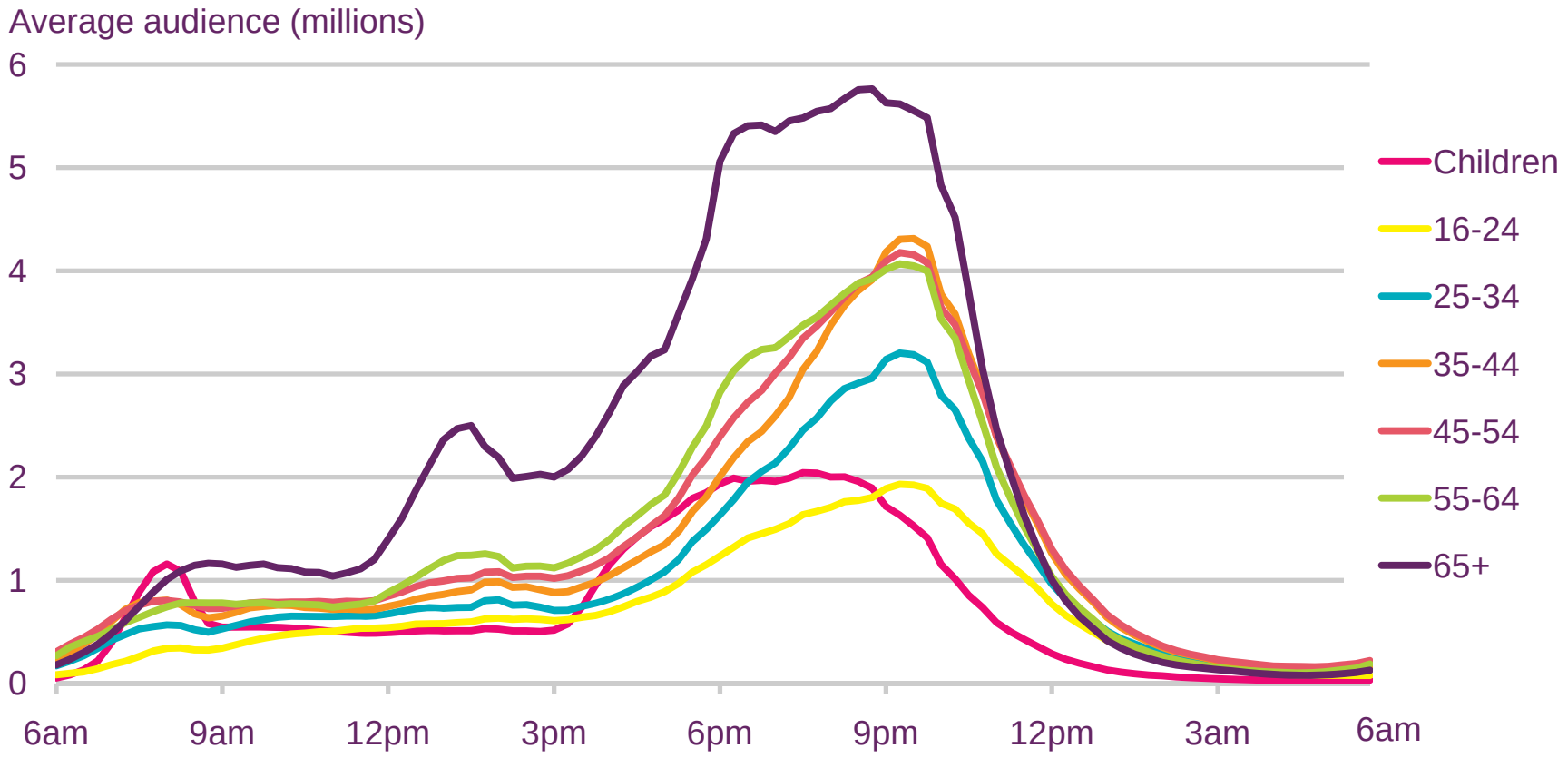
Average 2009 audiences, weekdays/weekends: by day part, all homes



Source: BARB

Figure 2.70

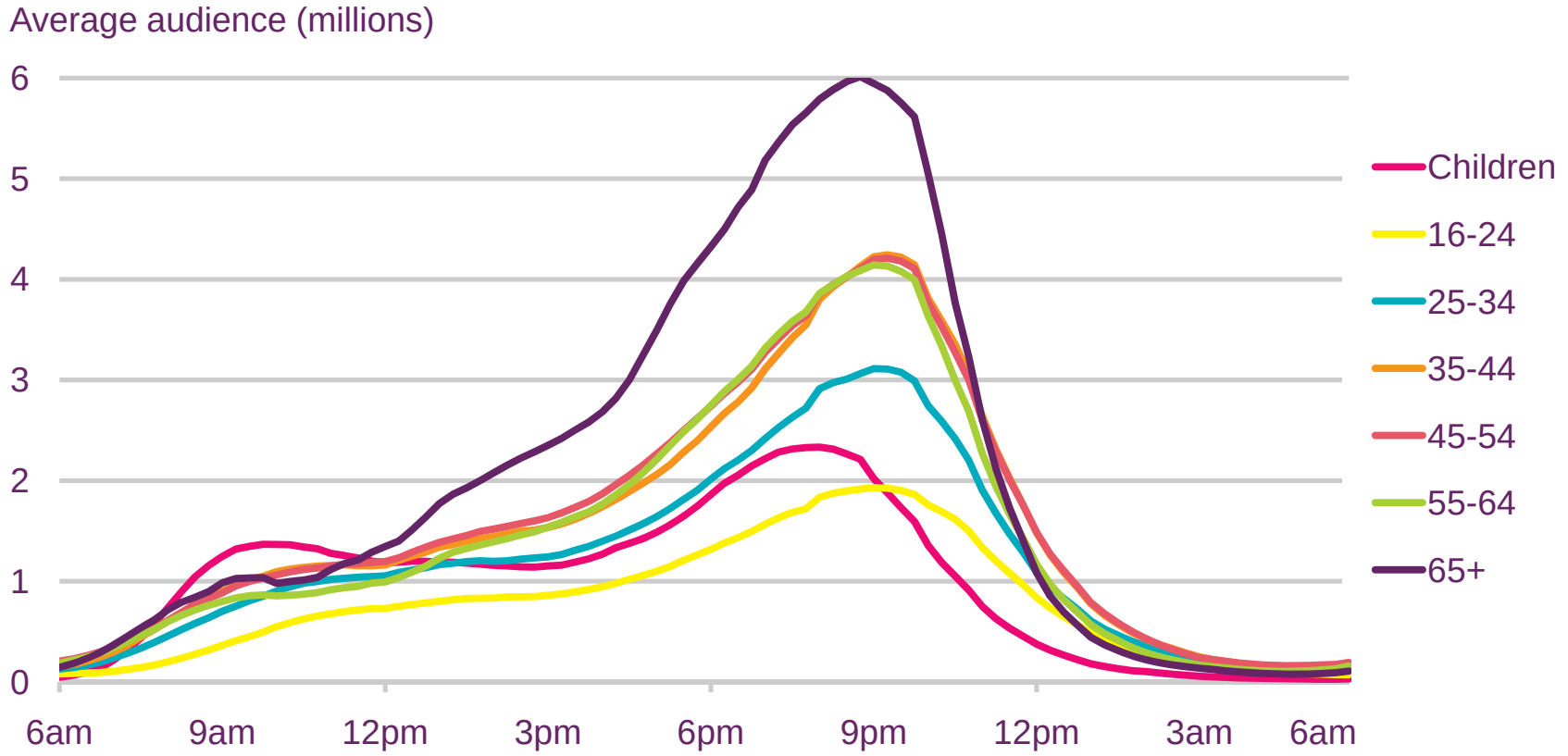
Average 2009 weekday audiences, by day part and age, all homes



Source: BARB

Figure 2.71

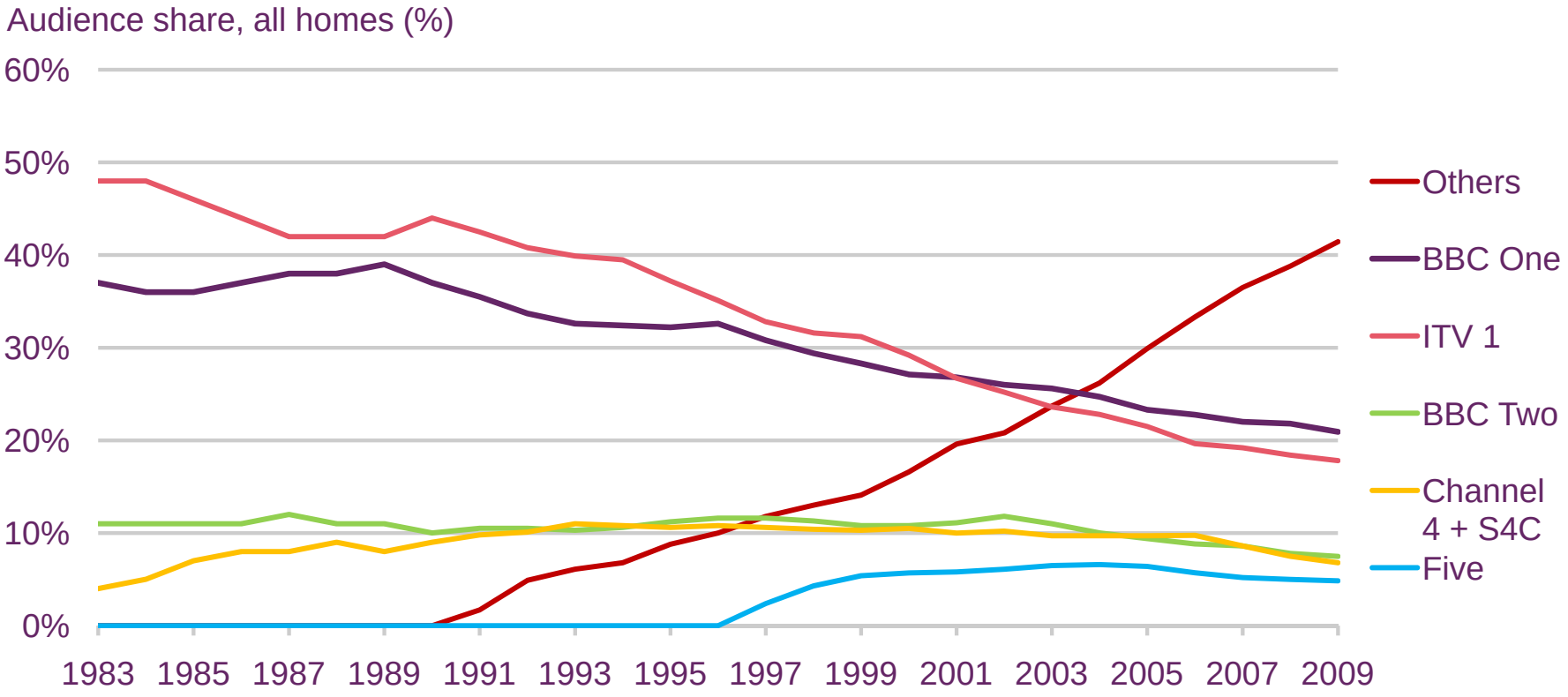
Average 2009 weekend audiences, by day part and age, all homes



Source: BARB

Figure 2.72

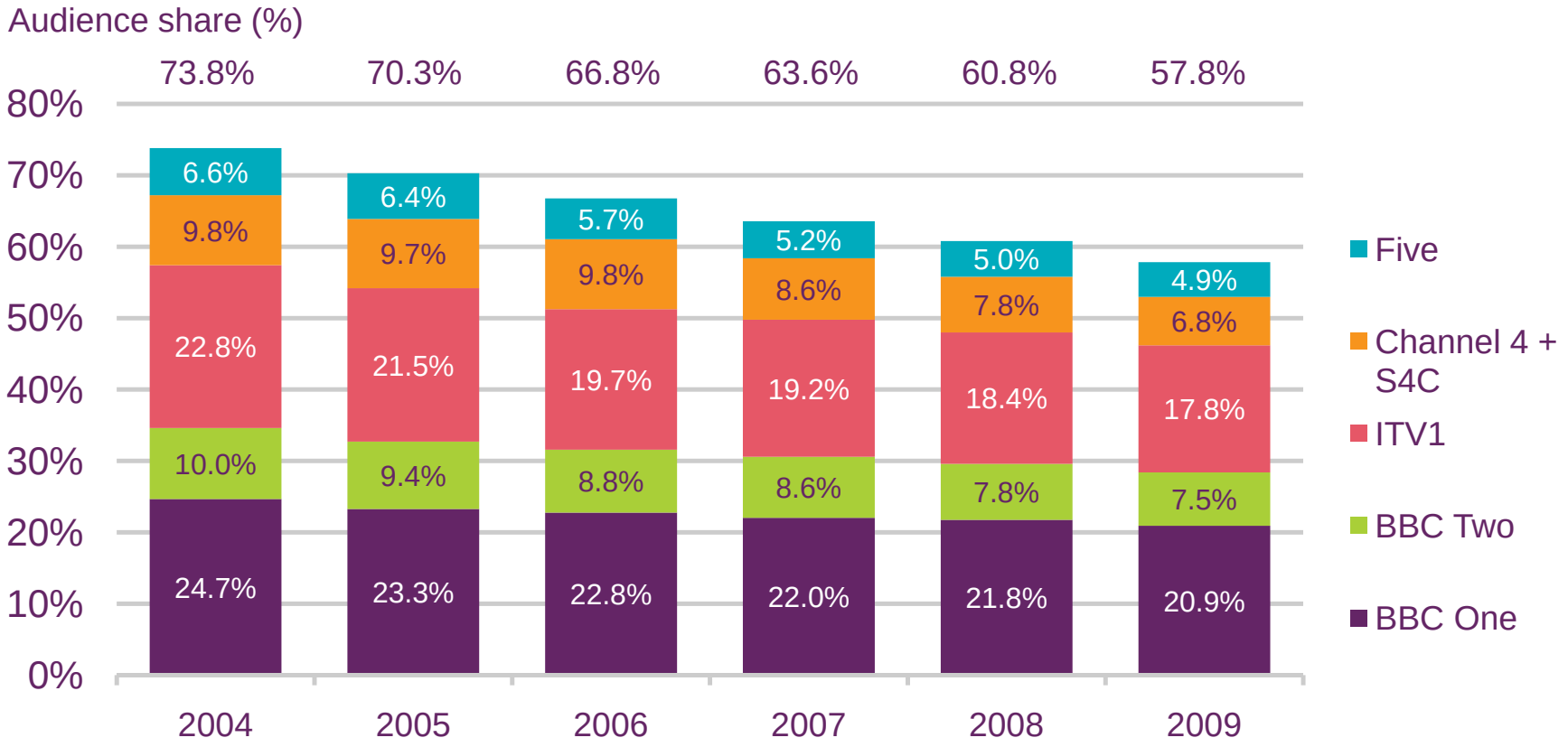
Channel shares in all homes, 1982 to 2009



Source: BARB, TAM JICTAR and Ofcom estimates

Figure 2.73

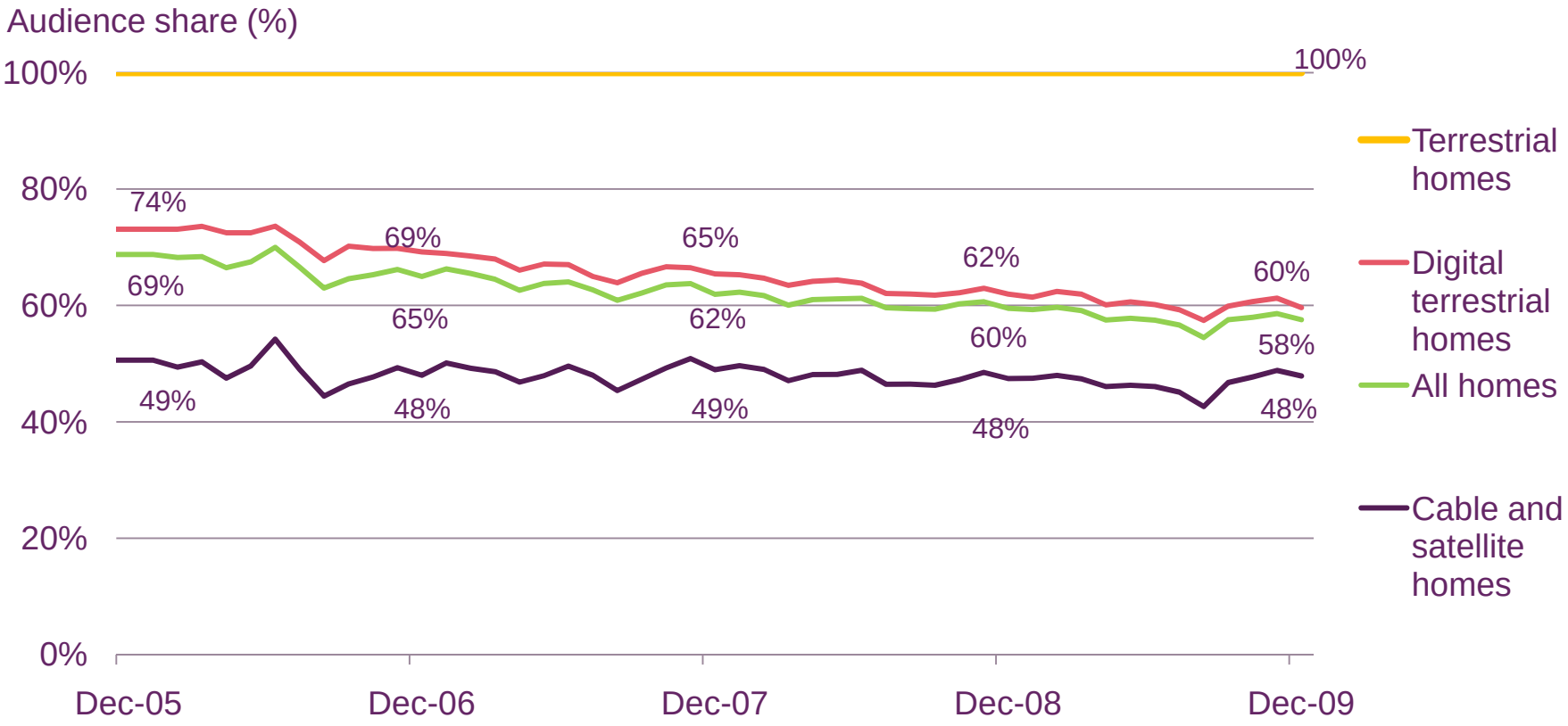
Five main PSB channels' audience share, all homes



Source: BARB

Figure 2.74

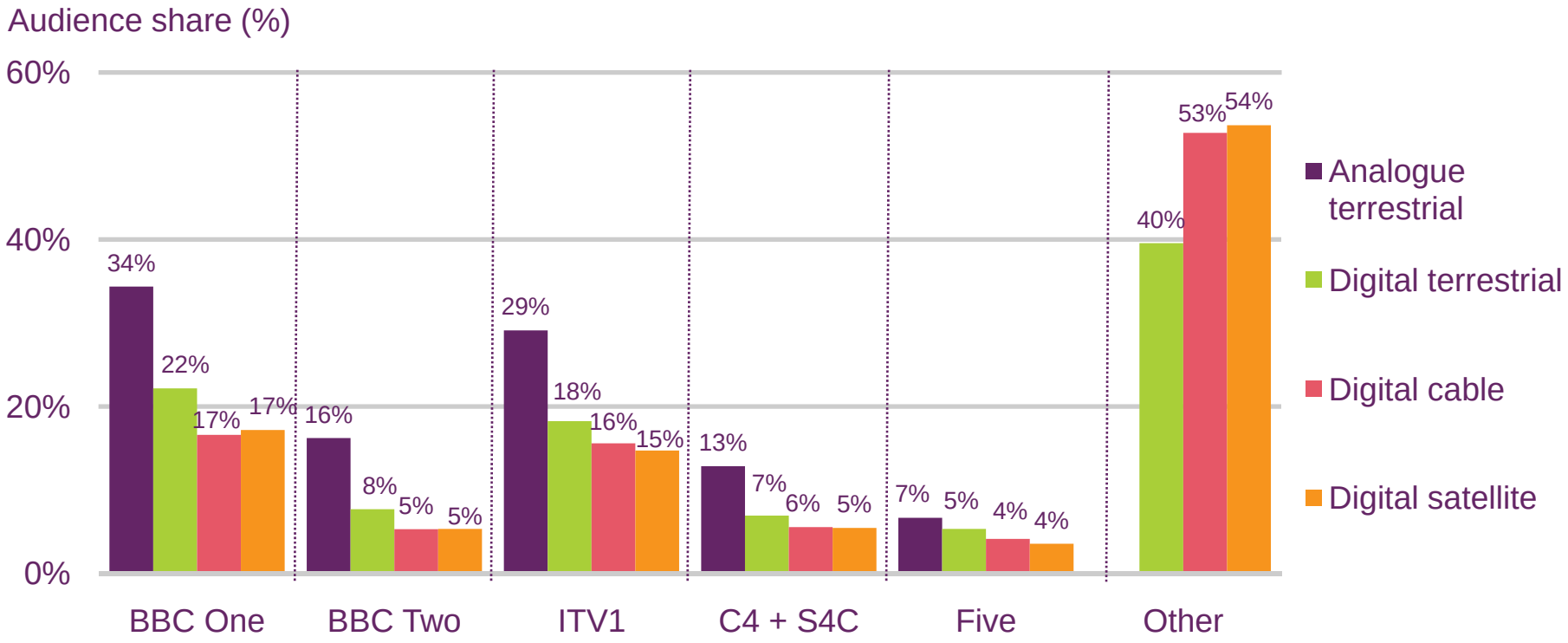
Five main PSB channels' audience shares, by platform



Source: BARB, all day, all viewers, various platforms

Figure 2.75

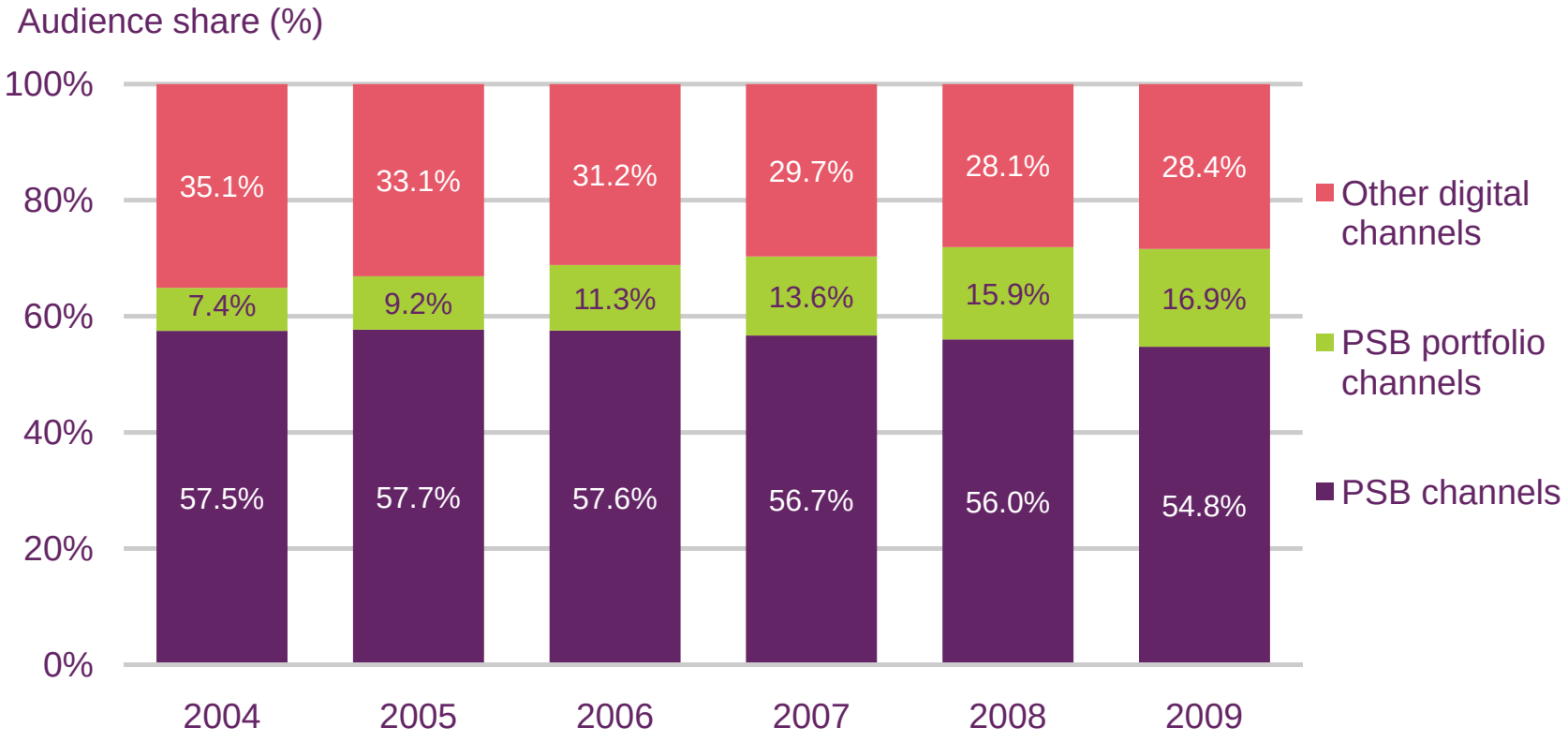
Channel share, by platform, 2009



Source: BARB

Figure 2.76

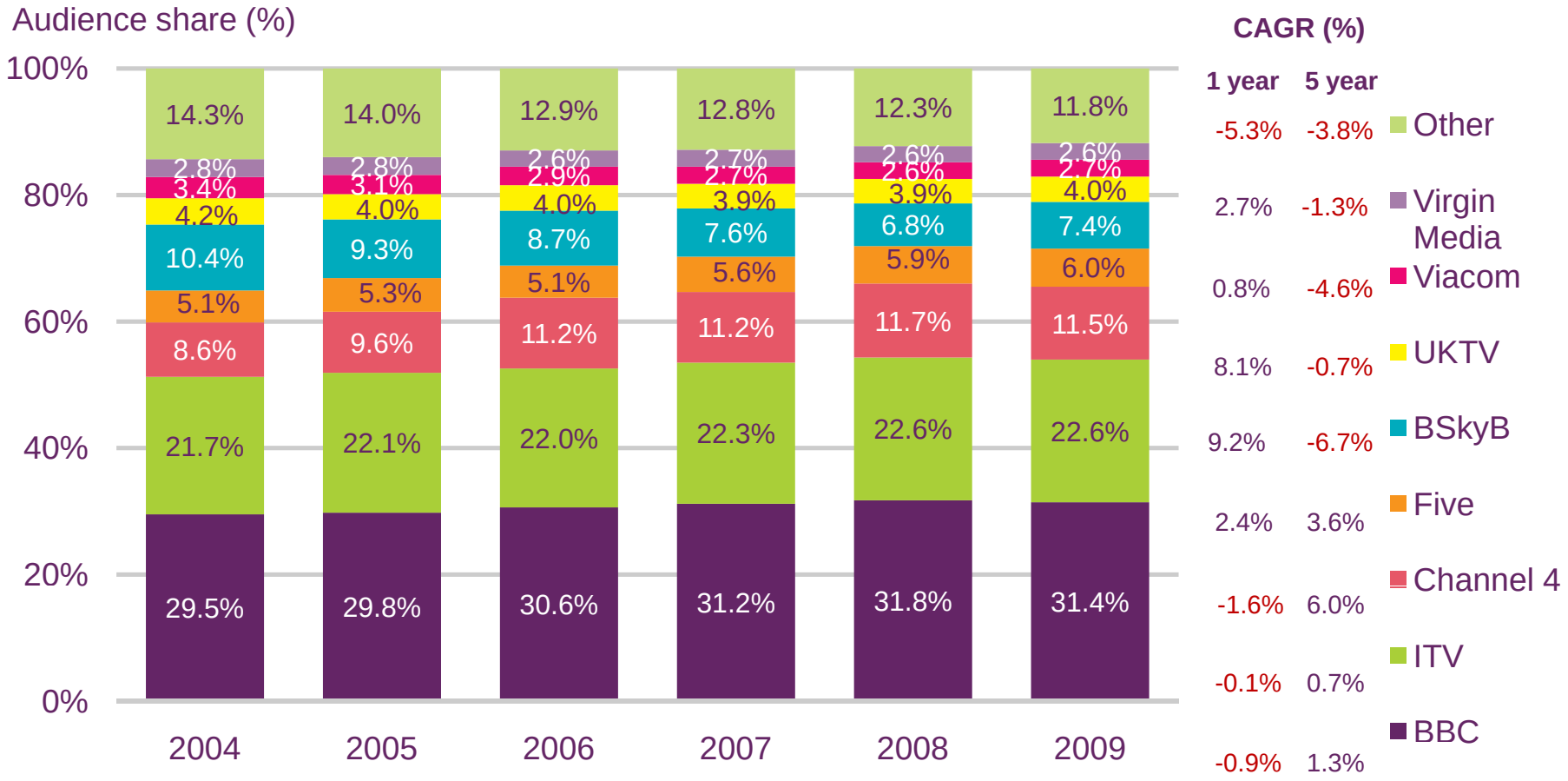
PSB and portfolio channel shares in multichannel homes



Source: BARB

Figure 2.77

Broadcaster portfolio shares in multichannel homes



Source: BARB

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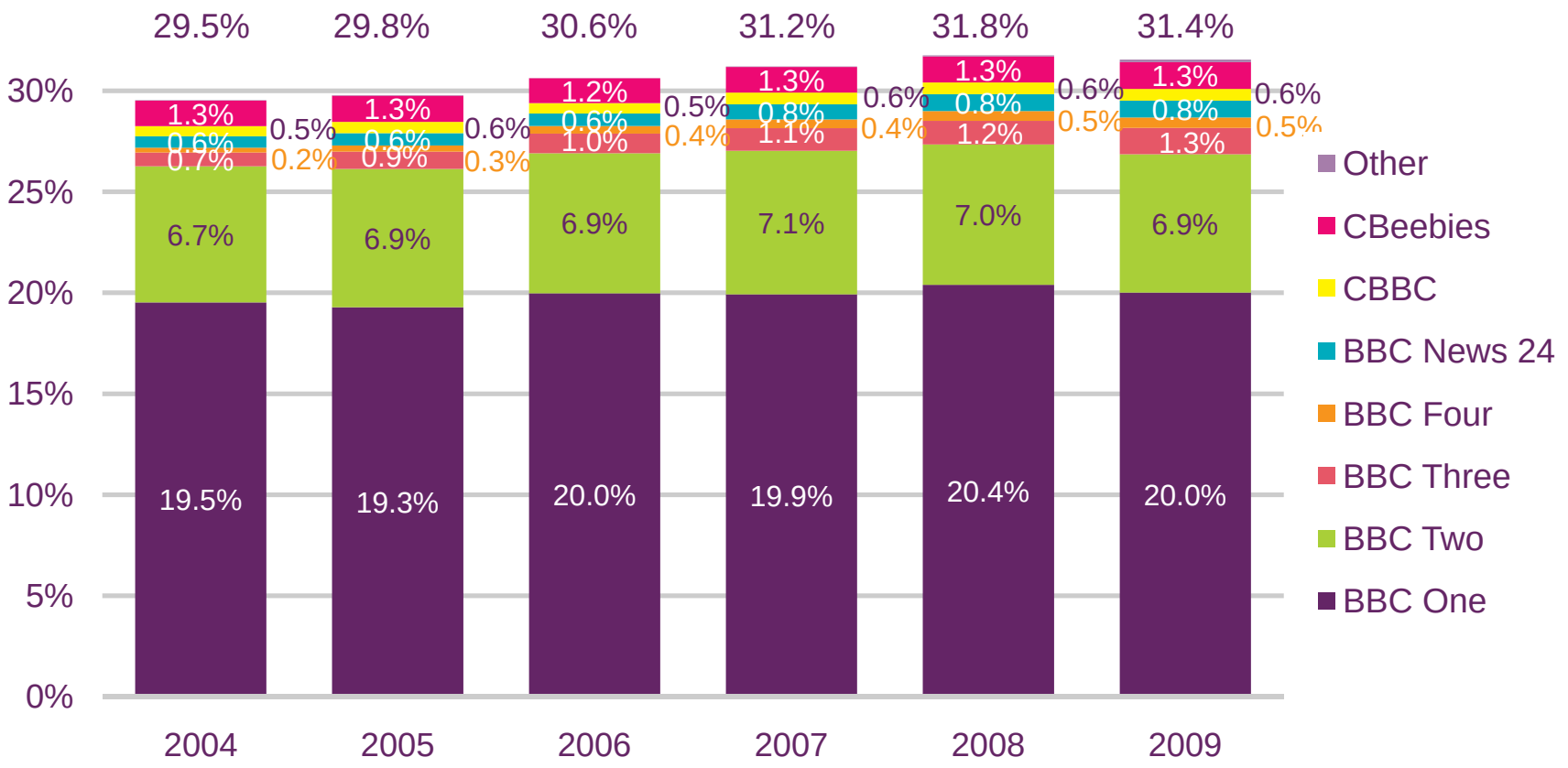
Figure 2.78

BBC portfolio share in multichannel homes

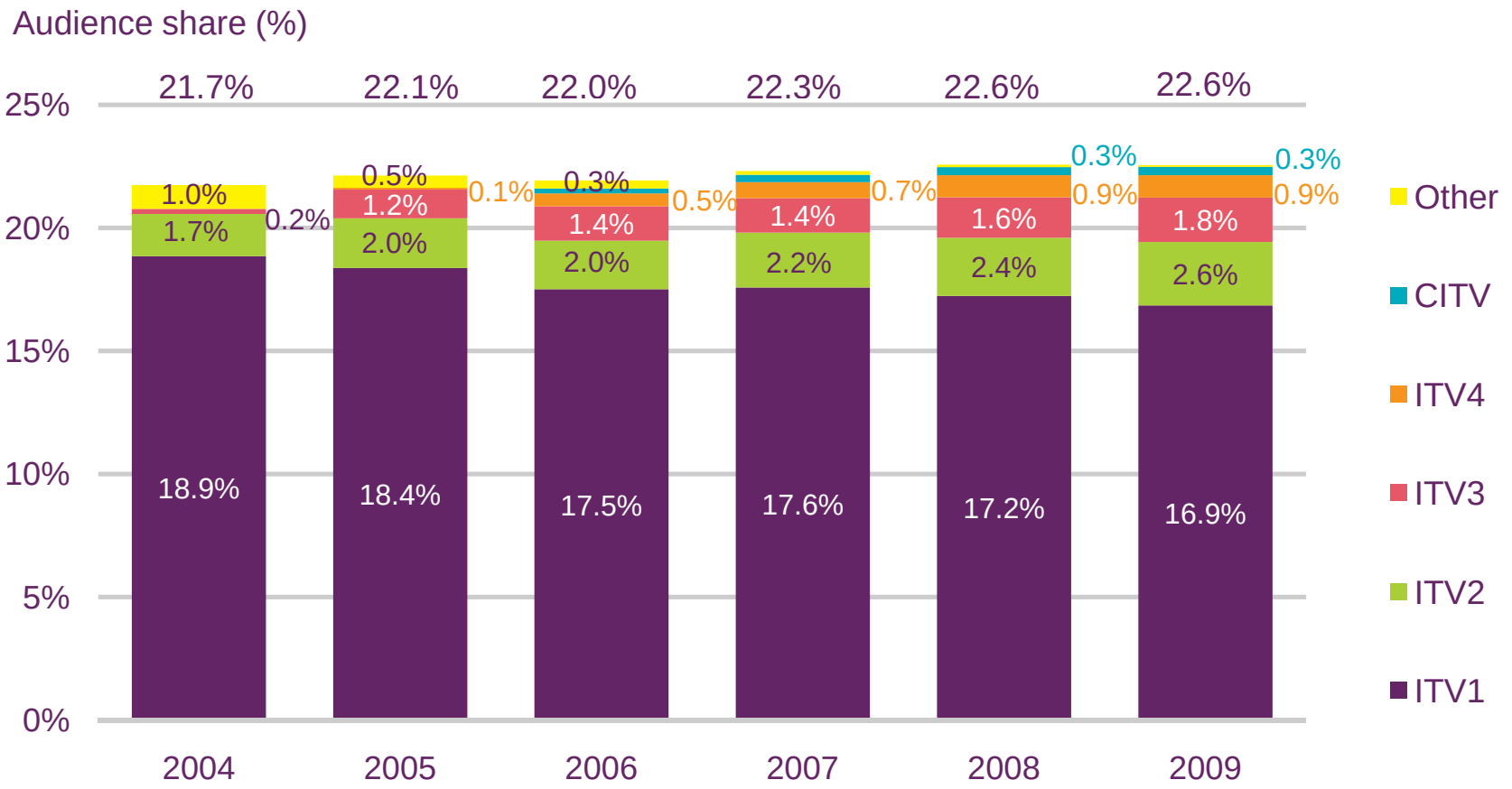
Audience share (%)



Source: BARB Note: 'Other' includes BBC Parliament, BBC Choice, BBC HD and BBC Knowledge

Figure 2.79

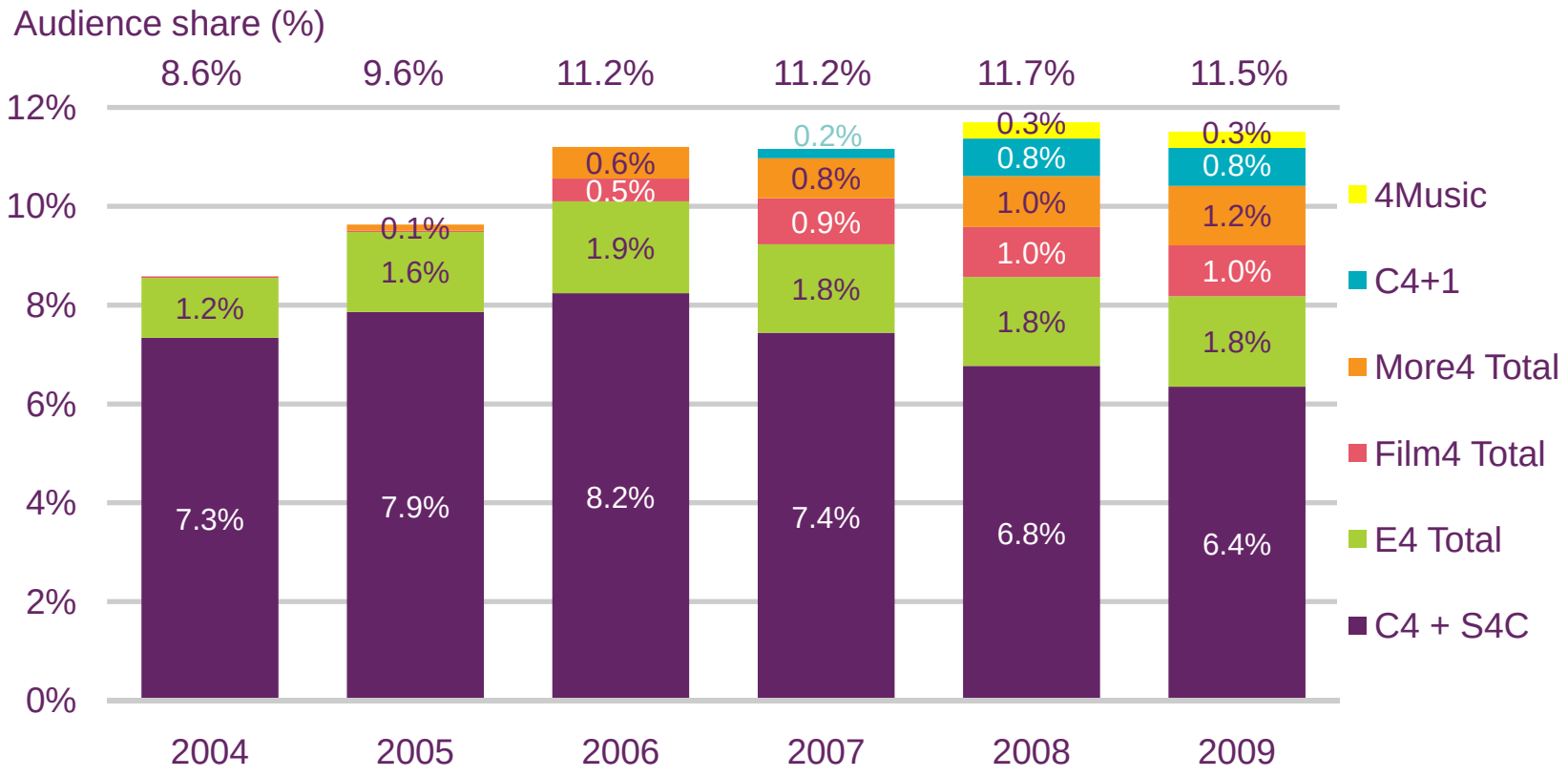
ITV portfolio shares in multichannel homes



Source: BARB Note: Other includes ITV Play, Men & Motors, GMTV2, Granada Breeze, Plus, ITV News
ITV2, ITV3 and ITV4 include their +1 service share

Figure 2.80

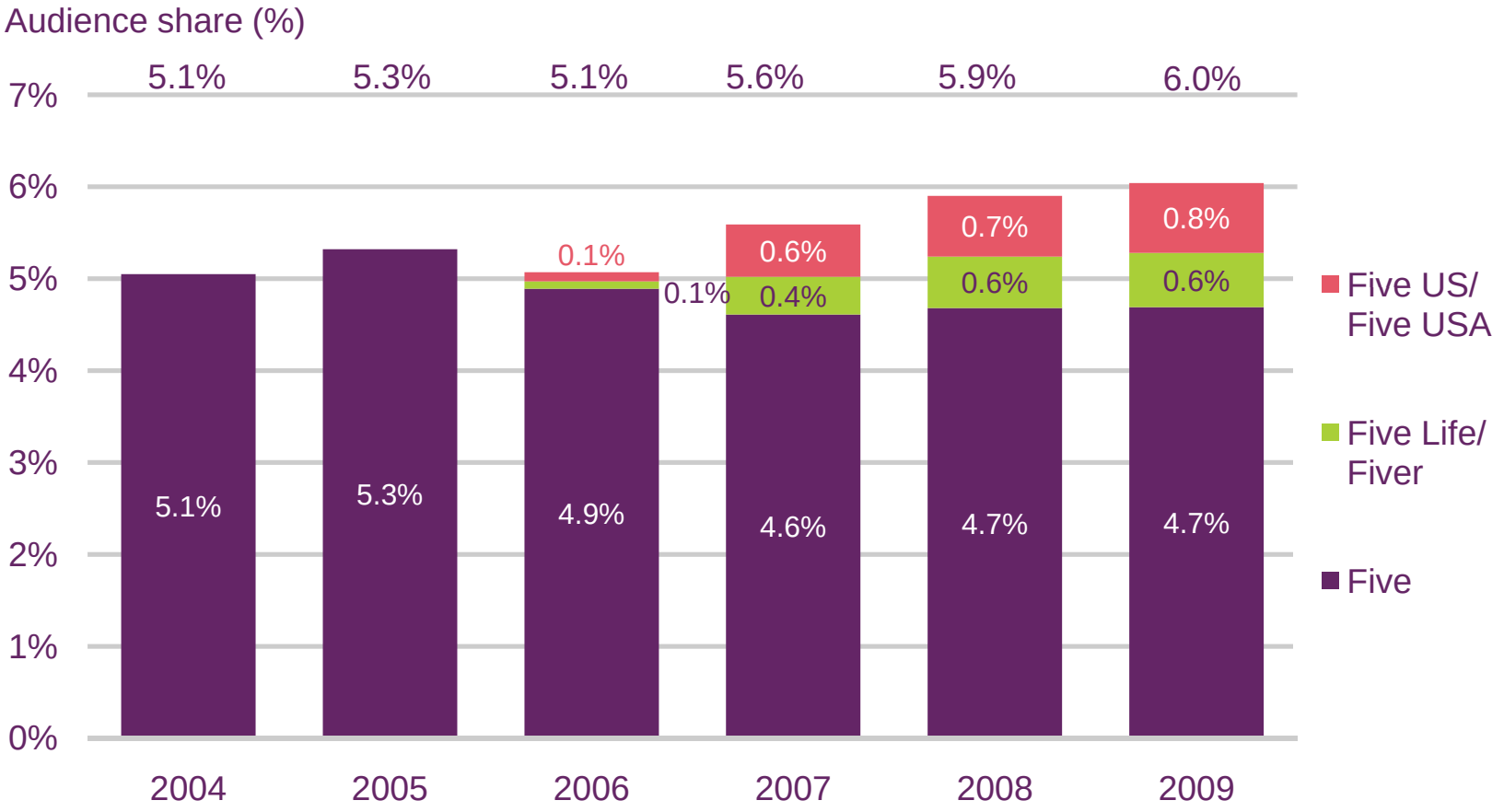
Channel 4 portfolio shares in multichannel homes



Source: BARB

Figure 2.81

Five portfolio shares in multichannel homes

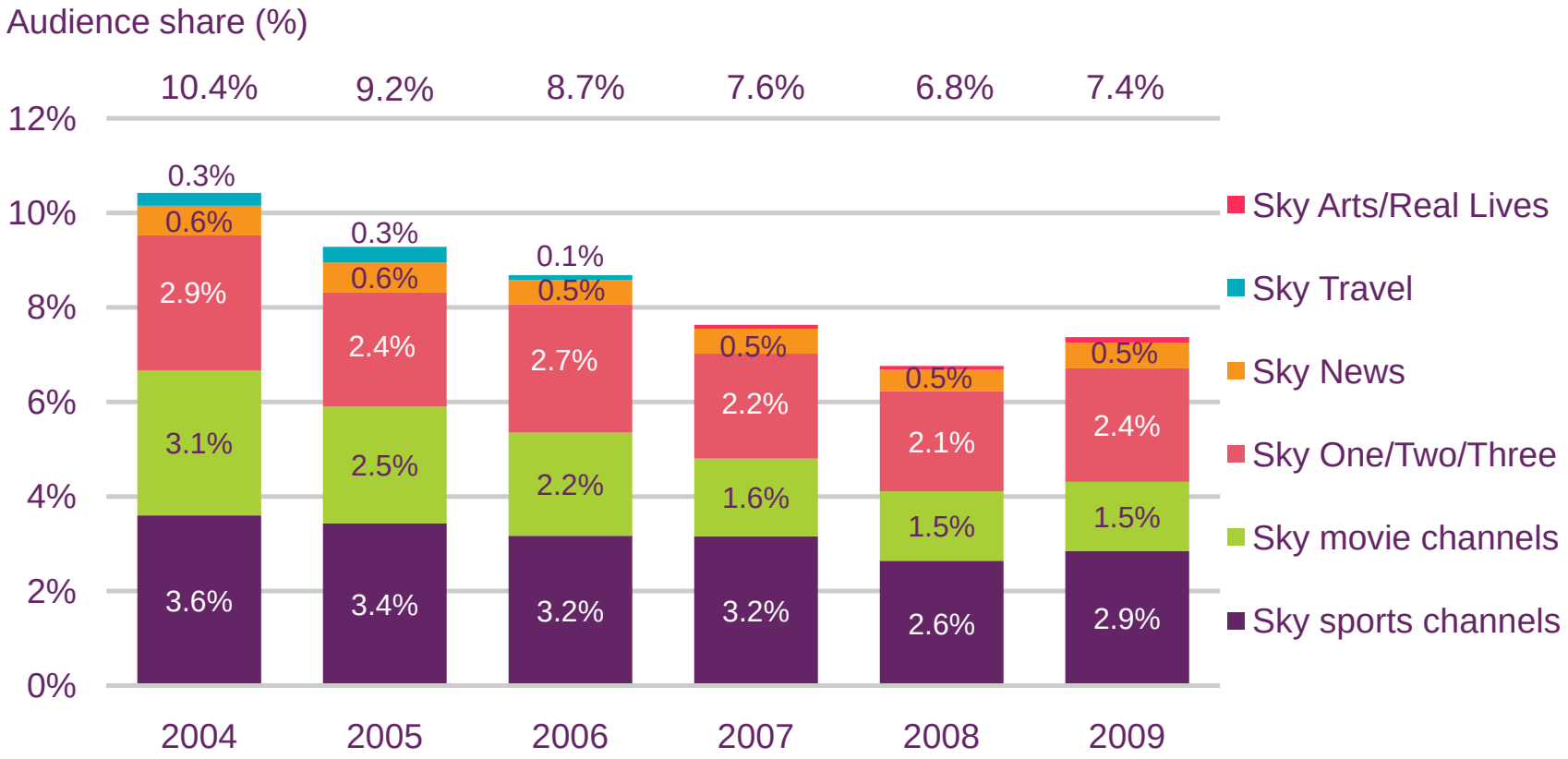


Source: BARB

Note: Five Life and Five US include their +1 service share

Figure 2.82

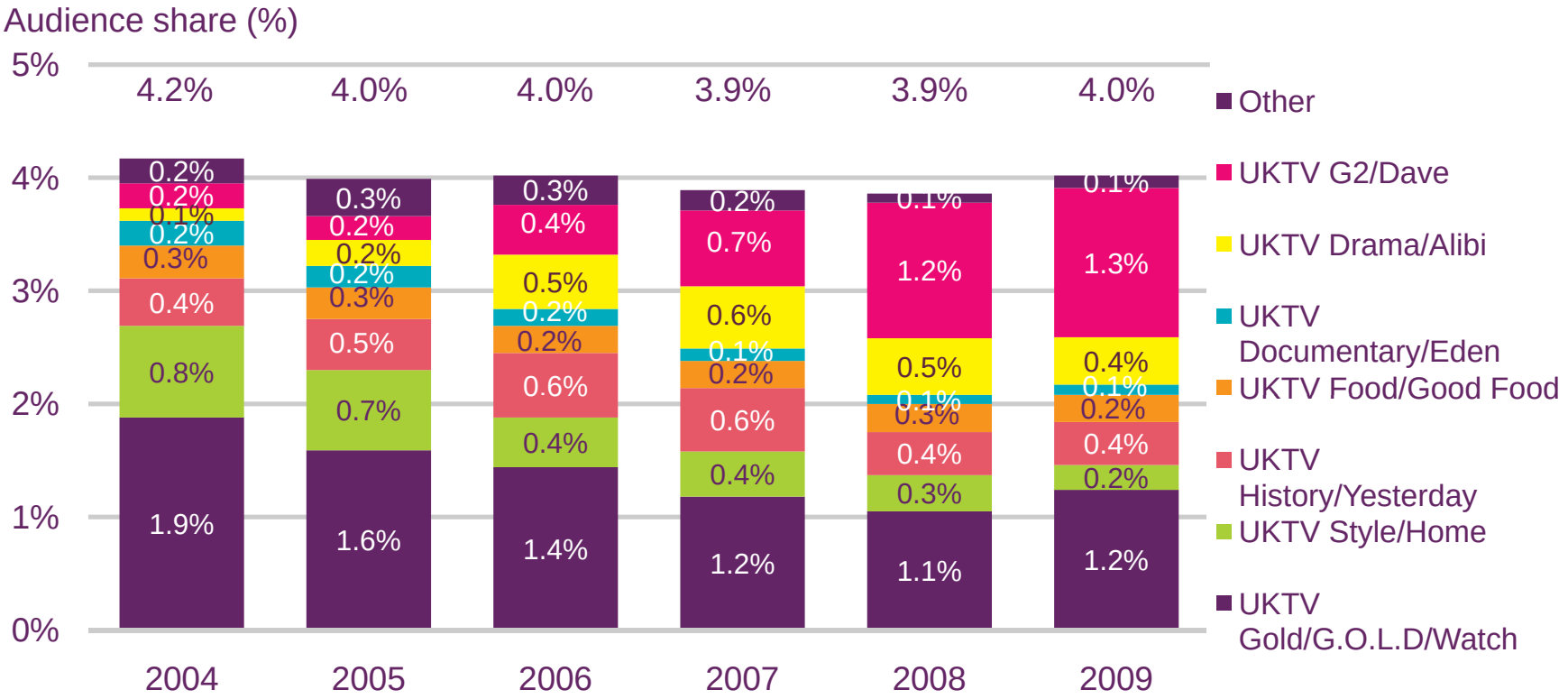
BSkyB portfolio shares in multichannel homes



Source: BARB

Figure 2.83

UKTV portfolio shares in multichannel homes

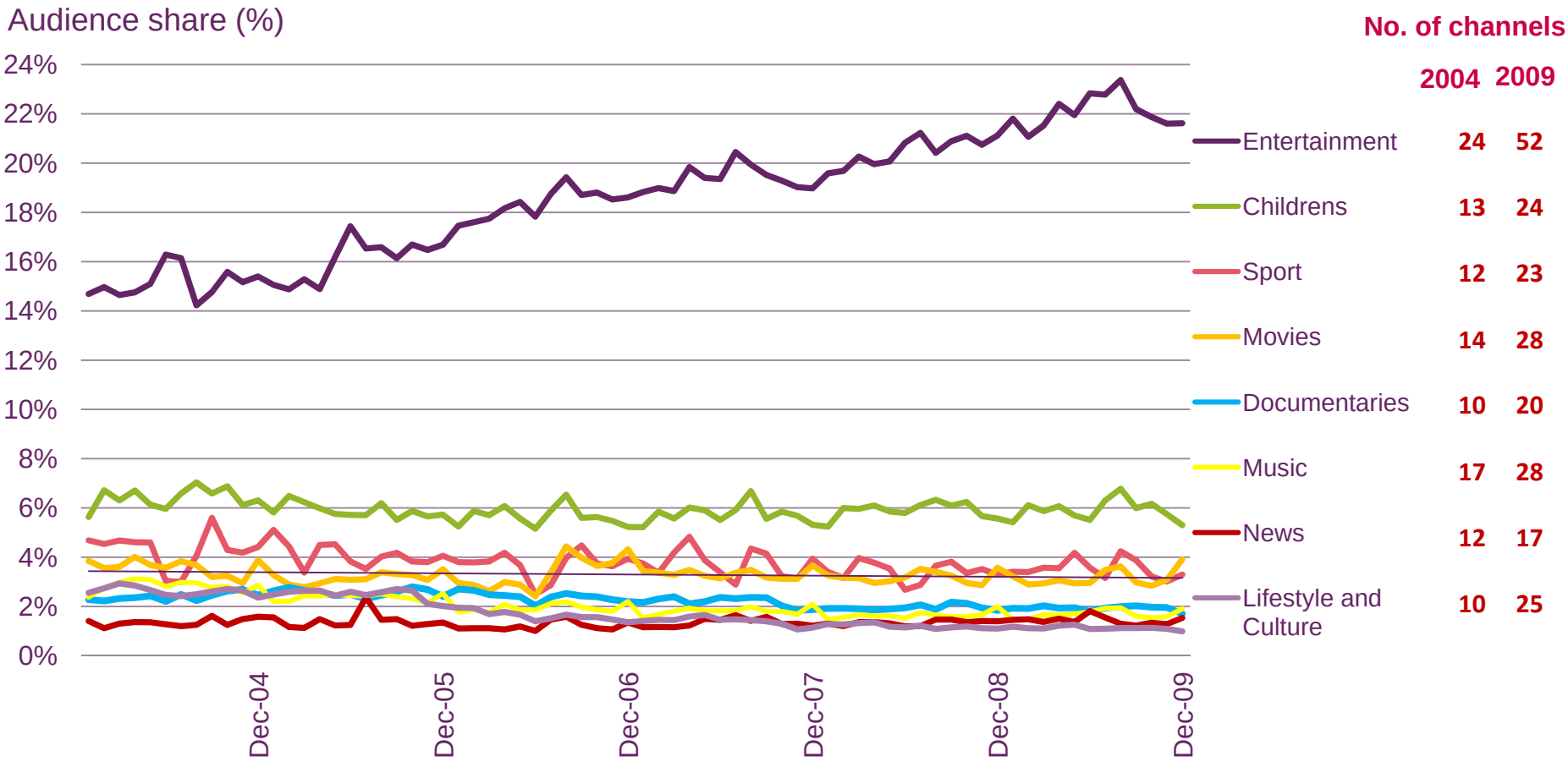


Source: BARB

Note: UKTV portfolio channels have evolved over the past twelve months. In the 2008 figures, new channel names and shares have been matched to old channels. Trends should be interpreted with caution

Figure 2.84

Aggregate shares of channel genres in multichannel homes



Source: BARB

+1 services are not included in the number of channels.

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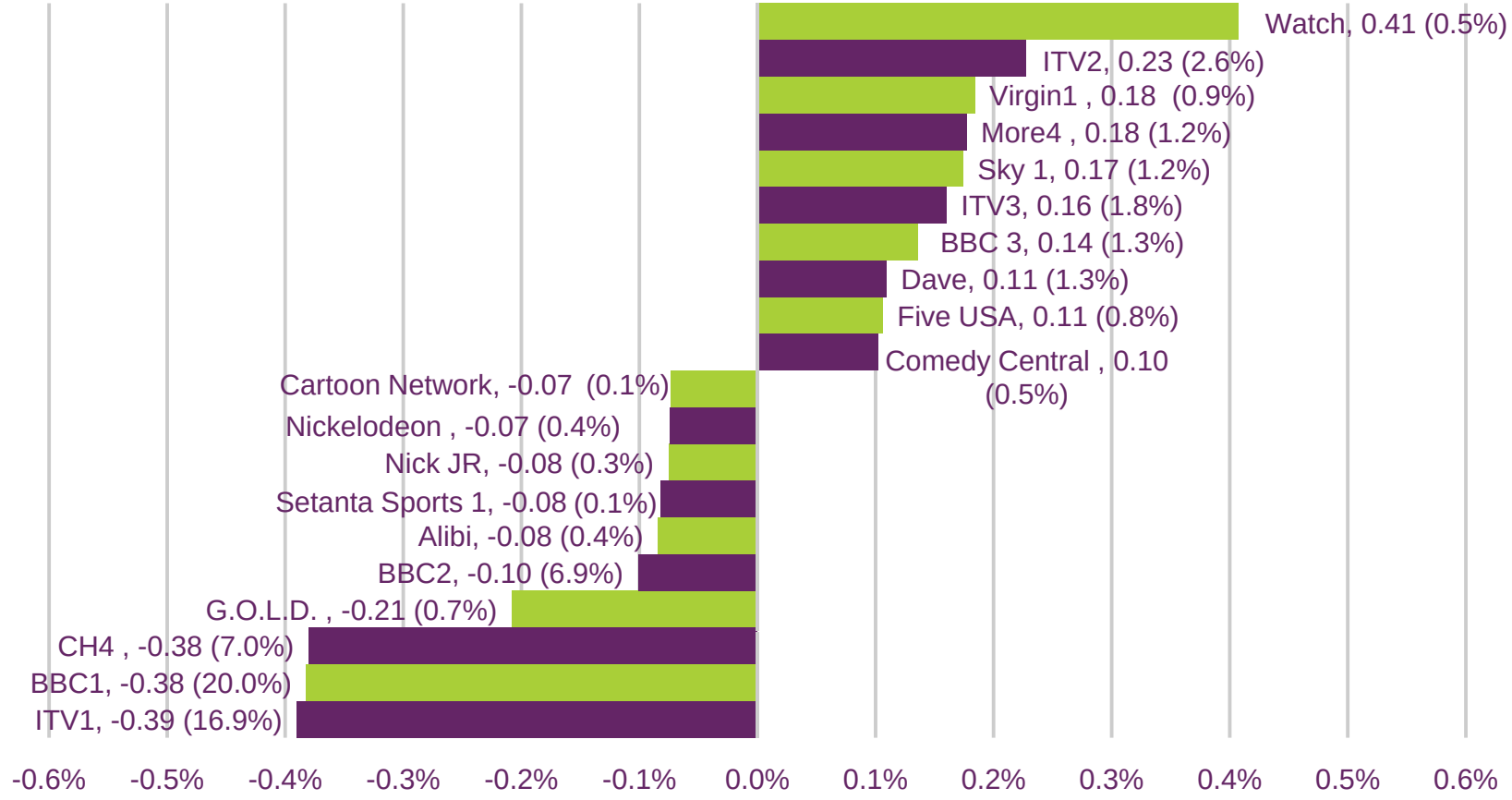
Figure 2.85

Multichannel audience winners and losers, 2008 to 2009

Percentage point change in audience share (2009 average audience share %)



Source: BARB

Note: Includes channel's +1 services

Figure 2.86

The top channels by share in multichannel homes, 2008 to 2009

Channel	Share 2009	Rank 2009	Rank 2008	Channel	Share 2009	Rank 2009	Rank 2008
BBC One	20.0%	1	1	Dave	1.3%	11	11
ITV1	16.9%	2	2	BBC Three	1.3%	12	12
Channel 4	7.0%	3	3	More 4	1.2%	13	13
BBC Two	6.9%	4	4	Sky One	1.2%	14	15
Five	4.7%	5	5	Film4	1.0%	15	14
ITV2	2.6%	6	6	ITV4	0.9%	16	17
E4	1.8%	7	7	Living	0.9%	17	18
ITV3	1.8%	8	8	Virgin1	0.9%	18	22
Sky Sports 1	1.4%	9	9	BBC News	0.8%	19	19
CBeebies	1.3%	10	10	Disney Channel	0.8%	20	20

Source: BARB
Includes channel's +1 services.

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Figure 2.87

Top 20 TV programmes in 2009, based on average audience

No.	Title	Channel	Date	Day	Start time	End time	Aud' (m)
1	BRITAIN'S GOT TALENT FINAL RESULT	ITV1	30/05/2009	Saturday	21:31	22:00	16.5
2	THE X FACTOR RESULTS	ITV1	13/12/2009	Sunday	19:29	21:26	15.6
3	BRITAIN'S GOT TALENT	ITV1	30/05/2009	Saturday	18:45	20:23	14.8
4	THE X FACTOR	ITV1	21/11/2009	Saturday	20:03	21:17	13.5
5	THE ROYLE FAMILY	BBC1	25/12/2009	Friday	21:01	21:59	11.4
6	EASTENDERS	BBC1	25/12/2009	Friday	20:00	20:59	11.3
7	DOCTOR WHO	BBC1	25/12/2009	Friday	17:59	18:58	11.1
8	STRICTLY COME DANCING	BBC1	19/12/2009	Saturday	20:41	21:45	10.7
9	I'M A CELEBRITY - GET ME OUT OF HERE!	ITV1	21/11/2009	Saturday	21:21	22:21	10.4
10	CORONATION STREET	ITV1	16/11/2009	Monday	20:29	20:55	10.3
11	DANCING ON ICE	ITV1	22/03/2009	Sunday	18:55	20:58	10.2
12	I DREAMED A DREAM - THE SUSAN BOYLE STOR	ITV1	13/12/2009	Sunday	21:34	22:33	10.0
13	COMIC RELIEF	BBC1	13/03/2009	Friday	19:00:	21:59	10.0
14	DOC MARTIN	ITV1	08/11/2009	Sunday	21:02	22:00	9.7
15	GAVIN AND STACEY	BBC1	25/12/2009	Friday	22:00	22:29	9.6
16	CHILDREN IN NEED	BBC1	20/11/2009	Friday	19:00	21:59	9.5
17	THE GRUFFALO	BBC1	25/12/2009	Friday	17:31	17:57	9.5
18	THE ROYAL VARIETY PERFORMANCE	ITV1	16/12/2009	Wednesday	19:29	21:58	9.1
19	THE APPRENTICE	BBC1	03/06/2009	Wednesday	21:00	21:59	9.1
20	JONATHAN CREEK	BBC1	01/01/2009	Thursday	20:59	22:58	9.0

Source: BARB. All individuals (4+). Highest occurrence only.

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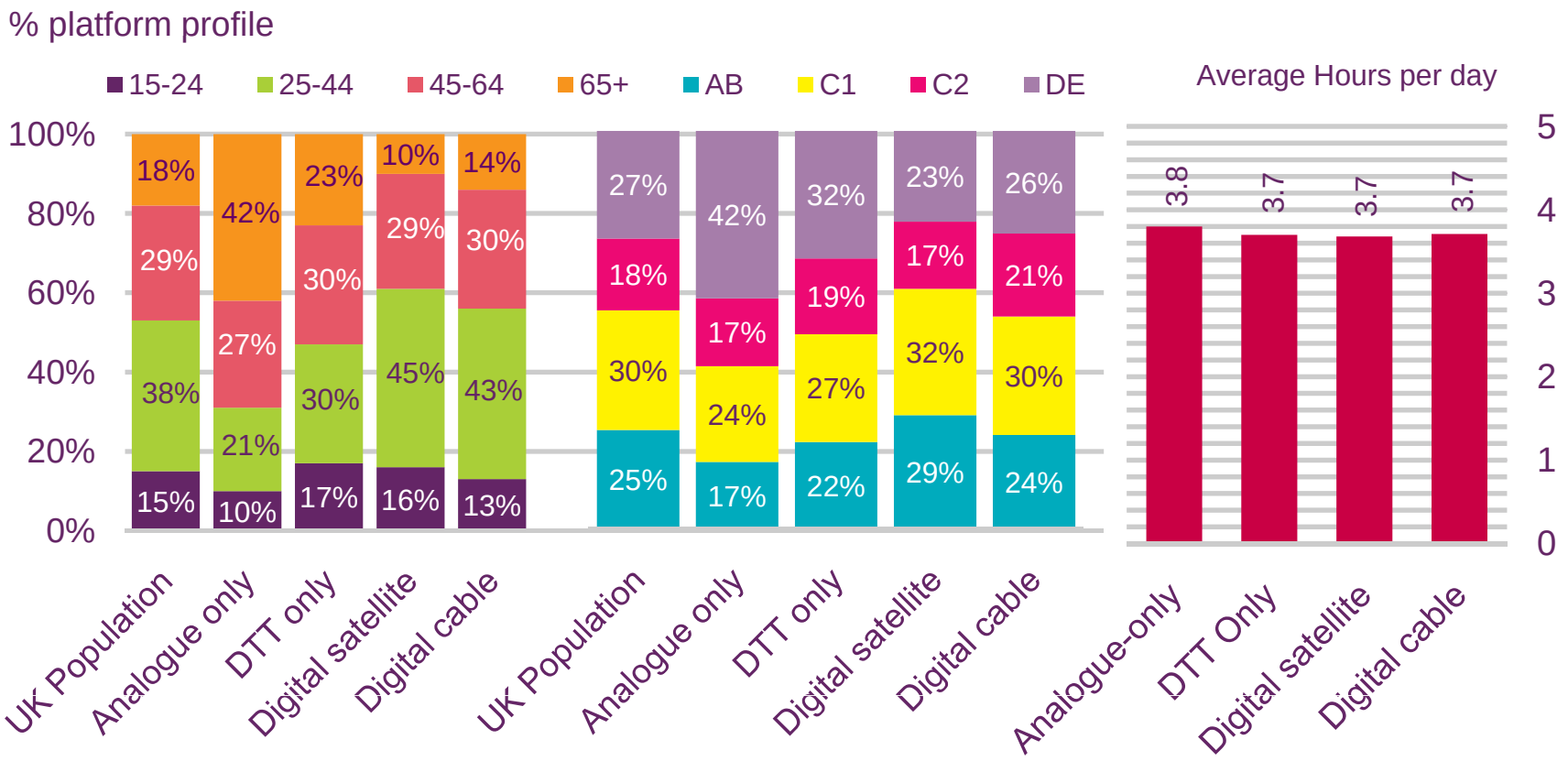
Figure 2.88

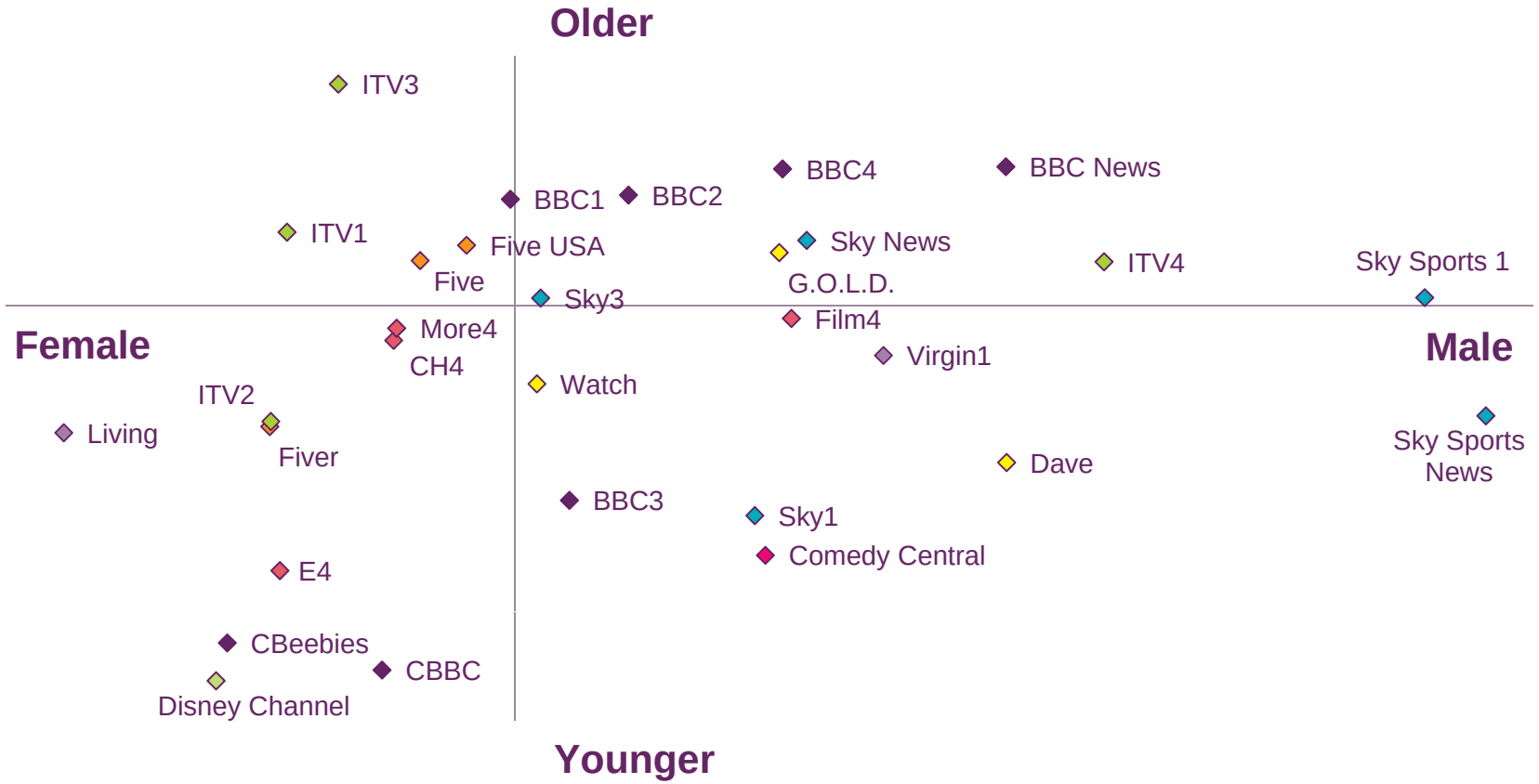
Platform demographics by age, socio-economic group and viewing hours, 2009



Source: Ofcom and BARB

Figure 2.89

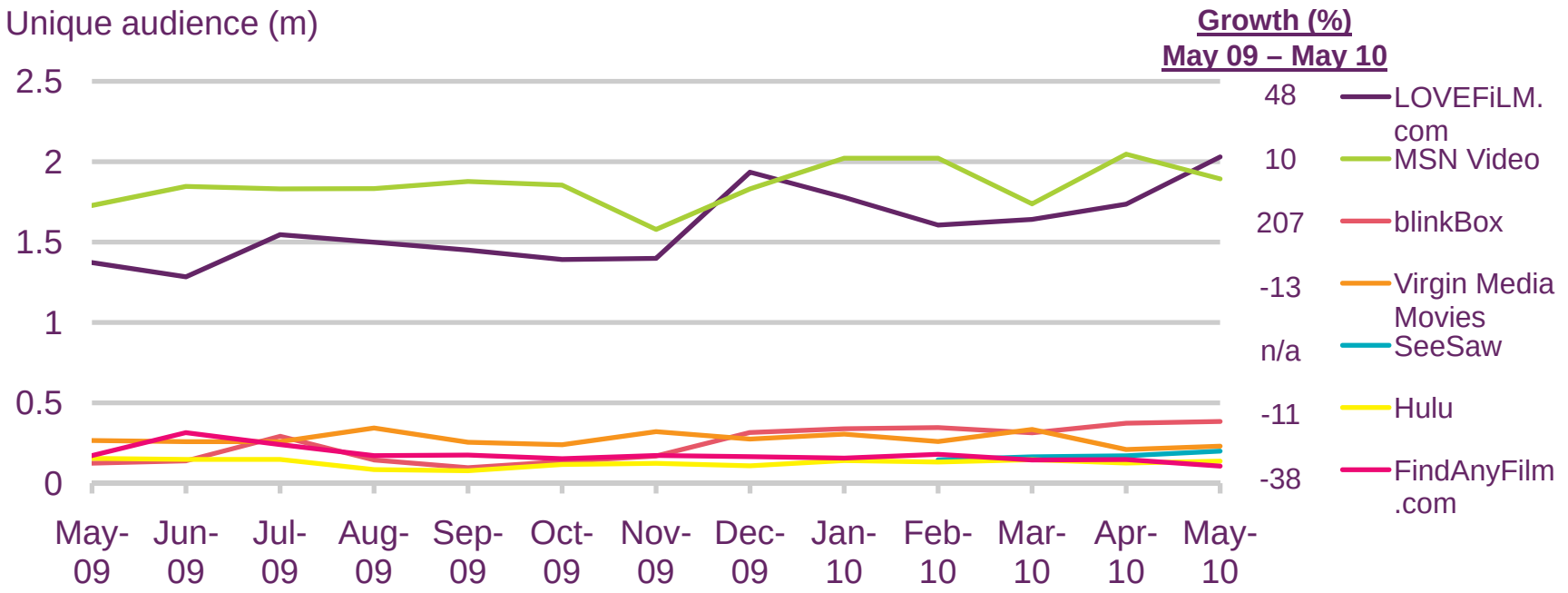
Age and gender profile of the 30 most- viewed channels in multichannel homes



Source: BARB Note: The profile of a channel is calculated relative to the television population in multichannel homes.
Includes channel's +1 services

Figure 2.90

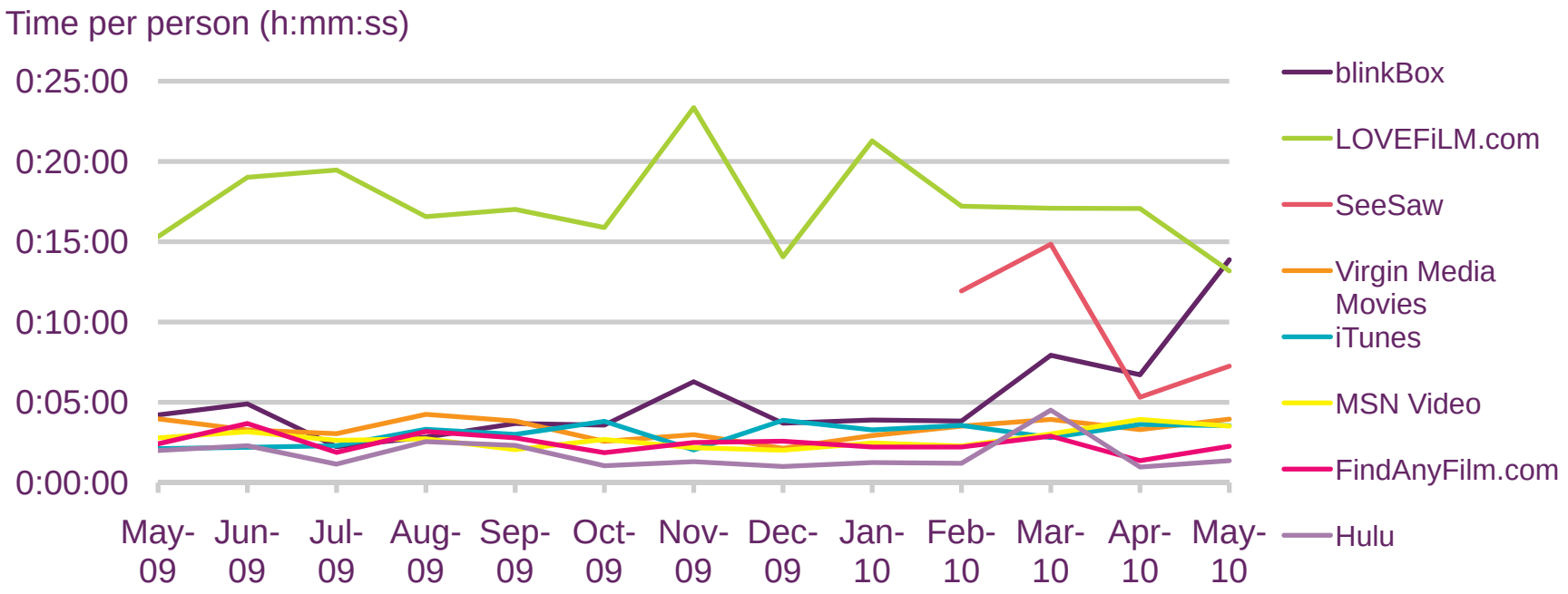
Unique audiences to selected online film and TV sites



Source: UKOM/Nielsen, home and work panel.

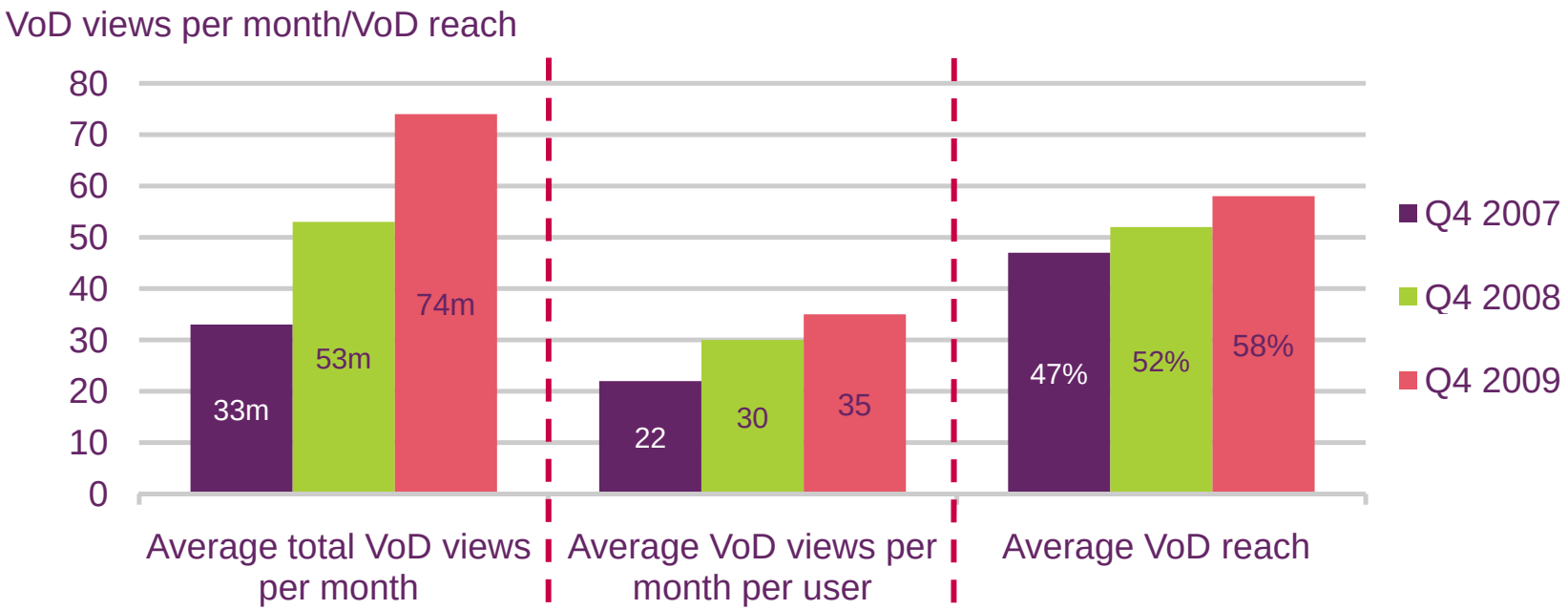
Figure 2.91

Monthly time spent per person on selected online film and TV sites



Source: UKOM/Nielsen, home and work panel.

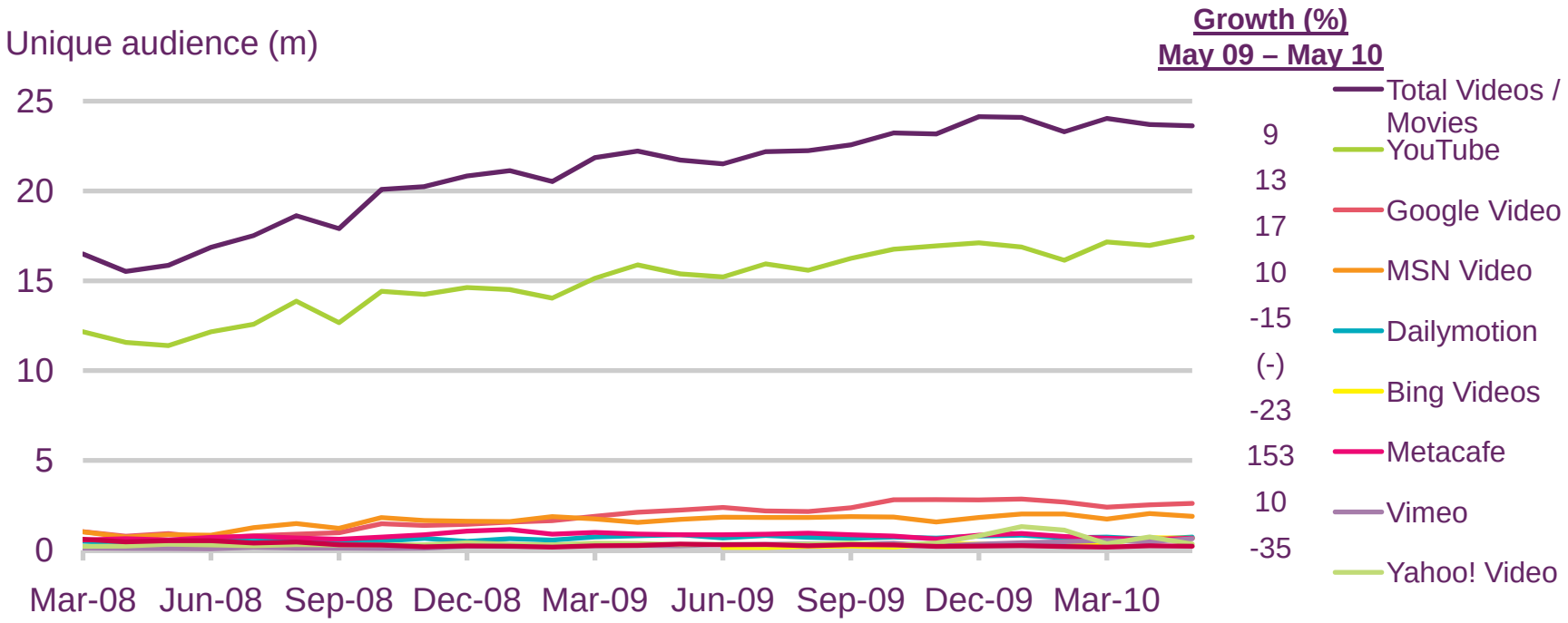
Figure 2.92
Video on-demand use in Virgin Media homes



Source: Virgin Media company results.

Figure 2.93

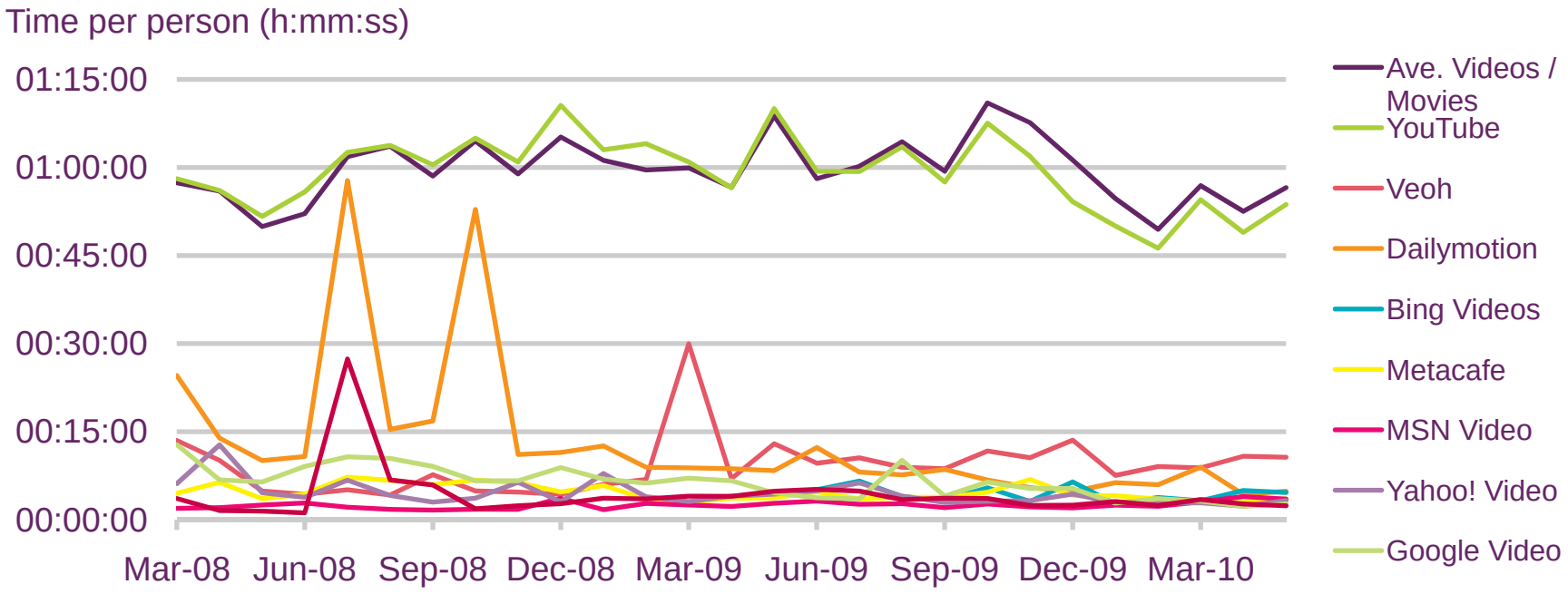
Unique audiences to selected video-sharing sites



Source: UKOM/Nielsen, home and work panel.

Figure 2.94

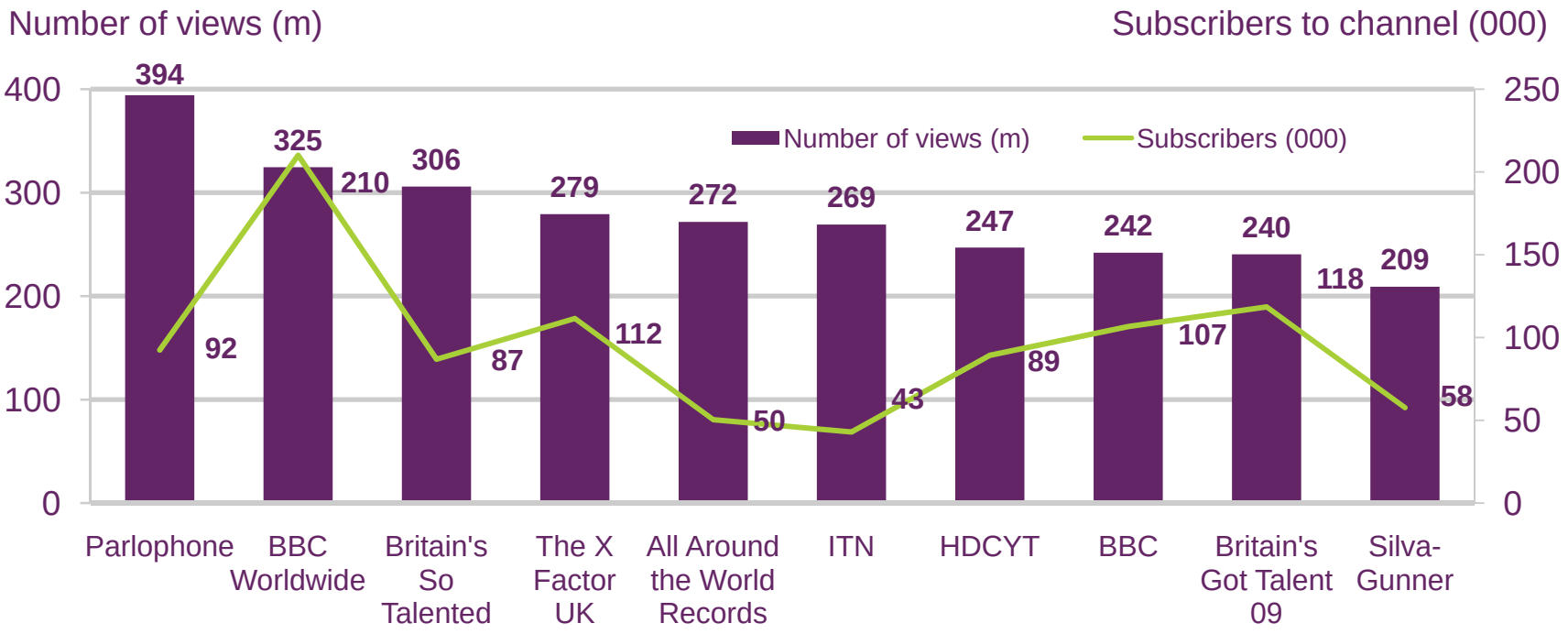
Monthly time spent per person on selected video-sharing sites



Source: UKOM/Nielsen, home and work panel.

Figure 2.95a

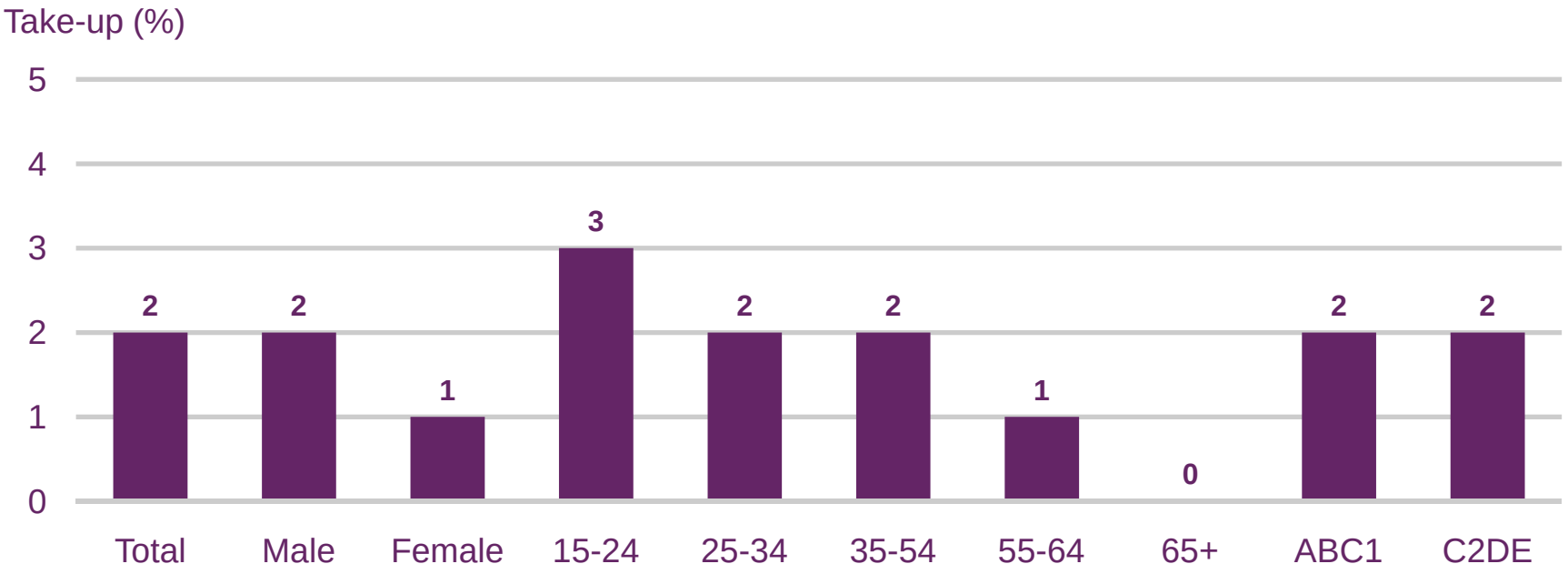
Popularity of top 10 UK YouTube channels



Source: YouTube statistics June 2010

Figure 2.95b

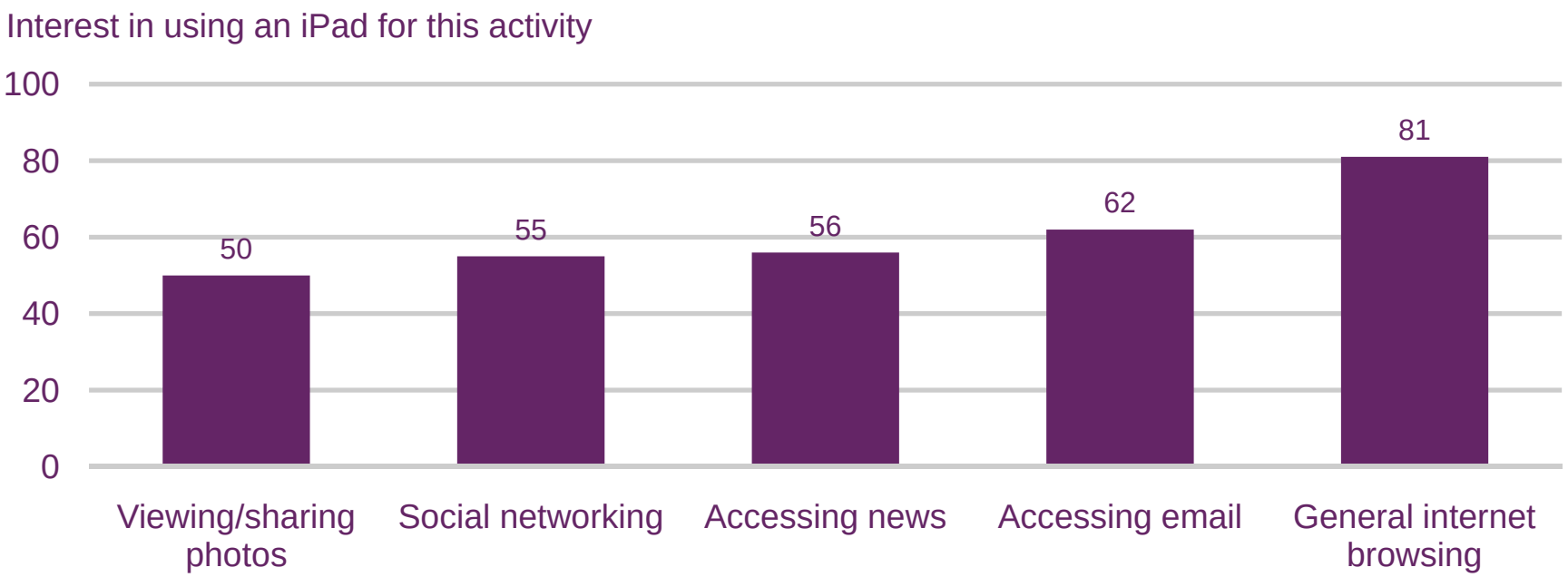
Take-up of e-reader devices



Source: Ofcom research
Base: All adults (6682); males (3204); females (3478); 15-24 (996); 25-44 (2514); 45-64 (1971); 65+ (1200); ABC1 (3633); C2DE (3008).
QB1: Which of the following do you, or does anyone in your household, have in your home at the moment?

Figure 2.95c

Anticipated interest in selected iPad activities (top five)



Source: IPSOS MediaCT
Base: all GB adults 15+ interested in owning an iPad (n=521)

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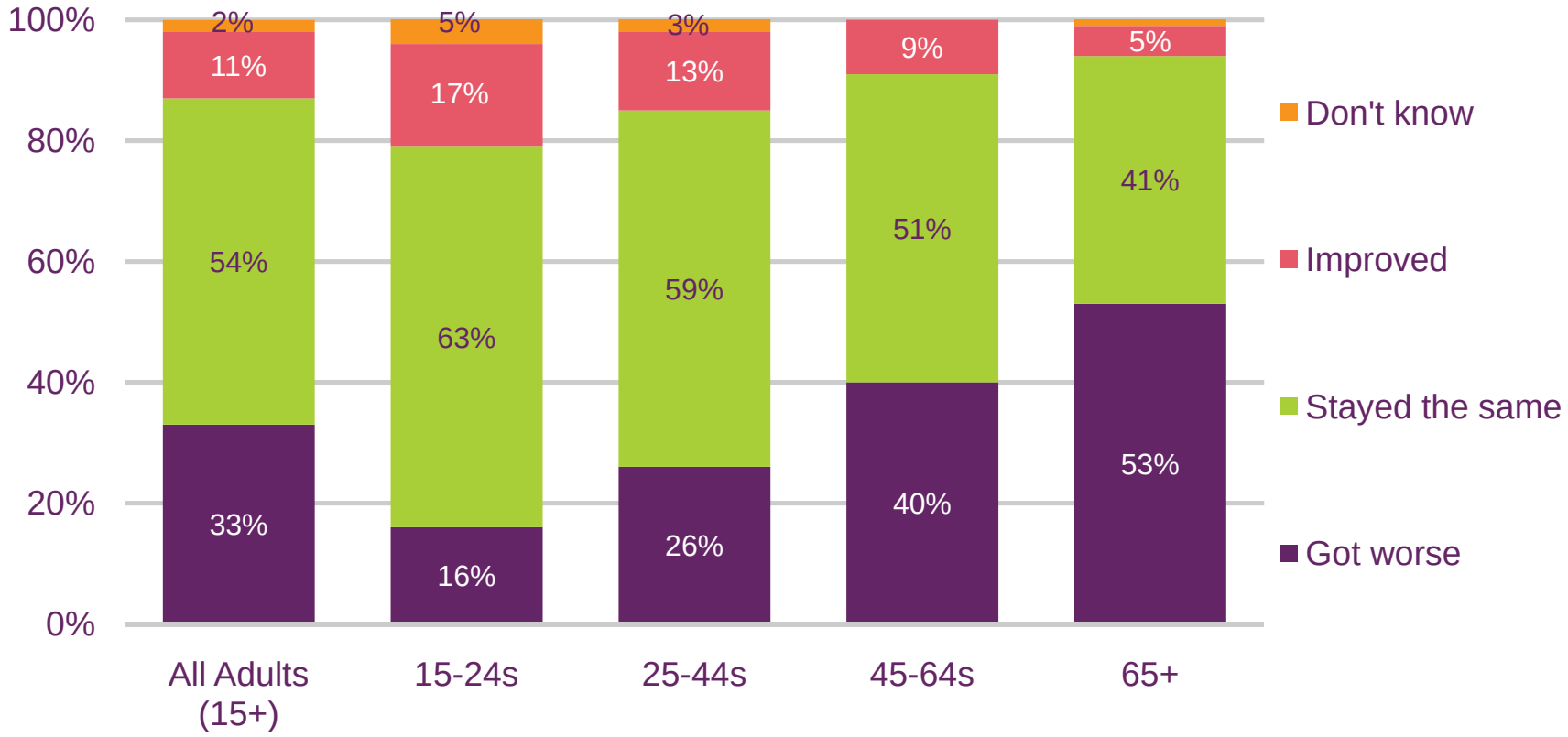
Figure 2.96

Consumer attitudes towards television programme standards, by age, 2009

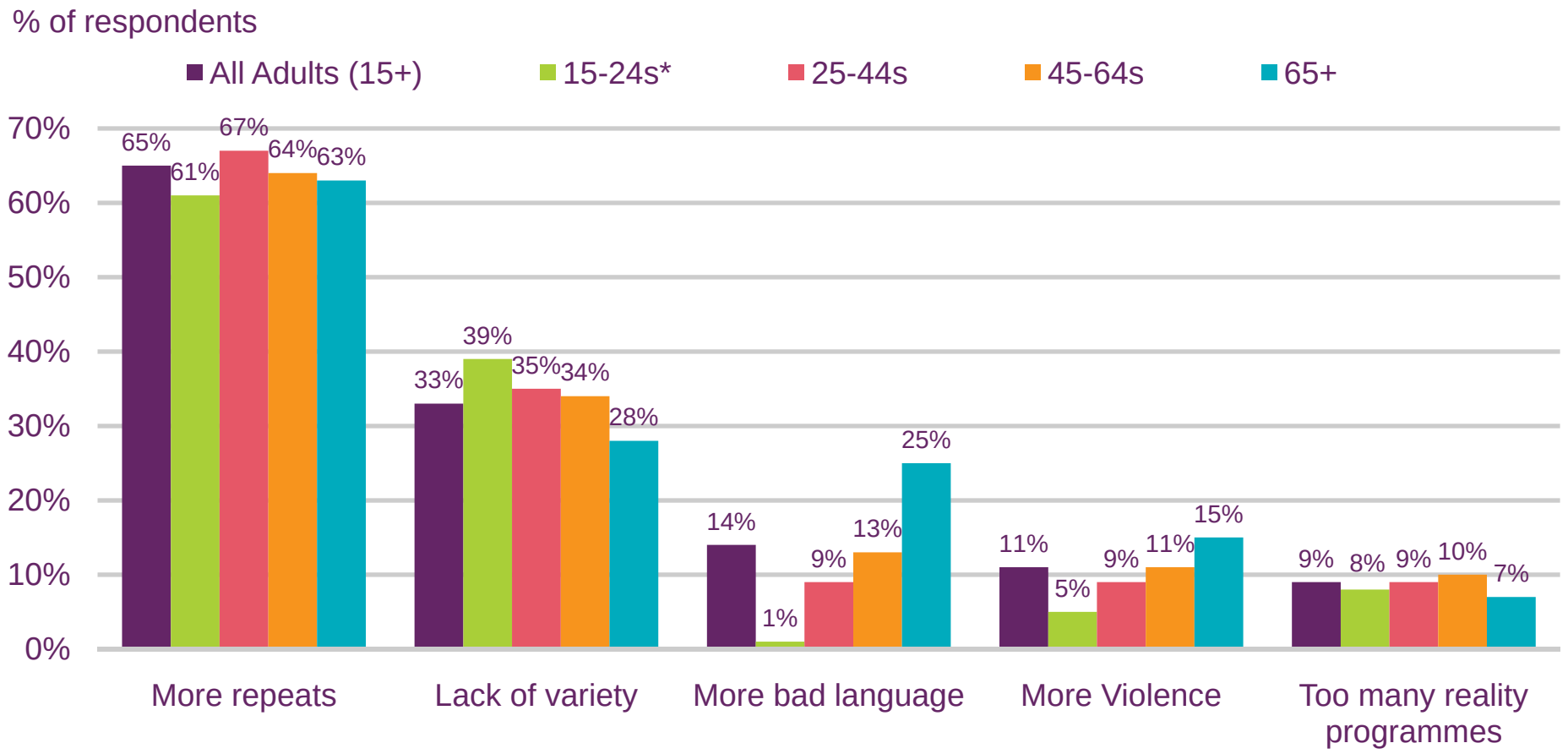
% of respondents



T50 – Do you feel that over the past year, television programmes have improved, got worse or stayed about the same?
Base: All adults aged 15+ (2044) (344 aged 15-24, 749 aged 25-44 ,626 aged 45-64, 325 aged 65+)
Source: Ofcom 2009 Media Tracker survey . Fieldwork carried out by Continental Research, April and October 2009.

Figure 2.97

Reasons why viewers thought TV programme quality deteriorated, 2009



Source: Ofcom 2009 Media Tracker survey . Fieldwork carried out by Continental Research, April and October 2009. T52 – In what ways do you think the television programmes have got WORSE over the past year?

Base: All adults 15+ saying programmes got worse over past year (676) (56 aged 15-24, 197 aged 25-44 , 249 aged 45-64, 174 aged 65+). *NOTE: Sample size for 15-24s extremely small – results only to be used for indicative purposes.

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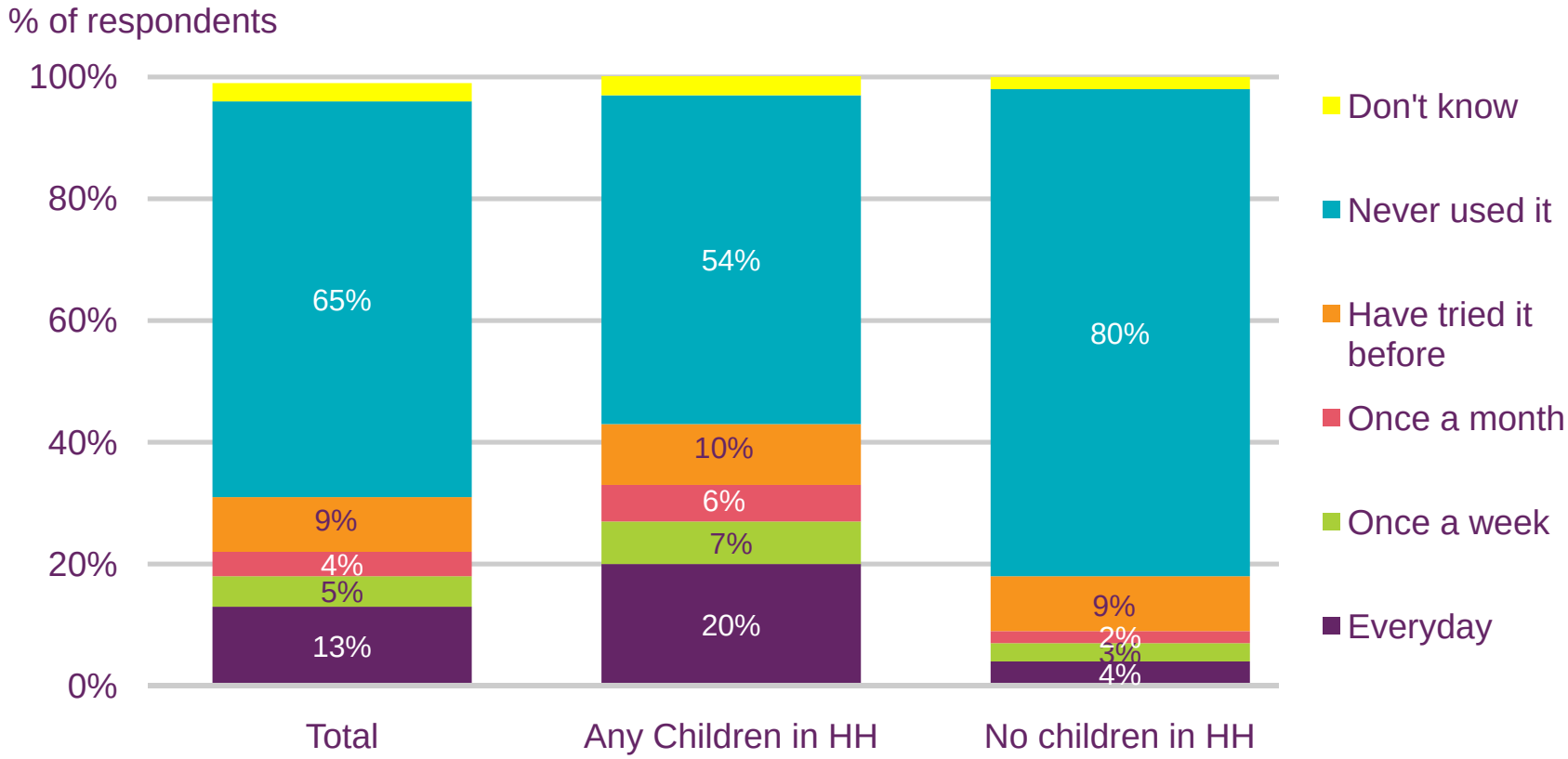
Figure 2.98

PIN/password-protected TV, 2009



T71 – How often, if at all, do you use this system?
Base: All adults 15+ with a feature which enables them to block access to certain channels (882) (507 Any children in Household, 375 No children in household)
Source: Ofcom 2009 Media Tracker survey . Fieldwork carried out by Continental Research, April and October 2009

3. Radio and audio

Figure 3.1

UK radio industry key metrics 2004-2009

UK radio industry	2004	2005	2006	2007	2008	2009
Weekly reach of radio (% of population)	90.3%	90.0%	89.8%	89.8%	89.5%	89.8%
Average weekly hours per head	21.9	21.6	21.2	20.6	20.1	19.8
BBC share of listening	55.5%	54.5%	54.7%	55.0%	55.7%	55.3%
Total industry revenue (£m)	1,158	1,156	1,126	1,175	1,131	1,092
Commercial revenue (£m)	551	530	512	522	488	432
BBC expenditure (£m)	607	626	614	653	643	660
Radio share of advertising spend	3.5%	3.3%	3.0%	2.9%	2.7%	2.8%
DAB digital radio take-up (households)	5%	10%	16%	22%	30%	33%

Source: Ofcom, RAJAR 2008 (adults aged 15+), BBC, WARC, radio operators 2008

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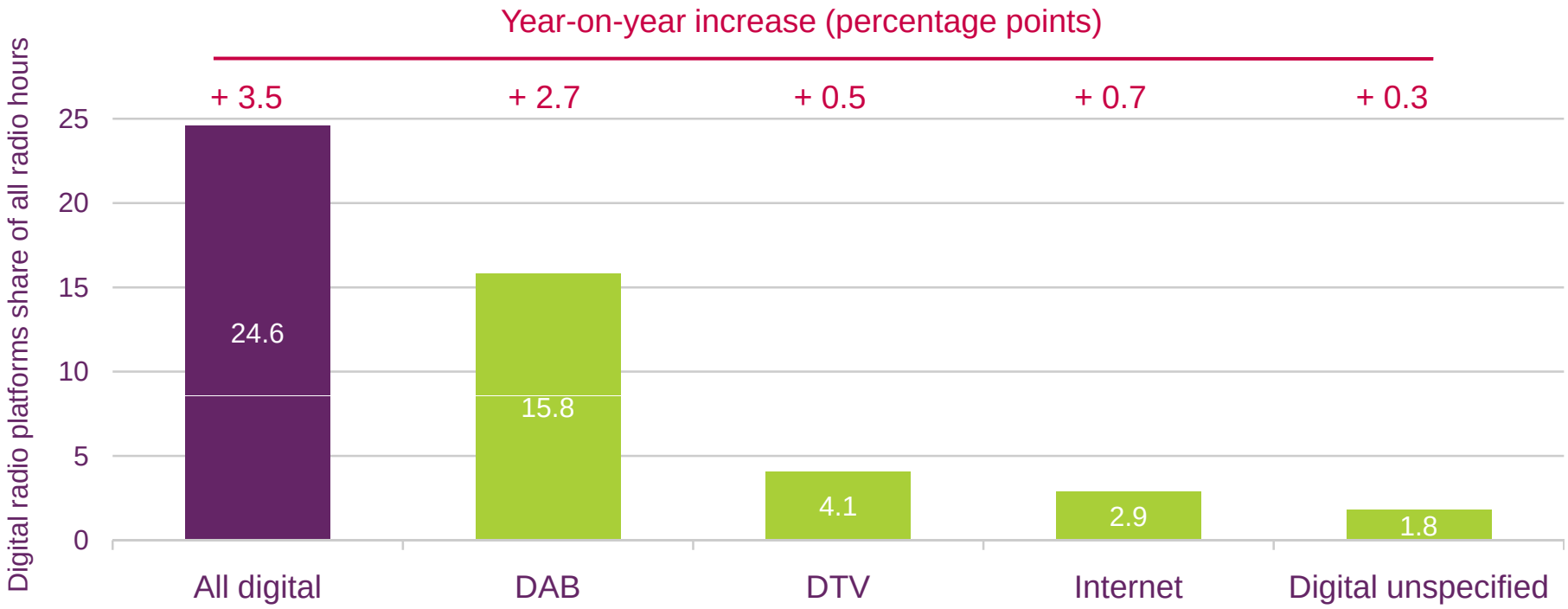
Figure 3.2

Digital radio's share of radio listening, Q2 2010



Source: RAJAR (adult listeners 15+), Q2 2010
Note: 'Digital unspecified' relates to listening to digital-only stations where the survey respondent has not specified the listening platform used.

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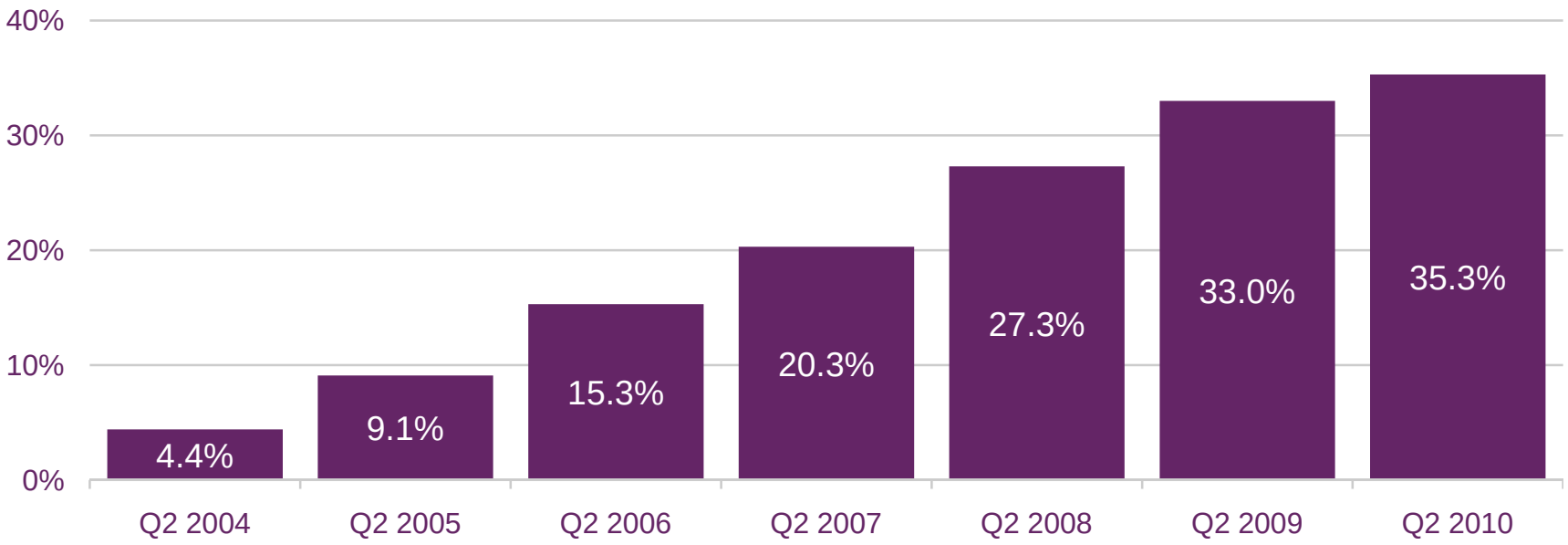
Figure 3.3

Ownership of DAB set, Q2 2010

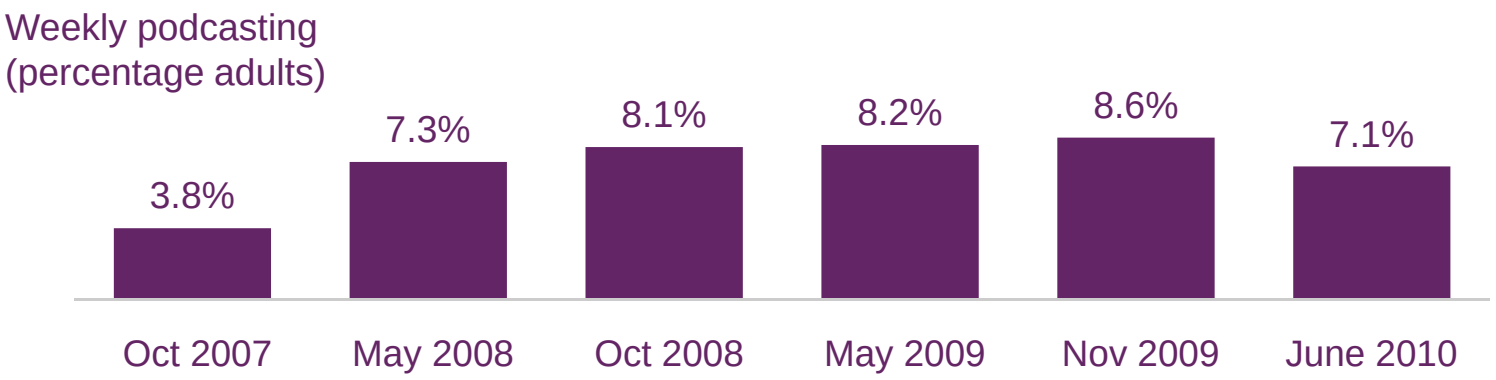
Percentage of adults who claim to own a DAB set / have a DAB set in the home



Source: RAJAR / Ipsos MORI / RSMB Q1 2004-2010.

Figure 3.4

Listening to podcasts



Source: RAJAR / Ipsos MORI, 'Measurement of Internet Delivered Audio Services (MIDAS 6)', conducted during June 2010, and previously Nov 2009, May 2009, October 2008, May 2008, and October 2007.

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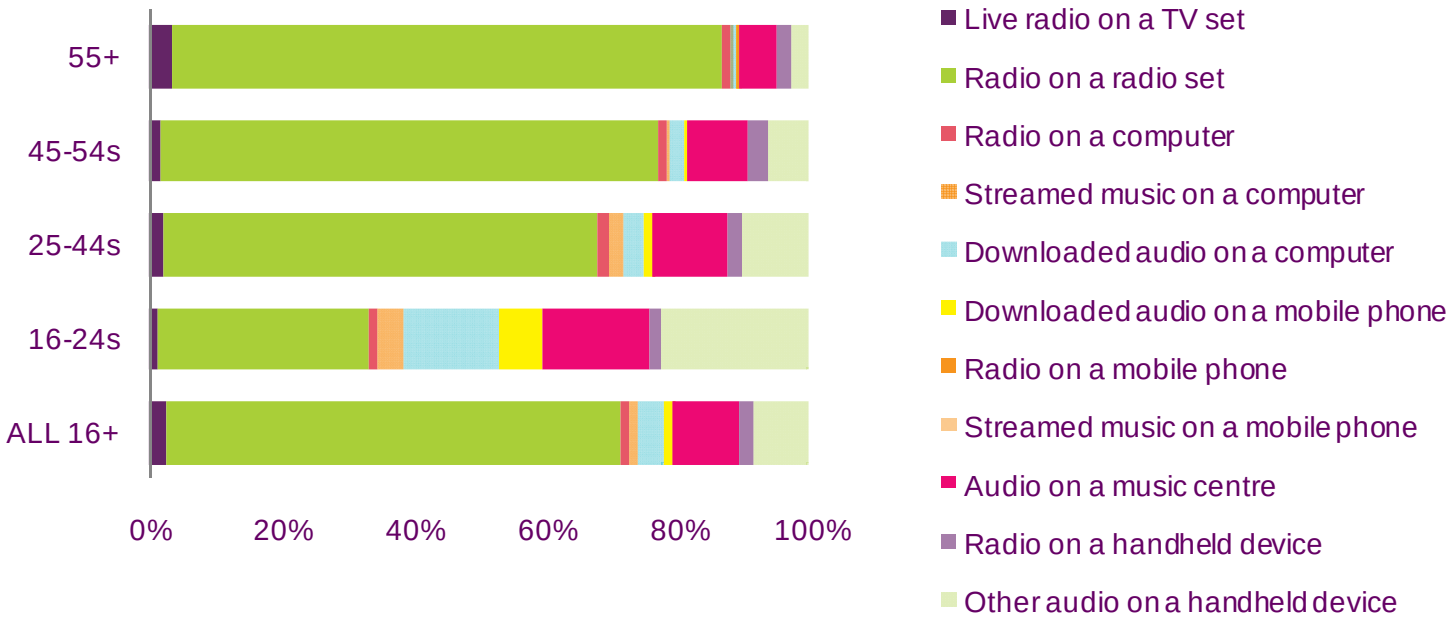
Figure 3.5

Proportion of listening time, by age and activity

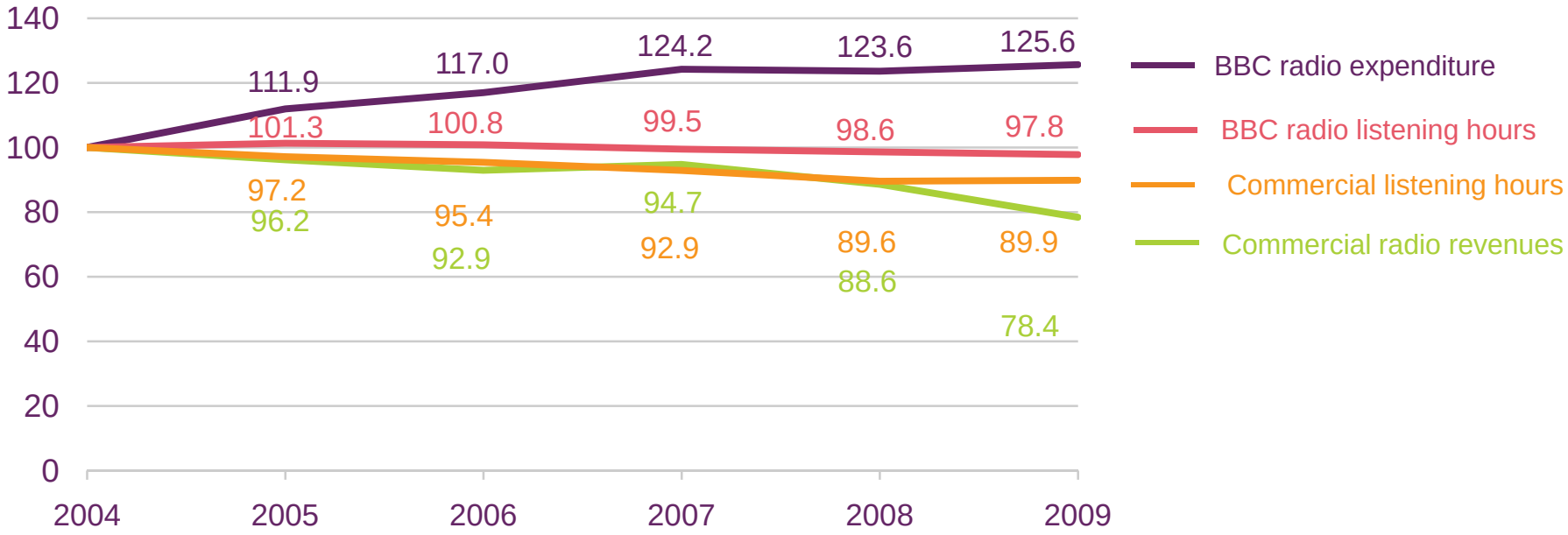


Source: Ofcom research June 2010
Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 3.6

BBC and commercial listening / income, indexed against 2004 figures

Listening hours and radio income / funding (as an index from 2004)



Source: Listening data based on RAJAR (Adults 15+). Funding share data based on commercial radio revenues and estimated BBC expenditure on radio for 2009.

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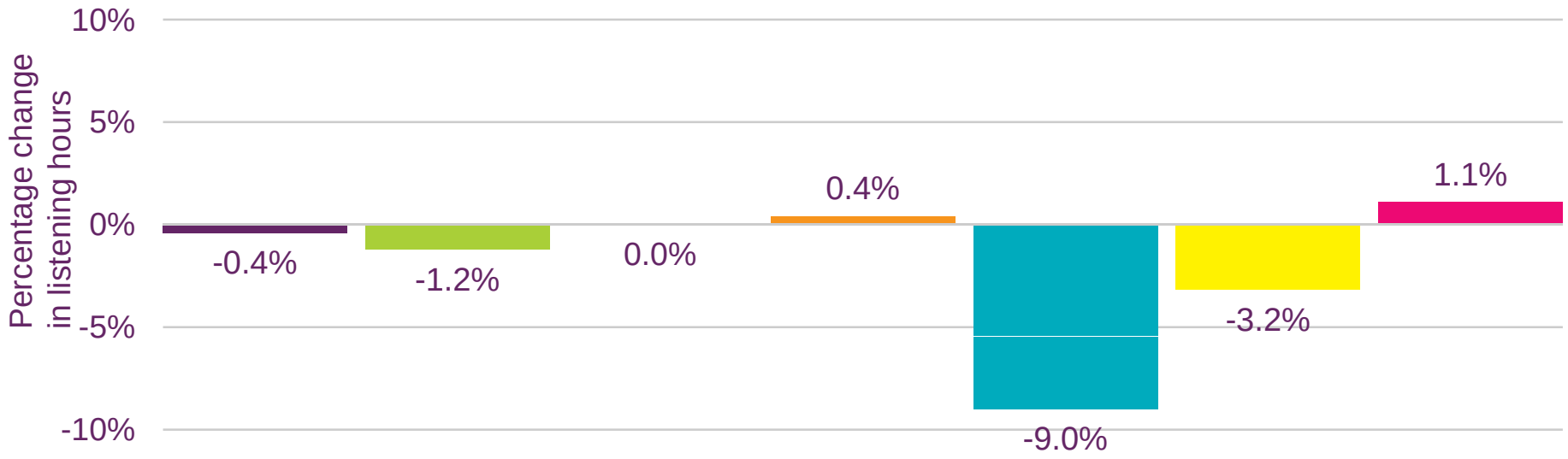
Figure 3.7

Change in listening hours 2008-2009

	All Radio	All BBC	All Commercial	BBC network	BBC local	Nat commercial	Local commerc
Share of all radio hours:	100%	55.3%	42.3%	46.6%	8.7%	10.6%	31.8%



Source: RAJAR, (all listeners aged 15+). Data based on calendar year 2008 - 2009

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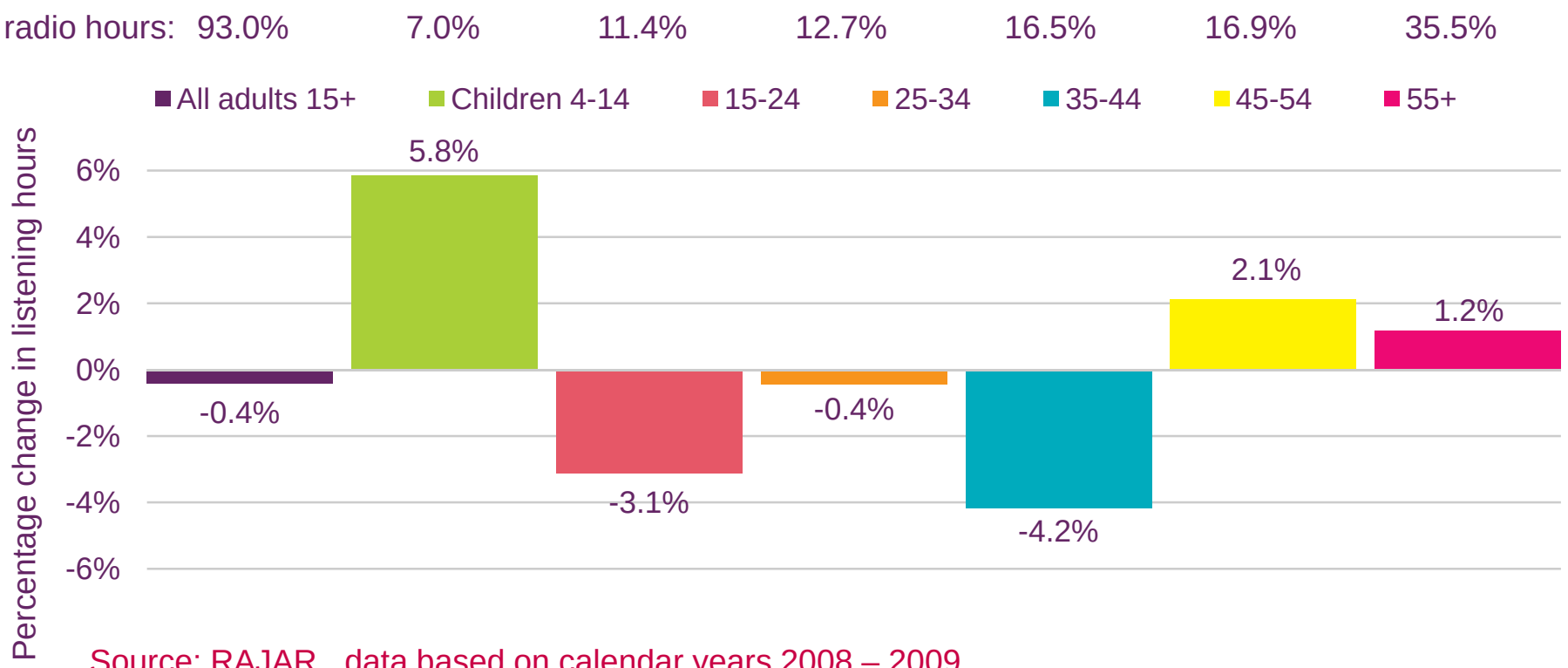
Figure 3.8

Changes in listening hours, 2009 vs. 2008, by age group



Source: RAJAR , data based on calendar years 2008 – 2009

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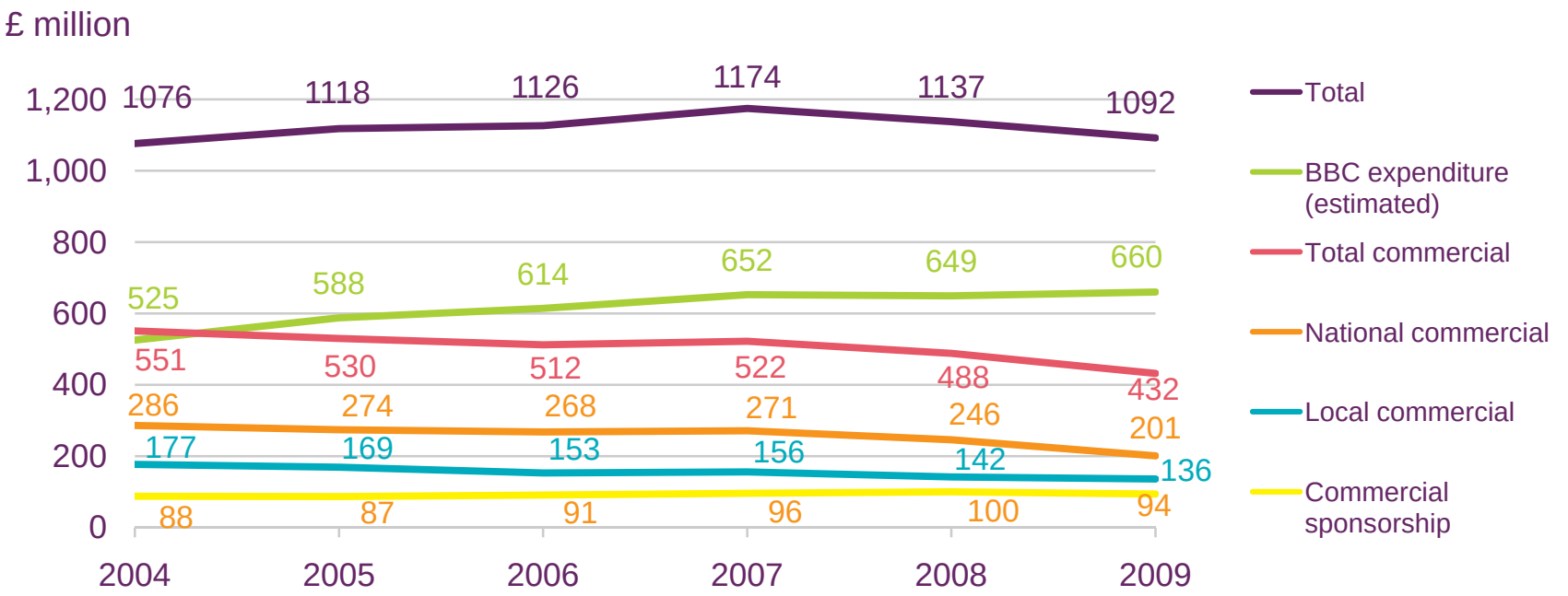
Figure 3.9

UK commercial radio revenue and BBC radio spending



Source: Ofcom / operator data / BBC, 2004-2009
Notes: BBC expenditure figures are estimated by Ofcom based on figures supplied by the BBC; figures in the chart are rounded.

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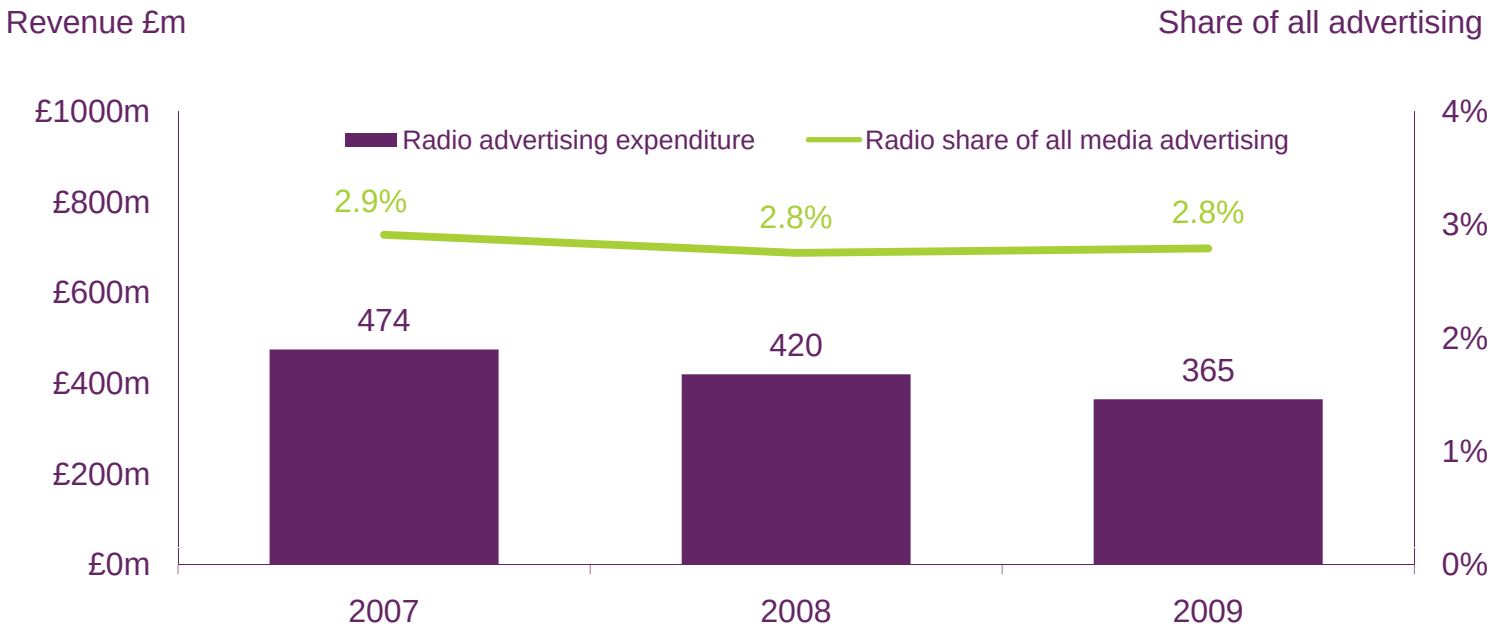
Figure 3.10

UK radio advertising spend and share of display advertising, 2007 – 2009, (based on 2005 prices)



Source: WARC (World Advertising Research Council), data based on constant 2005 prices

Figure 3.11

Commercial radio revenue per listener

Source: Licensee revenue data and RAJAR listening data, 2004-2009

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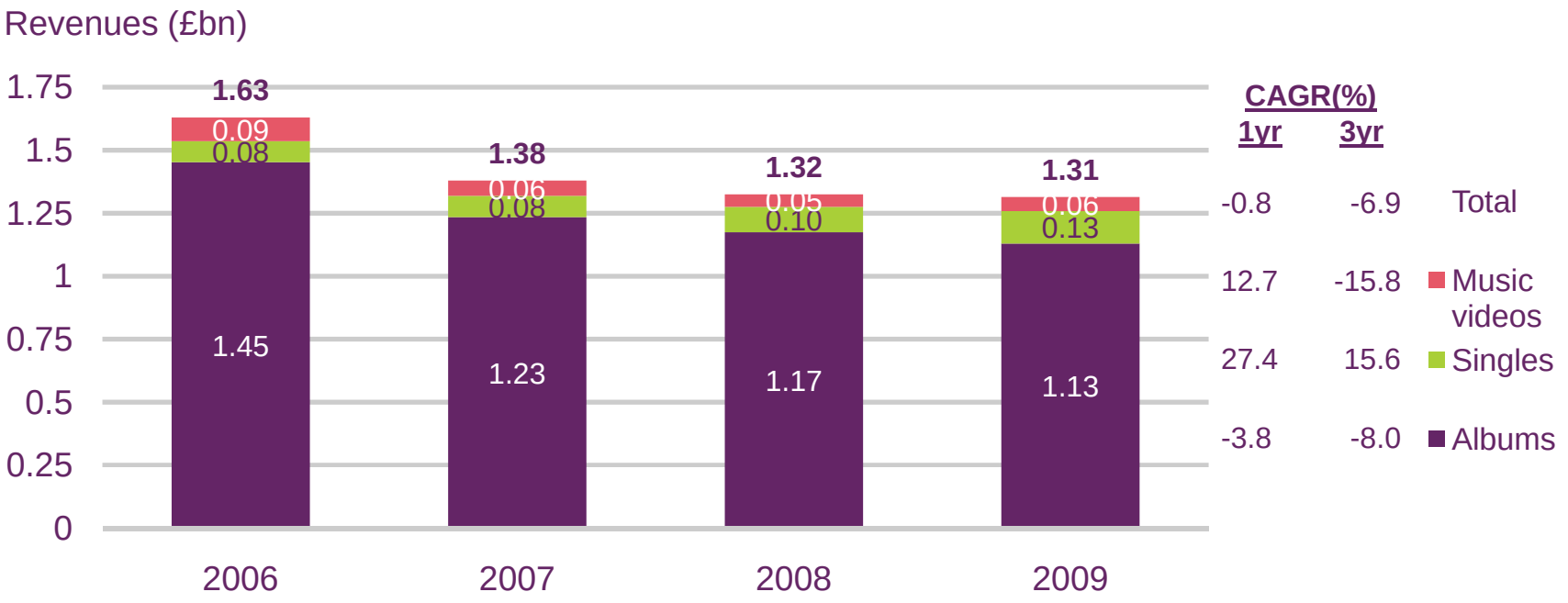
Figure 3.12

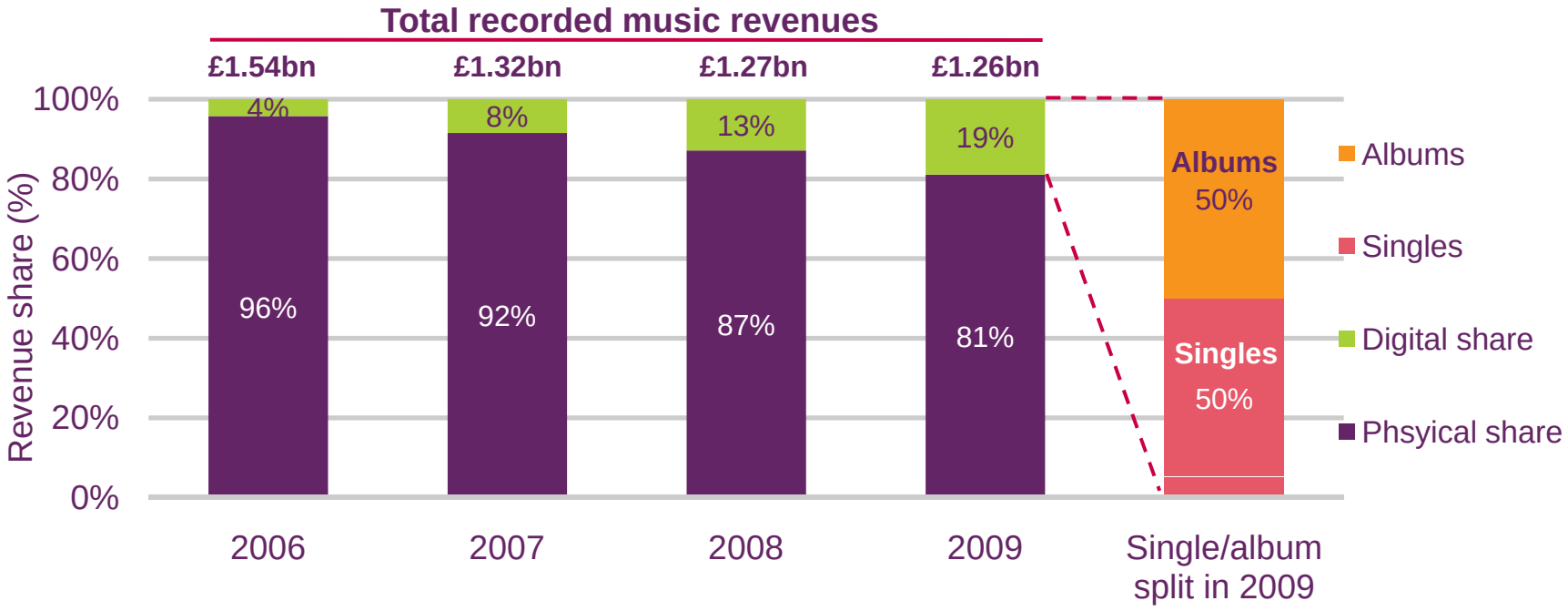
Recorded music retail revenues, 2006-2009



Source: Entertainment Retailers' Association yearbook, 2010.

Figure 3.13

Distribution of recorded music retail revenues, 2006-2009



Source: Entertainment Retailers' Association yearbook 2010
Note: This chart does not include revenues from music videos.

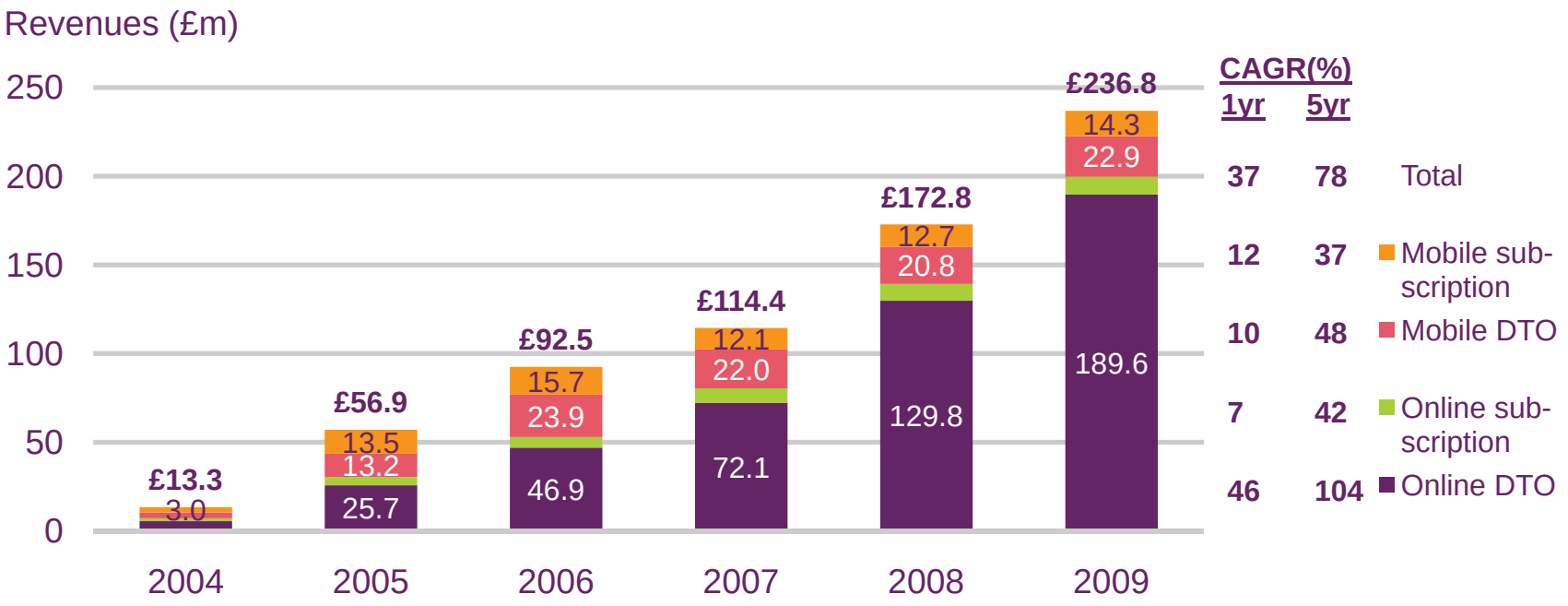
Figure 3.14

Recorded music sales by volume, 2006-2009

Source: Entertainment Retailers' Association yearbook 2010

Figure 3.15

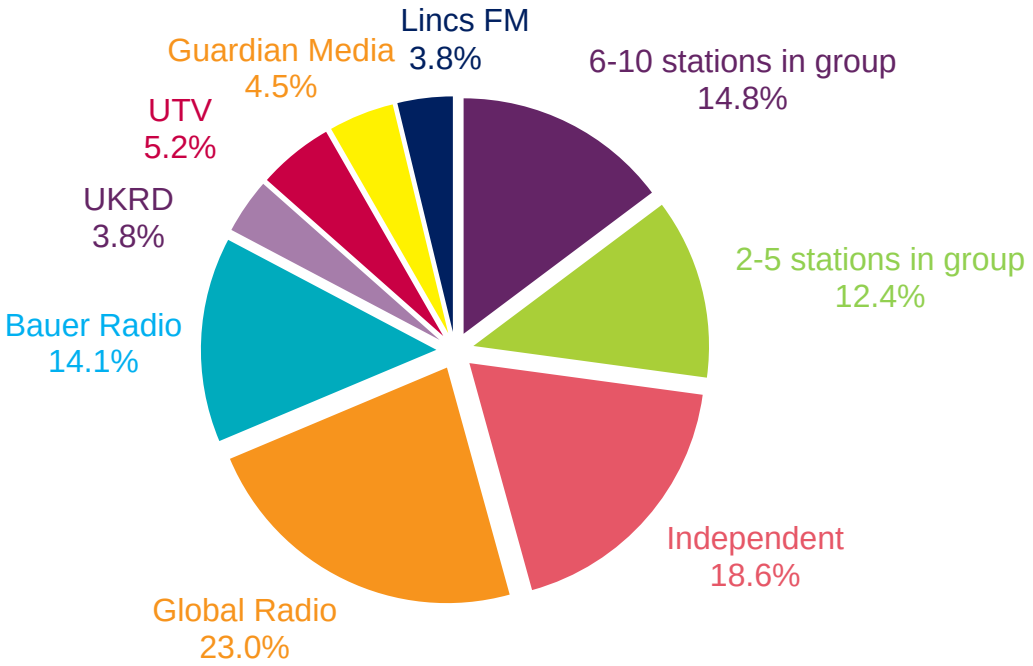
Digital music revenues by business model, 2006-2009



Source: Screen Digest
Note: excludes revenue from ad-supported services. Due to different data sources this chart is not directly comparable with previous charts.

Figure 3.16

Number of commercial analogue stations owned, by group



Source: Ofcom, July 2010
Note: The percentages are derived from a universe of analogue stations rather than licences

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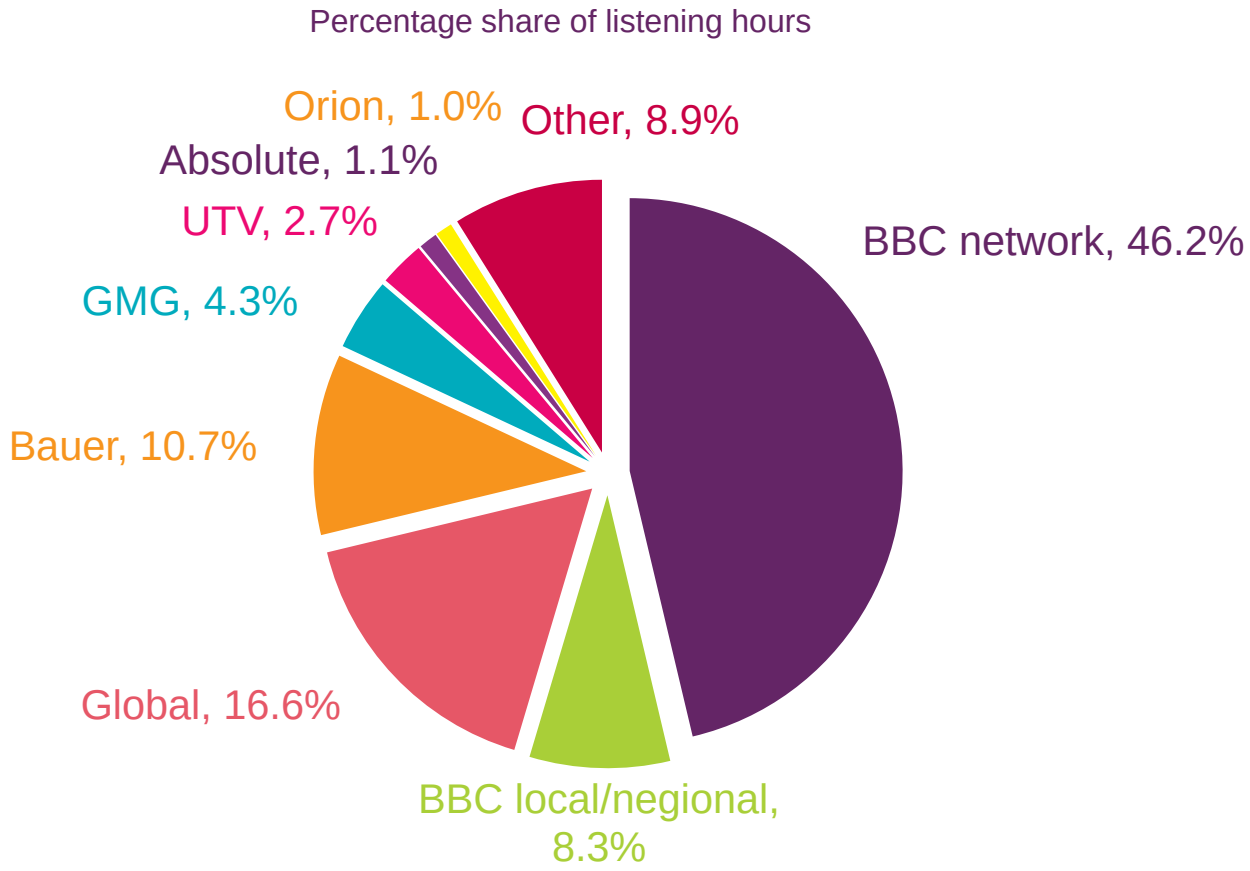
Figure 3.17

Share of all radio listening hours, Q2 2010



Source: RAJAR Q1 2010

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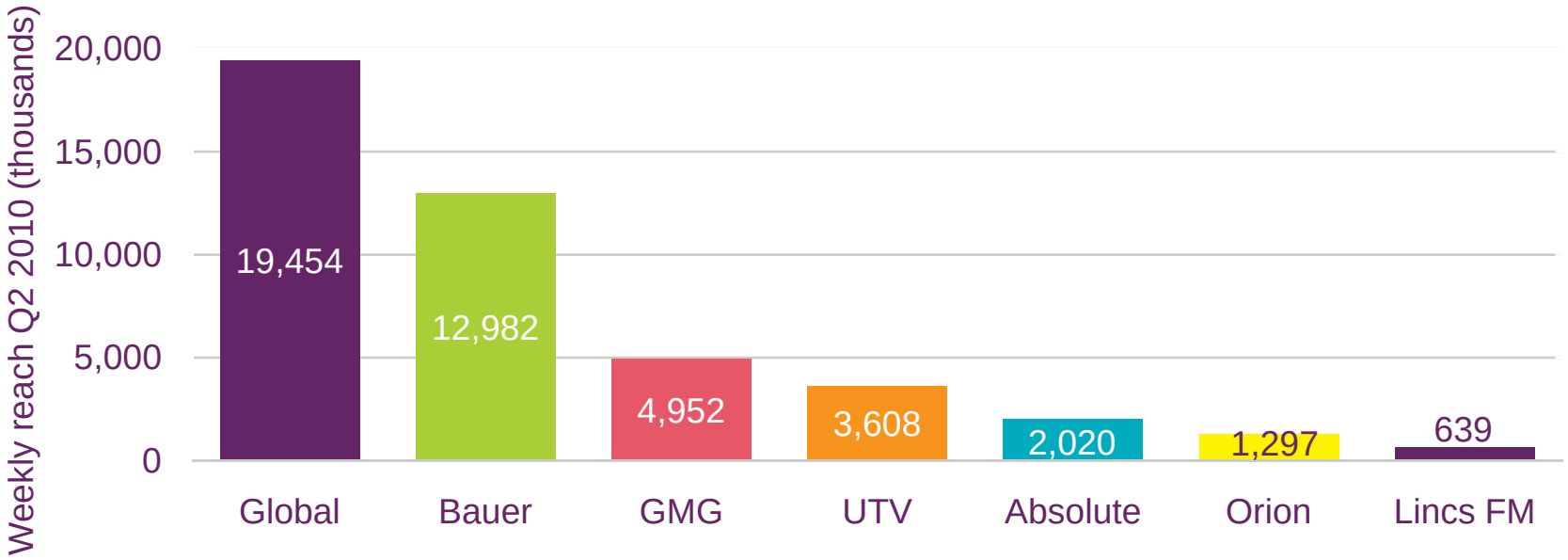
Figure 3.18

Commercial radio: weekly audience reach, Q2 2010

	Global	Bauer	GMG	UTV	Absolute	Orion	Lincs FM
Weekly UK audience reach	37.7%	25.2%	9.6%	7.0%	3.9%	2.5%	1.2%
Annual change in reach	+ 0.5pp	+ 0.5pp	- 0.2pp	- 0.1pp	+ 0.2pp	n/a	- 0.1pp



Source: RAJAR Q2 2010, adults

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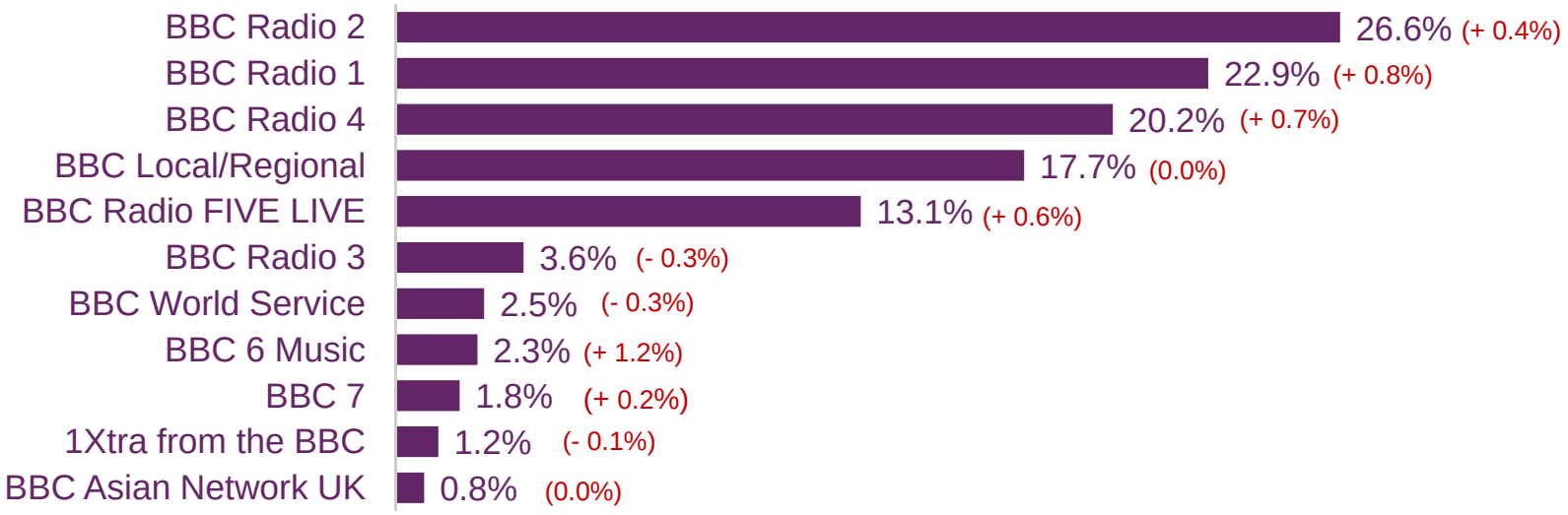
Figure 3.19

Weekly reach of BBC stations, Q2 2010

Average weekly listening (% UK adults), and year on year change



Source: RAJAR Q2 2010, adults 15+

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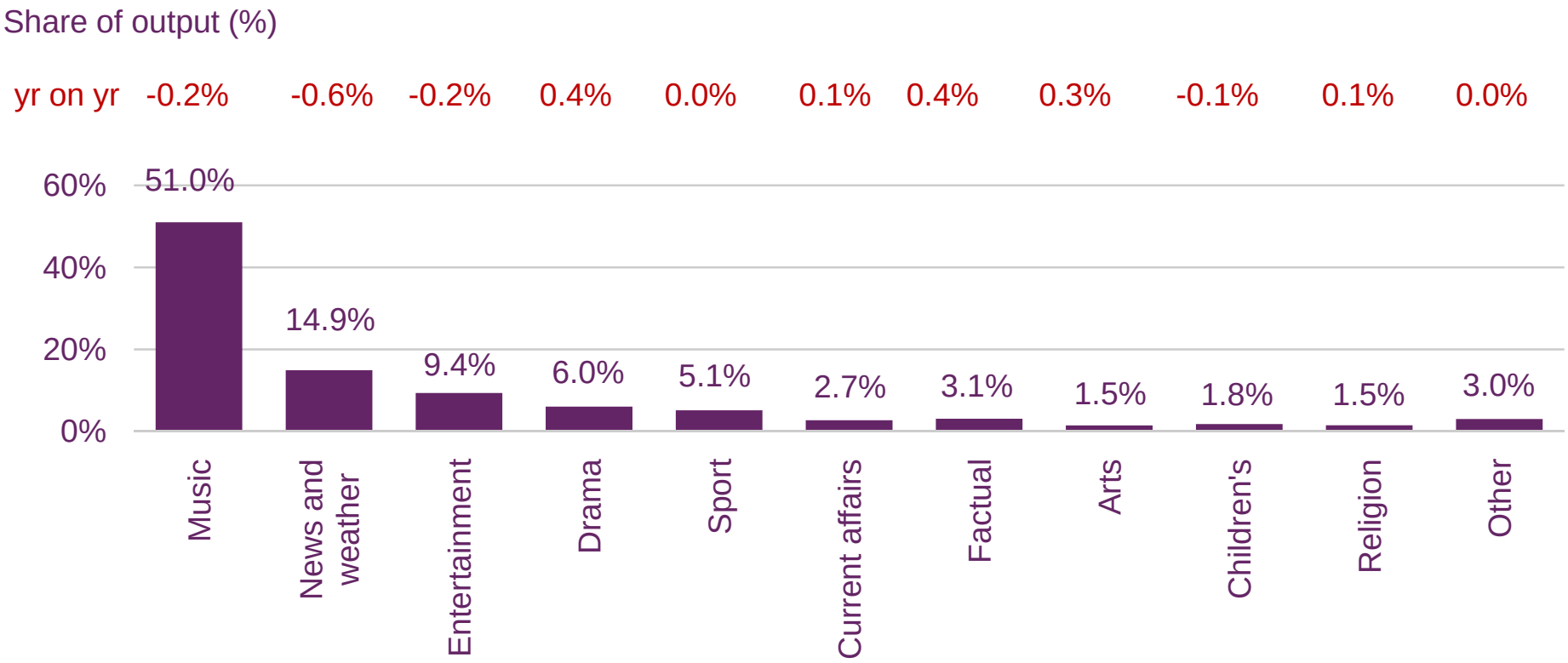
Figure 3.20

BBC network radio broadcast hours, by genre: 2009/10



Source: BBC annual report 2009/10

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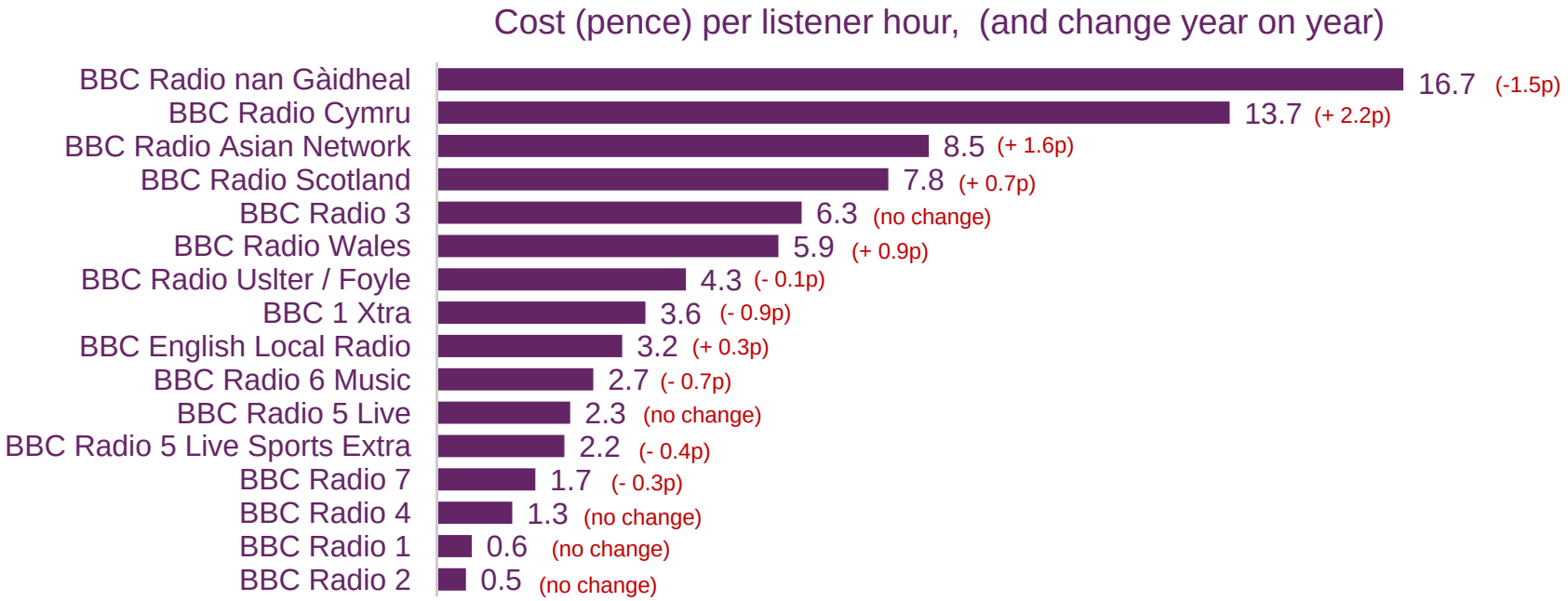
Figure 3.21

BBC radio stations: cost per listener hour of programmes, 2009/10



Source: BBC Annual report 2009/10

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Figure 3.22

UK radio stations broadcasting on analogue, DAB digital radio, and community radio, July 2010

Type of station	AM	FM	AM/FM total	DAB	Total
Local commercial	31	203	234	139	267
UK-wide commercial	2	1	3	10*	10
BBC UK-wide networks	1	4	5	11	11
BBC local and nations	36	46	46	32	46
Community radio	4	172	176	0	176
TOTAL	**74**	**426**	**464**	**192**	**510**

Source: Ofcom, July 2010

Note 1: In total there are 288 individual analogue services on AM/FM as 36 simulcast over both AM/FM wavebands. Of the 288 analogue stations and 191 DAB stations, there are 334 unique stations, as 46 stations are digital-only brands.
*The existing Digital One national DAB radio multiplex does not offer coverage of Northern Ireland.
Note 2: A single radio brand may broadcast to many different parts of the country, using different technologies. For each area/technology combination, Ofcom issues a distinct broadcast licence (where it is licensable). The conditions of each licence will determine the amount of programming that may be shared between these licensed services. Here we have taken the view that a service providing at least four hours a day of separate programming (even if the same brand has other services) equals one service.

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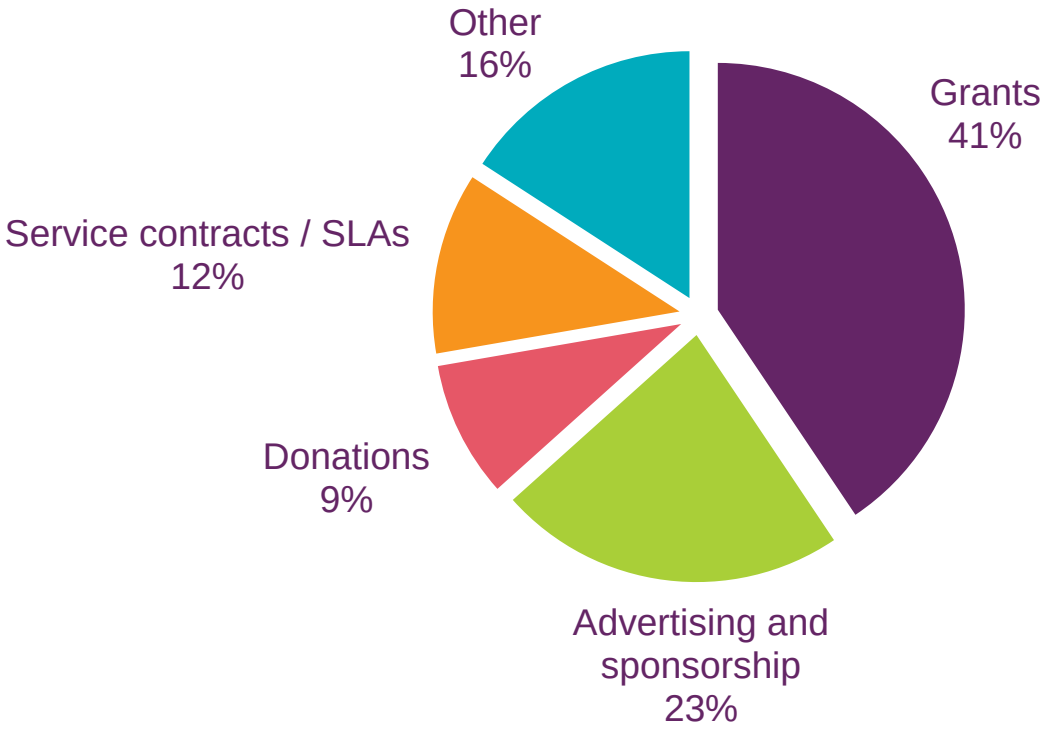
Figure 3.23

Community radio income, by source

Community radio stations' income 2008/09



Source: Ofcom, community station revenues 2008/09

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Figure 3.24

Community radio licence awards in 2009/10

Community station	Location	Award date
Betar Bangla	Stratford, east London	June 2010
Generation Radio	Clapham Park, south London	June 2010
Greenwich Kasapah	Greenwich, south east London	June 2010
Reprezent FM	South London	June 2010
Rinse FM	Inner London	June 2010
Streetlife Radio	Waltham Forest, north east London	June 2010
Susy Radio	Redhill and Reigate, Surrey	June 2010
SAFE Radio	Grays, Essex	March 2010
SFM	Sittingbourne, Kent	February 2010
Gateway FM	Basildon, Essex	February 2010
Insanity	Egham, Surrey	February 2010
Kane FM	Guildford, Surrey	February 2010
The Vibe	Watford	February 2010
Ox FM	Oxford	December 2009
Ummah FM	Reading	October 2009
Marlow FM	Marlow, Bucks	September 2009
Bradio BGWS	Farnborough, Aldershot, Camberley and Fleet	September 2009
Seahaven FM	Newhaven, Seaford and Peacehaven, East Sussex	September 2009
The Park	Brockenhurst, Hampshire	September 2009
Voice FM	Southampton	September 2009

Source: Ofcom, June 2010

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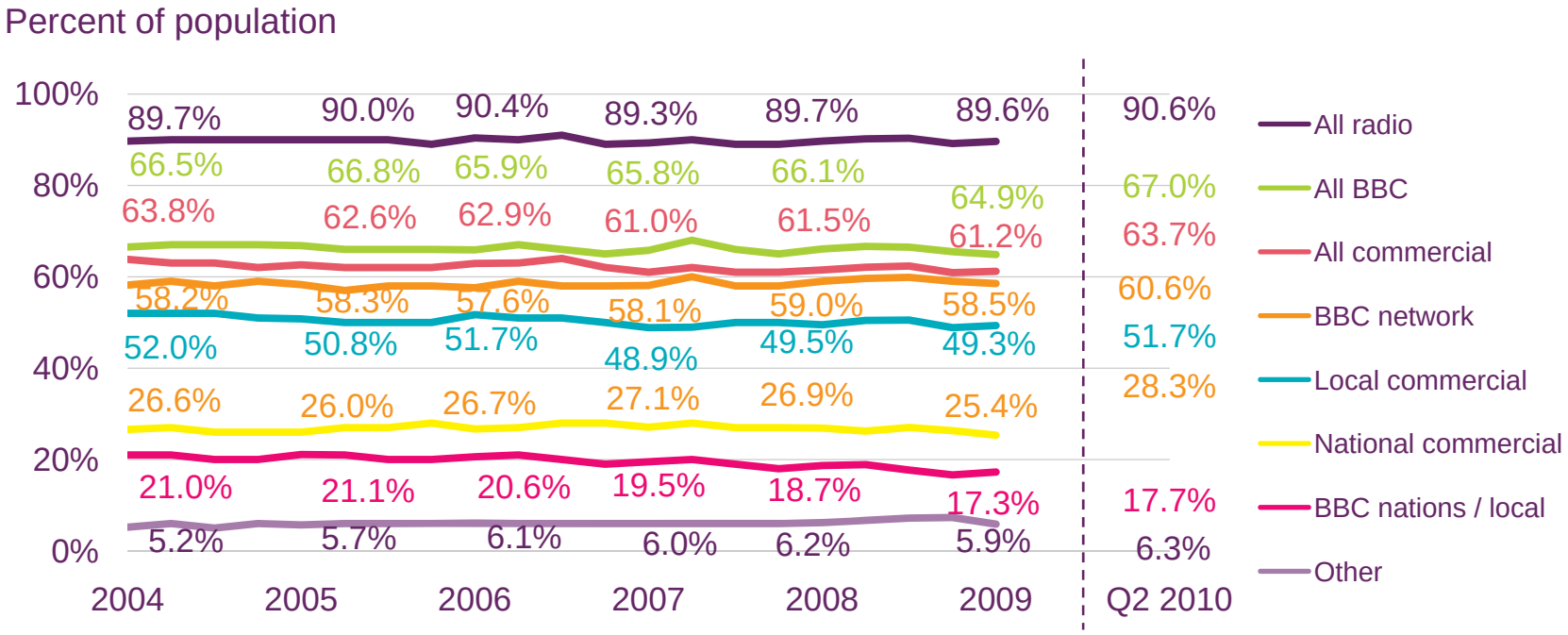
Figure 3.25

Availability of DAB stations, by area

Source: Ofcom, June 2010

Figure 3.26

Reach of radio, by sector



Source: RAJAR (adult 15+), 2004-2010

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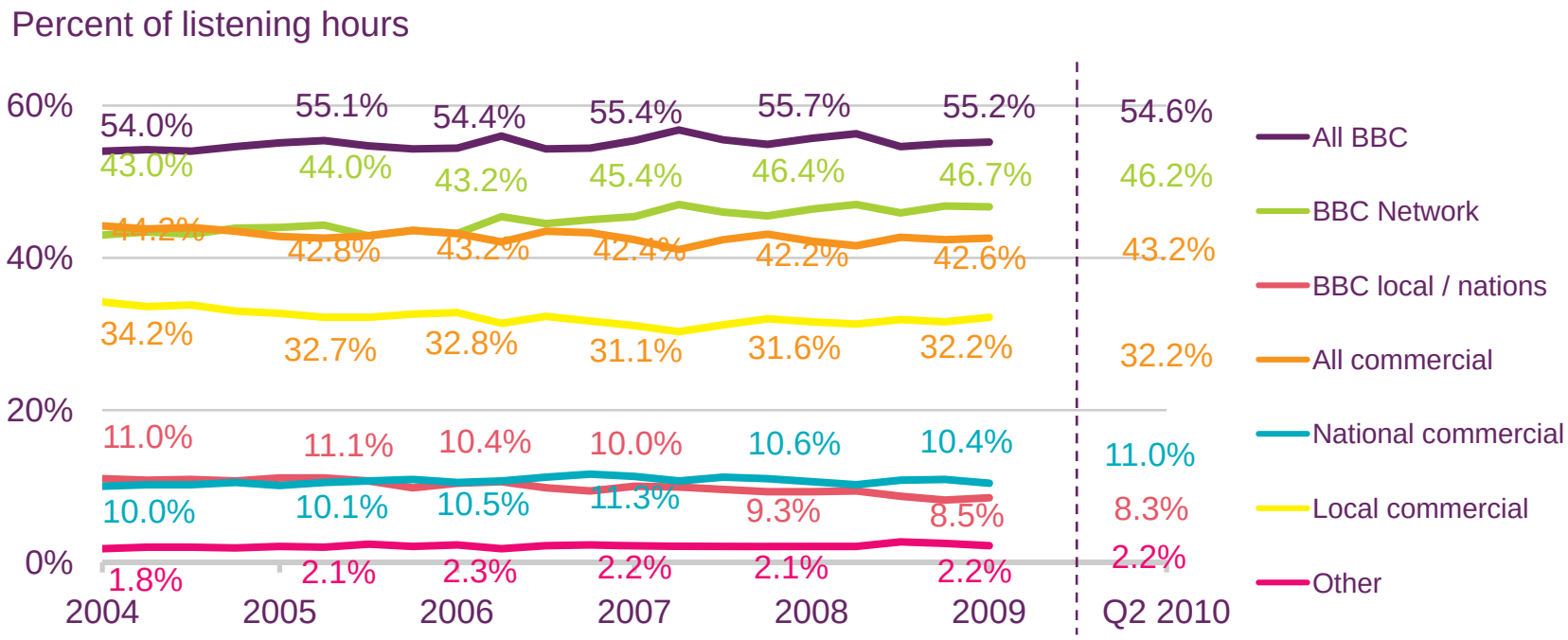
Figure 3.27

Share of listening hours, by sector



Source: RAJAR (adult listeners15+), 2004-2010

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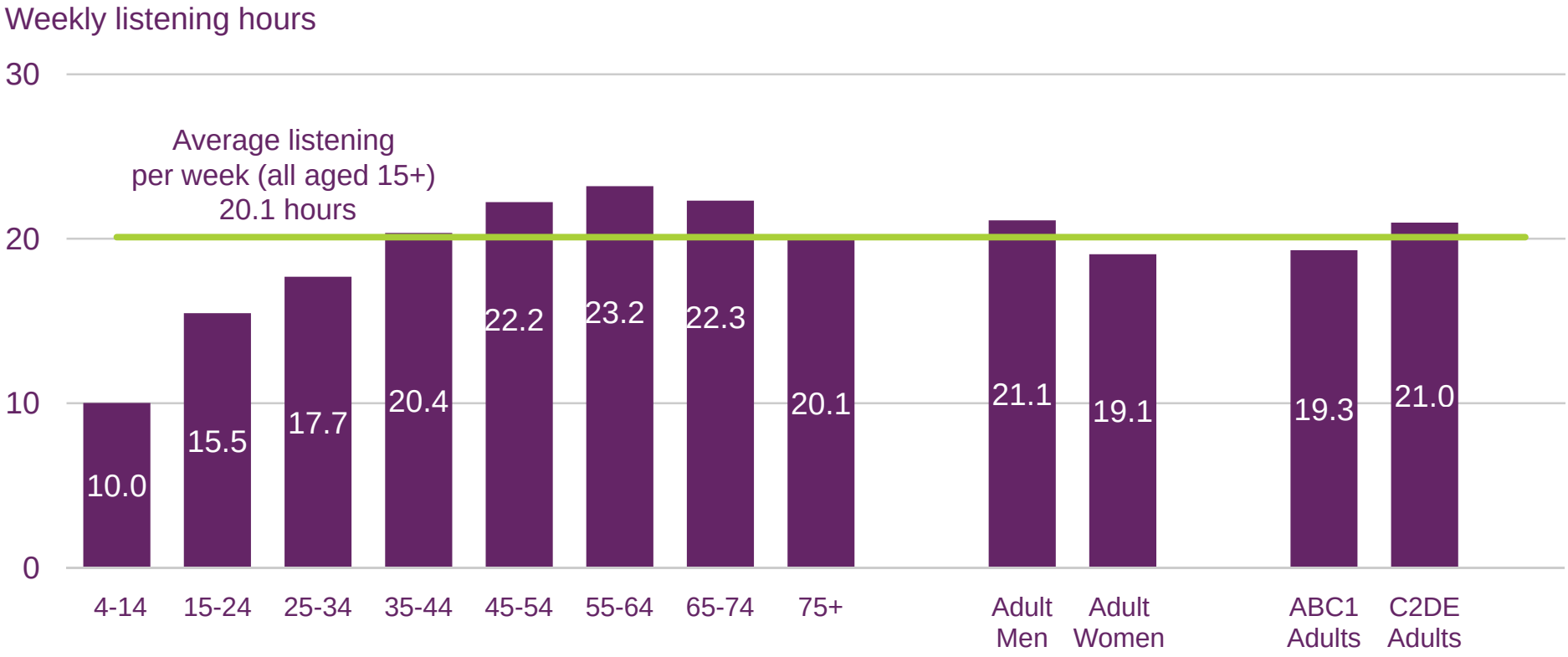
Figure 3.28

Demographic profile of overall listening



Source: RAJAR Q2 2010, (average weekly listening hours per head)

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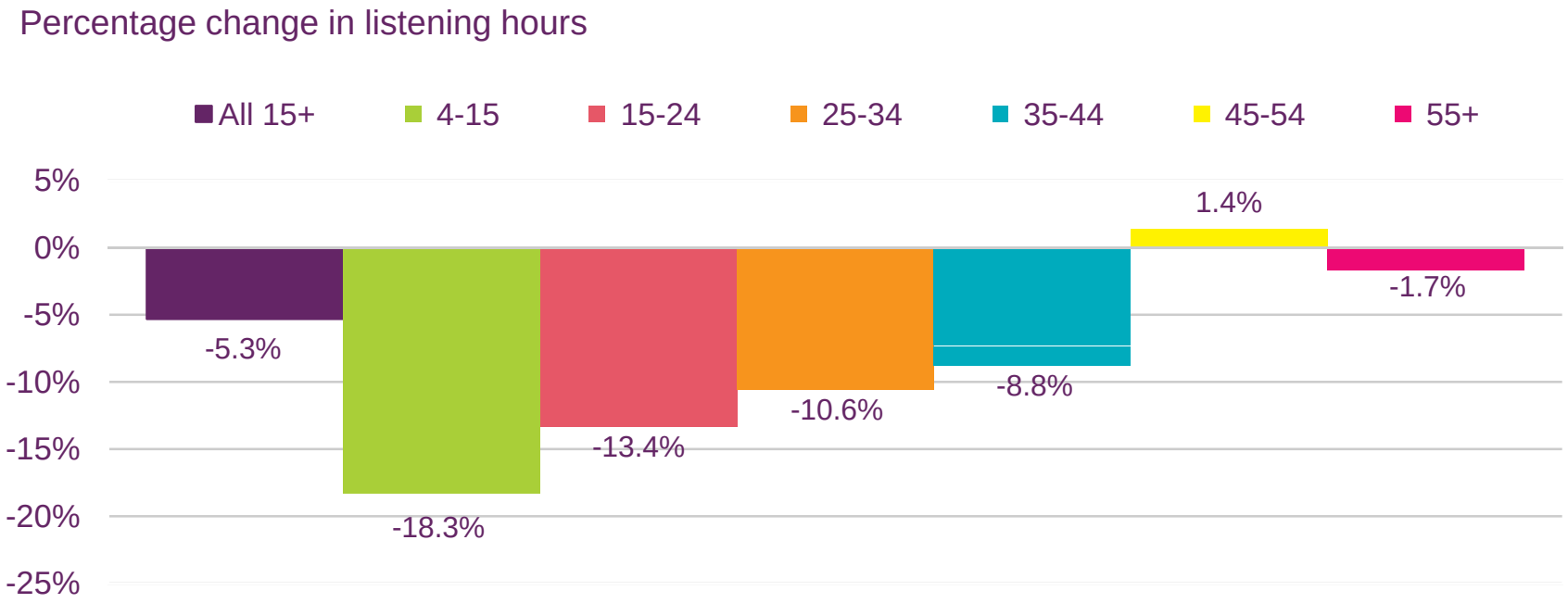
Figure 3.29

Changes in listening hours by age, 2004 - 2009



Source: RAJAR (Individuals 4+): data based on calendar years 2004 and 2009

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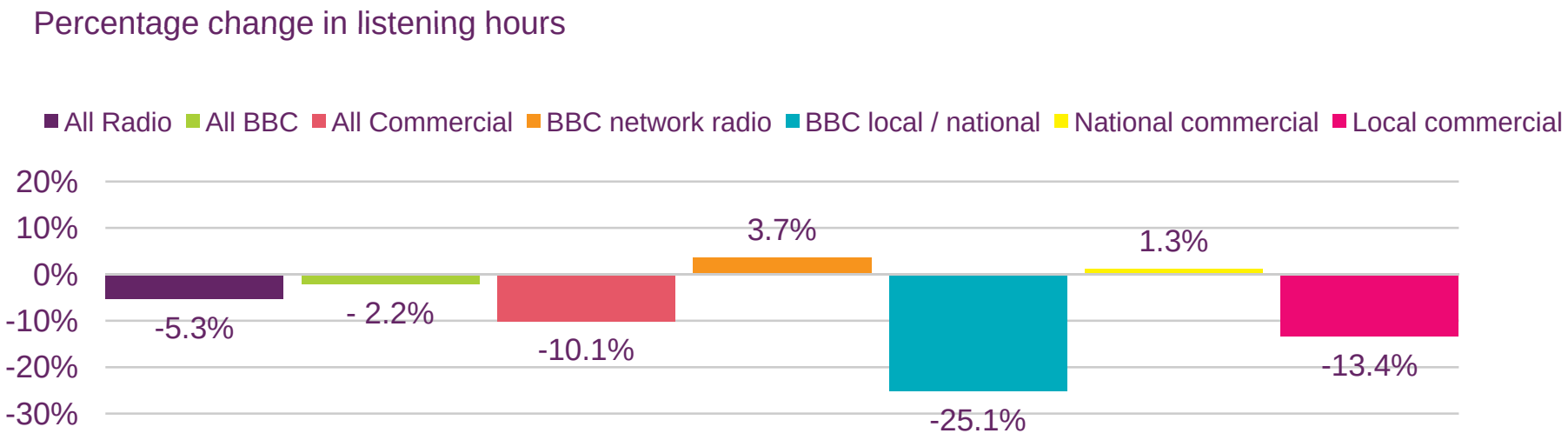
Figure 3.30

Changes in listening hours by sector, 2004 - 2009



Source: RAJAR, (all listeners aged 15+). Data based on calendar year 2004 versus 2009

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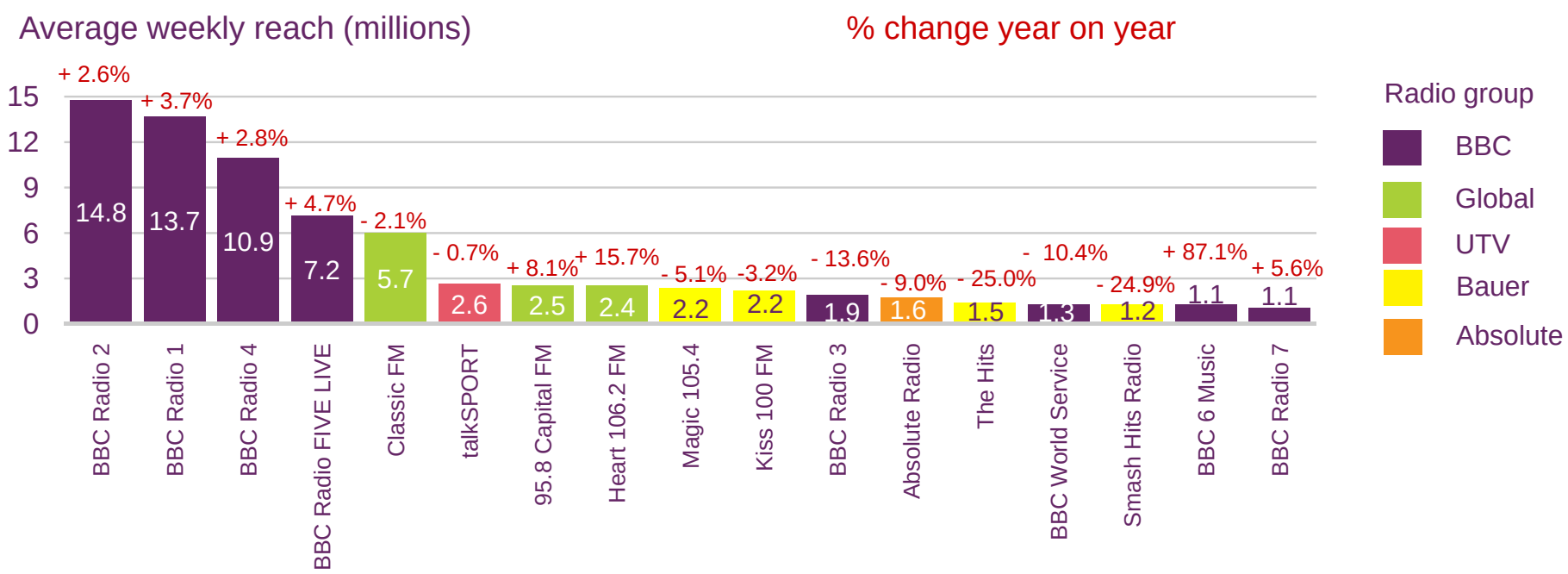
Figure 3.31

Most listened-to radio stations, Q2 2010

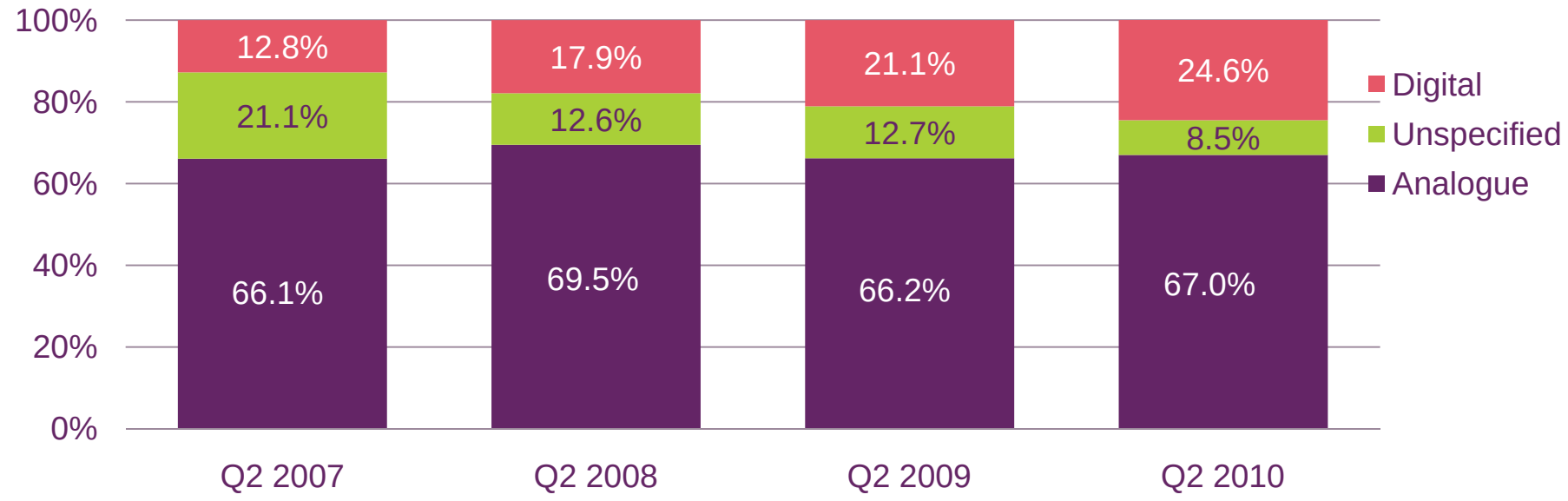


Source: RAJAR, (Q2 2010), (all listeners 4+), figures are rounded.

Figure 3.32

Share of listening hours across analogue and digital platforms

Radio listening share by digital and analogue listening



Source: RAJAR Ipsos MORI/ RSMB
Note: Unspecified relates to listening where the radio platform was not confirmed by the listener

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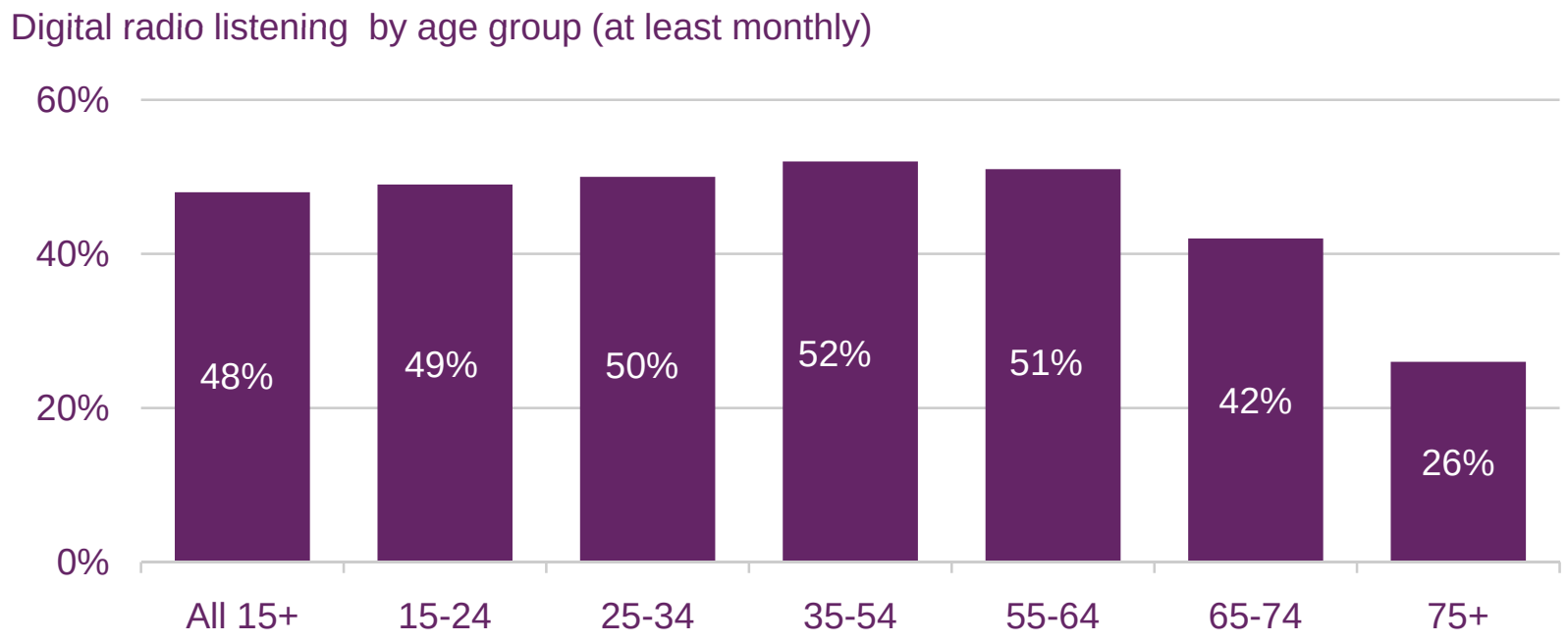
Figure 3.33

Digital radio listening by age group, (monthly)



Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=2483)
Q: Use digital radio at least monthly

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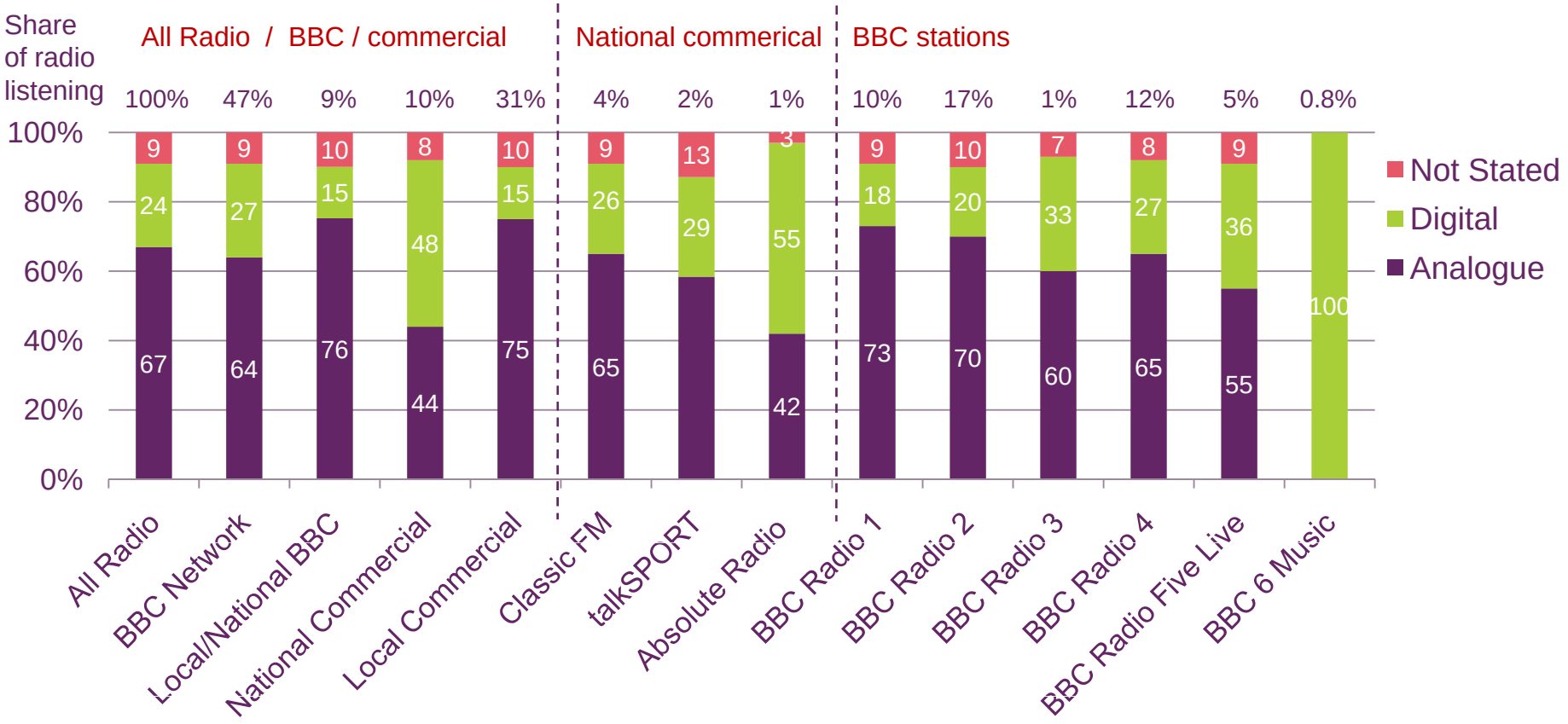
Figure 3.34

Audience profiles and platform split, by sector and station, Q1 2010



Source: RAJAR, Q1 2010, UK Adults aged 15+

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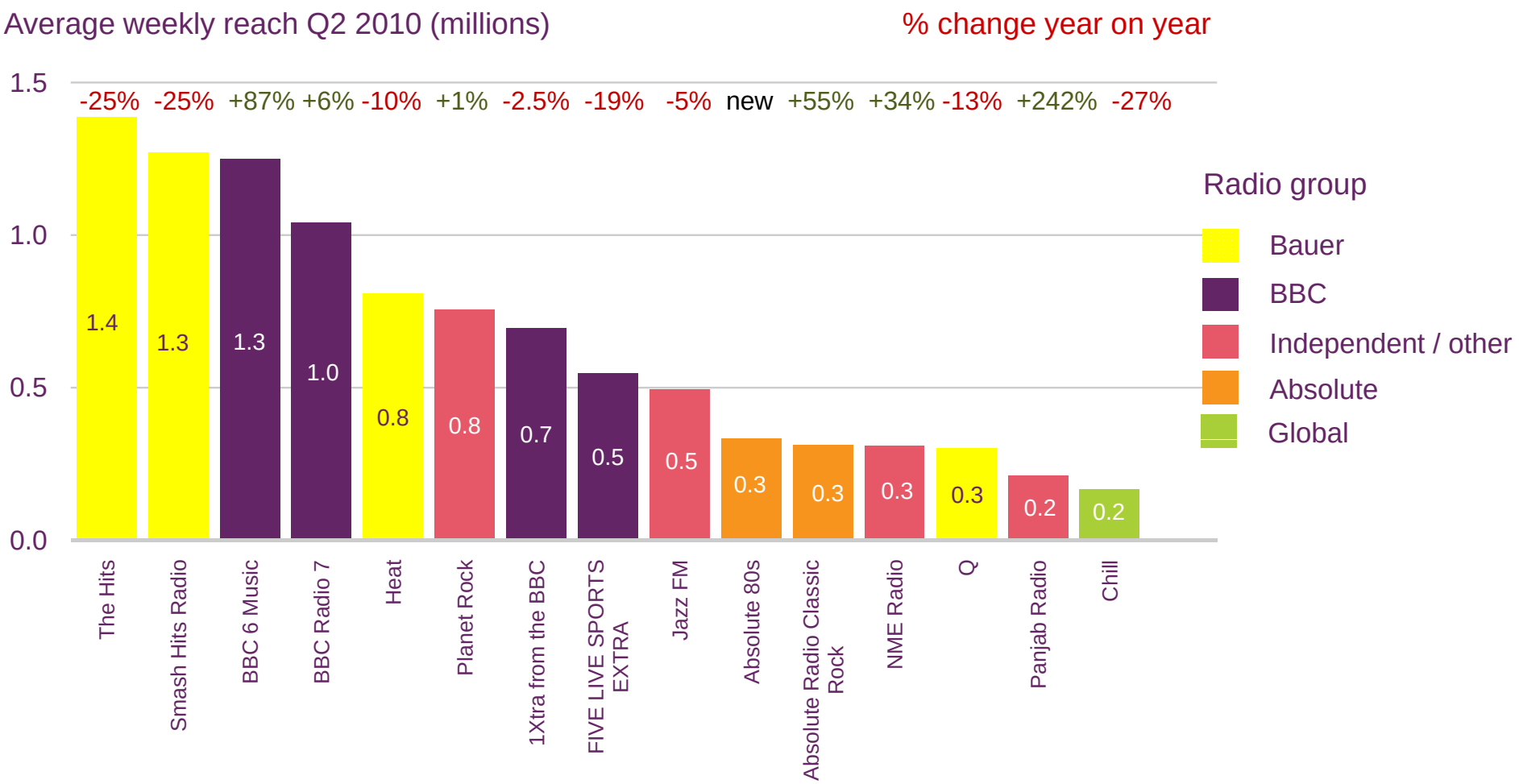
Figure 3.35

Most listened-to digital-only stations Q2 2010



Source: RAJAR, Q2 2010, (all listeners 4+), figures are rounded.

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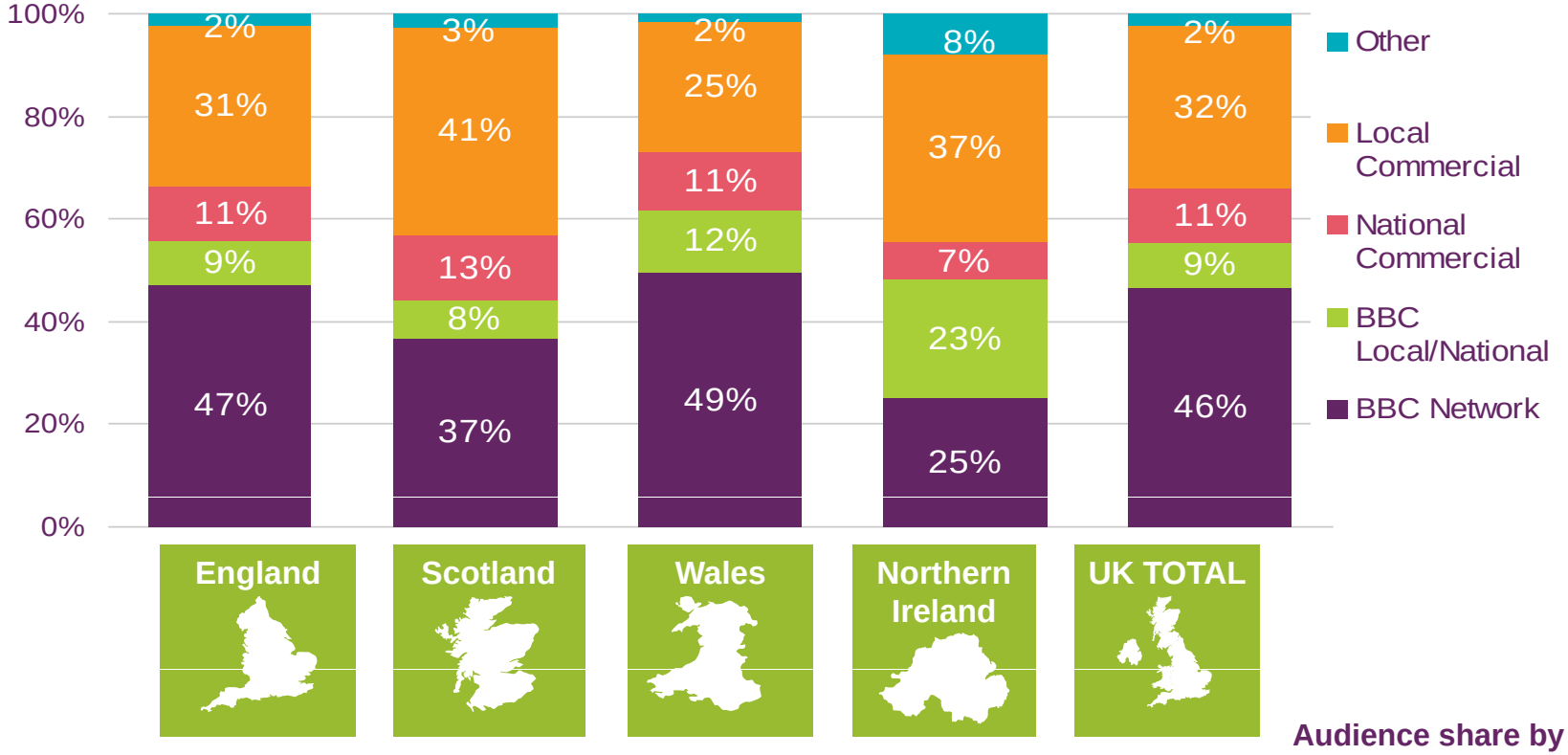
Figure 3.36 Share of listening hours, by nation

England Scotland Wales N Ireland UK

Listening hours share for BBC and commercial stations, local/national



	England	Scotland	Wales	N Ireland	UK
Average weekly listening	21.9 hours	21.0 hours	22.7 hours	22 hours	21.9 hours
Reach	90.1%	87.3%	90.5%	89.6%	89.9%

Audience share by category (Year to Q1 2010)
% share BBC & commercial, local & national

Source: RAJAR, All adults (15+), Apr '09-Mar '10 & Apr '08-Mar '09

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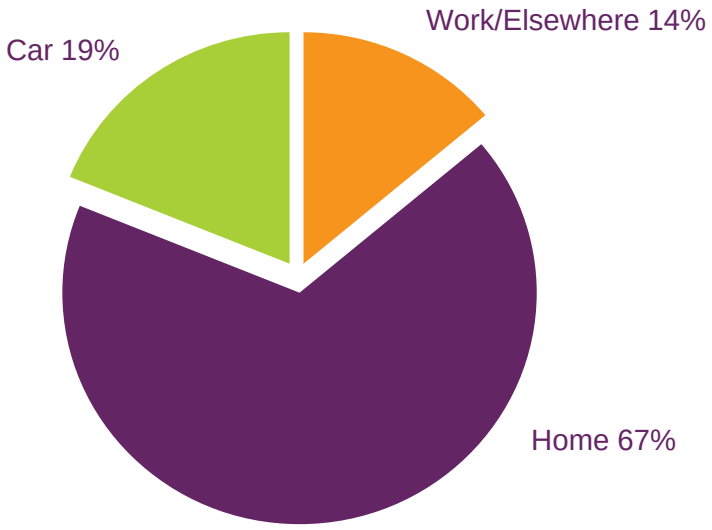
Figure 3.37

Location of listening – year to Q1 2010



Source: RAJAR / Octagon, All Adults (15+), Apr 2009 – Mar 2010

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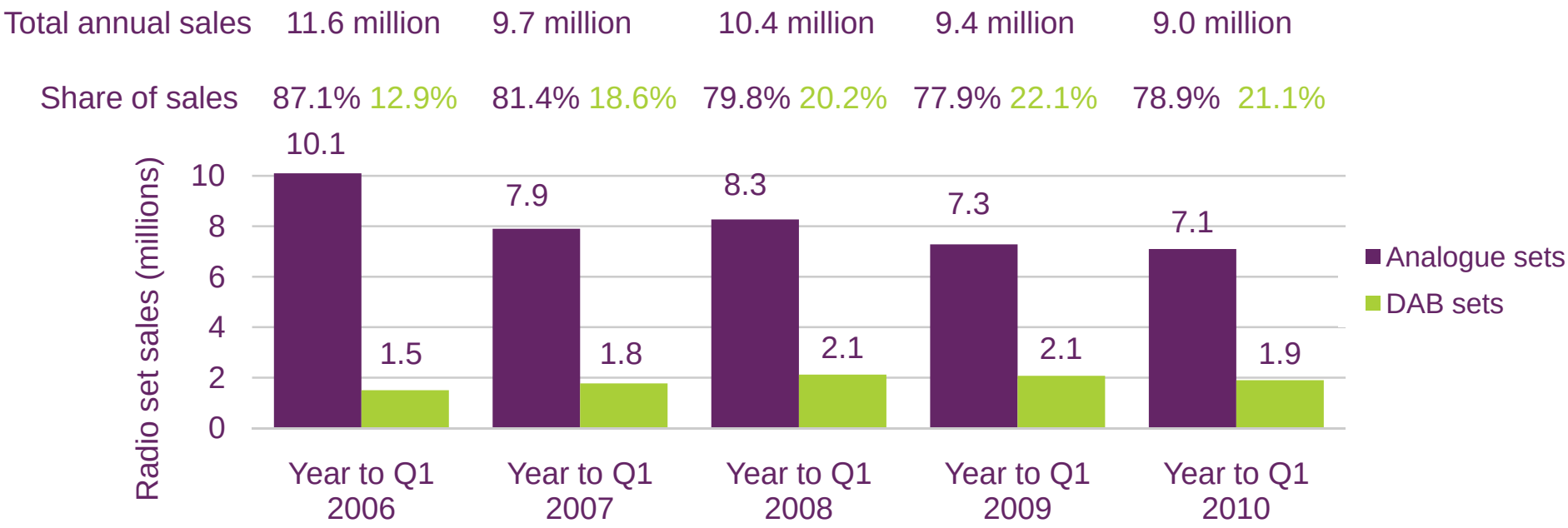
Figure 3.38

Number of analogue and digital radio sets sold



Source: GfK sales data, 2006-2010

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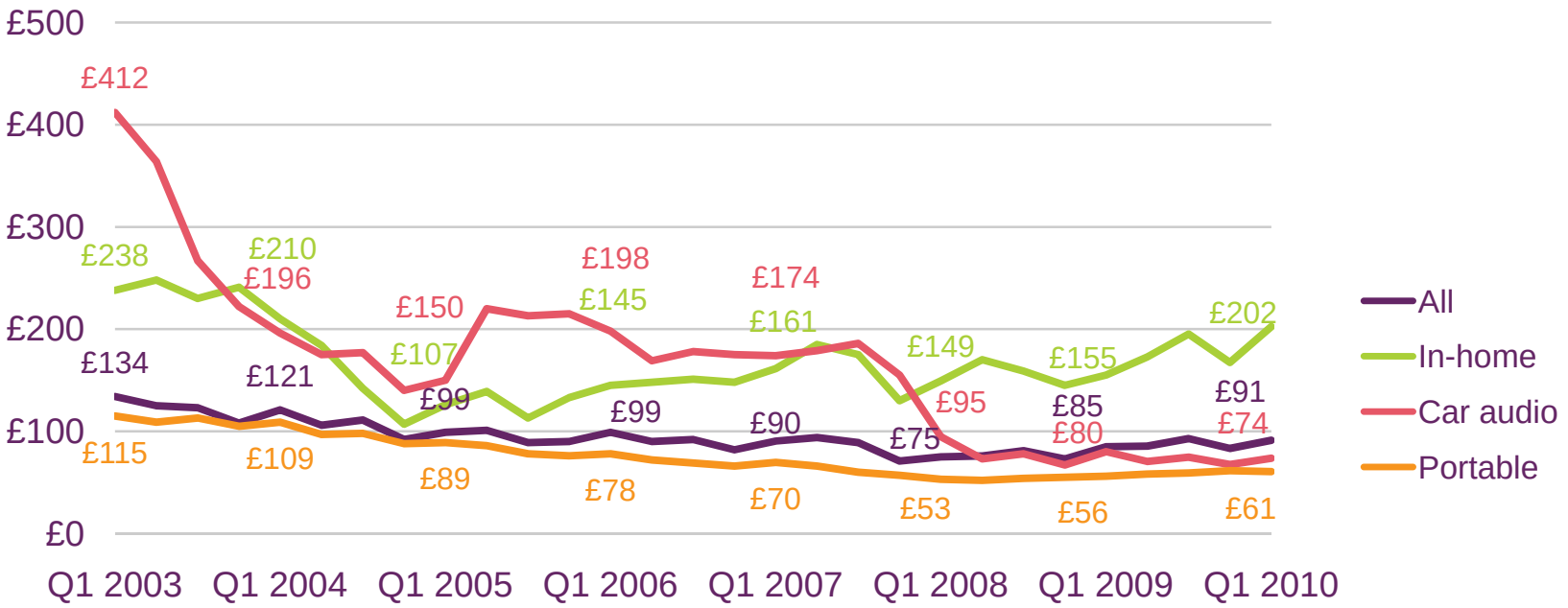
Figure 3.39

Average price paid for DAB digital radio receivers



Source: GfK sales data 2003-2010

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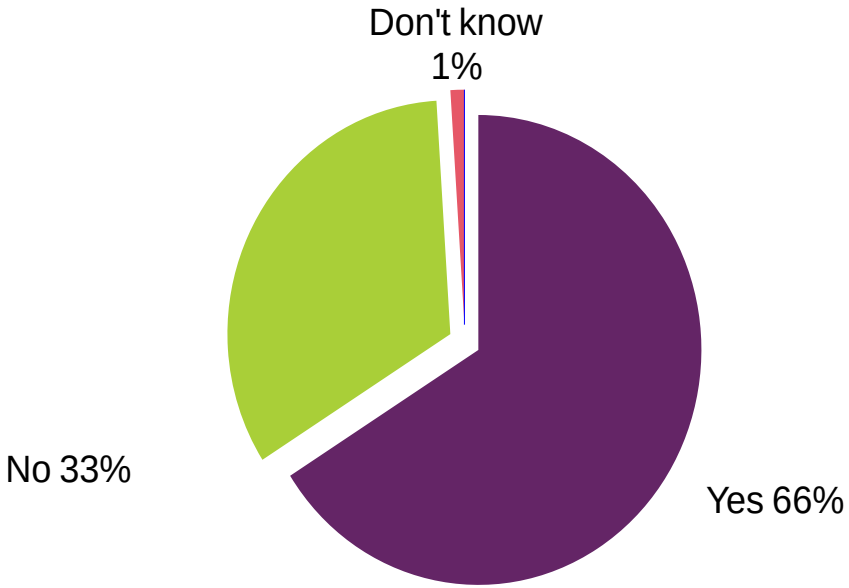
Figure 3.40

Have you heard of the term ‘DAB’ digital radio?



Source: Ofcom research May 2010

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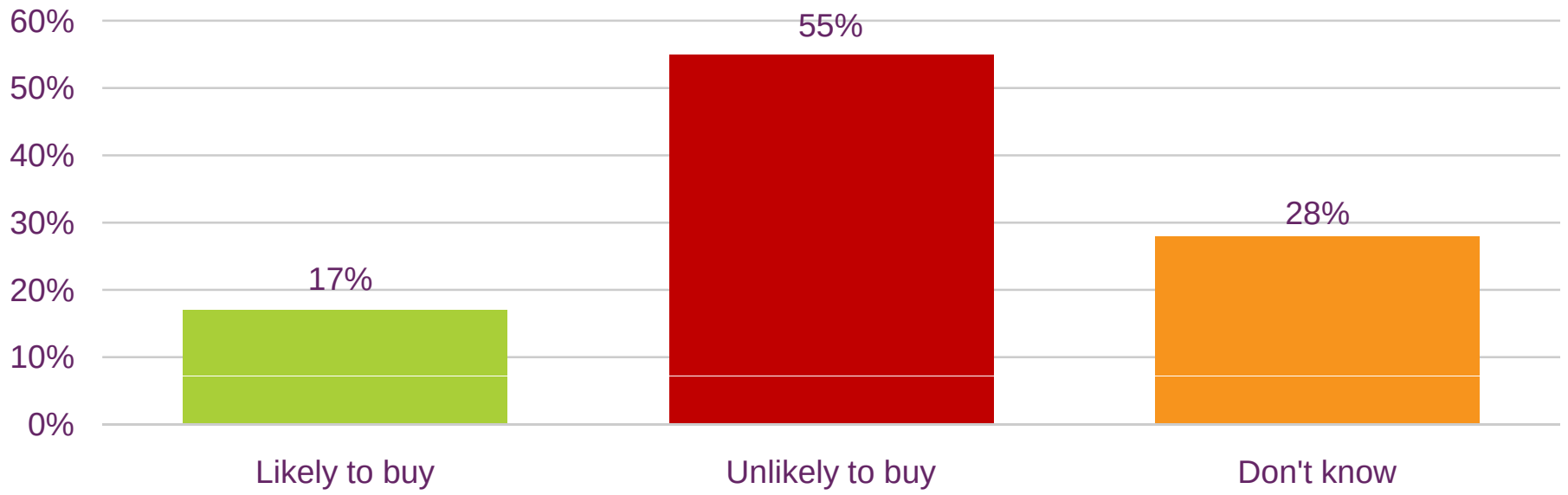
Figure 3.41

Likelihood to buy a DAB radio within the next 12 months

Percentage of respondents who listen to the radio but have no DAB set in the home



Source: Ofcom research, Q1 2010
Base: Those who listen to the radio but have no DAB sets in the home (n=)
Q: How likely is it that your household will get a DAB radio in the next 12 months?

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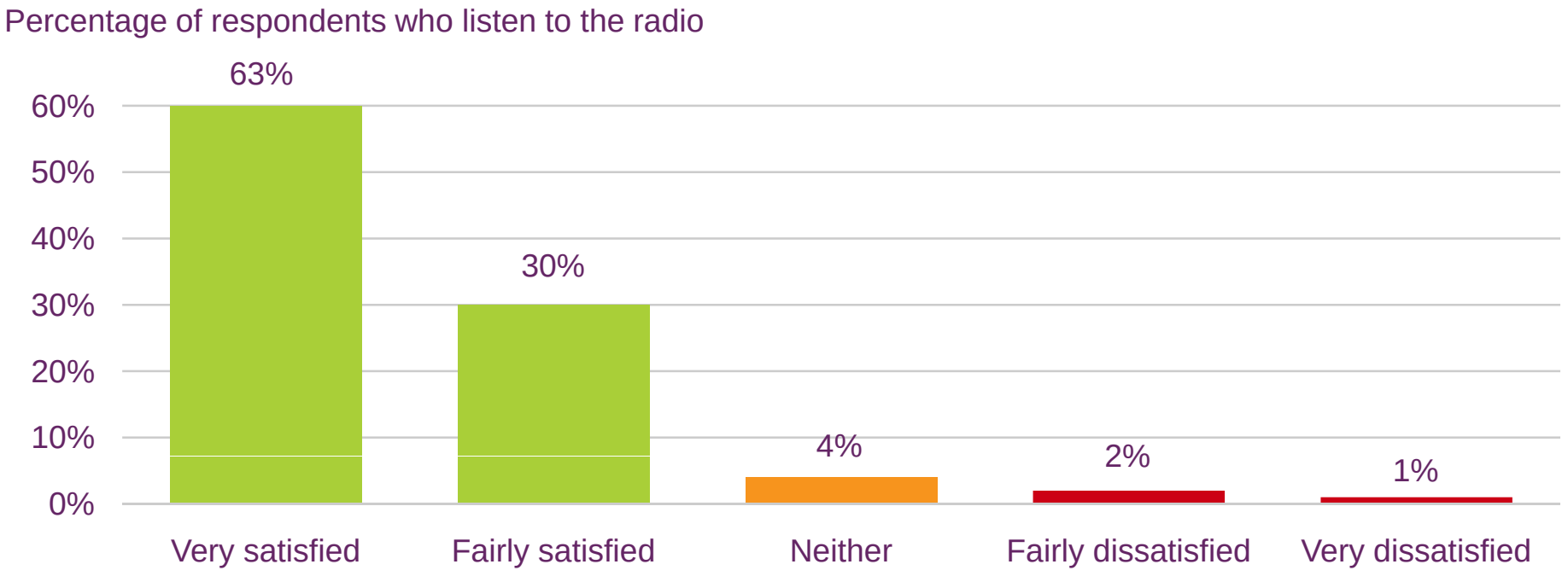
Figure 3.42

Satisfaction with choice of radio stations in area



Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=2483)
Q: How satisfied are you with the choice of radio stations available in your area?

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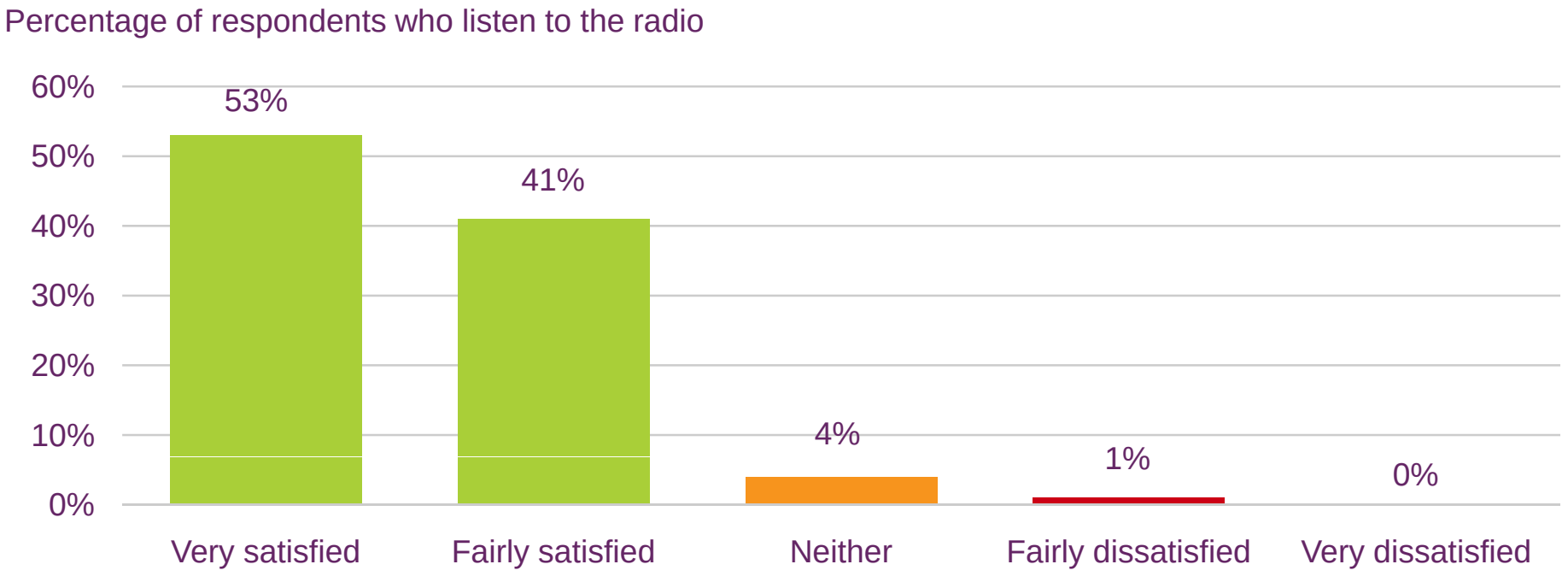
Figure 3.43

Satisfaction with radio content



Source: Ofcom research, Q1 2010
Base: All who listen to the radio (n=2483)
Q: How satisfied are you with the choice of radio stations available in your area?

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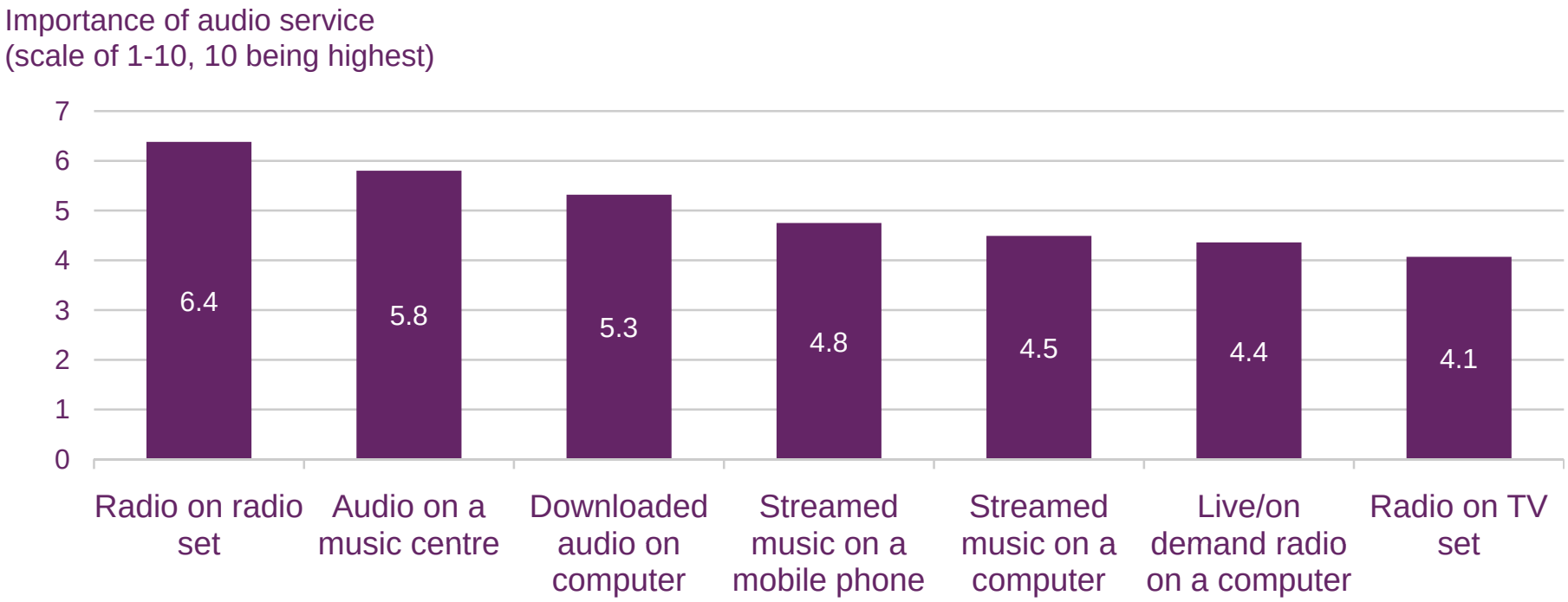
Figure 3.44

Importance of audio / radio activities to user



Source: Ofcom research June 2010
Additional questionnaire Q2f: "How important are each of these activities to you? Please use a scale from 1 to 10, where 1 means not at all important to you and 10 means very important to you."
Base: all who ever do each activity: Radio on TV (530); radio on radio set (1013); radio on computer (354); streamed music on a computer (219); downloaded audio on computer (466); downloaded audio on mobile phone (206); audio on a music centre (907)

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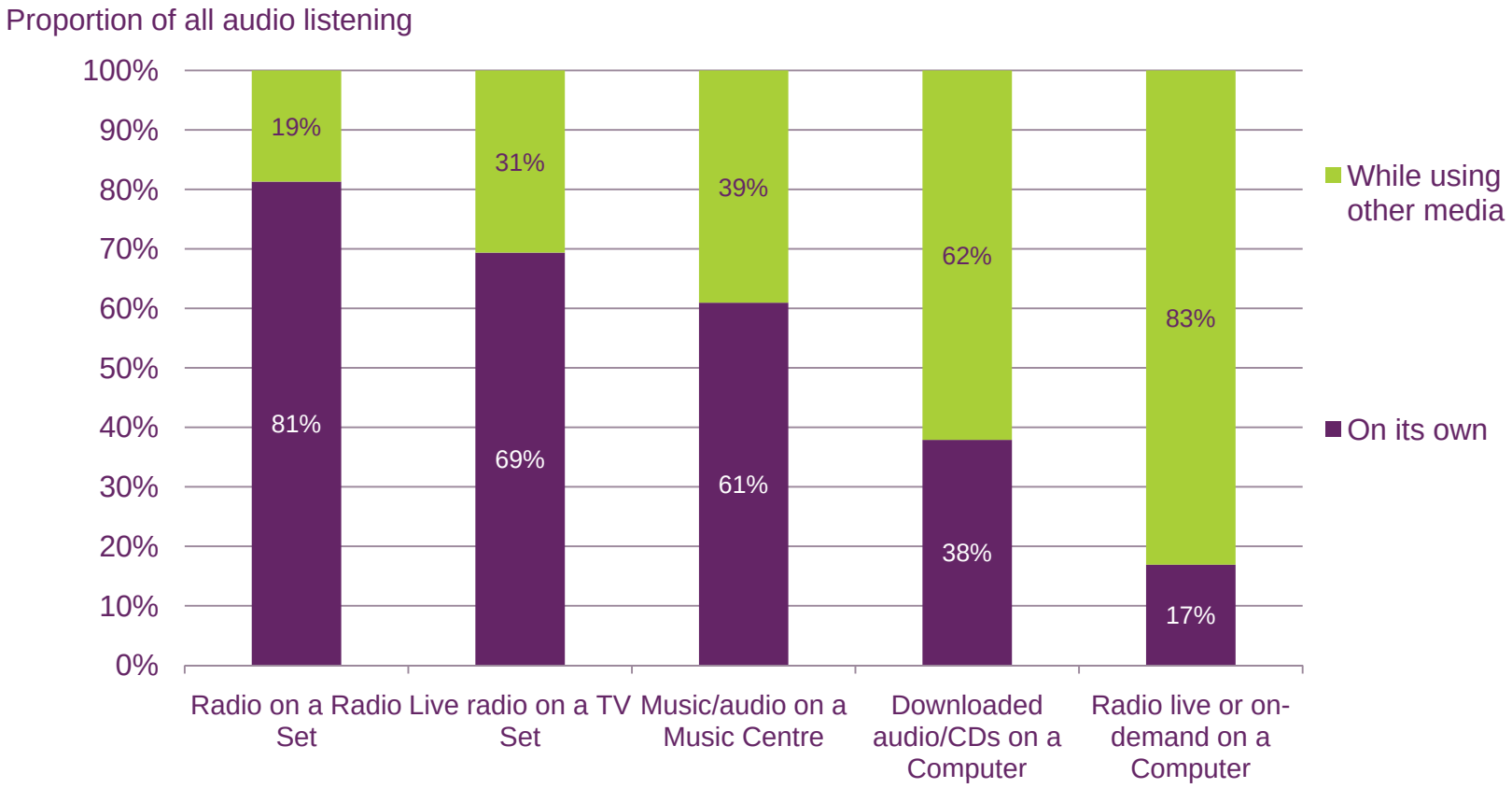
Figure 3.45

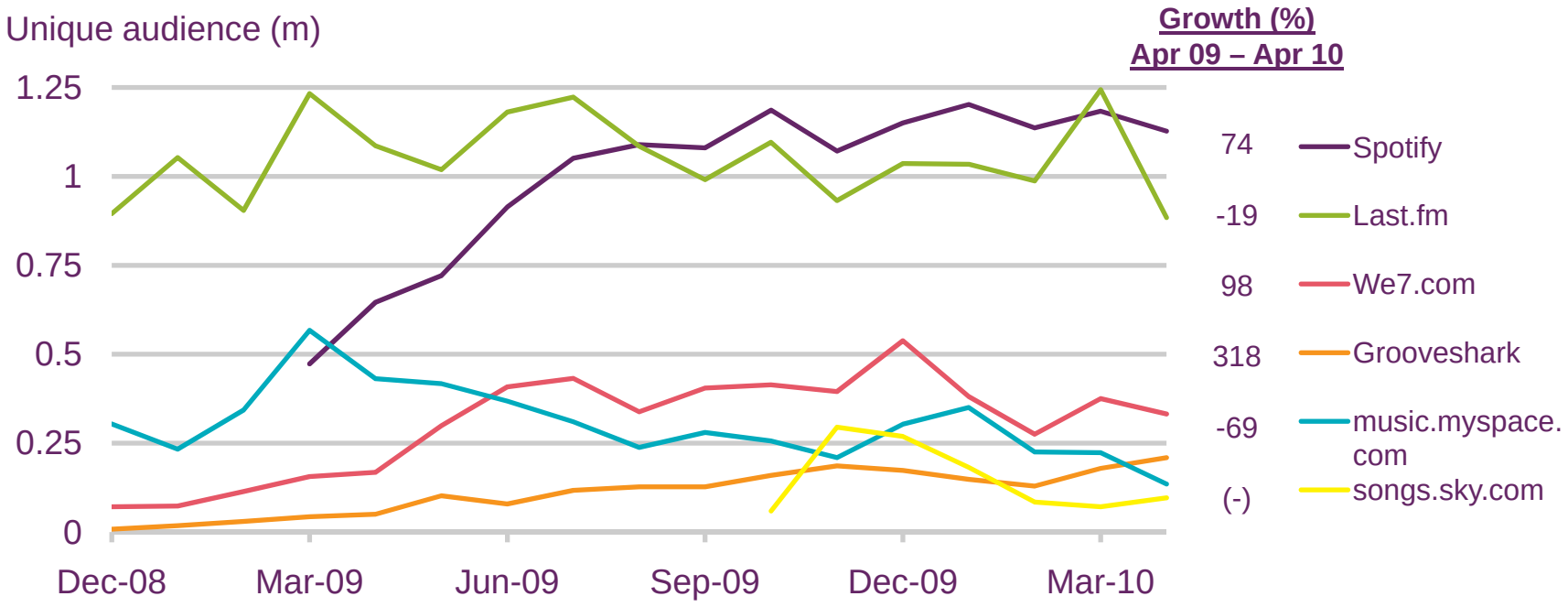
Proportion of time spent listening to audio, solus vs. simultaneous



Source: Ofcom research. Base = All respondent days: 7966

Figure 3.46

Unique audience to selected streaming sites



Source: UKOM/Nielsen. Month of April 2010, home and work panel. Applications included.

Figure 3.47

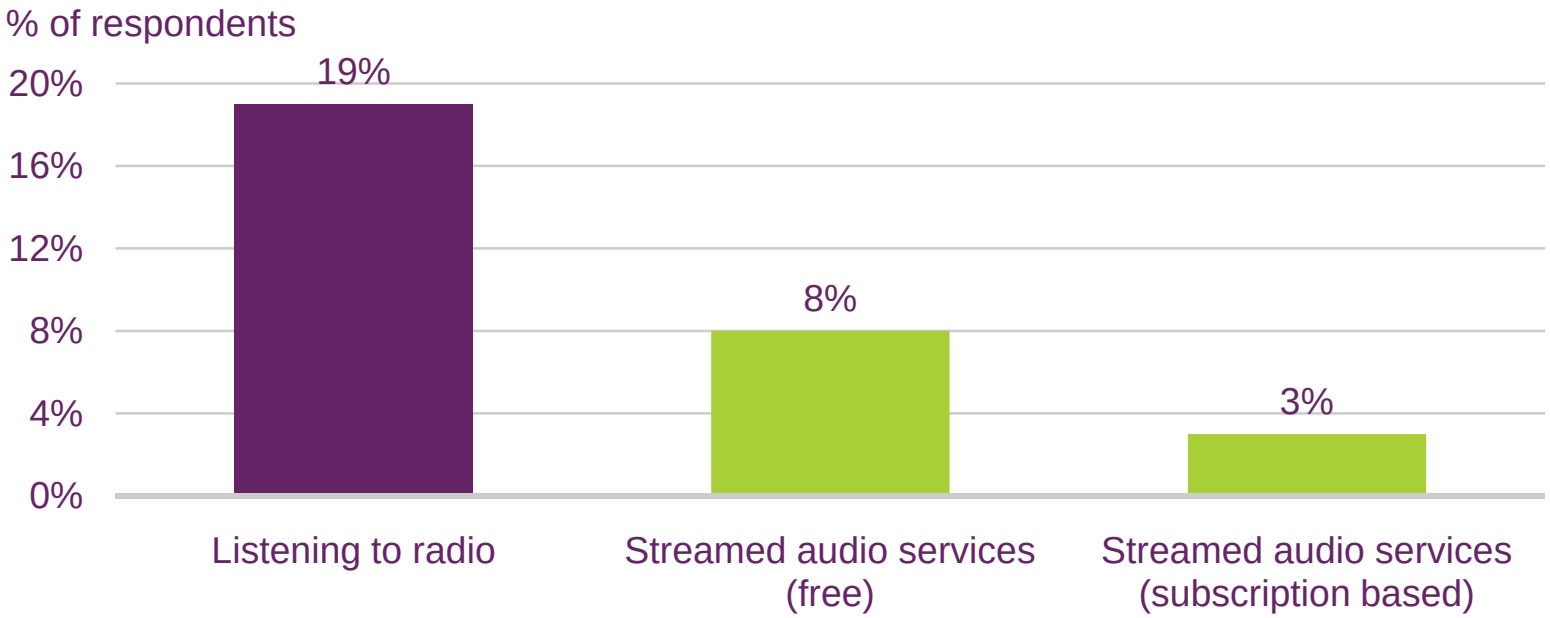
Selected online streaming services

Service	Business Model	Catalogue	Launch date
Spotify	Free ad-supported streaming application Premium monthly subscription for extra features, also available via mobile apps	8 million tracks	February 2009
Last.fm	Free ad-supported 'radio-based' streaming service Premium monthly subscription for extra features	6.5 million tracks	2002
Sky Songs	Subscription based only, paid each month for access to unlimited streaming and 5 downloads	5 million tracks	October 2009
Grooveshark	Ad-funded music streaming and recommendation service	7 million tracks	2007
We7	Ad-funded online streaming service, browser based and available via iPhone app	4 million tracks	October 2008
mflow	Free limited online streaming and pay per download	2 million tracks	April 2010

Source: Operators, June 2010

Figure 3.48

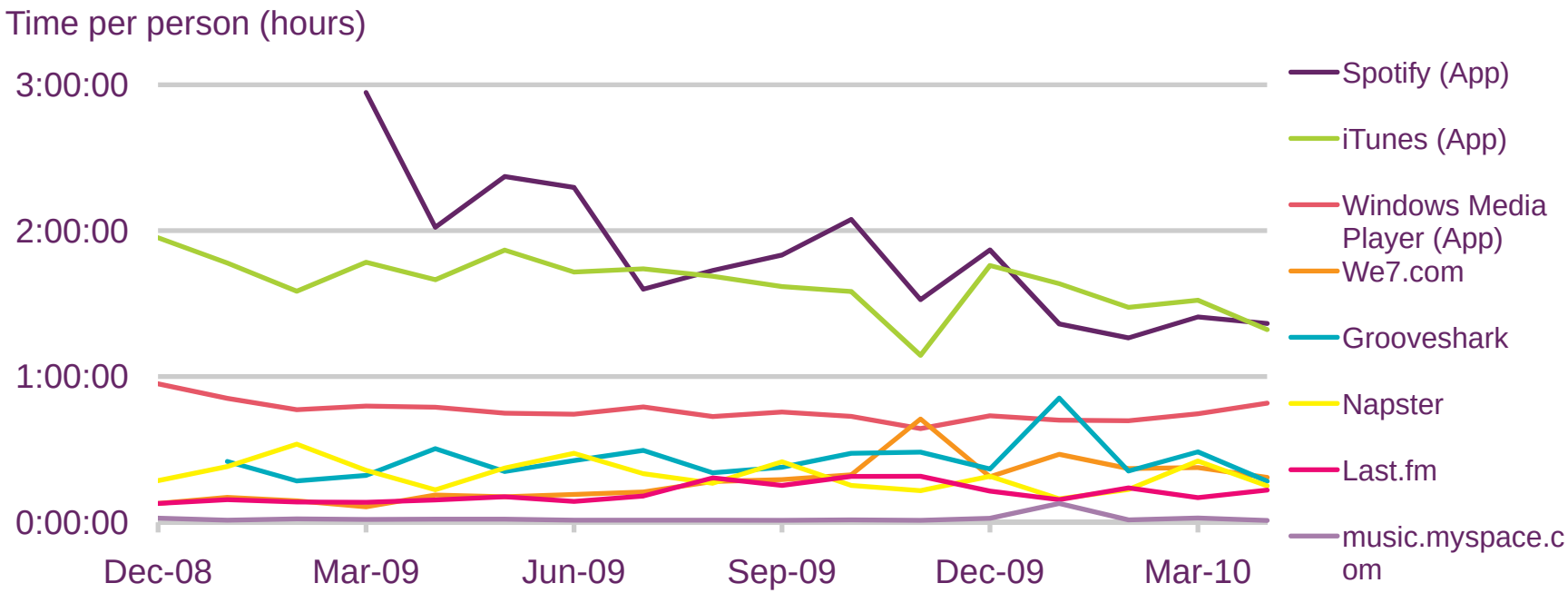
Audio internet usage



QE10A. Which, if any, of these do you or members of your household use the internet for whilst at home?
Source: Ofcom research, Q1 2010
Base: Those with access to the internet at home (n= 6163)

Figure 3.49

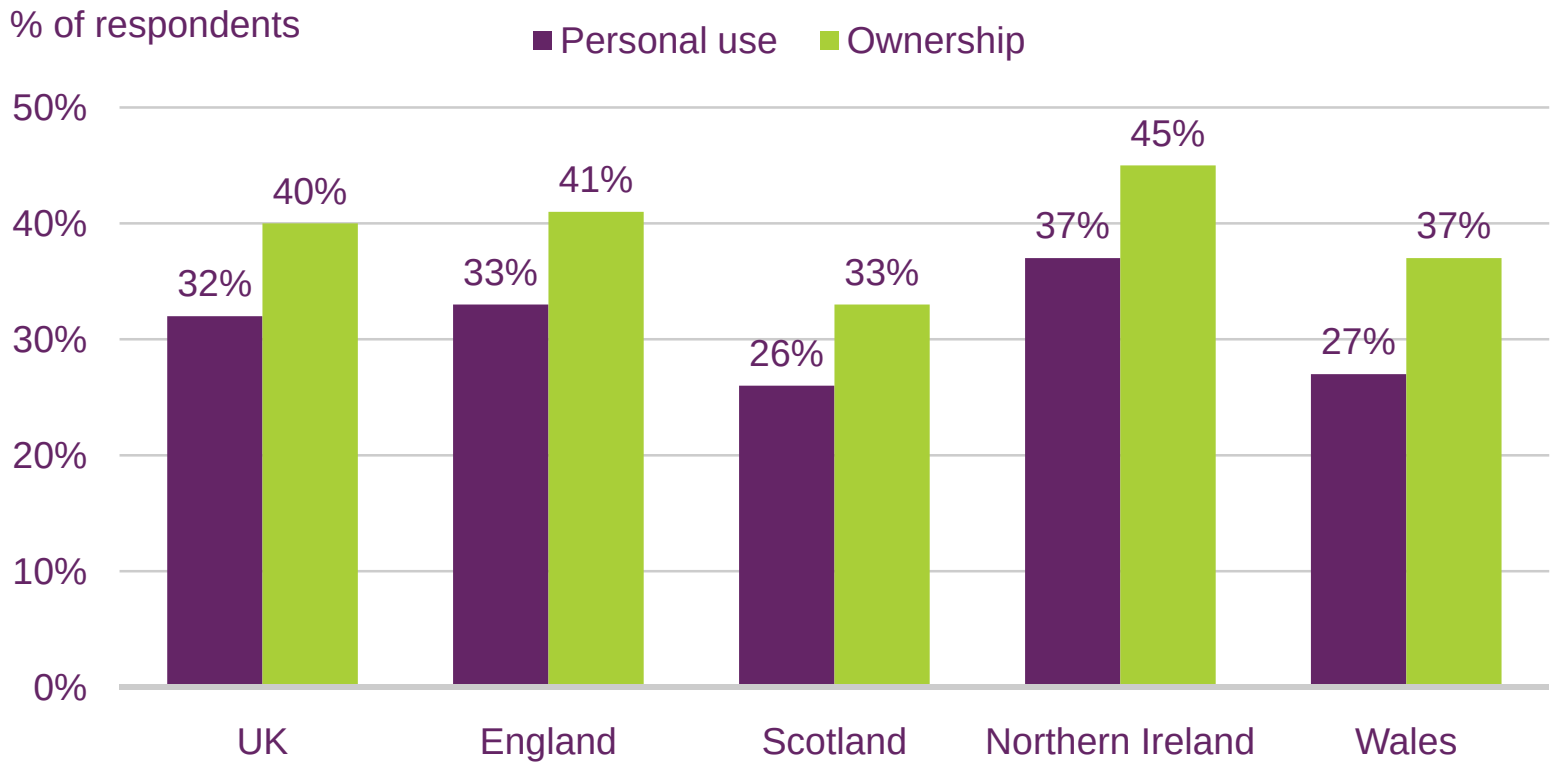
Time spent using selected music services and media players



Source: UKOM/Nielsen. Month of April 2010. Home and work panel. Applications included.

Figure 3.50

MP3 player/iPod ownership and personal use



QB1: Which of the following do you, or does anyone in your household, have in your home at the moment?
QB2. Do you personally use: MP3 player / IPod?
Source: Ofcom research, Quarter 1 2010
Base: All adults aged 15+ (n = 9013 UK, 1075 Wales, 5709 England, 1468 Scotland, 761 Northern Ireland, 810 Wales urban, 265 Wales rural, 348 South East Wales, 360 South West Wales, 367 North/ Mid Wales)

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4. Internet and web-based content

Figure 4.1

UK internet and web-based content market: key statistics

UK internet & web-based content market	2005	2006	2007	2008	2009	2010
PC / laptop take-up (%)	68	67	71	72	74	76
Internet take-up (%)	60	60	64	67	70	73
Total broadband take-up (%)	31	41	52	58	68	71
Fixed broadband take-up (%)	n/a	n/a	n/a	n/a	65	65
Mobile broadband take-up (%)	n/a	n/a	n/a	n/a	12	15
Social networking site take-up (%)	n/a	n/a	n/a	20	30	40
Use of mobile phone for web/data access (%)	n/a	n/a	n/a	20	20	23
Internet advertising expenditure	£1.4bn	£2.0bn	£2.8bn	£3.4bn	£3.5bn	n/a
Mobile media advertising revenue	£0.02m	£0.12m	£0.38m	£1.04m	£1.03m	n/a

Source: Ofcom / IABUK/PwC / Screen Digest.
Note: Mobile media includes mobile TV, mobile VoD and mobile games and excludes display and search advertising.

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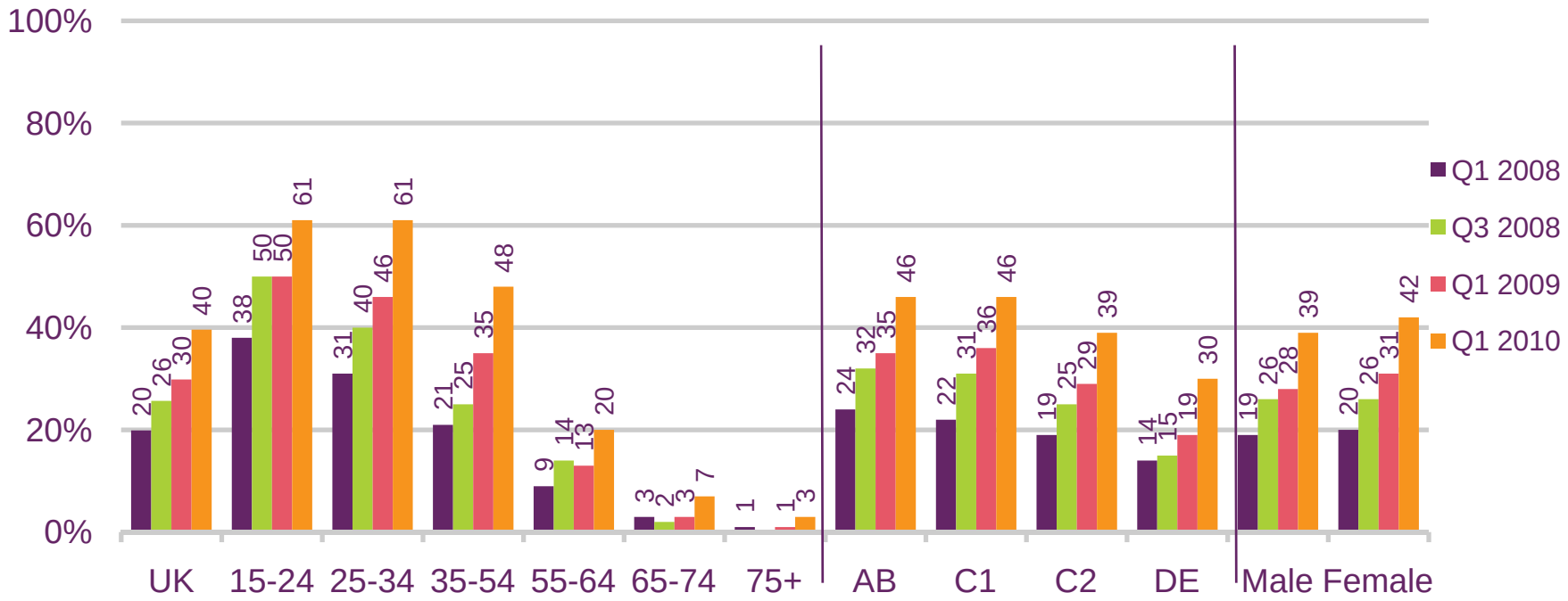
Figure 4.2

Proportion of adults who access social networking sites on the internet at home



QE12: Which, if any, of these do you or members of your household use the internet for while at home?
Source: Ofcom technology tracker, Q1 2010
Base: All adults aged 15+ (n = 5812 Q1 2008, 1581 Q3 2008, 6090 Q1 2009, 9013 Q1 2010)
Note: Q1 2008 data in this chart are not directly comparable to data published in the 2009 Communications Market Report due to updated data provided to Ofcom.

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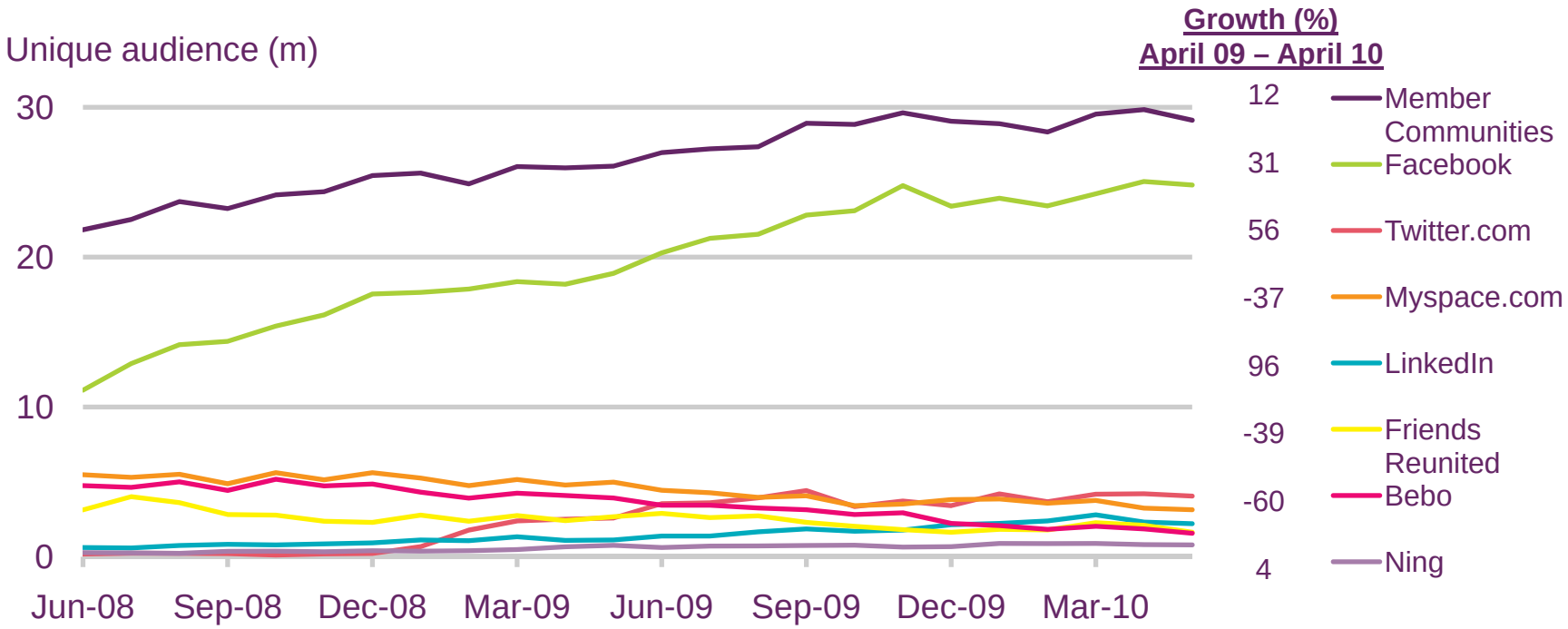
Figure 4.3

Unique audience of selected social networking sites

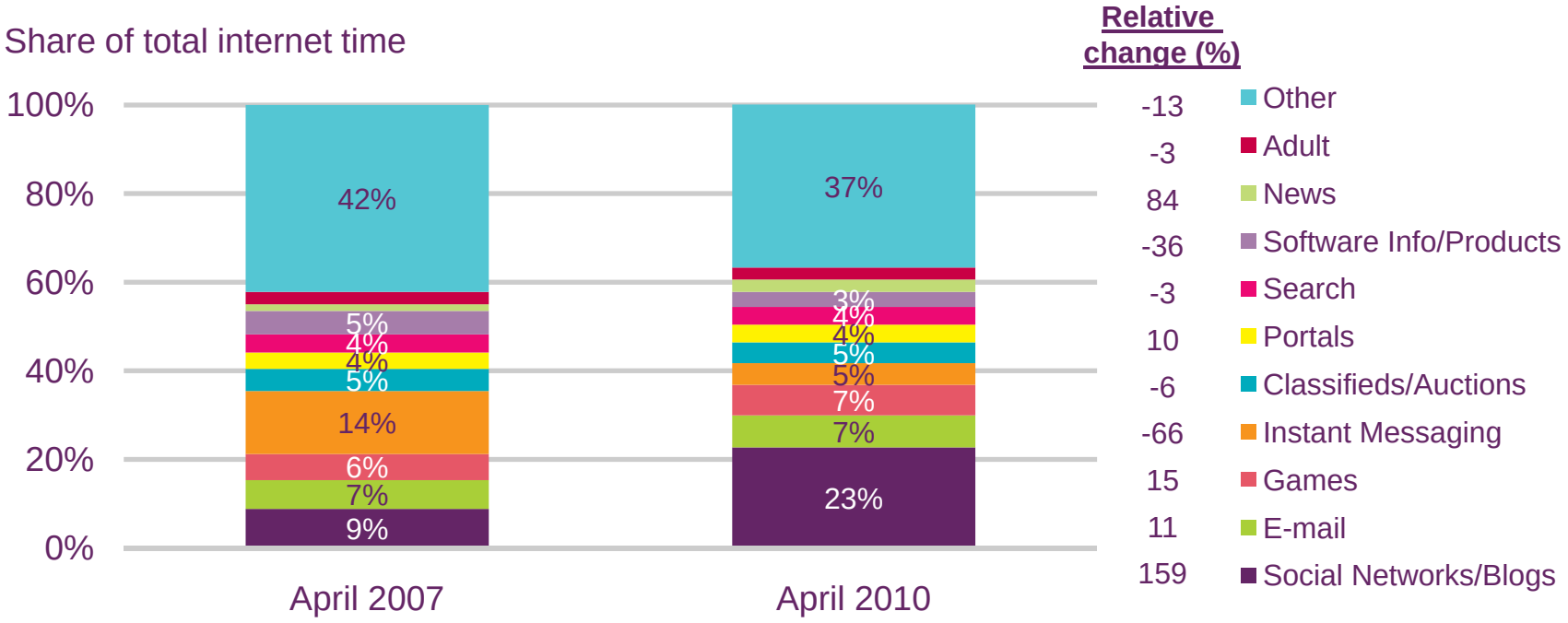


Source: UKOM/Nielsen.

Note: Home and work panel, applications included. 'Member communities' is the UKOM category that primarily consists of social networking sites. "Unique audience" = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

Figure 4.4

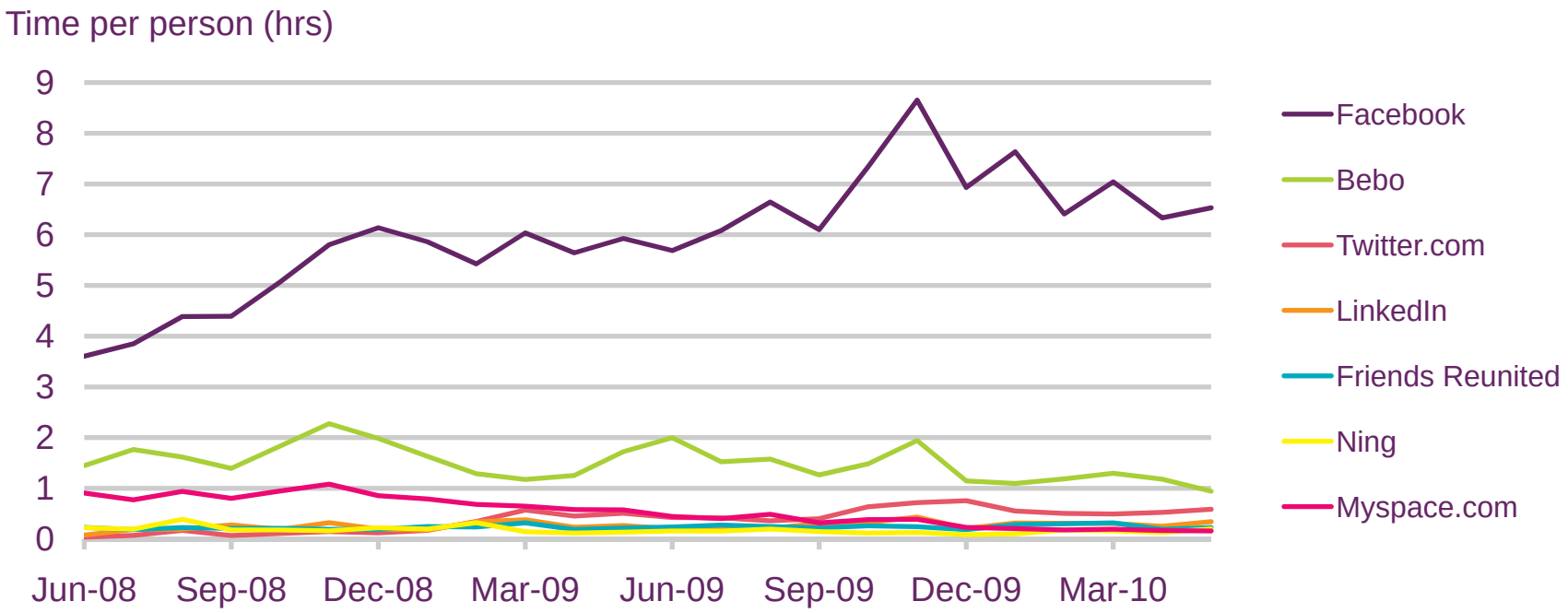
UK internet sectors' share of total internet time



Source: UKOM/Nielsen.
Note: Home and work panel, applications included. Email excludes work-related email.

Figure 4.5

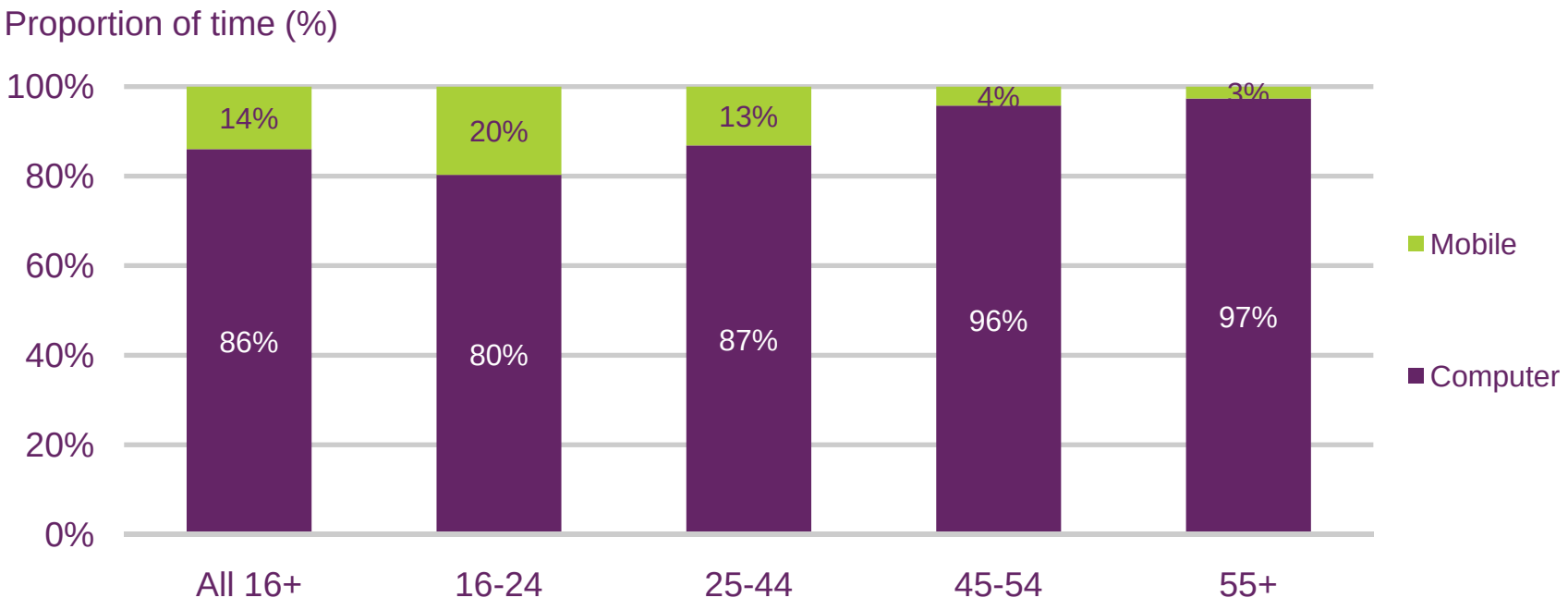
Time per user per month spent on selected social networking sites



Source: UKOM/Nielsen.
Note: home and work panel, applications included.

Figure 4.6

Proportion of time spent social networking, by device



Source: Source: Ofcom research.
Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

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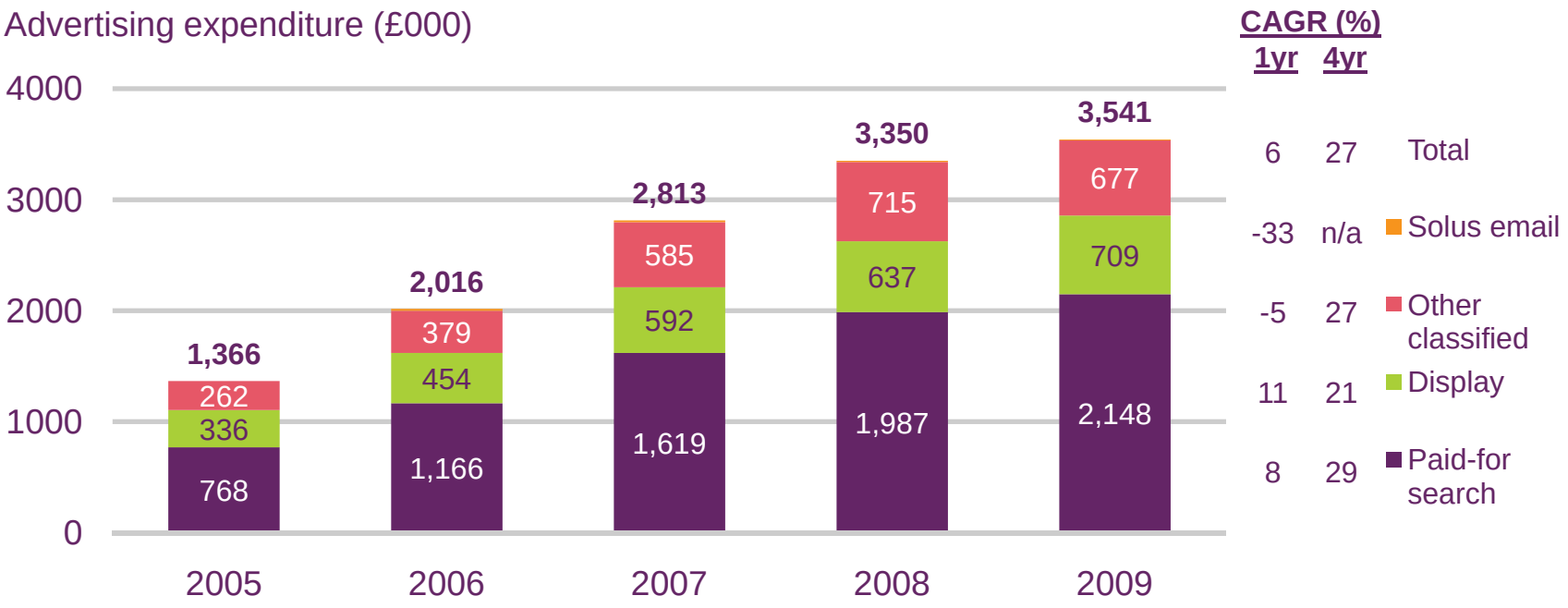
Figure 4.7

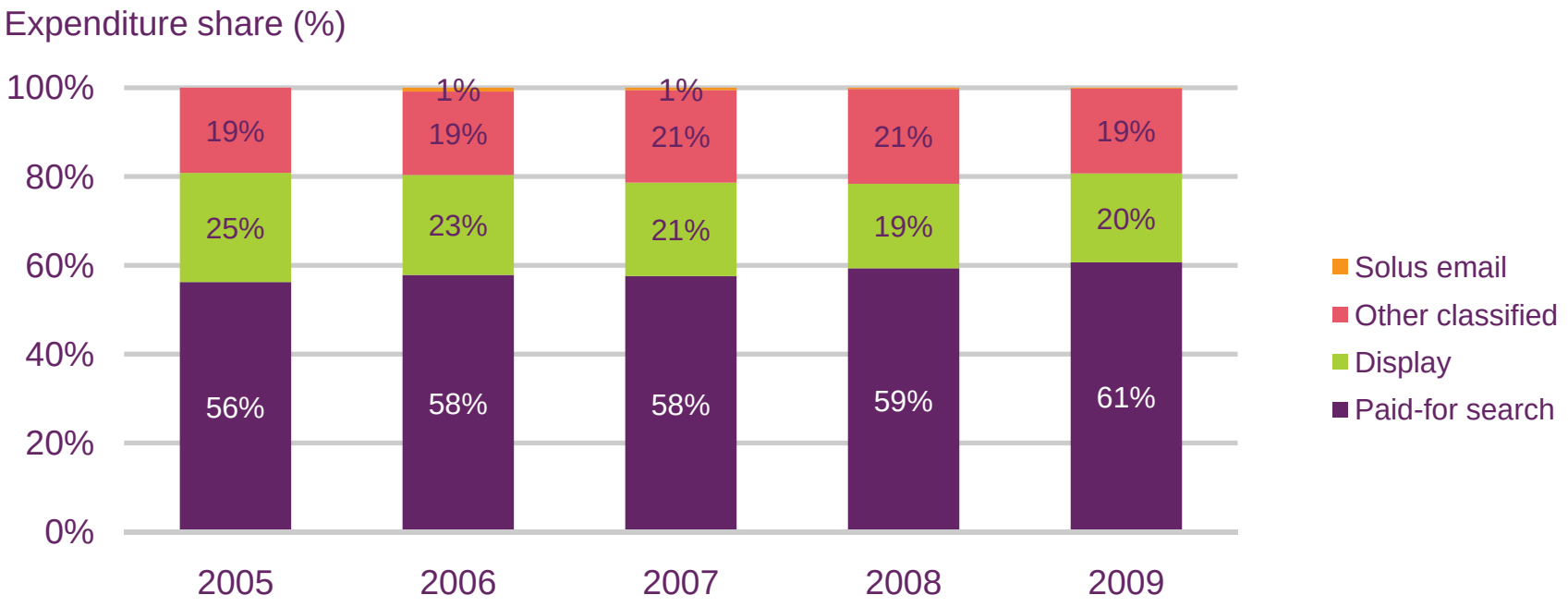
Internet advertising expenditure, by category



Source: IABUK/PwC.
Note: CAGR = compound annual growth rate. Solus email is an opt-in form of advertising where the body of the email is determined by the advertiser, and is sent on their behalf by an email list manager/owner.

Figure 4.8

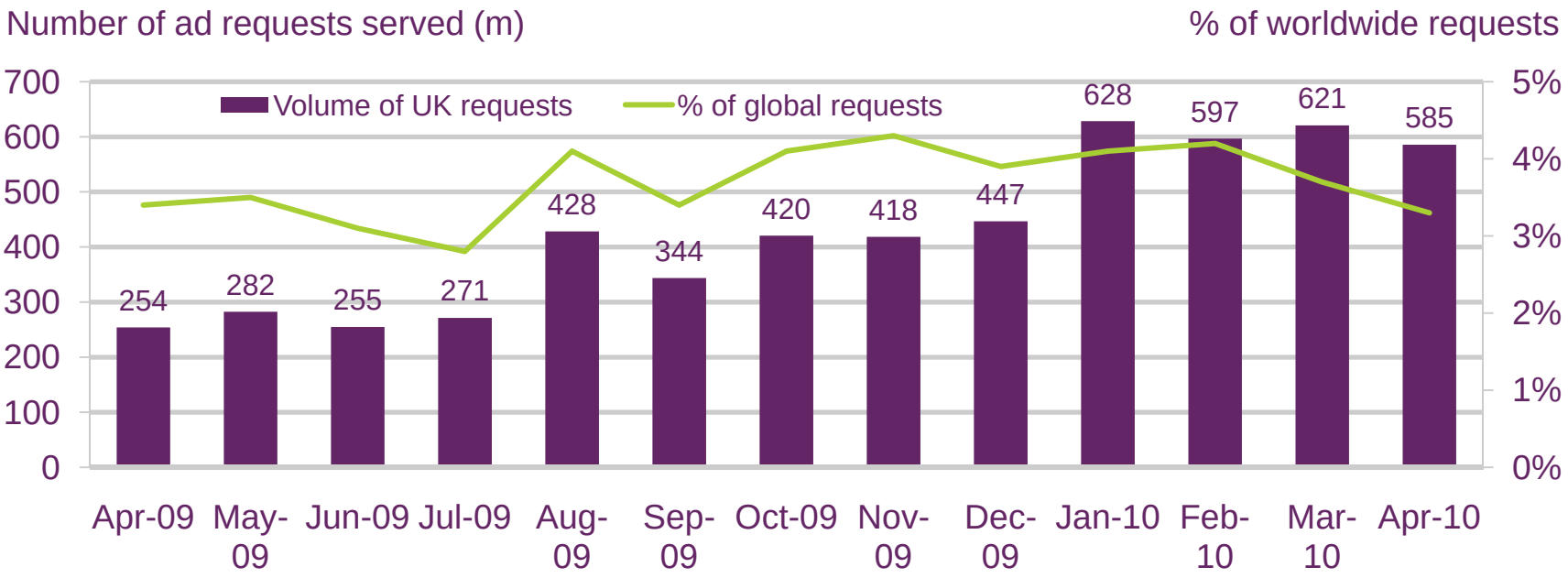
Distribution of internet advertising expenditure by category



Source: IABUK/PwC.
Note: CAGR = compound annual growth rate. Solus email is an opt-in form of advertising where the body of the email is determined by the advertiser, and is sent on their behalf by an email list manager/owner.

Figure 4.9

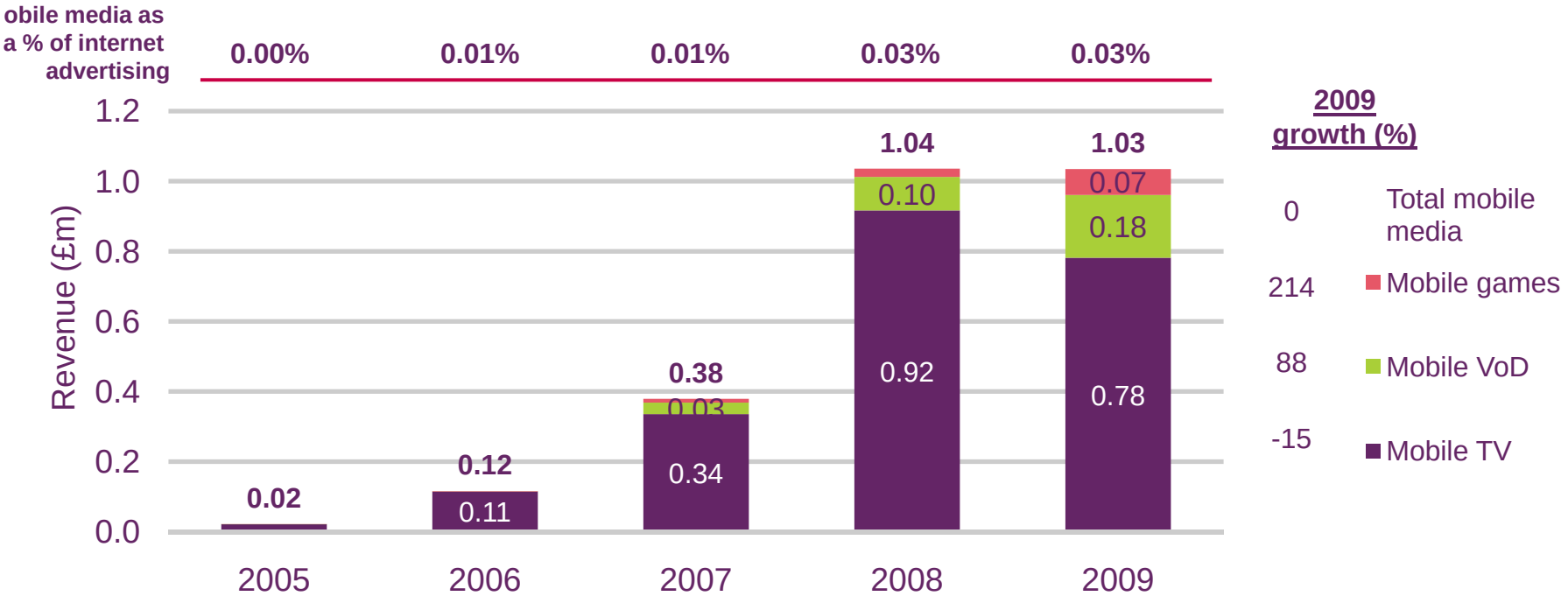
Ad requests served by Admob



Source: Admob metrics.

Figure 4.10

Mobile media advertising revenues

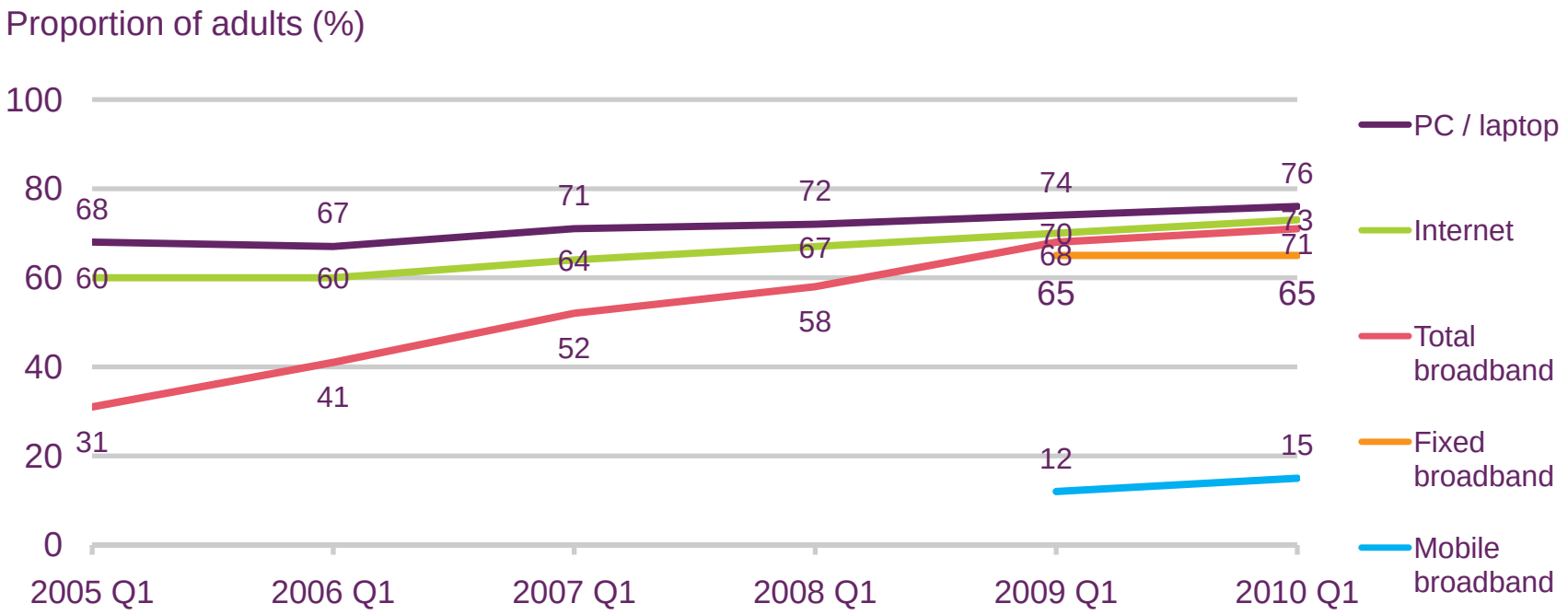


Source: Screen Digest / Ofcom / IABUK

Note: Total mobile media advertising revenues include revenues from mobile TV, mobile VoD and mobile games and exclude display and search advertising.

Figure 4.11

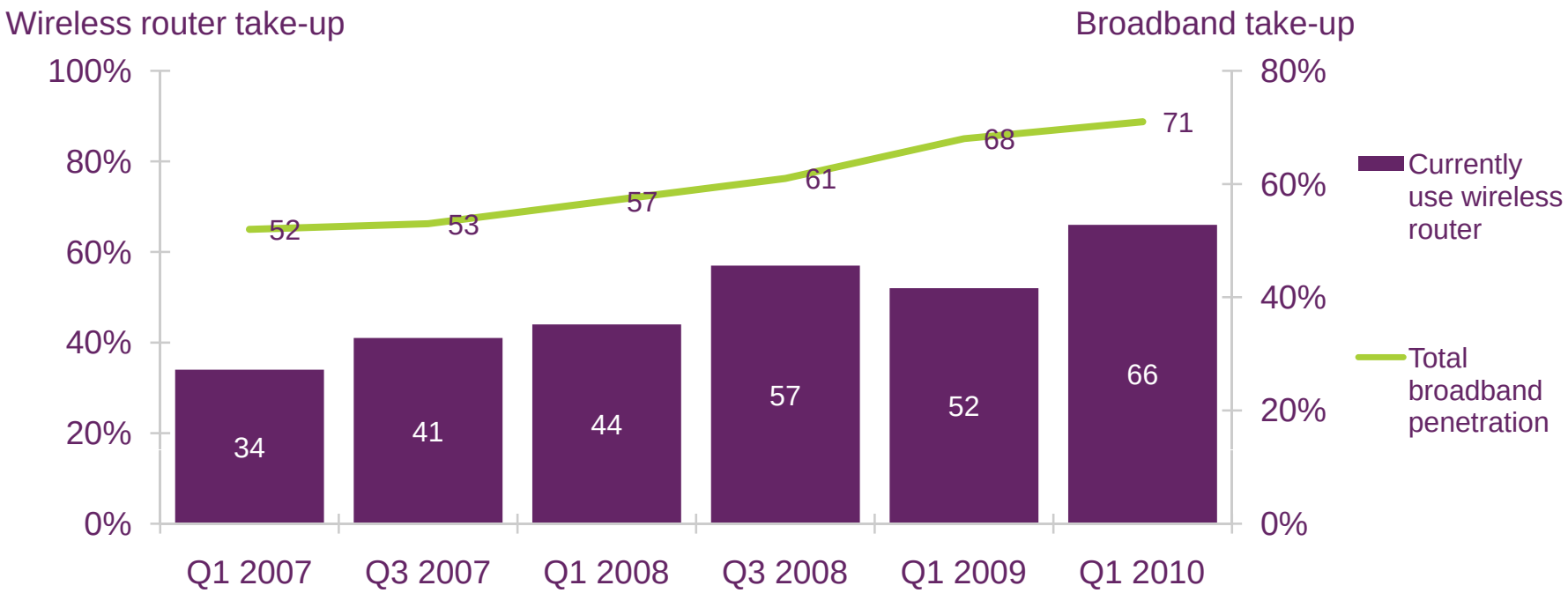
Household PC and internet take-up, 2005-2010



QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the Internet/Worldwide Web at HOME (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?
Source: Ofcom technology tracker, Q1 2010.
Base: All adults aged 15+ (n=9013).

Figure 4.12

Use of wireless router vs. broadband take-up, 2007-2010



Source: Ofcom research, Quarter 1 2010
Base: Adults aged 15+ with a broadband connection at home (from 2009 this is based on fixed broadband connections only)
Note: Total broadband penetration (fixed and mobile) based on all adults aged 15+

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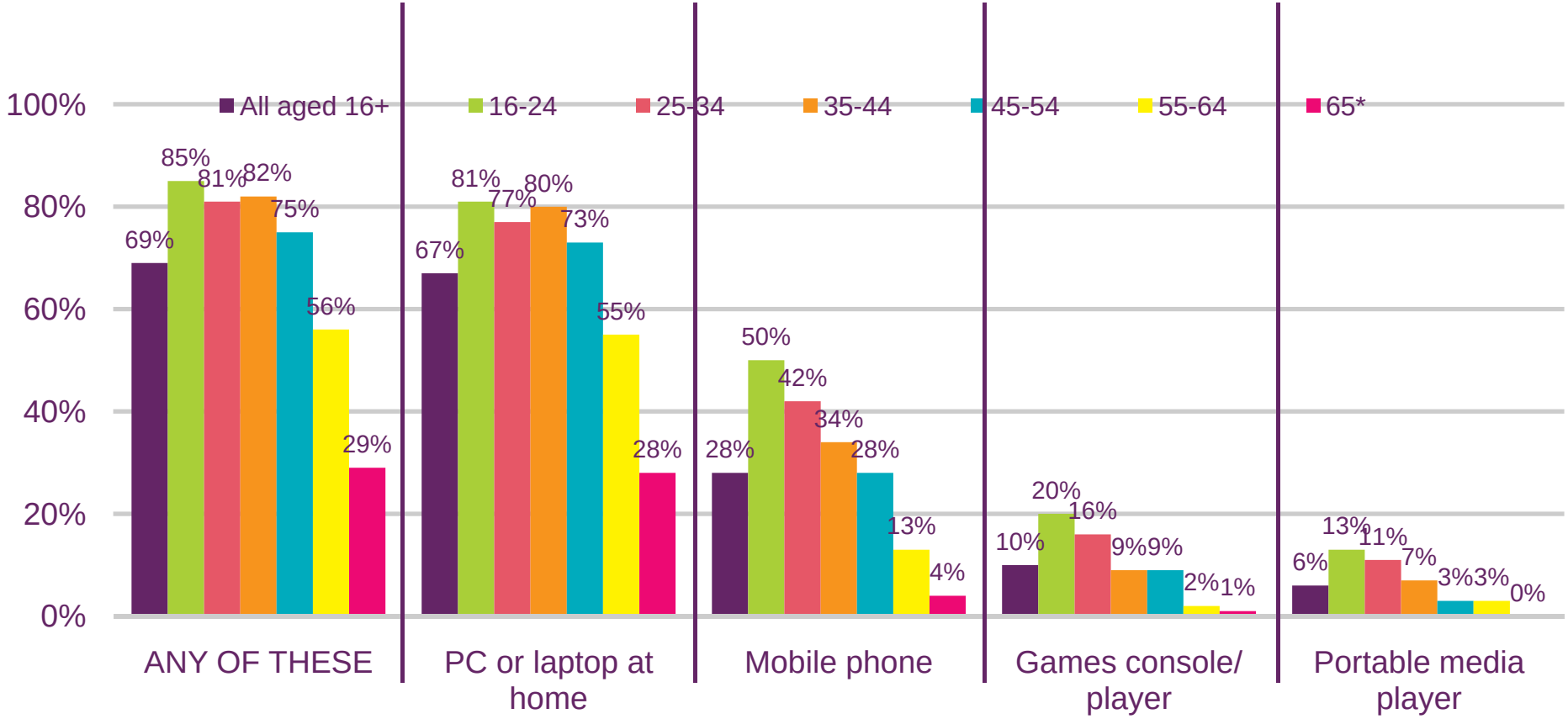
Figure 4.13

Devices used to visit internet websites in 2009, by age



IN1/ IN2 – Do you or does anyone in your household have access to the internet at home through a laptop or computer? And do you personally use the internet at home?/ Do you own and use any of the items shown on this card to visit internet websites? (Prompted responses, single coded)
Base: All adults aged 16+ (1824 aged 16+, 253 aged 16-24, 274 aged 25-34, 374 aged 35-44, 274 aged 45-54, 276 aged 55-64, 373 aged 65+).
Significance testing shows any difference between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

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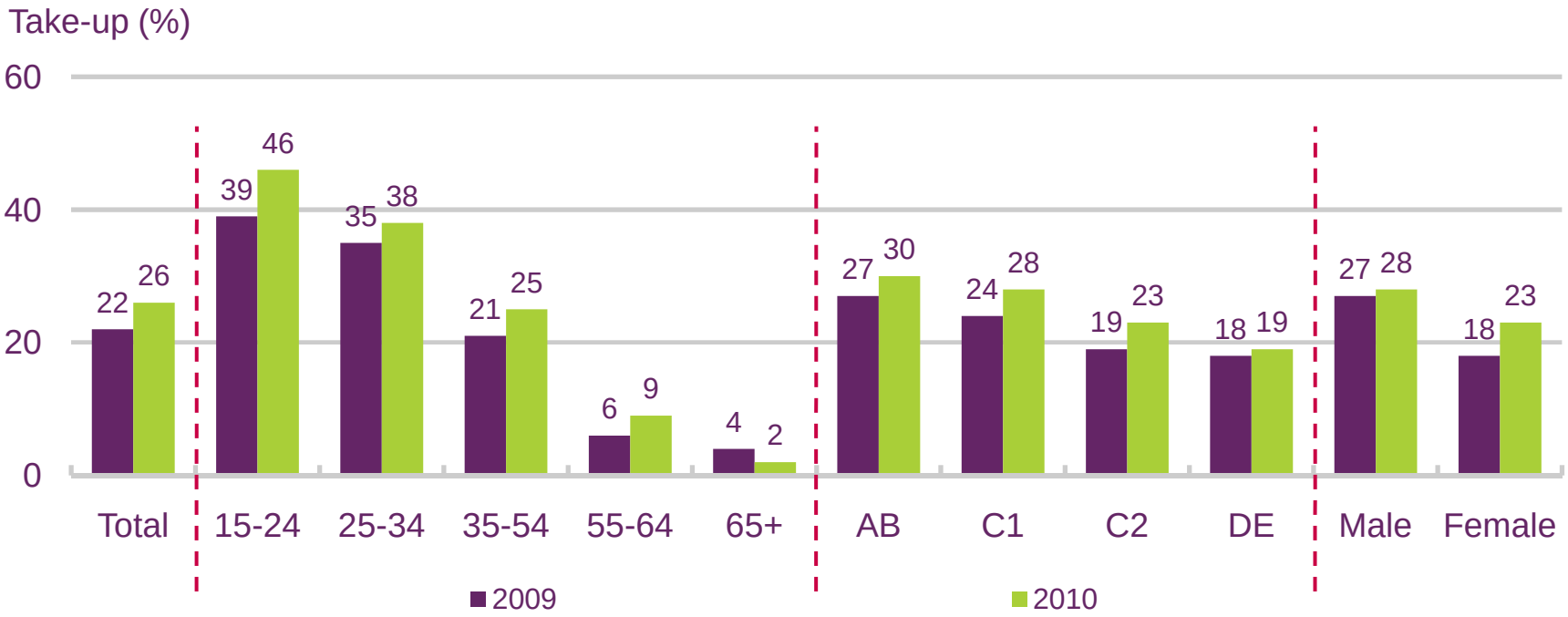
Figure 4.14

Use of mobile phones for web/data access



QD9A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?
Source: Ofcom technology tracker, Q1 2010.
Base: all adults 15+ (n = 9013 UK, 1351 15-24, 1378 25-34, 3038 35-54, 1334 55-64, 1912 65+).
Note: Web/data access includes accessing the internet, downloading and streaming content, connecting using WiFi and using VoIP.

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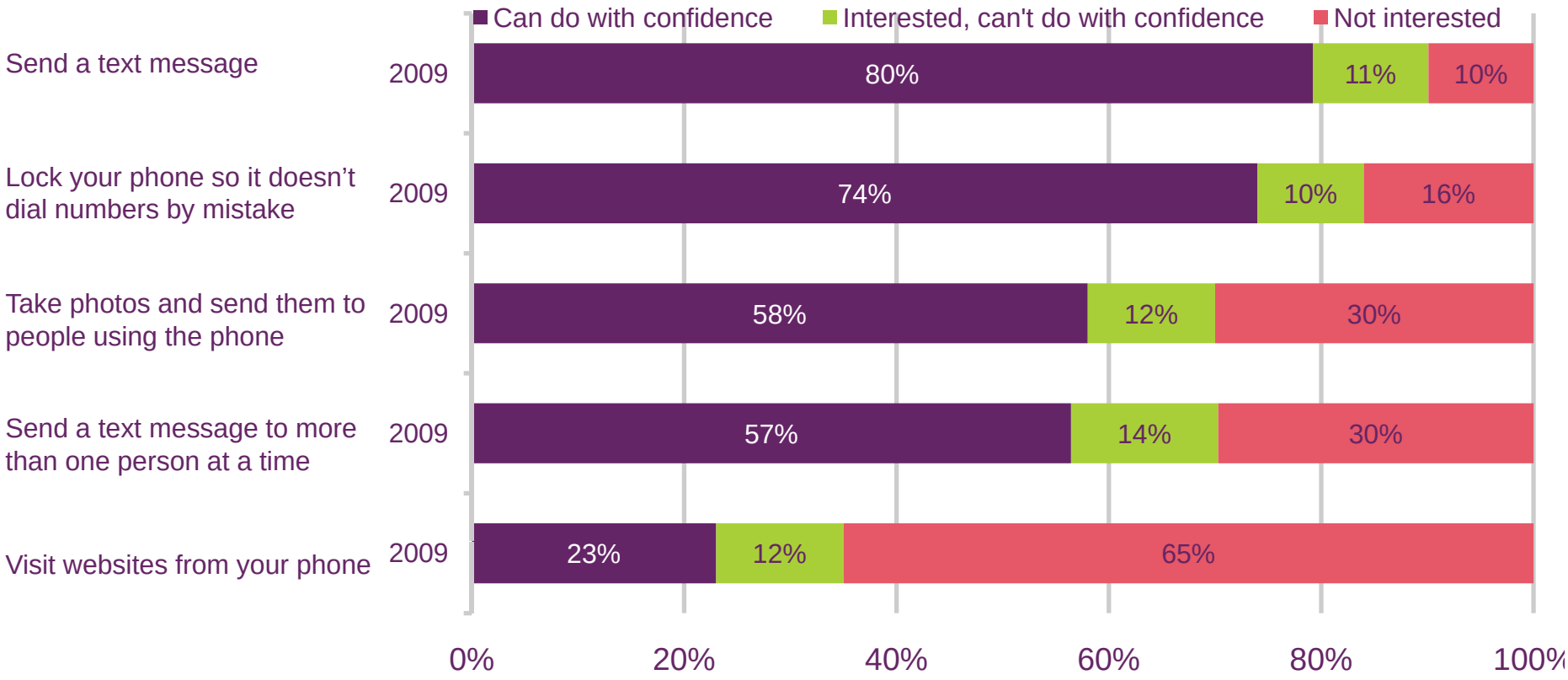
Figure 4.15

Confidence and interest in mobile phone functions



M3A-M3E – I'm going to read out some different types of things that you can do with some kinds of mobile phone, and for each one I'd like you to say which of the options on the card applies to you.
Base: Adults aged 16+ with a mobile phone (1632)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

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Figure 4.16

Home internet access, by age, socio-economic group and gender

QE2: Do you or does anyone in your household have access to the internet/Worldwide Web at home?
Source: Ofcom technology tracker, Q1 2010.
Base: all adults 15+ (n = 9013 UK, 1351 15-24, 1378 25-34, 3038 35-54, 1334 55-64, 1109 65-74, 803 75+, 2029 AB, 2631 C1, 1735 C2, 2569 DE, 4298 male, 4715 female).

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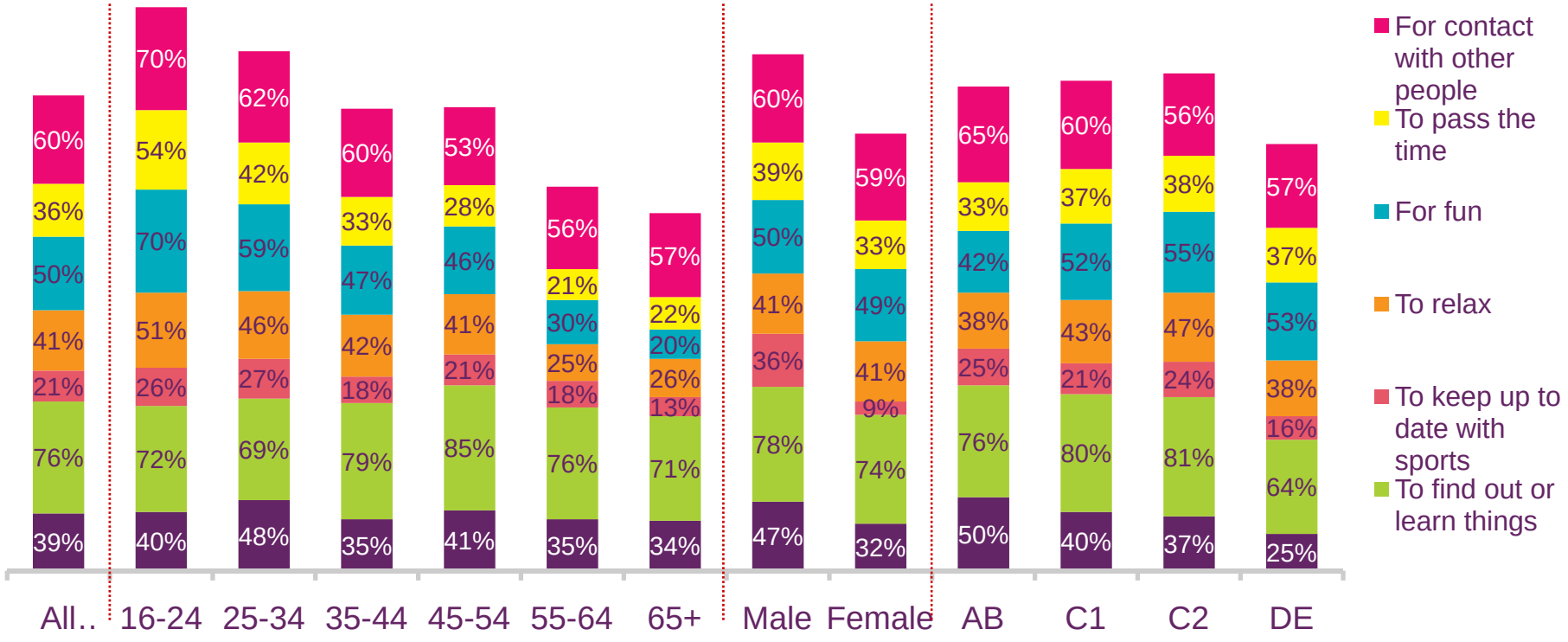
Figure 4.17

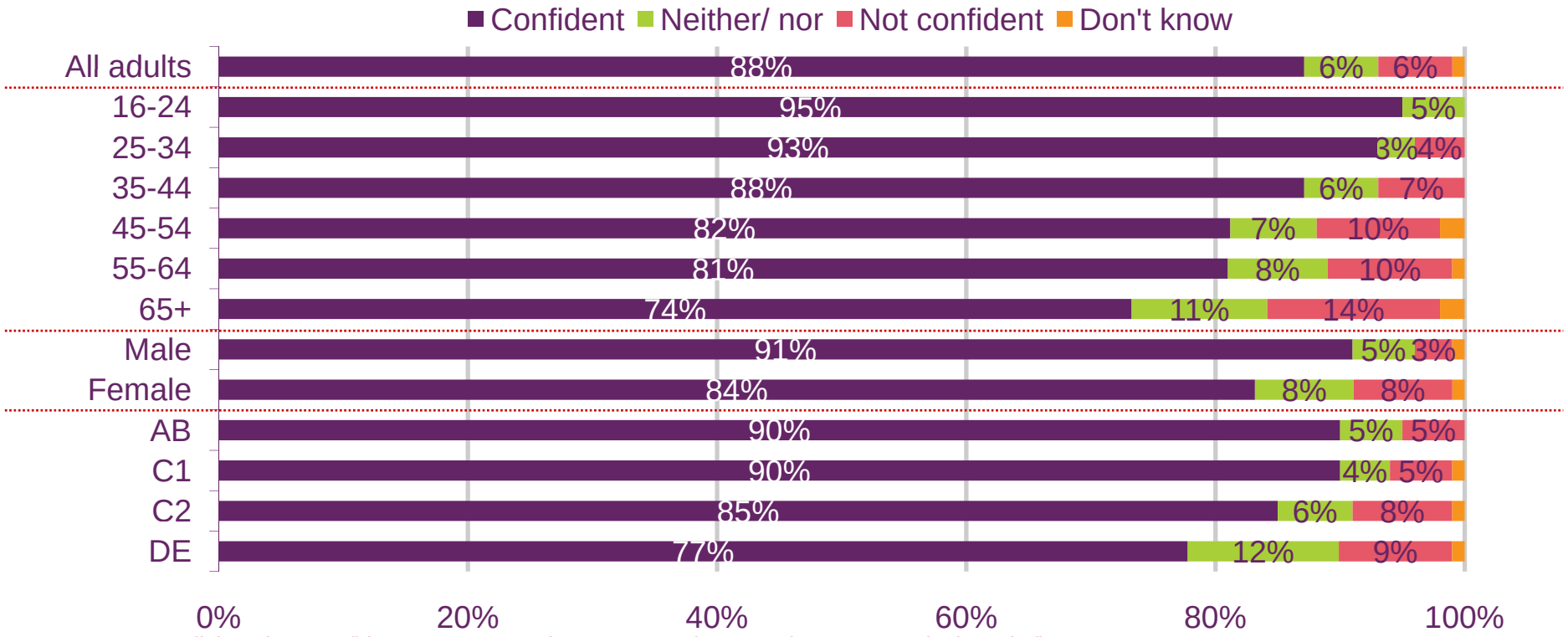
Reasons for using the internet, by age, gender and SEG



IN42 – Which, if any of these are reasons why you use the internet? (prompted responses, multi-coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+ in 2009, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+, 615 male, 667 female, 341 AB, 417 C1, 232 C2, 290 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Figure 4.18

Confidence as an internet user in 2009, by age, gender and SEG



IN10D – Overall then, how confident are you as an internet user? (Prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+, 615 male, 667 female, 341 AB, 417 C1, 232 C2, 290 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

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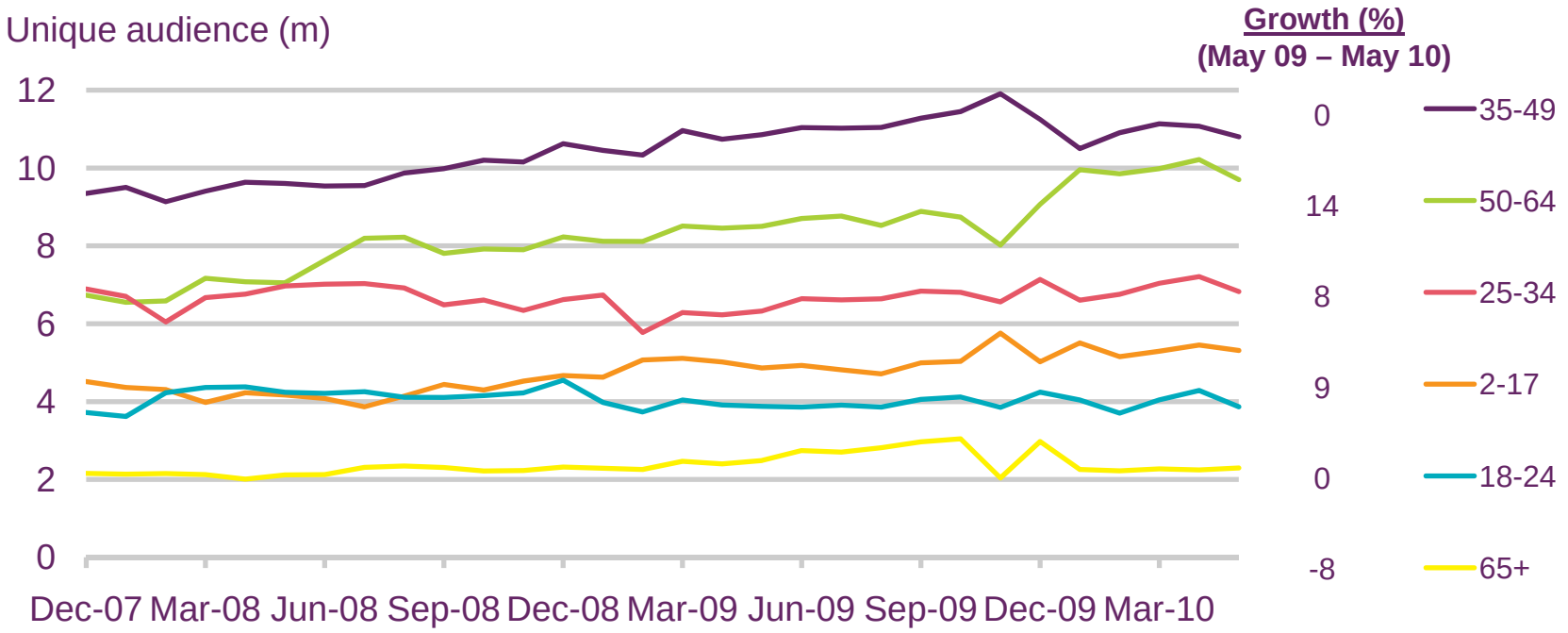
Figure 4.19

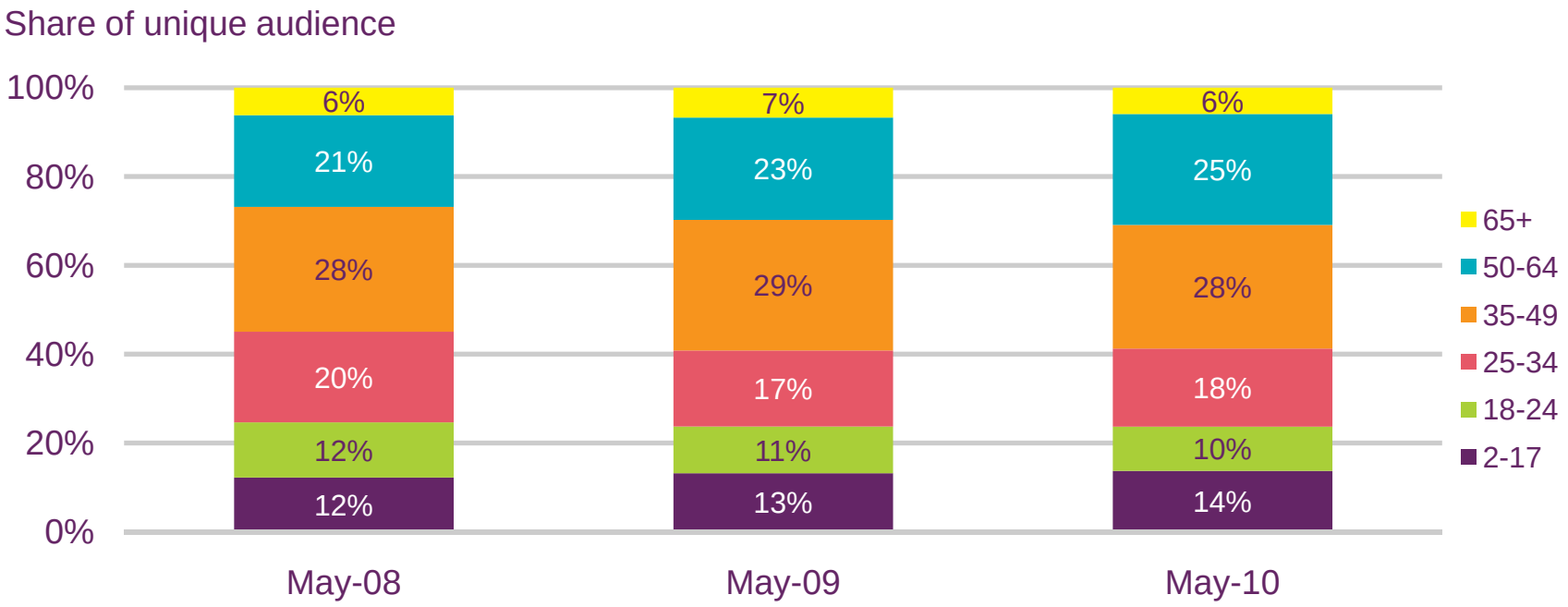
Active online universe, by age



Source: UKOM/Nielsen, home and work panel, applications included.
Note: active online universe = number of users aged 2+ who use an internet-enabled computer.

Figure 4.20

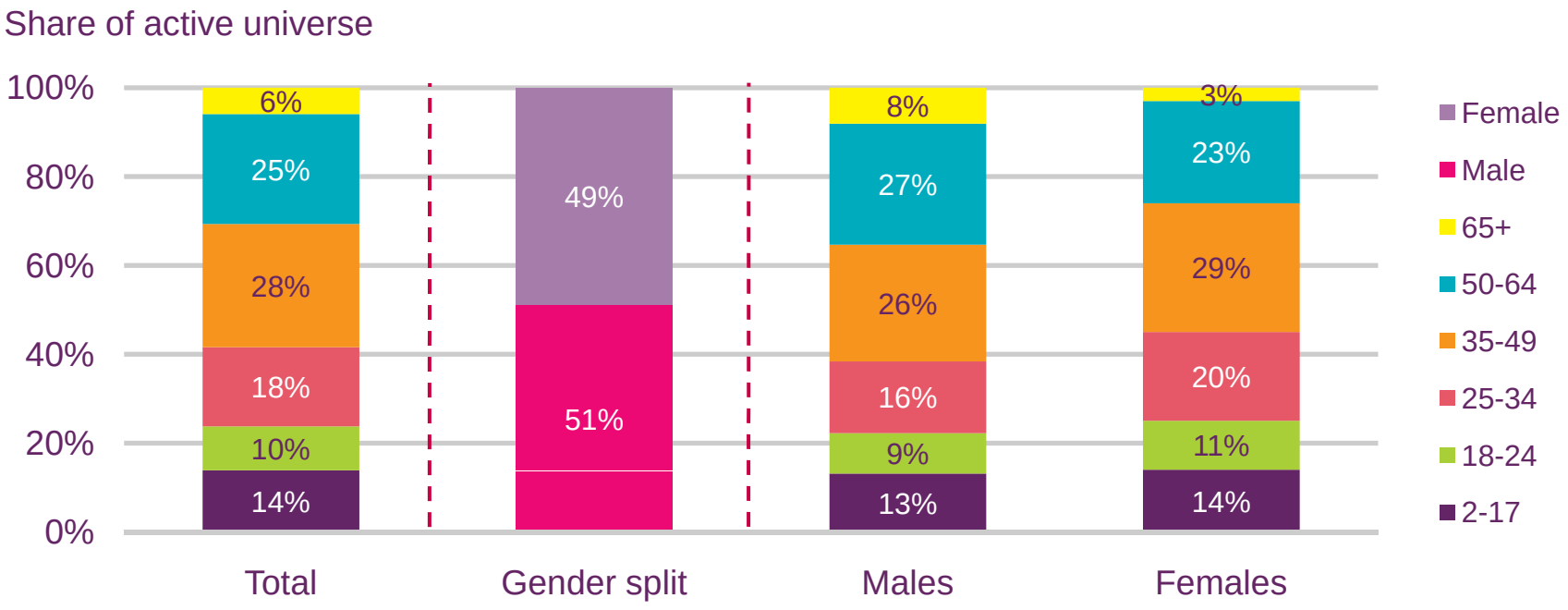
Share of active online universe, by age



Source: UKOM/Nielsen, home and work panel, applications included, month of May 2010.
Note: active online universe = number of users aged 2+ who use an internet-enabled computer.

Figure 4.21

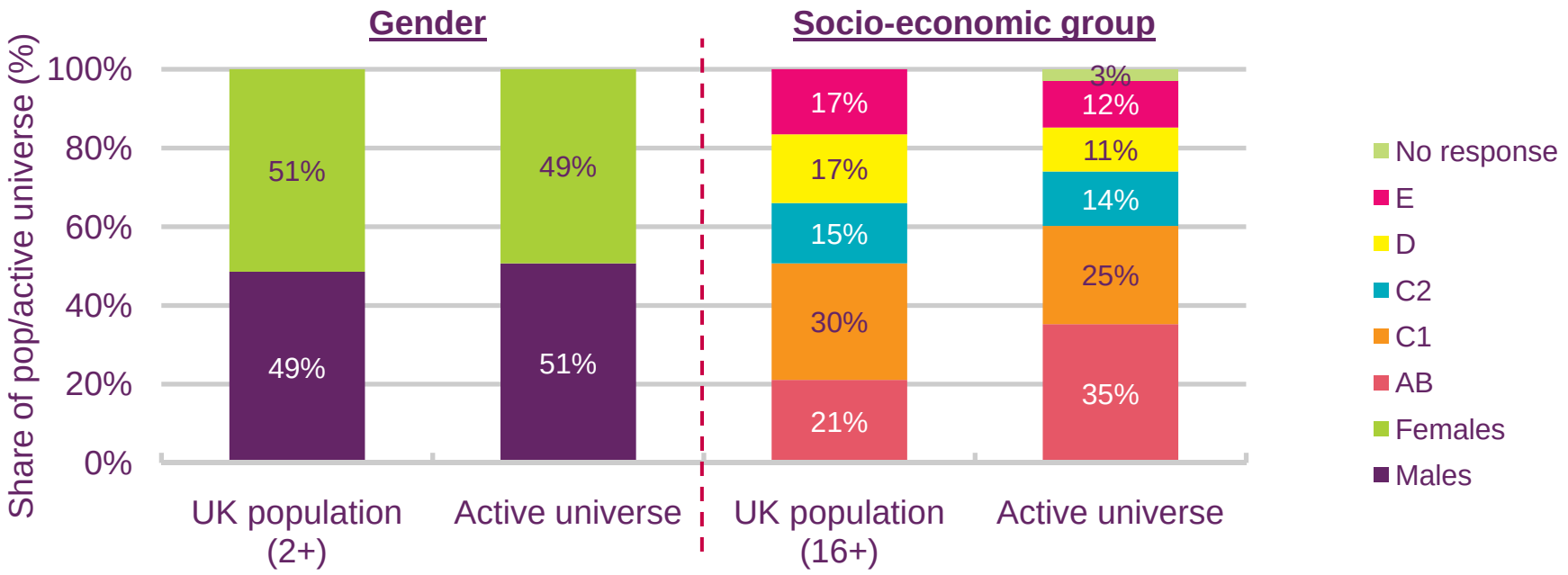
Share of active online universe, by age and gender



Source: UKOM/Nielsen, home and work panel, applications included, month of May 2010.
Note: active online universe = number of users aged 2+ who use an internet-enabled computer.

Figure 4.22

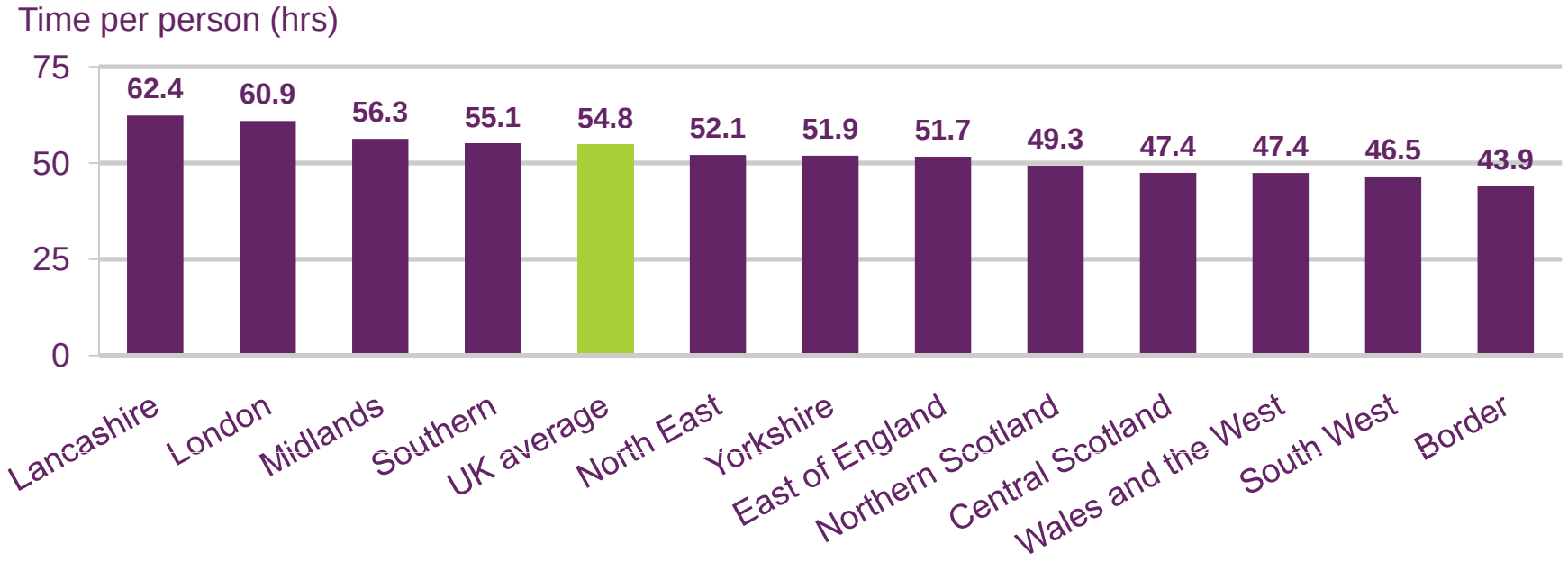
Gender and demographic breakdown of active online universe



Source: ONS/UKOM, home and work panel, applications included.
Note: active online universe = number of users aged 2+ who use an internet-enabled computer.

Figure 4.23

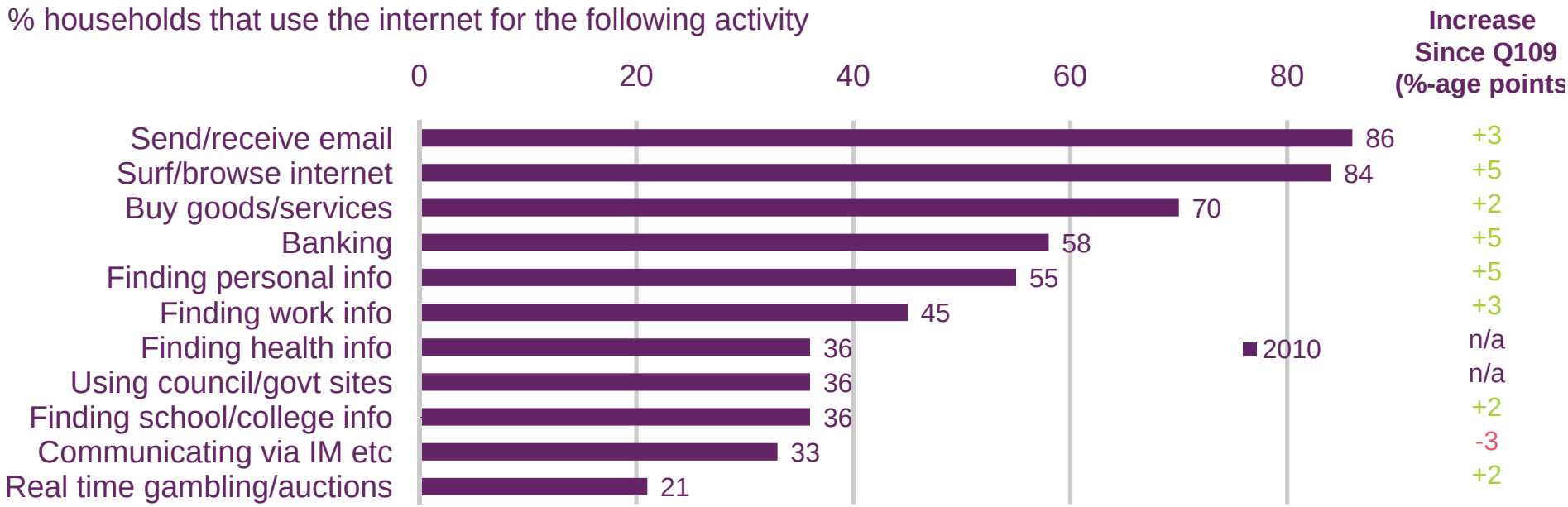
Monthly internet-enabled PC time per user, by region



Source: UKOM, home and work panel, applications included. Month of May 2010. Regions based on ISBA regions.
Note: active online universe = number of users aged 2+ who use an internet-enabled computer.

Figure 4.24

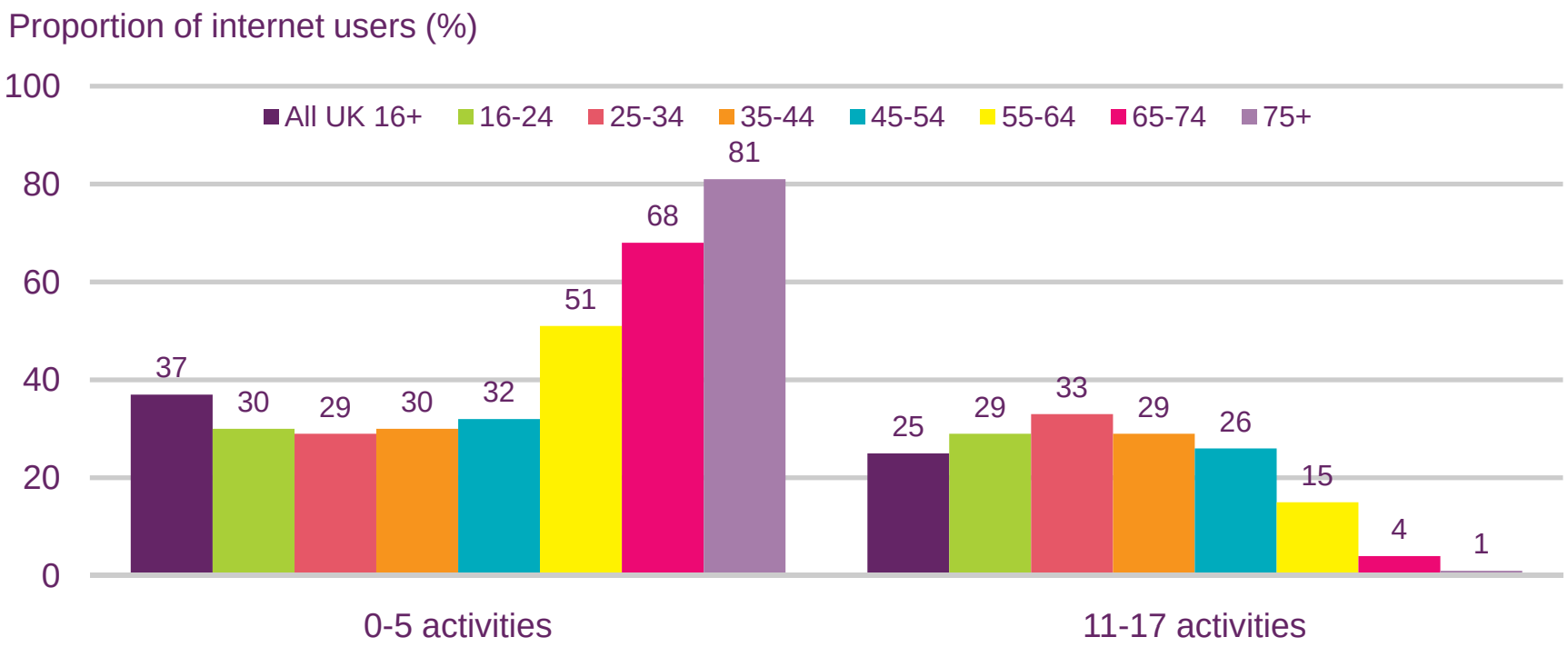
Claimed use of the internet for selected activities



QE10A: Which, if any, of these do you or members of your household use the internet for while at home?
Source: Ofcom technology tracker, Q1 2010.
Base: All with internet access (n=6163).

Figure 4.25

Breadth of internet use (number of internet activities undertaken)



Q10A: Which, if any, of these do you or members of your household use the internet for whilst at home?
Source: Ofcom Technology Tracker digital participation research, Q1 2010
Base: all home internet users (n=6946).

Figure 4.26

Consumers' agreement/disagreement on use of online services

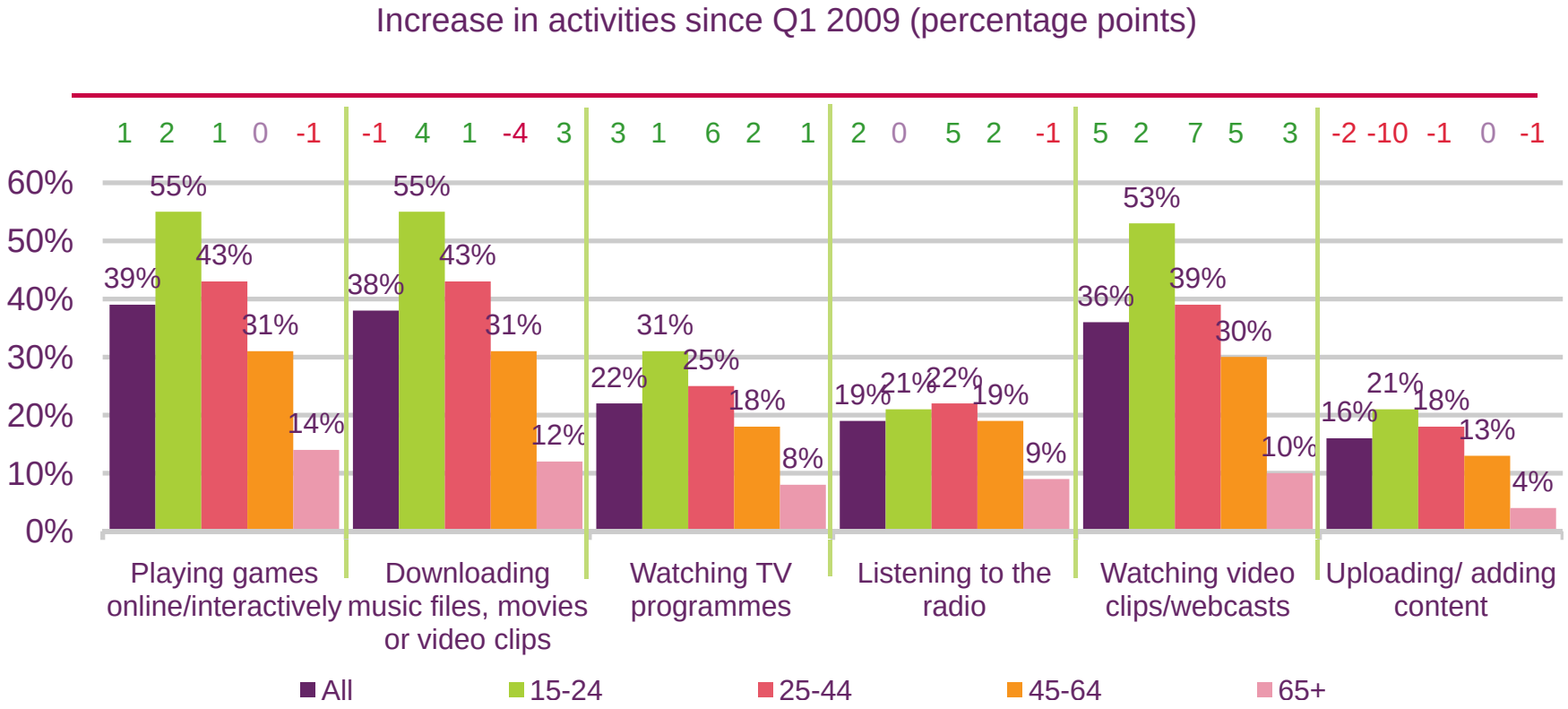
Proportion of respondents (%)

Q: How much do you agree or disagree... I am more likely to read free newspapers or catch up with the news and sport online than purchase a newspaper. I am more likely to purchase goods and services over the internet than in shops in order to save money. I am more likely to use price comparison websites (such as uswitch.com or pricerunner.co.uk) in order to find the best deal. I am more likely to use vouchers from websites or emails offering money off goods and services. I make more telephone calls over the internet, using services like Skype, rather than using my home phone.
Source: Ofcom-commissioned research
Base: All those with broadband access (n = 1554)

Figure 4.27

Engagement with online media content, by age

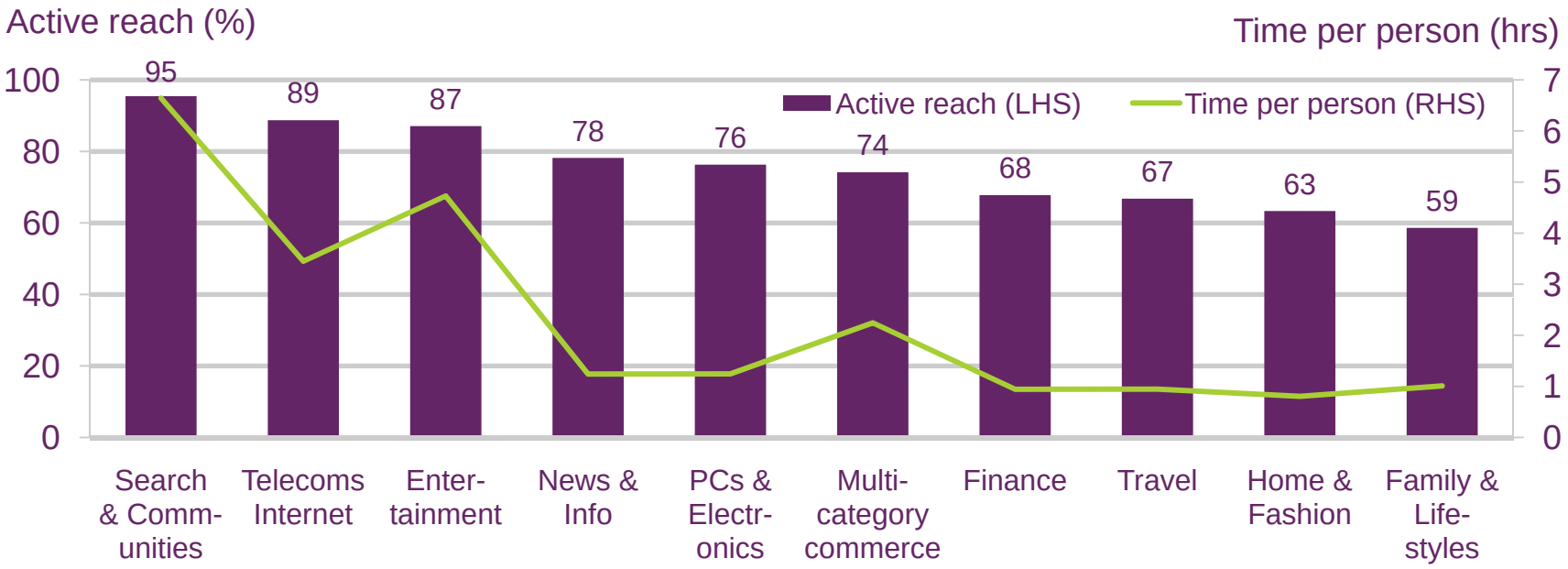
% of households who use the internet for the following activities



QE10A: Which, if any, of these do you or members of your household use the internet for while at home?
Source: Ofcom research, Q1 2010.
Base: All adults who have the internet at home (n= 6163).

Figure 4.28

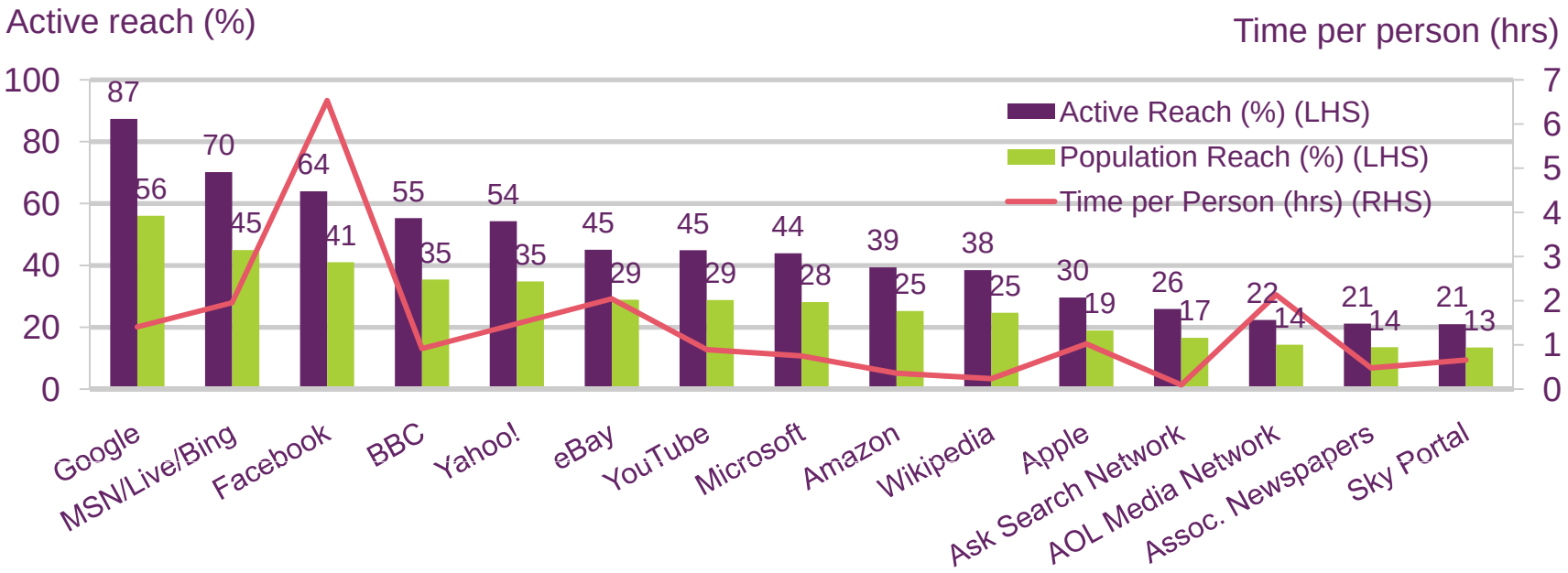
Most popular site categories, by active reach



Source: UKOM home and work panel, applications included, month of May 2010.
Note: “active reach” = the percentage of all active 2+ unique persons who visited the site or used the application. ‘Active’ is defined as anyone who used an internet-enabled computer within the time period.

Figure 4.29

Most popular online brands, by reach



Source: UKOM home and work panel, applications included, month of May 2010.
Note: “active reach” = the percentage of all active 2+ unique persons who visited the site or used the application. ‘Active’ is defined as anyone who used an internet-enabled computer within the time period. “Population reach” = percentage of UK population.

Figure 4.30

Top 10 sites by unique audience, split by age

Rank	2-17	18-24	25-34	35-49	50-64	65+
1	Google	Google	Google	Google	Google	Google
2	Google Search	Google Search	Google Search	Google Search	Google Search	Google Search
3	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing
4	Facebook	Facebook	Facebook	Facebook	Yahoo!	BBC
5	YouTube	Windows Live Hotmail	Yahoo!	BBC	Facebook	Yahoo!
6	BBC	YouTube	BBC	Yahoo!	BBC	Google Maps
7	Windows Live Messenger	Windows Live Messenger	Google Maps	Google Maps	Google Maps	Microsoft
8	Yahoo!	Yahoo!	YouTube	eBay	Microsoft	Amazon
9	YouTube Homepage	BBC	eBay	Microsoft	eBay	Facebook
10	Google Image Search	eBay	Windows Live Hotmail	YouTube	Amazon	Wikipedia

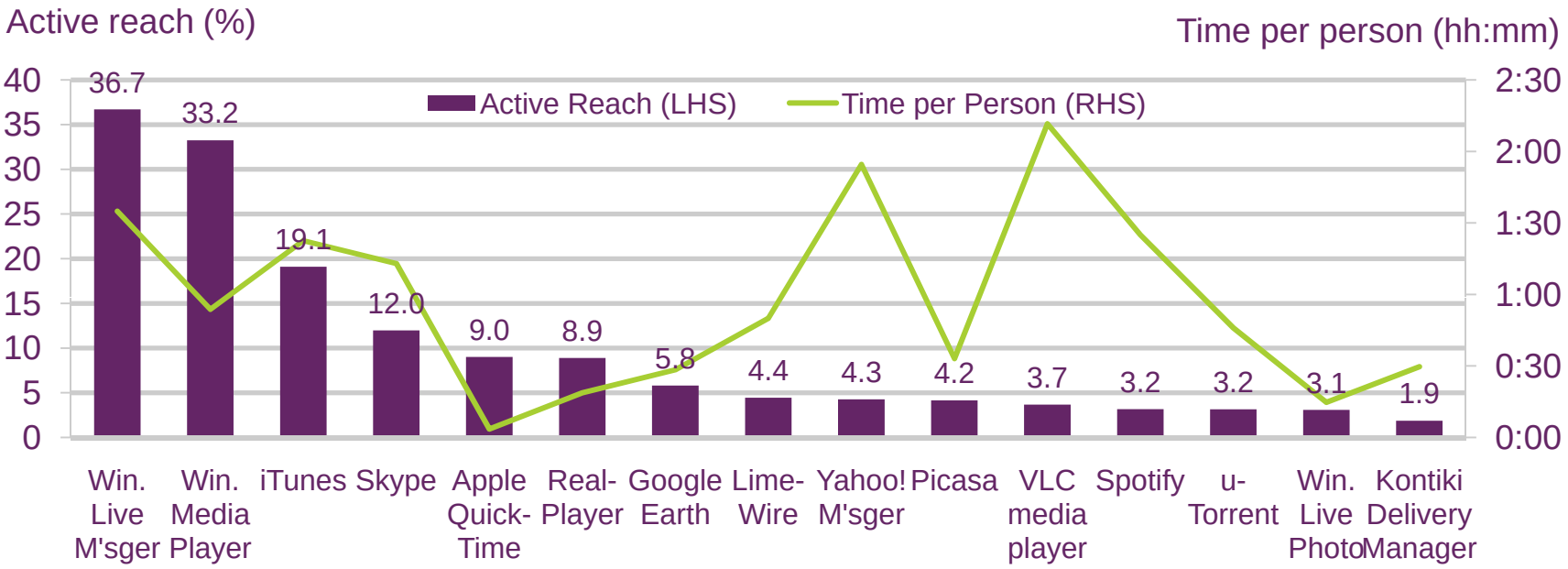
Key

Google (ex. YouTube)
Microsoft
Facebook
Yahoo!
BBC
YouTube
eBay
Amazon
Wikipedia

Source: UKOM home and work panel, applications included, month of May 2010.
Note: "Unique audience" = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

Figure 4.31

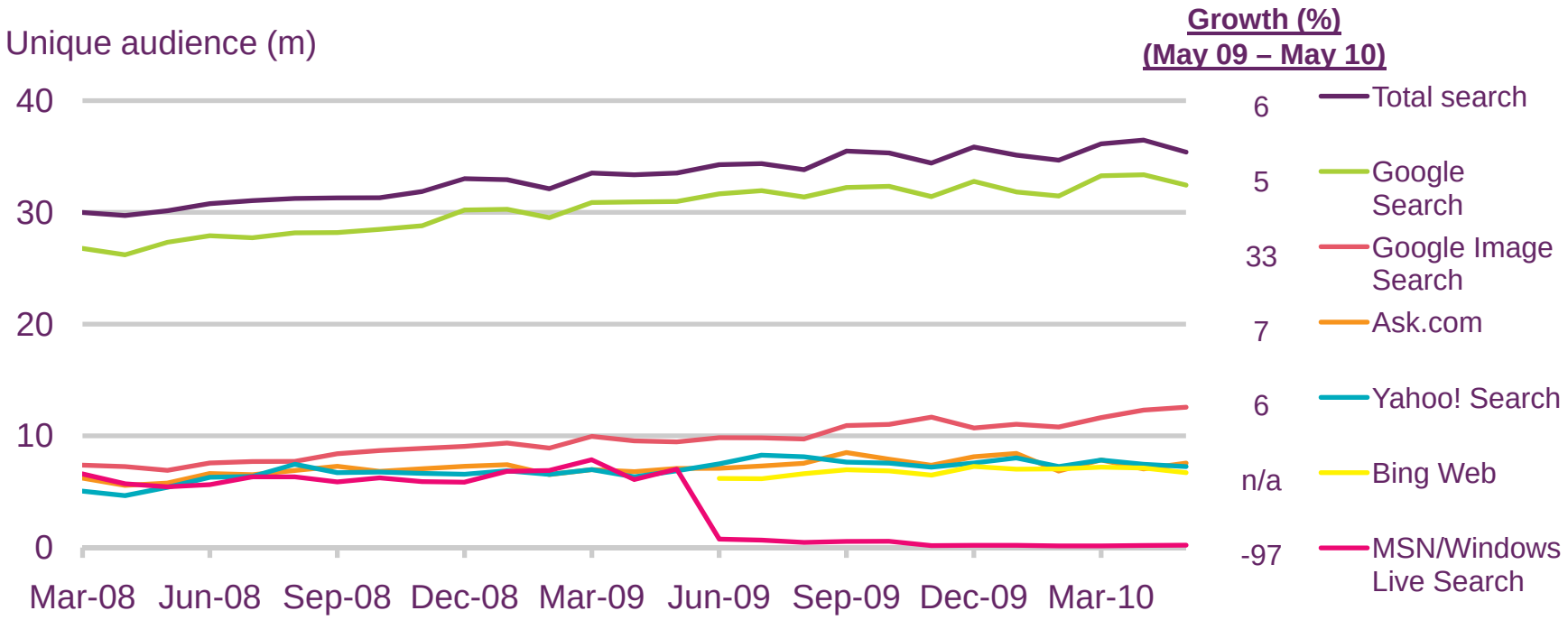
Most popular internet applications, by active reach



Source: UKOM home and work panel, applications included, month of May 2010.
Note: “active reach” = the percentage of all active 2+ unique persons who visited the site or used the application. ‘Active’ is defined as anyone who used an internet-enabled computer within the time period.

Figure 4.32

Unique audience of leading search sites



Source: UKOM home and work panel, applications included, month of May 2010.
Note: "Unique audience" = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once. MSN/Windows Live search rebranded as Bing in May 2009.

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Figure 4.33

Top 10 Google search terms and top 10 Google destinations

Rank	Search term	Rank	Destination
1	facebook	1	clients1.google.co.uk
2	youtube	2	en.wikipedia.org
3	bbc	3	www.facebook.com
4	hotmail	4	maps.google.co.uk
5	ebay	5	www.youtube.com
6	news	6	www.bbc.co.uk
7	games	7	news.bbc.co.uk
8	google	8	www.amazon.co.uk
9	you	9	www.google.com
10	yahoo	10	answers.yahoo.com

Source: Search terms – Google Insights for search, May 2010; destination urls – UKOM, home and work panel, May 2010.

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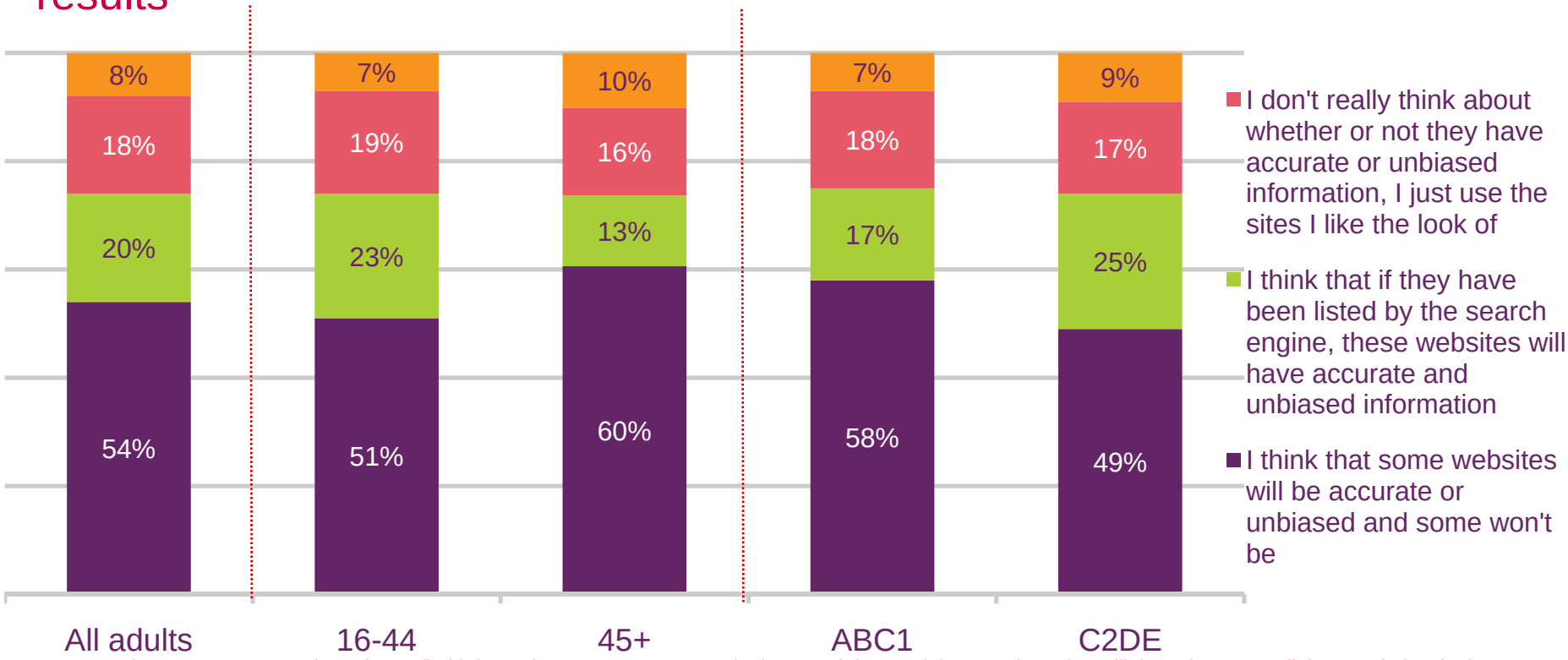
Figure 4.34

User attitudes towards accuracy or bias of search engine results



NIN46 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2009

Base: All adults aged 16+ who mostly use search engines to look for information on the internet (407 aged 16+, 252 aged 16-44, 155 aged 45+, 201 male, 206 female, 251 ABC1, 155 C2DE). Significance testing shows any between adults aged under 45 and aged 45 and over, between males and females, between those in ABC1 and C2DE socio-economic groups

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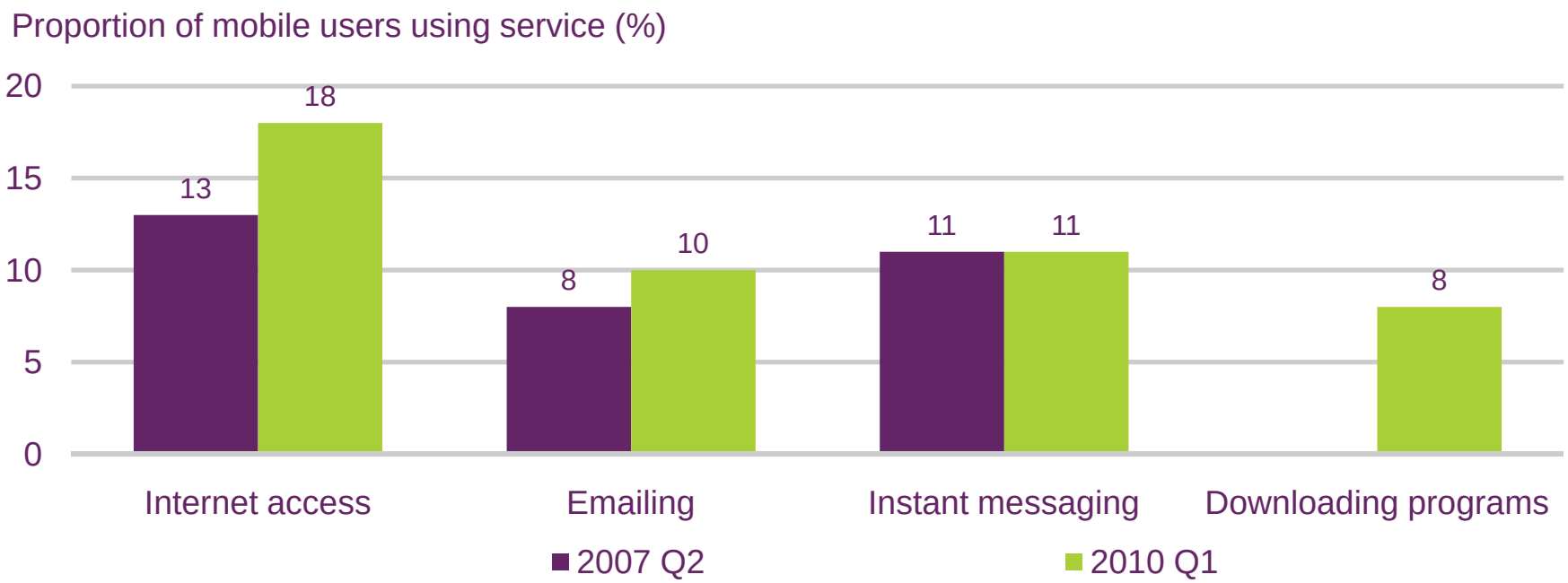
Figure 4.35

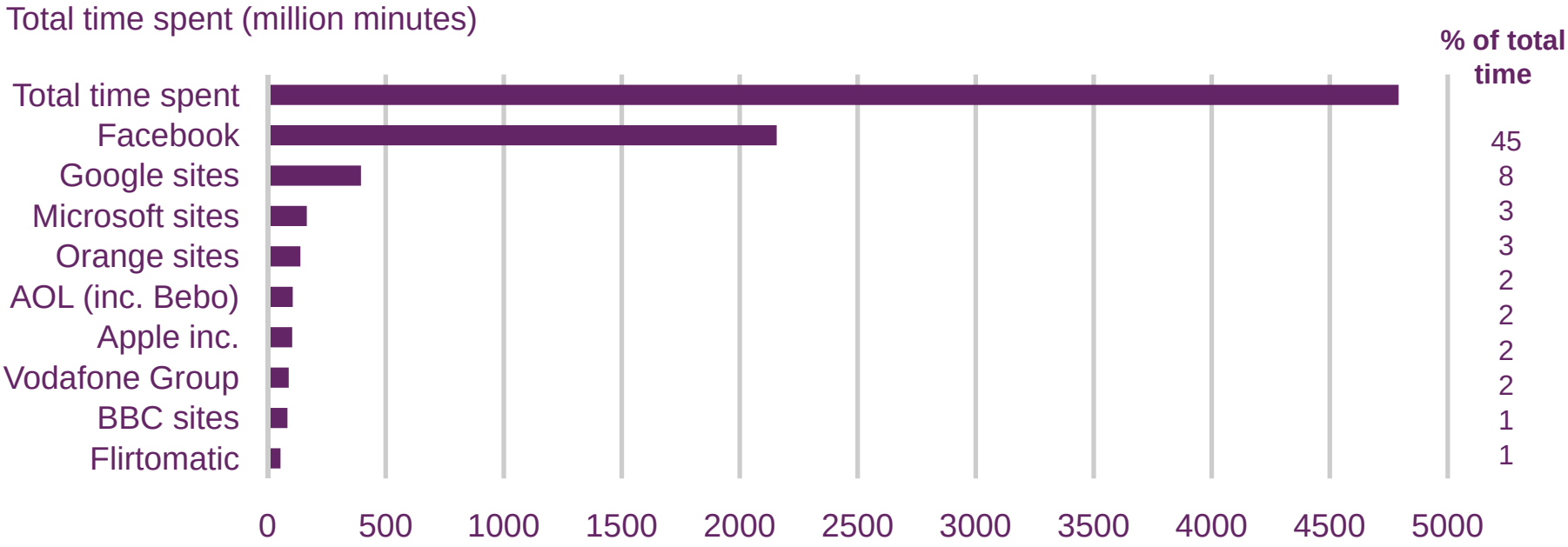
Use of mobile data services



QD9A: Which if any of the following activities, other than making and receiving voice calls, do you use your mobile for?
Source: Ofcom technology tracker, Q1 2010.
Base: all mobile users aged 15+ (n=7826).

Figure 4.36

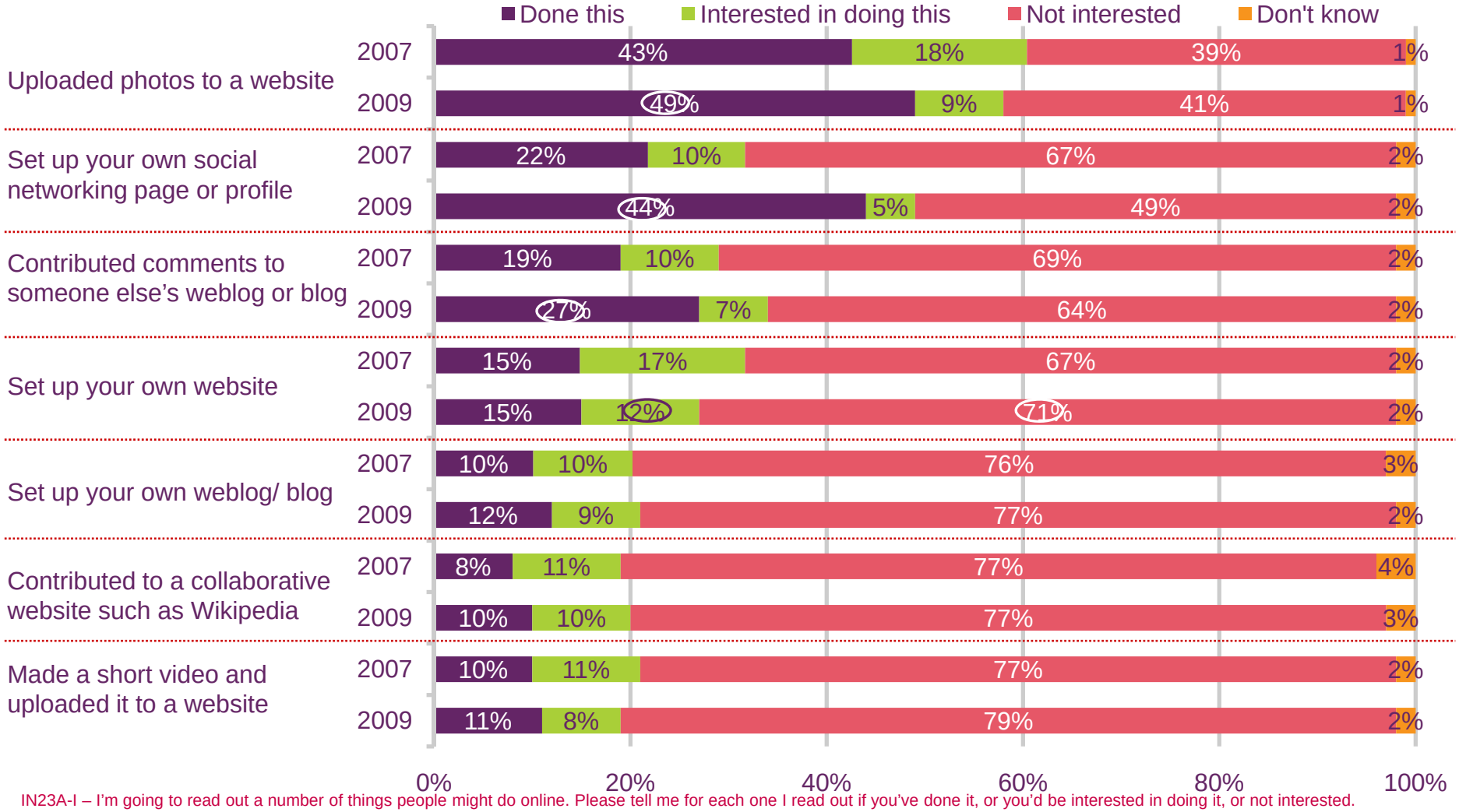
Top 10 UK mobile internet sites, December 2009



Source: GSMA Mobile Media Metrics

Figure 4.37

Experience of, and interest in, content creation



IN23A-I – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested. (prompted responses, single coded)

Base: All who use the internet at home or elsewhere (1723 in 2007,1282 in 2009). Significance testing shows any change between 2007 and 2009

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

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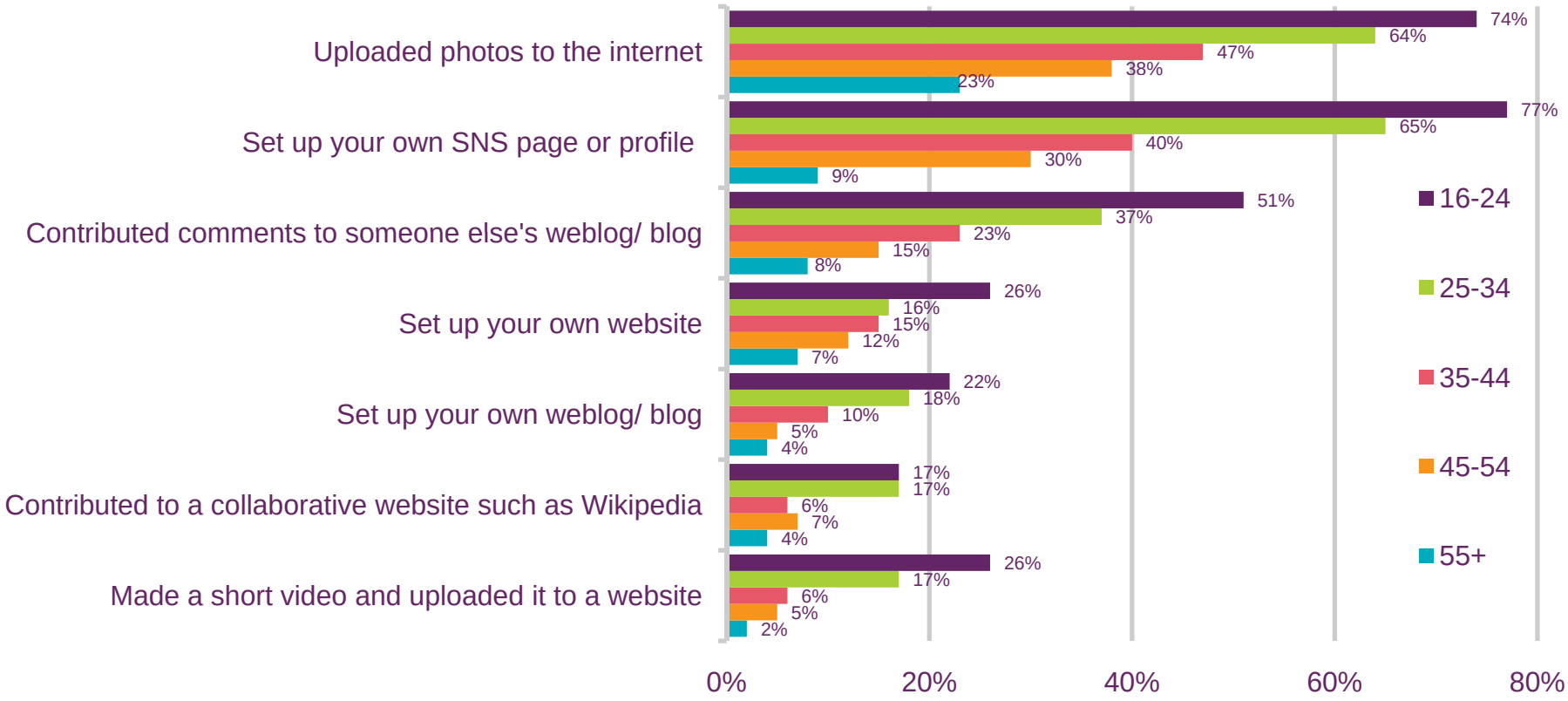
Figure 4.38

Experience of creative activities, by age

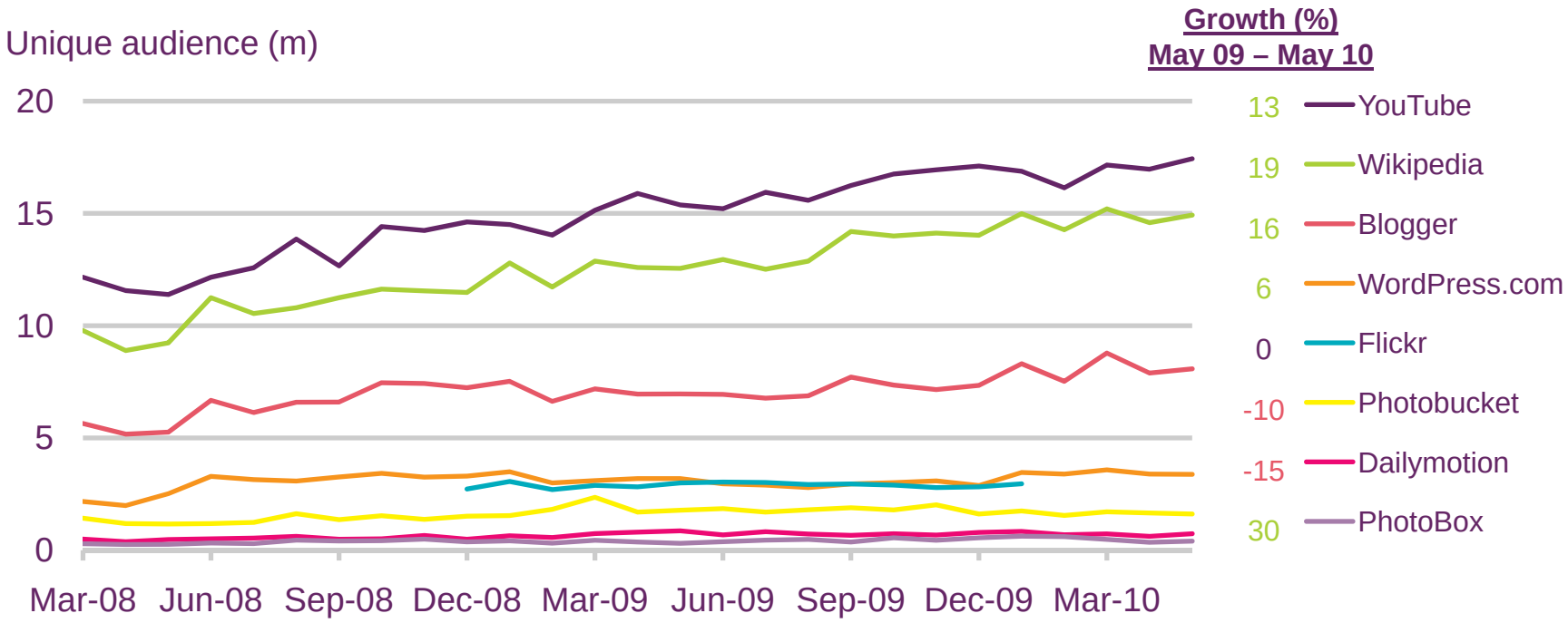


IN23A-I – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested.
All who use the internet at home or elsewhere (1278 aged 16+, 238 aged 16-24, 268 aged 25-34, 295 aged 35-44, 209 aged 45-54, 268 aged 55+).
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September-October 2009

©Ofcom

Figure 4.39

Unique audience of selected user-generated content sites

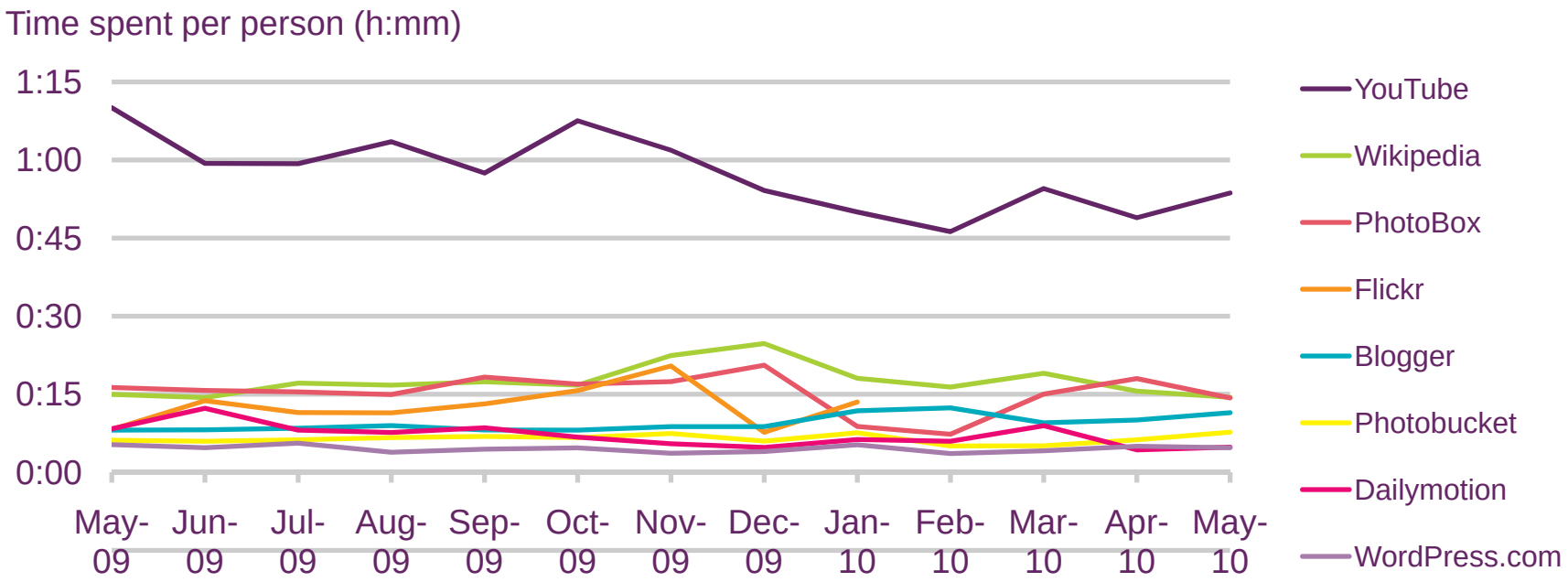


Source: UKOM home and work panel, applications included, month of May 2010.

Note: "Unique audience" = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

Figure 4.40

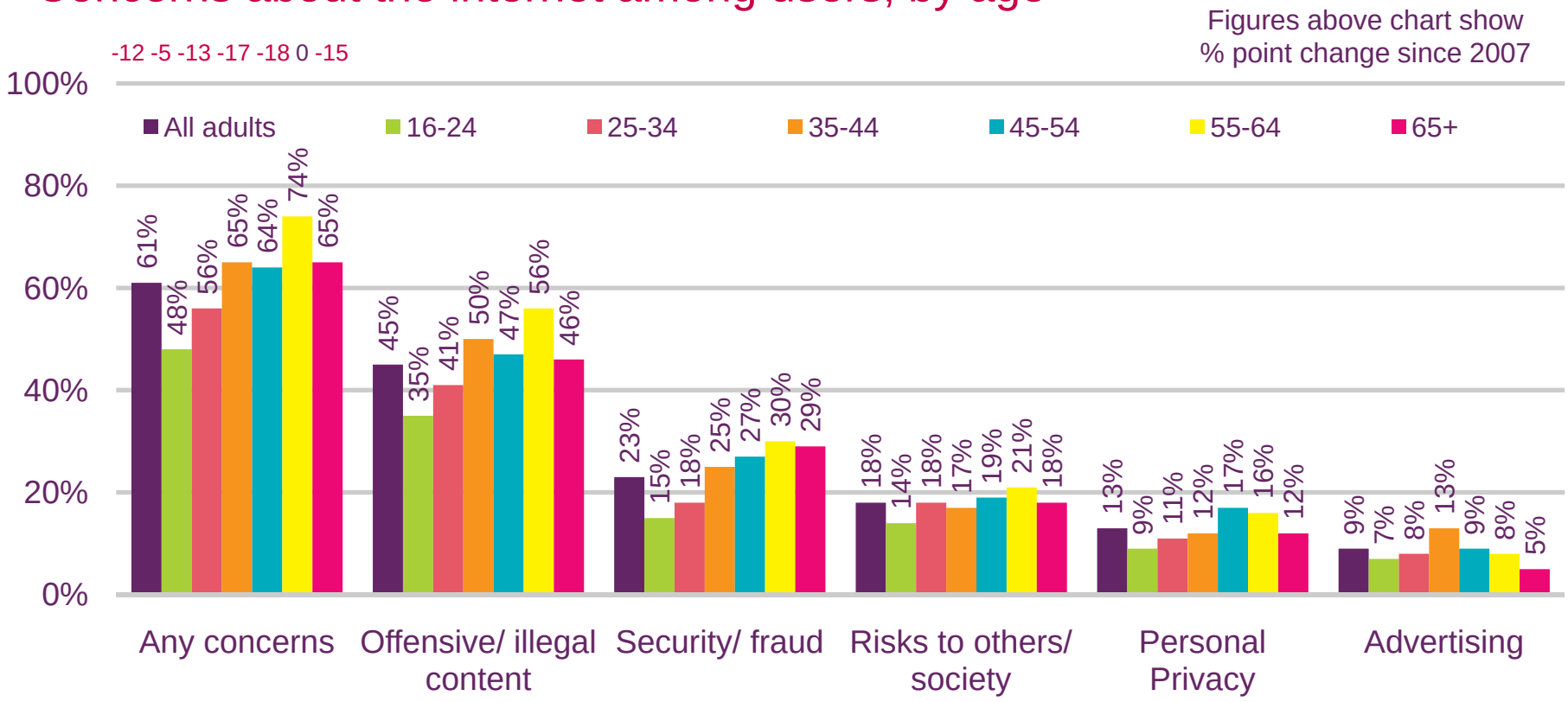
Time spent on selected user-generated content sites



Source: UKOM, home and work panel, applications included, month of May 2010.

Figure 4.41

Concerns about the internet among users, by age



IN30 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)
Base: Adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+). Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

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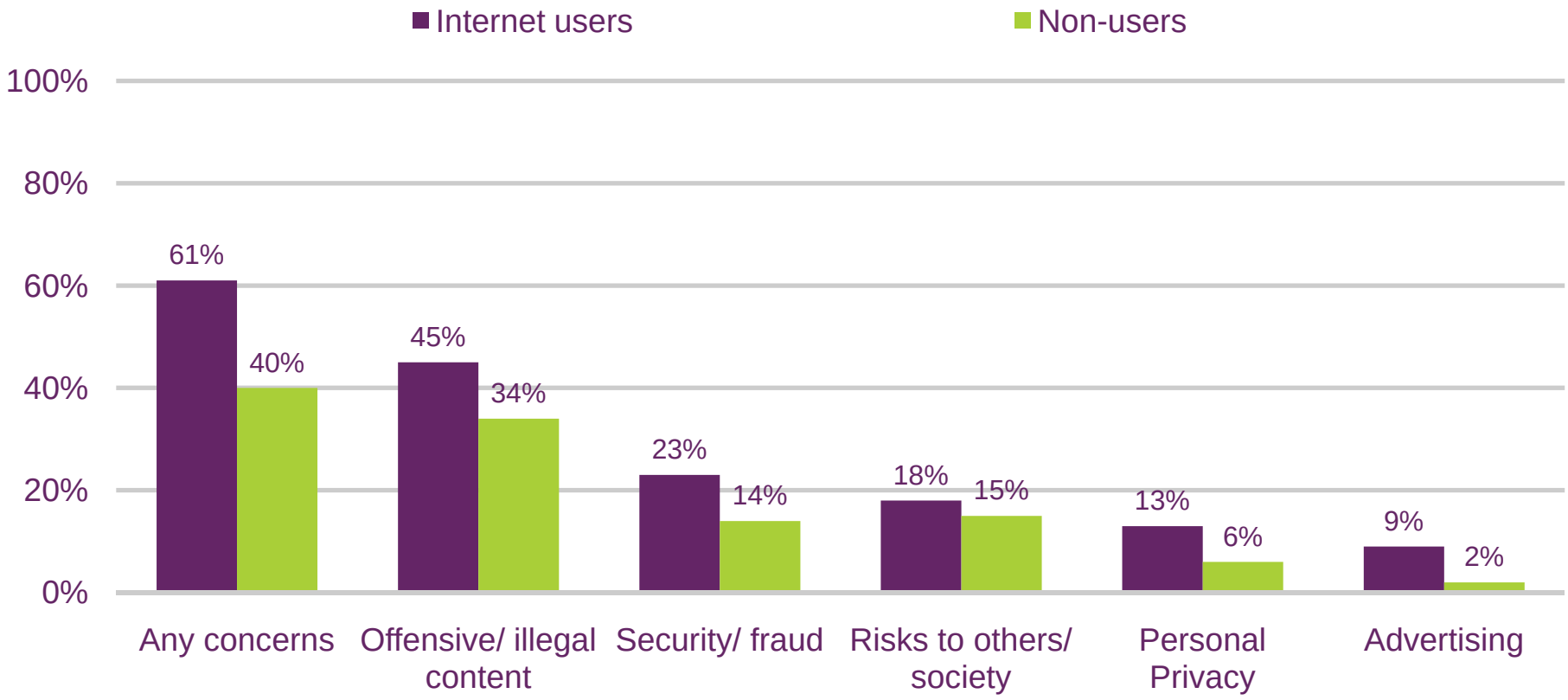
Figure 4.42

Concerns about the internet among users and non-users



IN30 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009
Base: Adults aged 16+ who use the internet at home or elsewhere (1282)/ who do not use the internet at home or elsewhere (542). Significance testing shows any differences between internet users and non-users

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5. Telecoms and networks

Figure 5.1 UK telecoms industry: key statistics

	2004	2005	2006	2007	2008	2009
Operator-reported retail revenue (£bn)	28.0	29.0	29.9	30.9	31.2	30.4
Operator-reported wholesale revenue (£bn)	9.3	9.6	10.1	10.4	10.5	10.2
Total operator-reported revenue (£bn)	37.3	38.6	40.0	41.3	41.7	40.6
Fixed voice call minutes (billions)	163	160	150	147	139	133
Mobile voice call minutes (billions)	64	71	82	100	111	118
Average monthly household telecoms spend (£)	71.1	71.4	69.4	67.0	64.5	62.1
Fixed access and call revenues (£bn)	10.6	9.9	9.5	9.3	9.1	8.8
BT share of fixed revenues (%)	58.8	56.9	54.7	53.9	52.4	49.8
Proportion of households connected to an unbundled exchange (%)	-	39.6	66.6	80.2	84.2	84.5
Fixed lines (millions)	34.5	34.0	33.6	33.5	33.2	32.1
Mobile retail revenues (£bn)	11.9	13.1	13.9	15.0	15.4	14.9
Active mobile connections per 100 population	99.9	109.2	115.9	121.8	126.3	131.7
Active 3G mobile connections per 100 population	4.3	7.7	12.8	20.6	30.3	41.8
Internet connections per 100 population	25.8	27.5	28.2	30.1	30.6	31.5
Fixed broadband connections per 100 population	10.2	16.4	21.5	25.7	28.4	29.9

Source: Ofcom / operators

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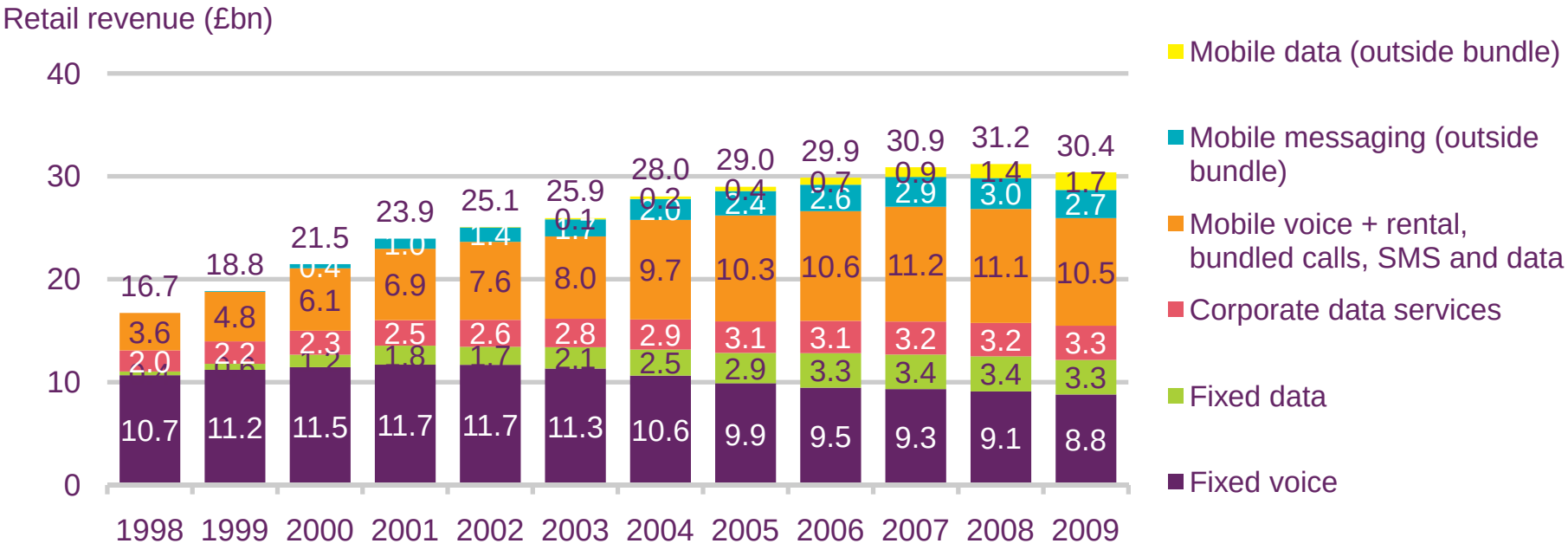
Figure 5.2

Operator-reported UK telecoms industry retail revenue

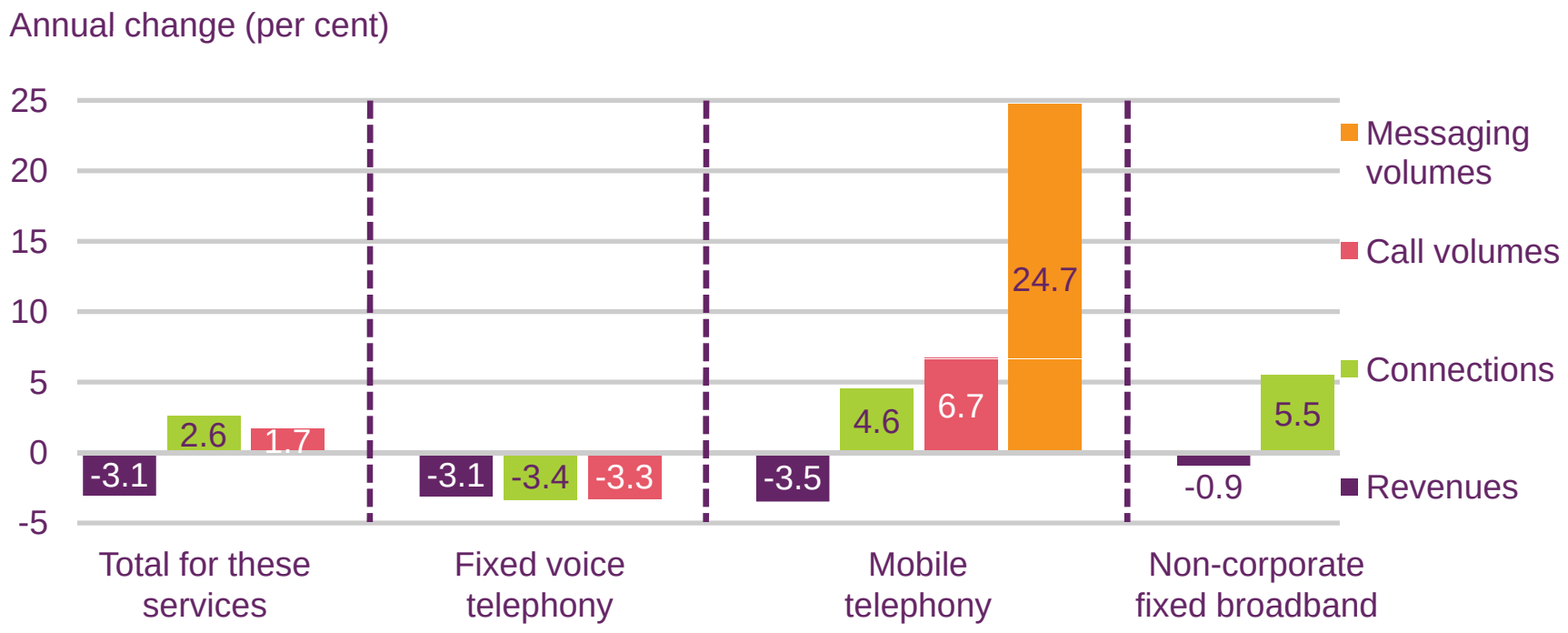


Source: Ofcom / operators / IDC

Note: The bundling of messaging and data services in with monthly rental tariffs mean that there will be an element of mobile data revenue included in mobile voice revenues

Figure 5.3

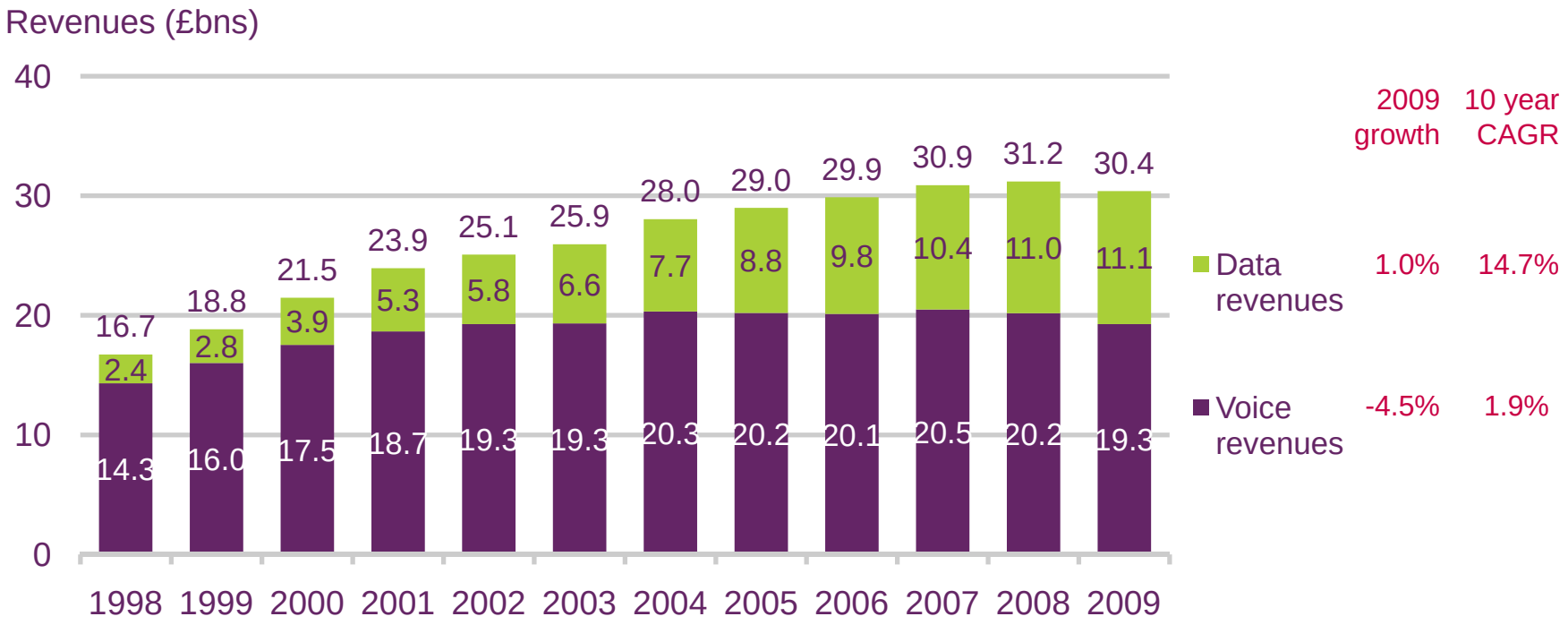
Growth in operator-reported telecoms retail revenues and usage in 2009



Source: Ofcom / operators

Figure 5.4

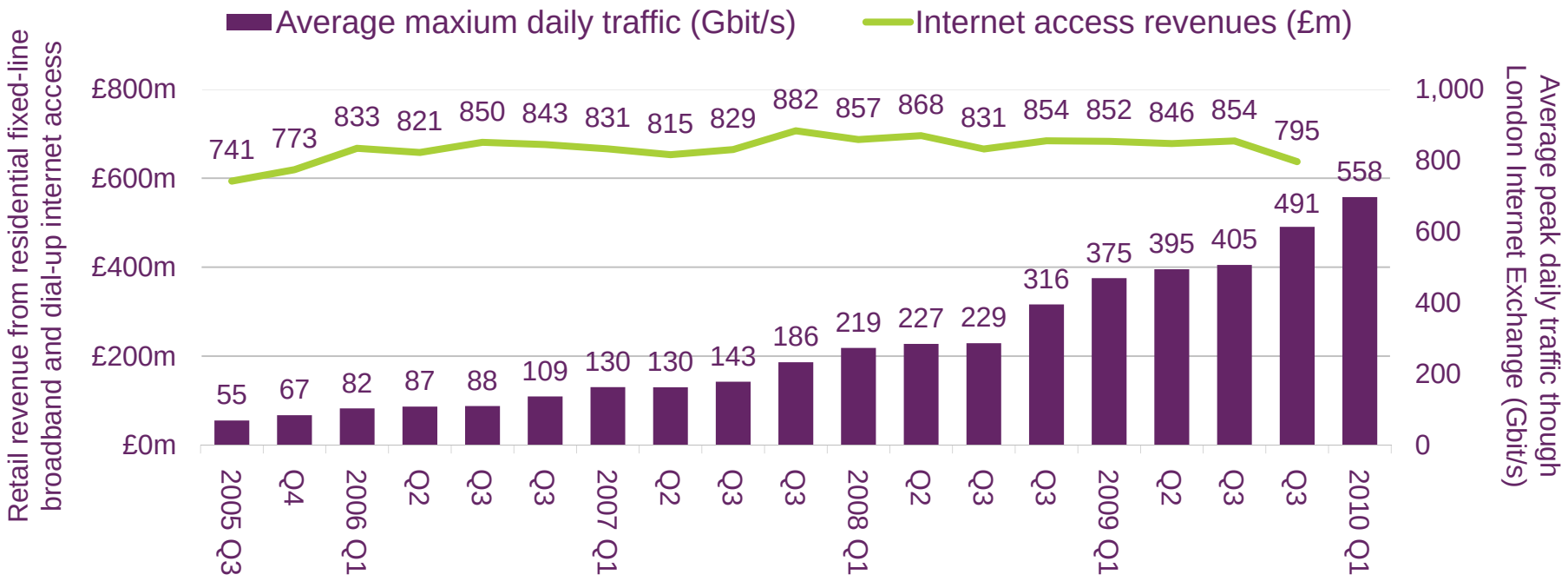
Voice and data operator-reported UK telecoms industry retail revenue



Source: Ofcom / operators

Figure 5.5

Internet access revenues and average peak daily data traffic flowing across London Internet Exchange (LINX) switches



Source: Revenue data – Ofcom based on operator returns; Data traffic – LINX, https://www.linx.net/pubtools/trafficstats.html

Note: LINX traffic data represents the average of the five-minute daily peaks of aggregate traffic across each of the LINX members' ports; LINX data excludes private peering; revenue data is fixed-line internet access only and is not available for Q1 2010.

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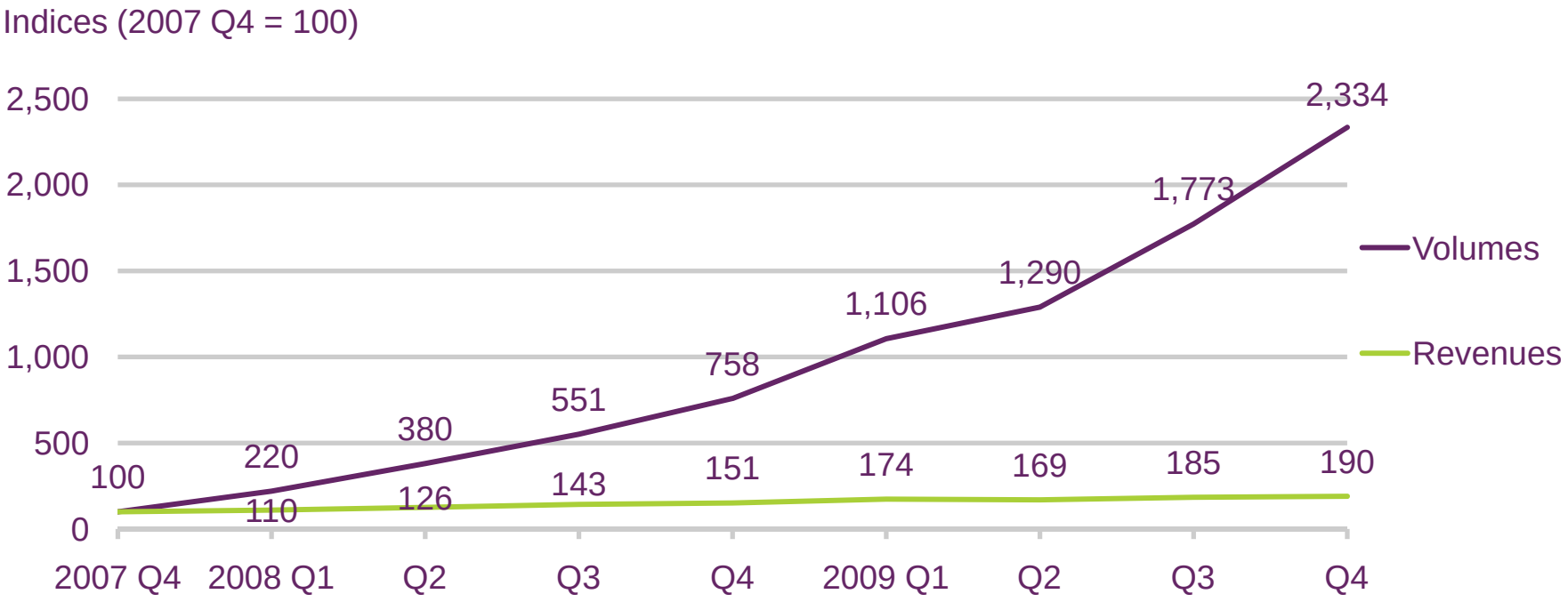
Figure 5.6

Mobile data volumes and revenues



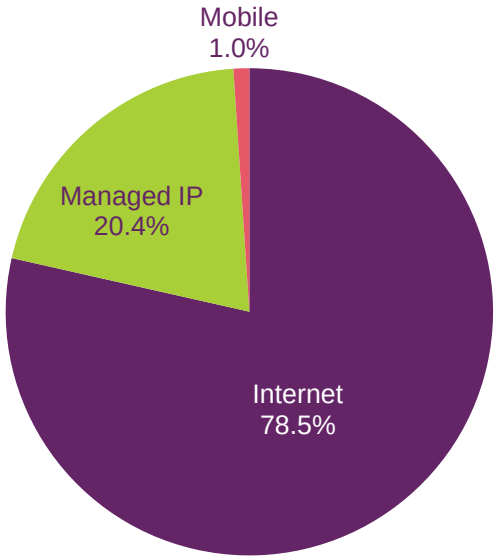
Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; data revenue is likely to be understated as it excludes any data element included within standard pay-monthly tariffs.

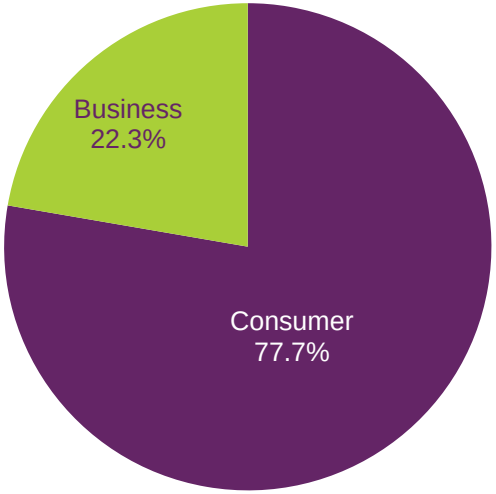
Figure 5.7

UK IP Traffic, 2009

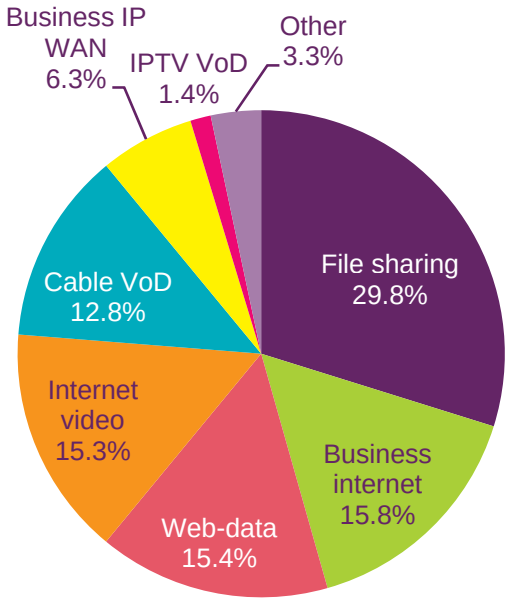
By network



By segment



By application type



Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2009-2014
Notes: The Cisco VNI forecast methodology rests on a foundation of analyst projections for internet users, broadband connections, video subscribers, mobile connections, and internet application adoption. Upon this foundation are layered Cisco's own estimates for application adoption, minutes of use, and kilobytes per minute based on Cisco VNI usage data (quantitative insights into current activity on service provider networks and qualitative samples of consumers' online behaviour) and other sources; other includes online gaming, mobile data and Internet-video-to-TV

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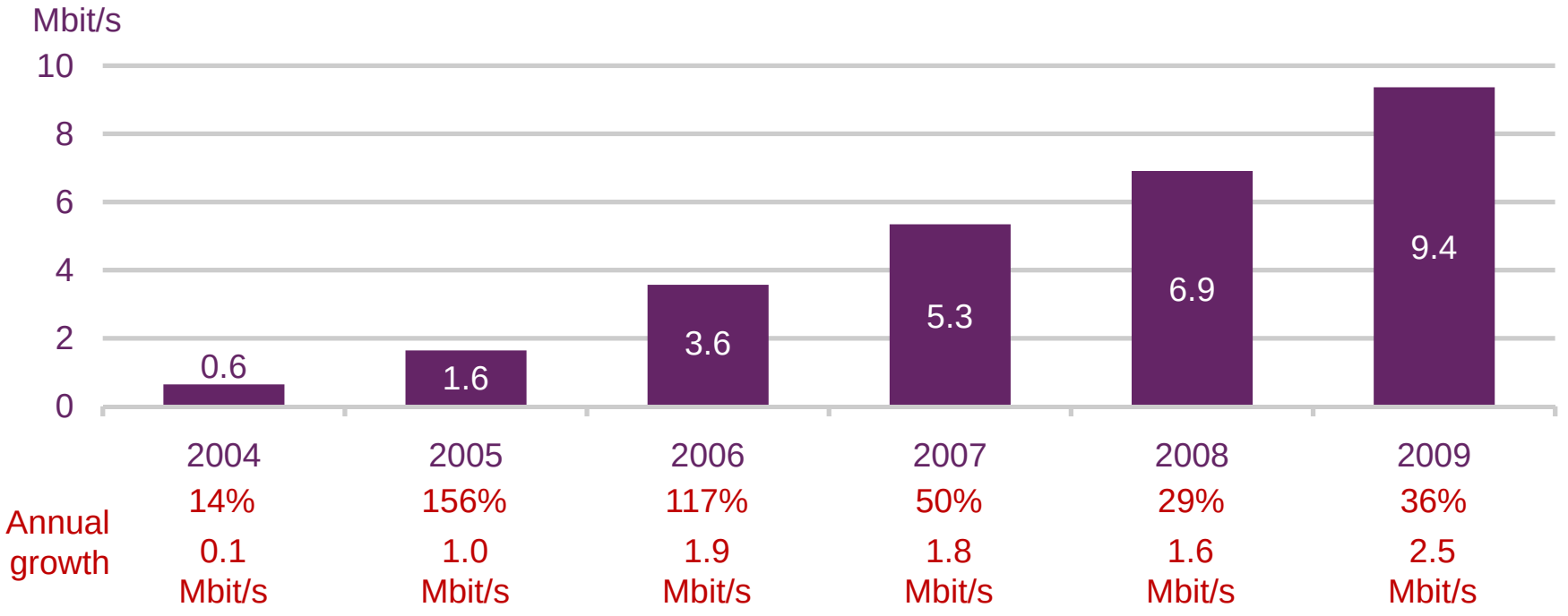
Figure 5.8

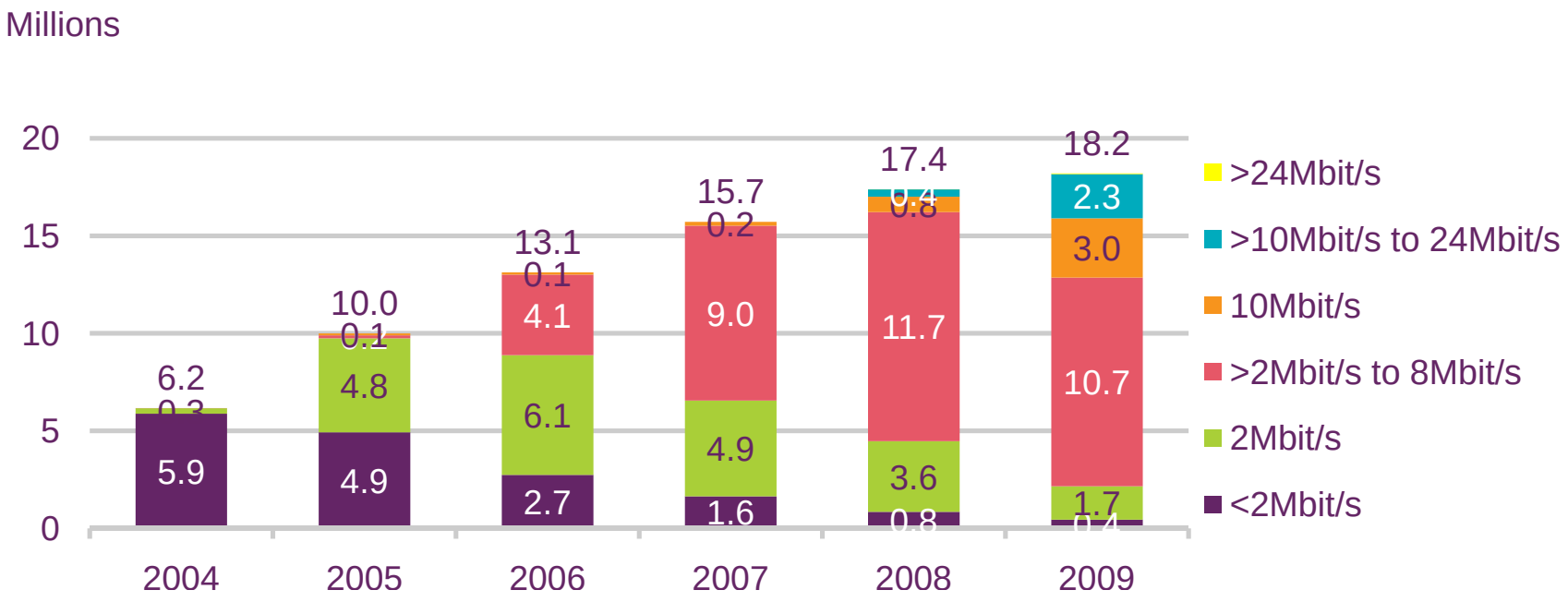
Average non-corporate fixed broadband connection headline speeds



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes mobile broadband connections

Figure 5.9

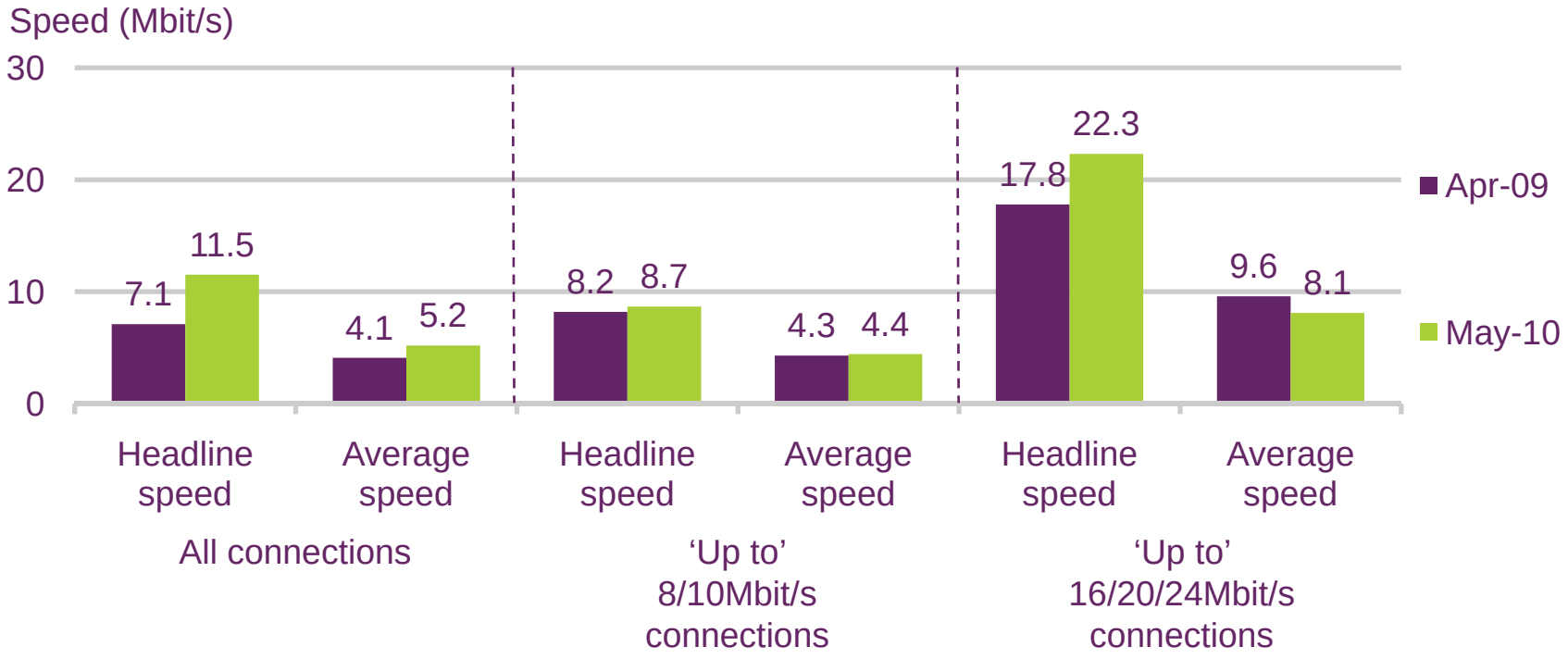
Non-corporate broadband connections by headline speed



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes mobile broadband connections

Figure 5.10

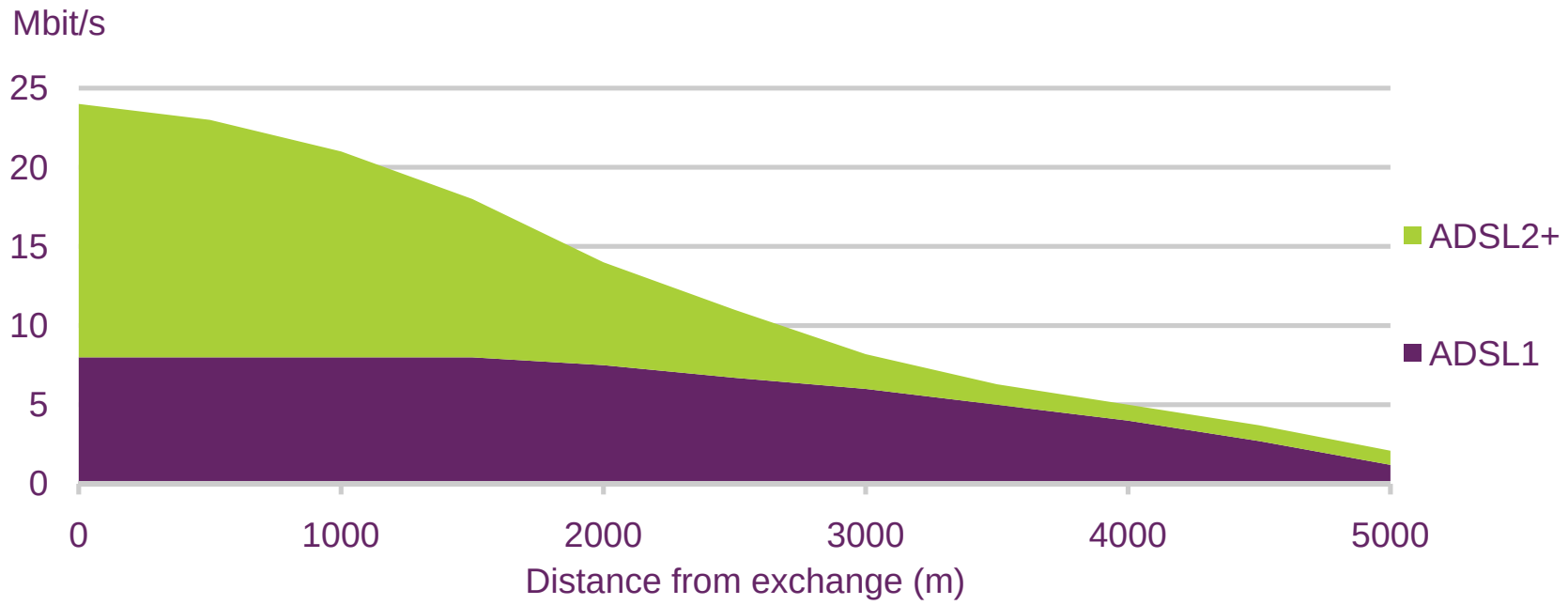
Average headline and actual broadband speeds, April 2009 and May 2010



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

Figure 5.11

Theoretical maximum DSL speeds by length of line from exchange to premises



Source: http://www.tpg.com.au/dslam/faq.php

Figure 5.12 Selected UK NGA projects

Operator	Project locations	Technology	Coverage	Estimated connections June 2010
Atlas Communications	Middletown, Northern Ireland	FTTC	150 homes	50
BT	Various locations across the UK	FTTC	1.5 million homes passed by July 2010, 40% of the UK population by 2012 and 66% by 2015	Ipswich - 50, Muswell Hill - 6,000, enabled exchange areas - 6,000, Ebbsfleet - 100
Fibrecity Holdings	Bournemouth and Dundee	FTTP	88,000 homes passed in Bournemouth and 70,000 premises including 55,000 homes in Dundee (networks planned in Derby, Halton, Nottingham, Plymouth and York)	350
Independent Fibre Networks (IFNL)	Corby, Swindon and Andover	FTTP	6,000 homes passed in Corby, 835 in Swindon and 2,500 in Andover	350
Isrighthere	Liverpool, Leeds and Chelsea	FTTP	498 apartments and 160 retail units passed in Liverpool and 166 residential apsrtments in Leeds (plus 55 apartments to be passed in Chelsea)	719
Rutland Telecom	Lyddington, Rutland	FTTC	Between 180 and 200 homes passed in Lyddington	50

Figure 5.13

Selected super-fast broadband tariffs

	BT Infinity Option 1	BT Infinity Option 2	Virgin Media Broadband XXL	Velocity (Bournemouth)
Headline monthly charge	£19.99 (plus landline rental)	£24.99 (plus landline rental)	£38 (£28 with a landline)	£19.99
Headline speed (‘up to’)	40Mbit/s	40Mbit/s	50Mbit/s	100Mbit/s
Monthly data allowance	20GB	Unlimited	Unlimited	Unlimited
Contract length	18 months	18 months	12 months	12 months
Activation fee	£50	£0	£20	£50

Source: Ofcom

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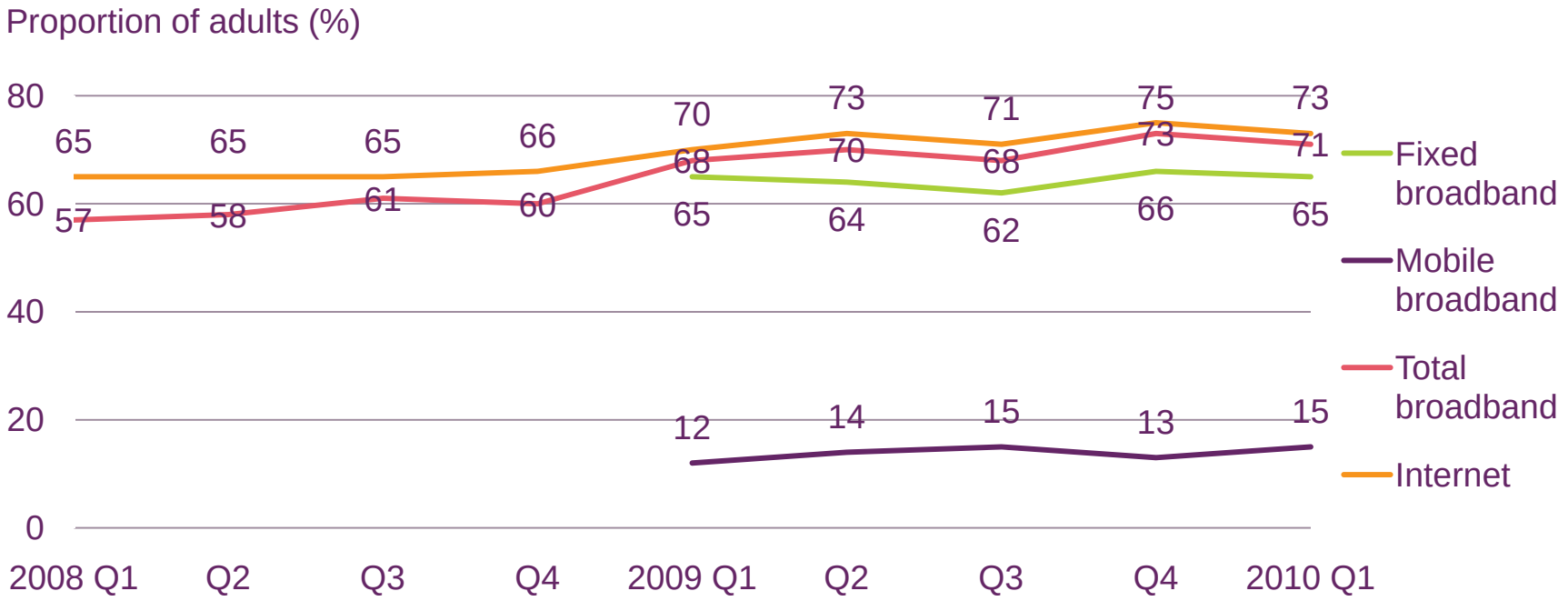
Figure 5.14

Household penetration of broadband



Source: Ofcom

Note: Data covering household penetration of fixed and mobile broadband is not available for 2008; error margins on this data are +/- 1% at the 95% confidence interval.

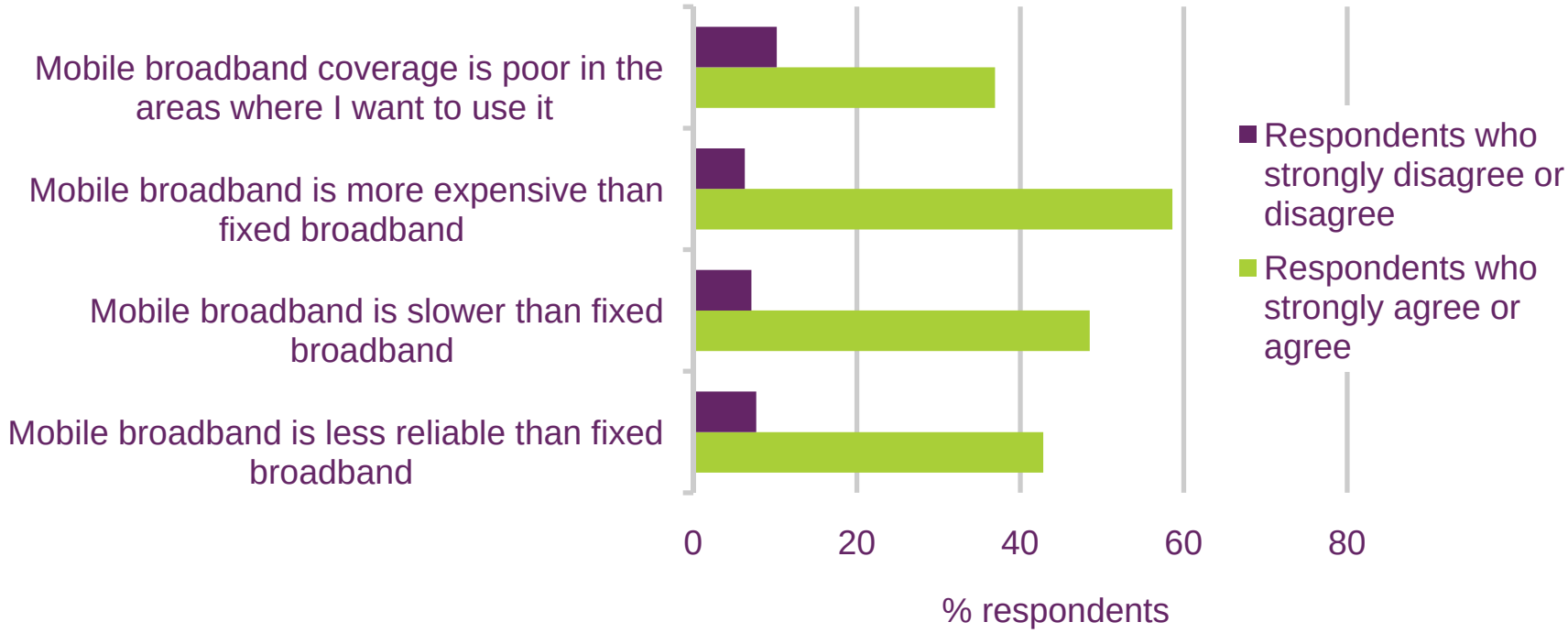
Figure 5.15

Take-up of mobile broadband, by socio-economic group

Source: Ofcom research, Q1 2010
Base: All adults aged 15+ (n=9013)

Figure 5.16

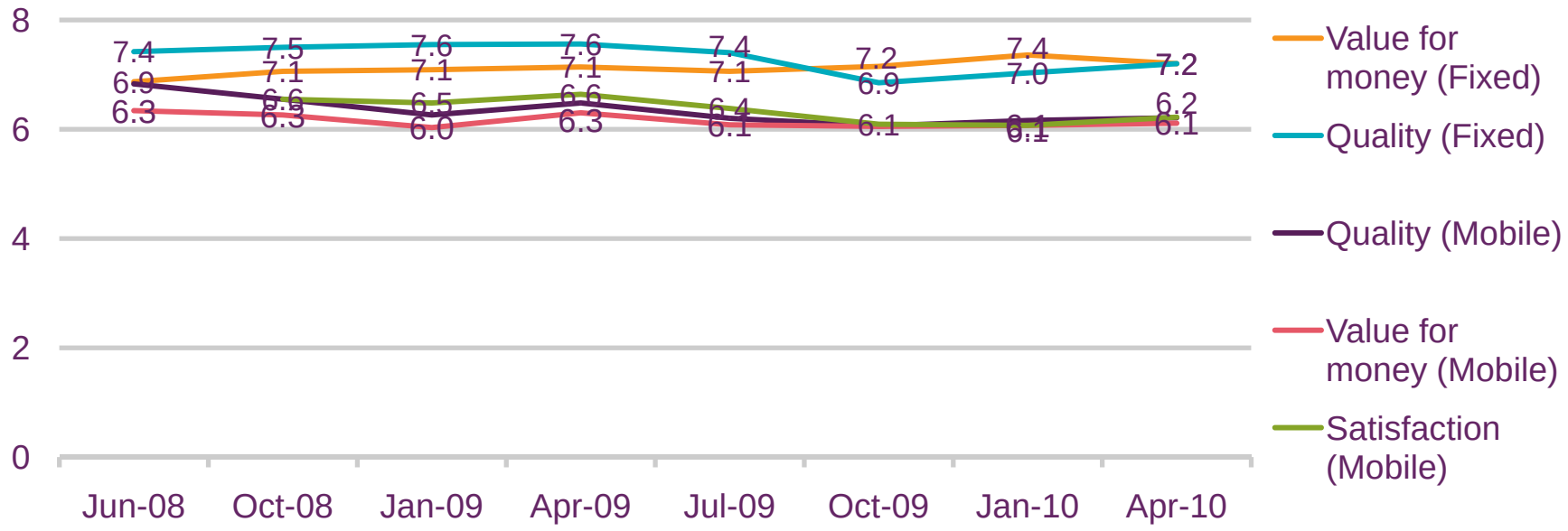
Attitudes towards mobile broadband in the UK



Source:YouGov
Question: 'How far do you agree or disagree with the following statement' n = 1024

Figure 5.17

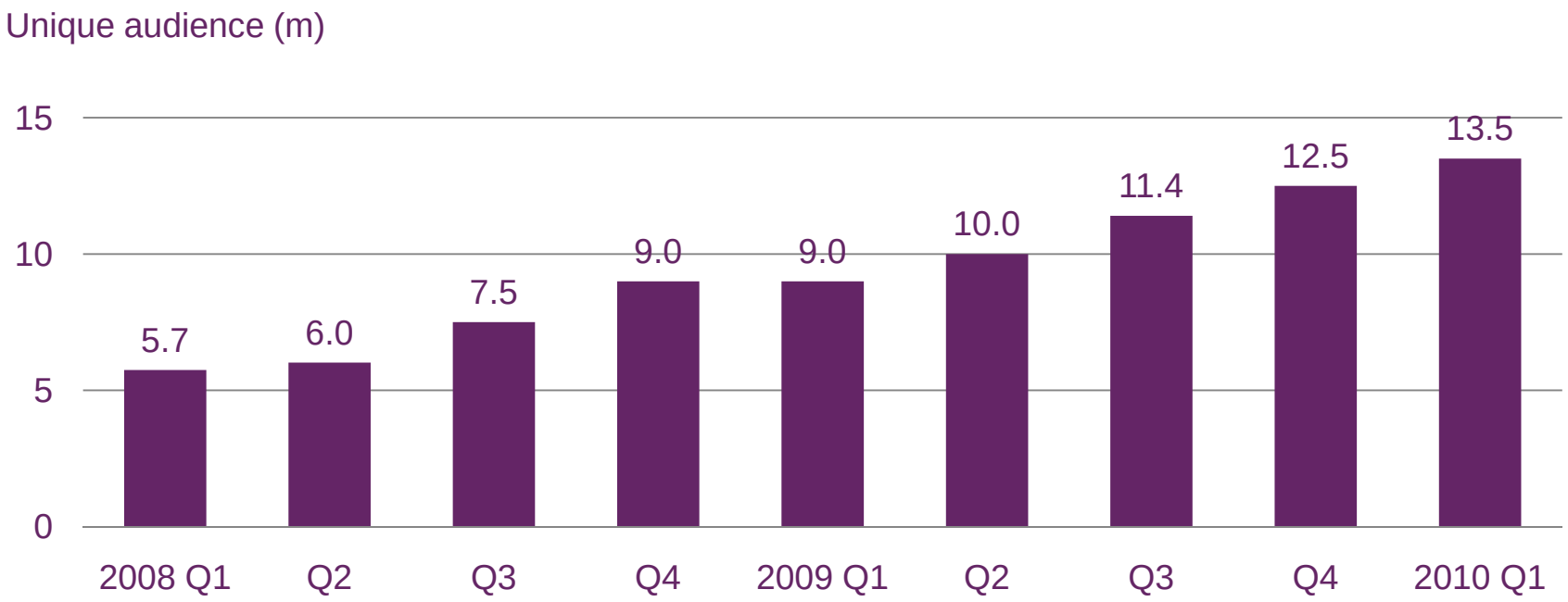
Mobile broadband customer indicators



Source:YouGov
Base: All mobile broadband respondents who rated their mobile broadband operator and all respondents that had a fixed broadband provider.
Q. Using a scale of 1 to 10 where 1 is very poor and 10 is excellent, how would you rate internet access from your provider?

Figure 5.18

Number of people in the UK using the internet on mobile phones



Source: The Nielsen Company
Note: The figure reflects the number of people (aged 15+) who declare having visited any site on the internet on their mobile phone in the past 30 days

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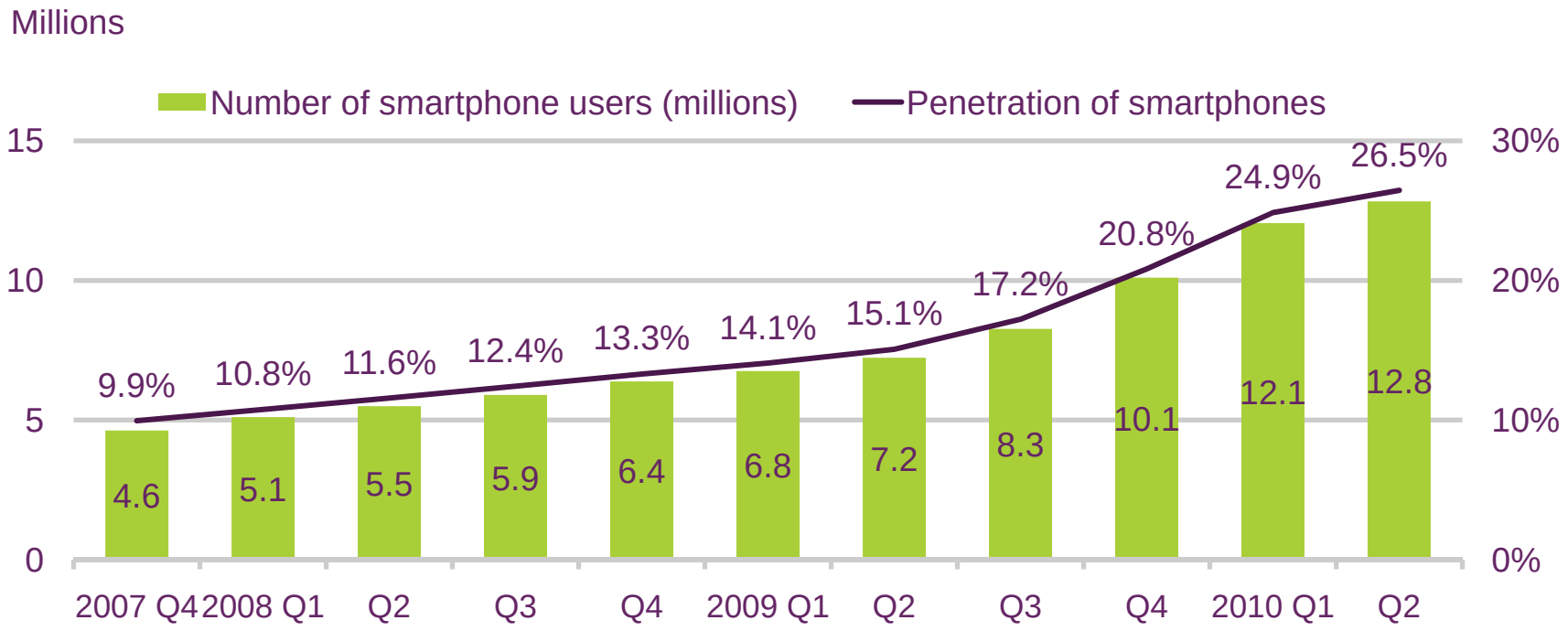
Figure 5.19

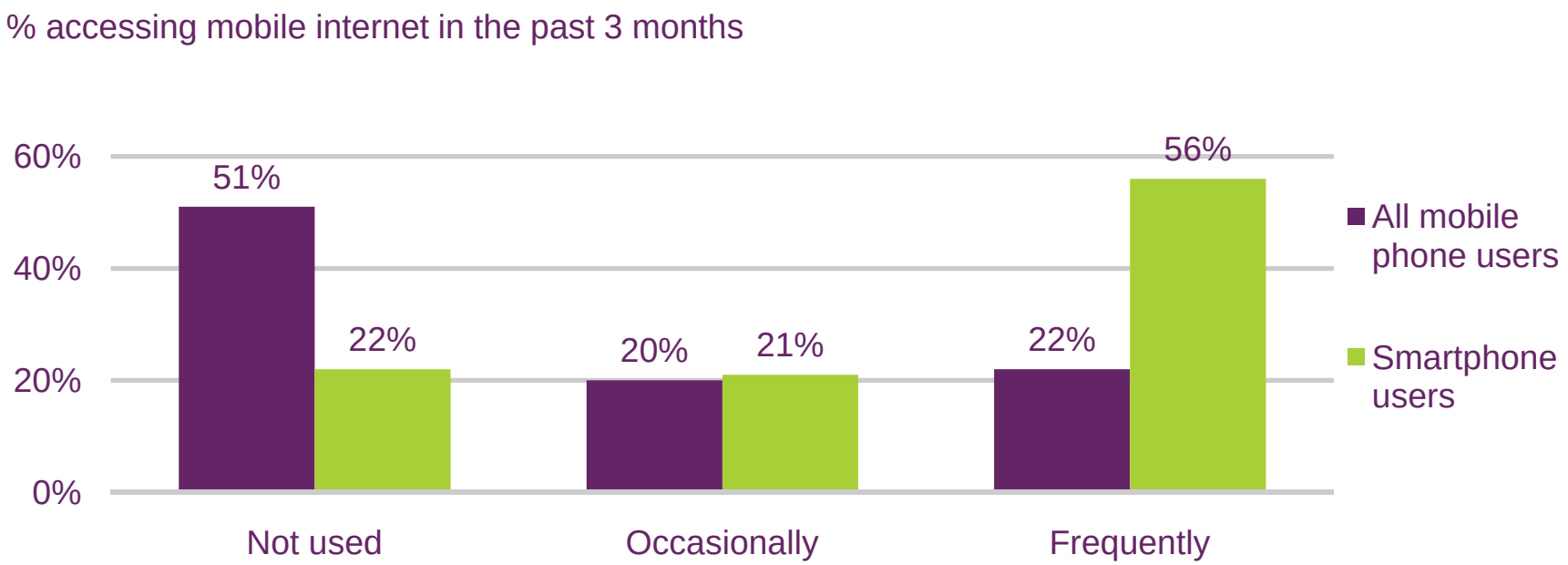
Number of smartphone users and penetration of smartphones in the UK



Source: comScore, Mobilens, December 2007 - May 2010

Figure 5.20

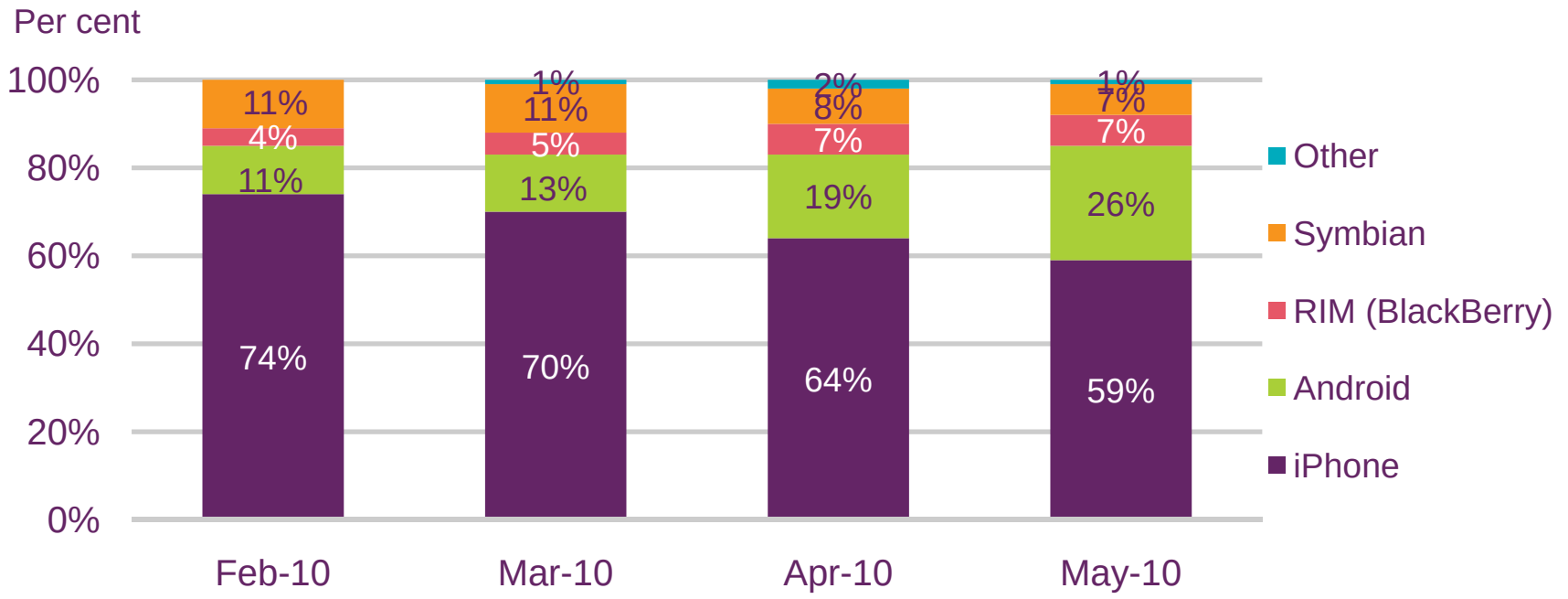
UK phone users accessing mobile internet, by handset type



Source: IPSOS MediaCT, based on an online survey carried out in November 2009 among a representative sample of 500 general mobile consumers aged 16-50

Figure 5.21

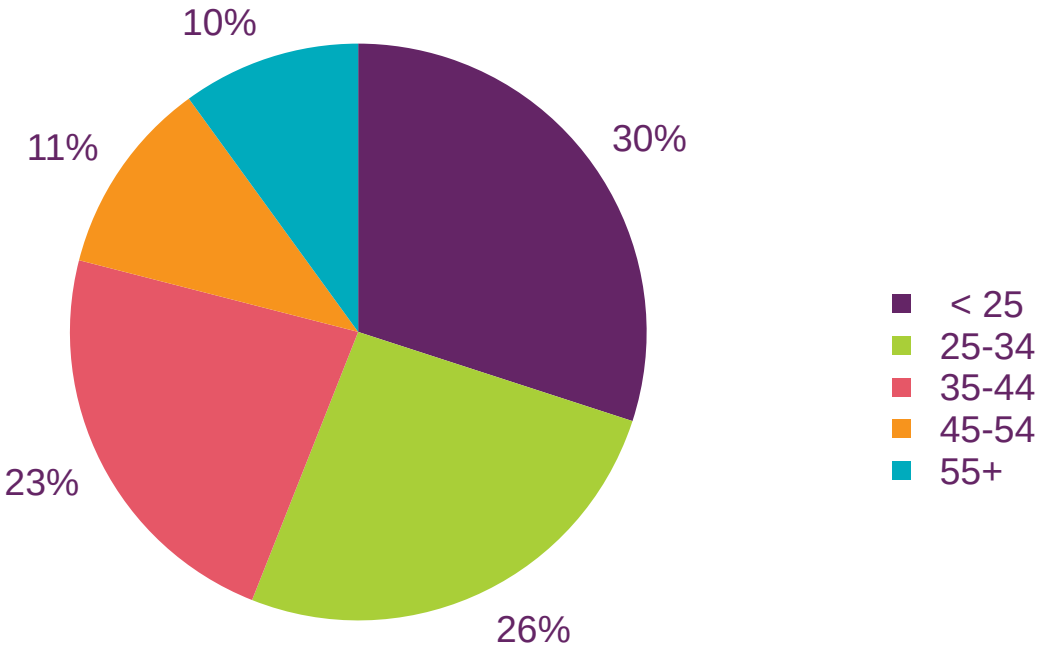
Mobile internet traffic volumes: share of requests, by mobile operating system



Source: Admob, May 2010, http://metrics.admob.com/2010/06/may-2010-country-data/

Figure 5.22

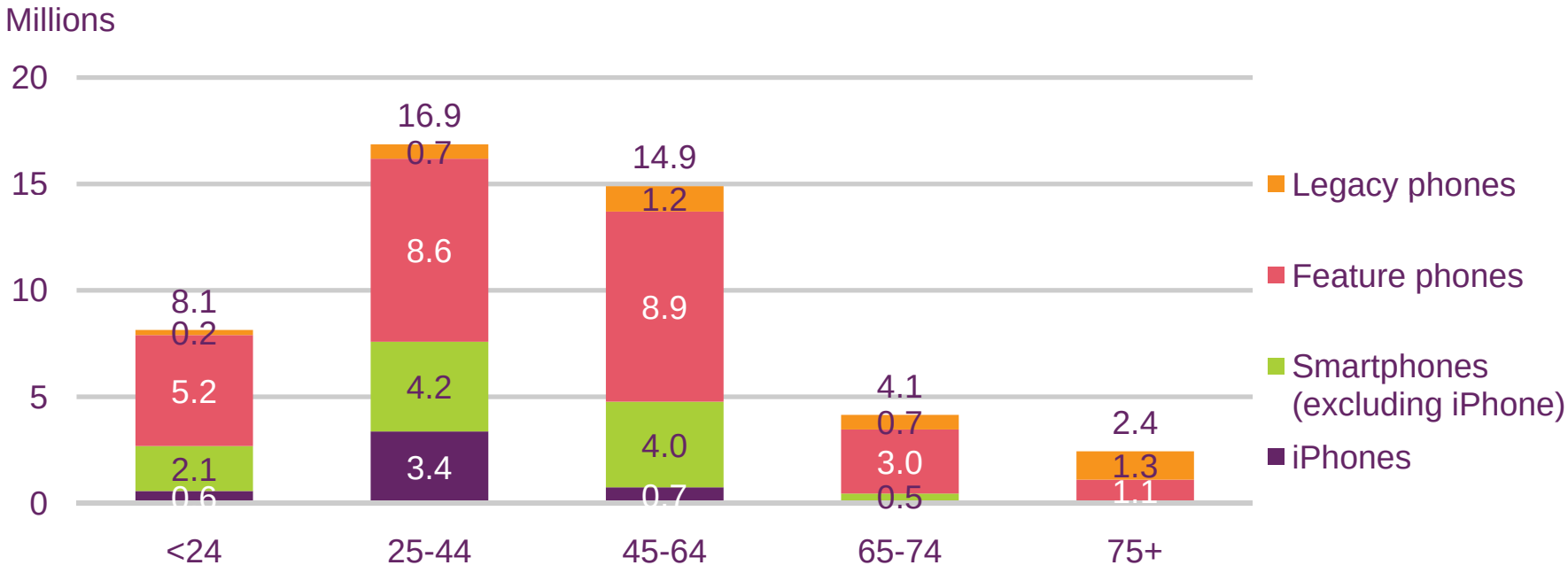
The majority of mobile internet users are under 35



Source: MobileSQUARED (2010)

Figure 5.23

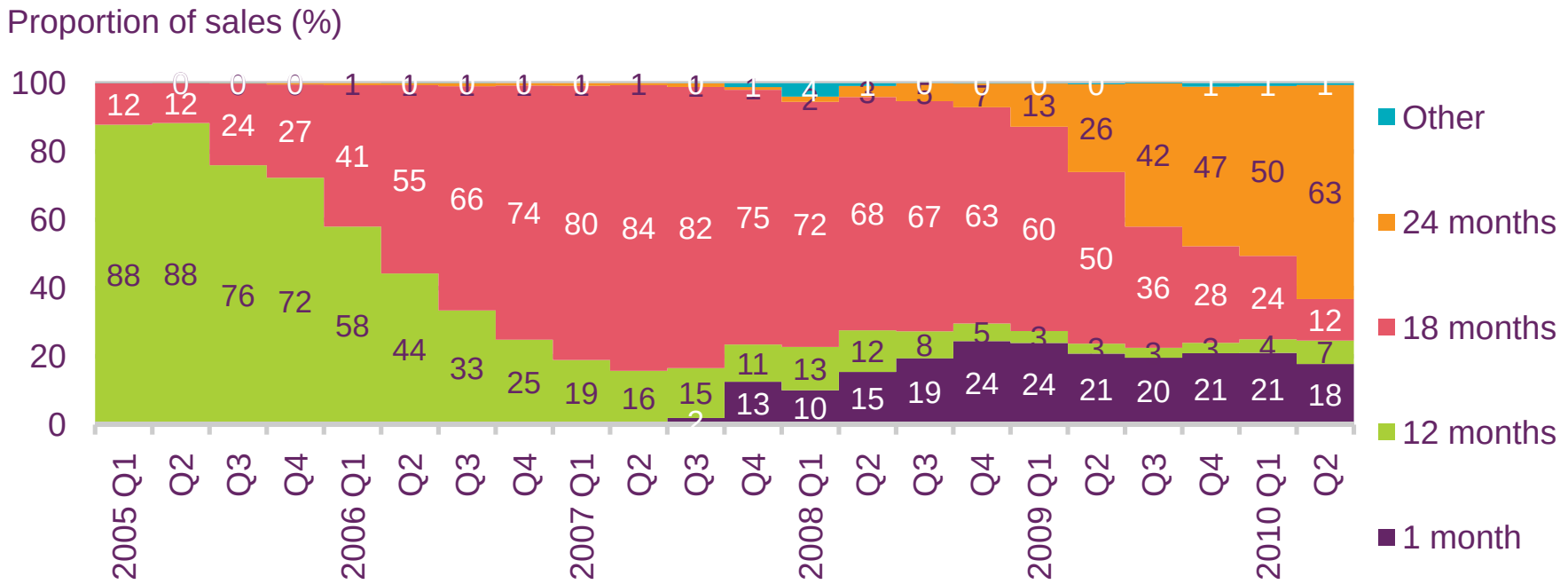
Type of handset used, by age



Source : MobileSQUARED

Figure 5.24

Contract lengths for new mobile connections

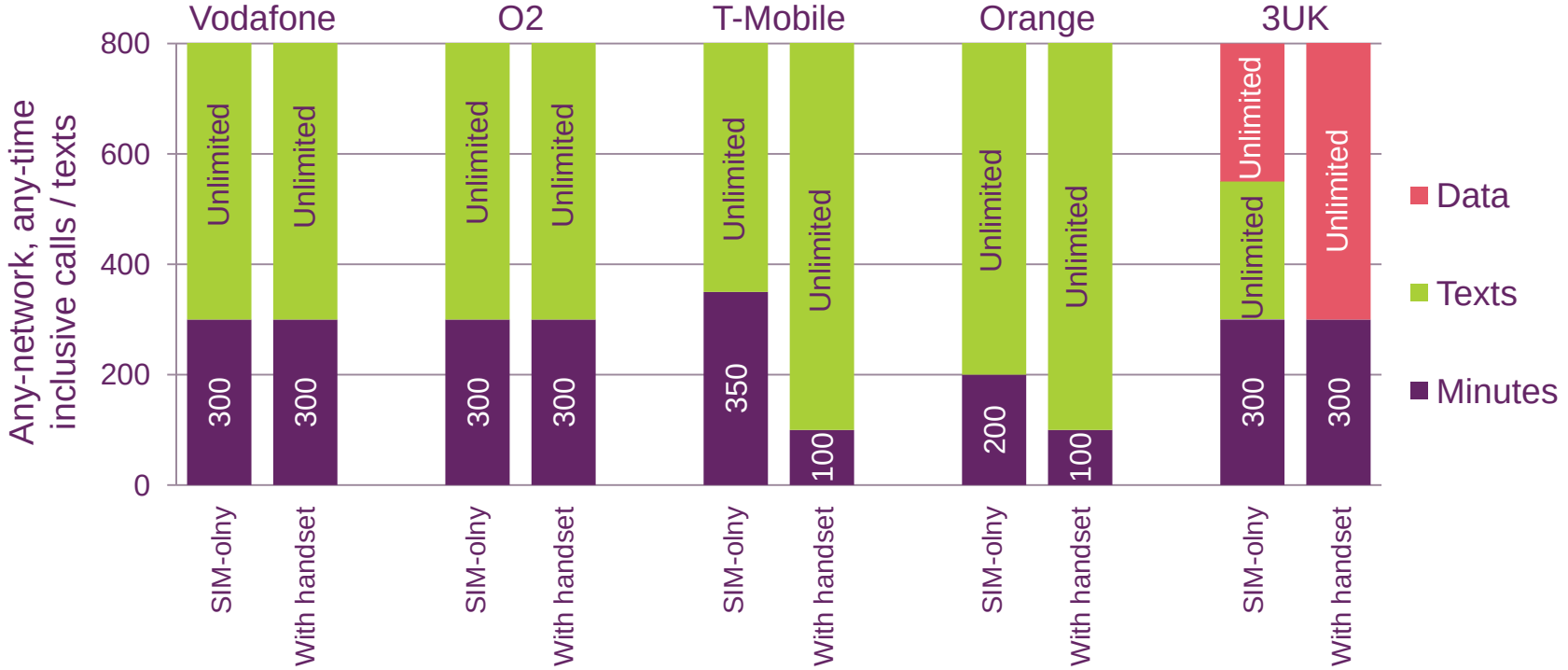


Source: GfK Retail and Technology UK Ltd, Contract Length Sales of new Mobile Connections, Q1 2005-Q2 2010.

Notes: England, Scotland and Wales only (excludes Northern Ireland); based on GfK's coverage of 94% of the consumer market; based on new post-pay connections; excludes contract renewals; only represents sales through consumer channels (i.e. most business connections are excluded)

Figure 5.25

Inclusive any-network, any-time allowances in £15 SIM-only 30-day contracts, and £15 handset-inclusive 24-month contracts, July 2010



Source: Ofcom/tariff data from Pure Pricing/Operator websites

Notes: Data based on tariffs available in July 2010; standard tariff with basic handset selected which offers highest number of anytime, any-network minutes and texts for £15 where available on an 24-month contract ; SIM-only one-month tariff selected with highest number of anytime minutes at £15; this table is indicative of inclusive anytime, any network minutes only (and texts when they are additional to the maximum number of minutes) and should not be used to compare overall pricing as many additional factors are excluded, such as handset included, on-net calls, off-net calls, off-peak calls, data bundles and metered pricing

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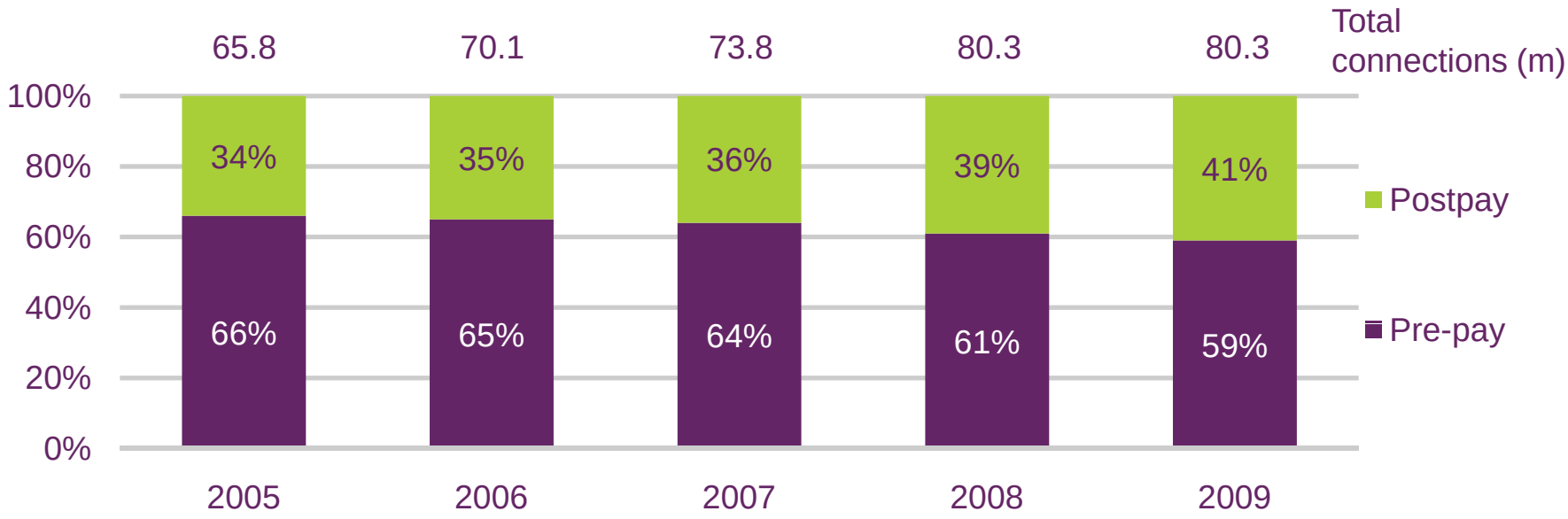
Figure 5.26

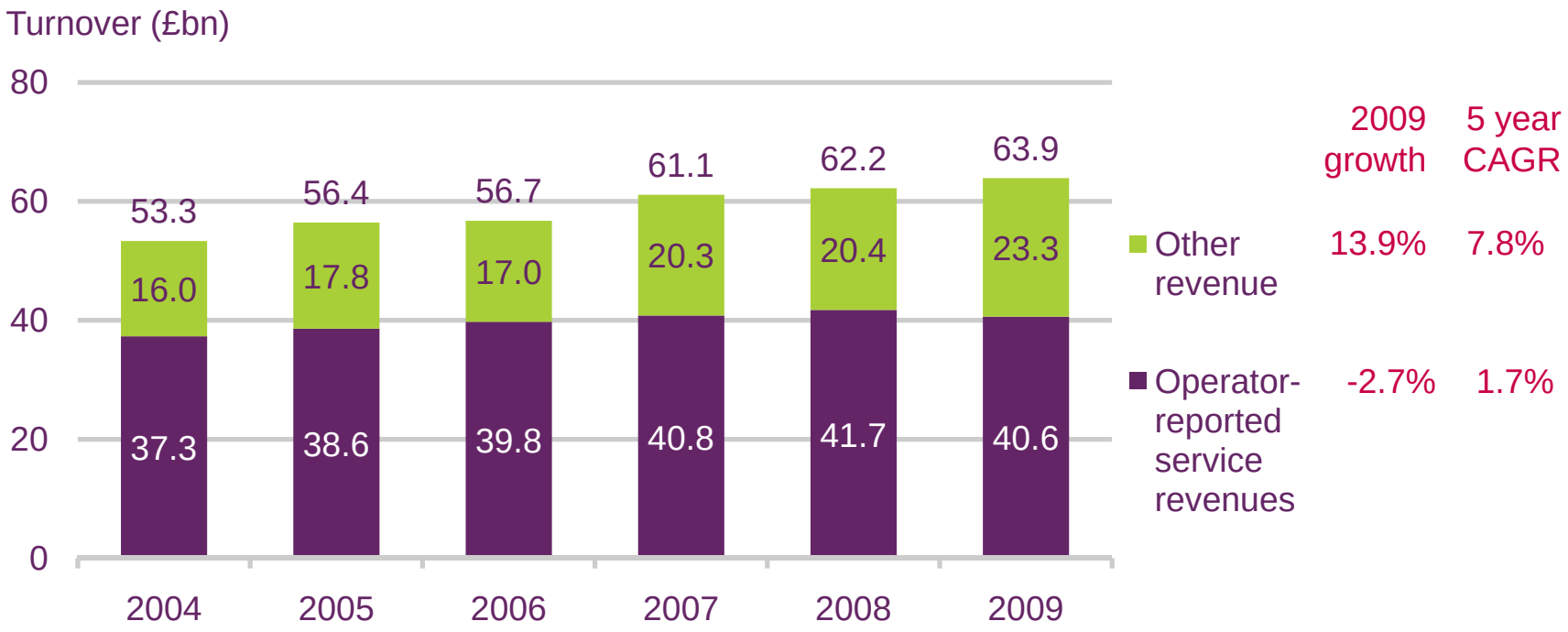
Market share of post-pay and pre-pay subscriptions



Source: End-year data provided to Ofcom by operators

Figure 5.27

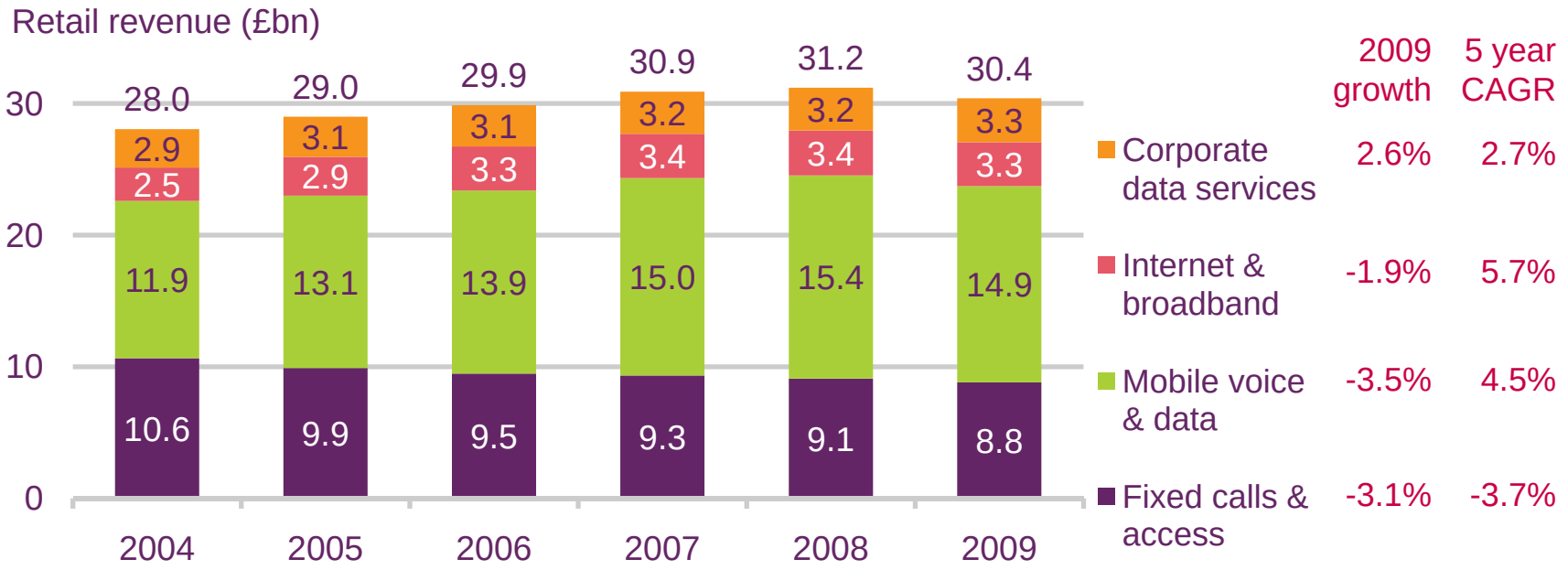
UK telecoms industry revenue overview



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

Figure 5.28

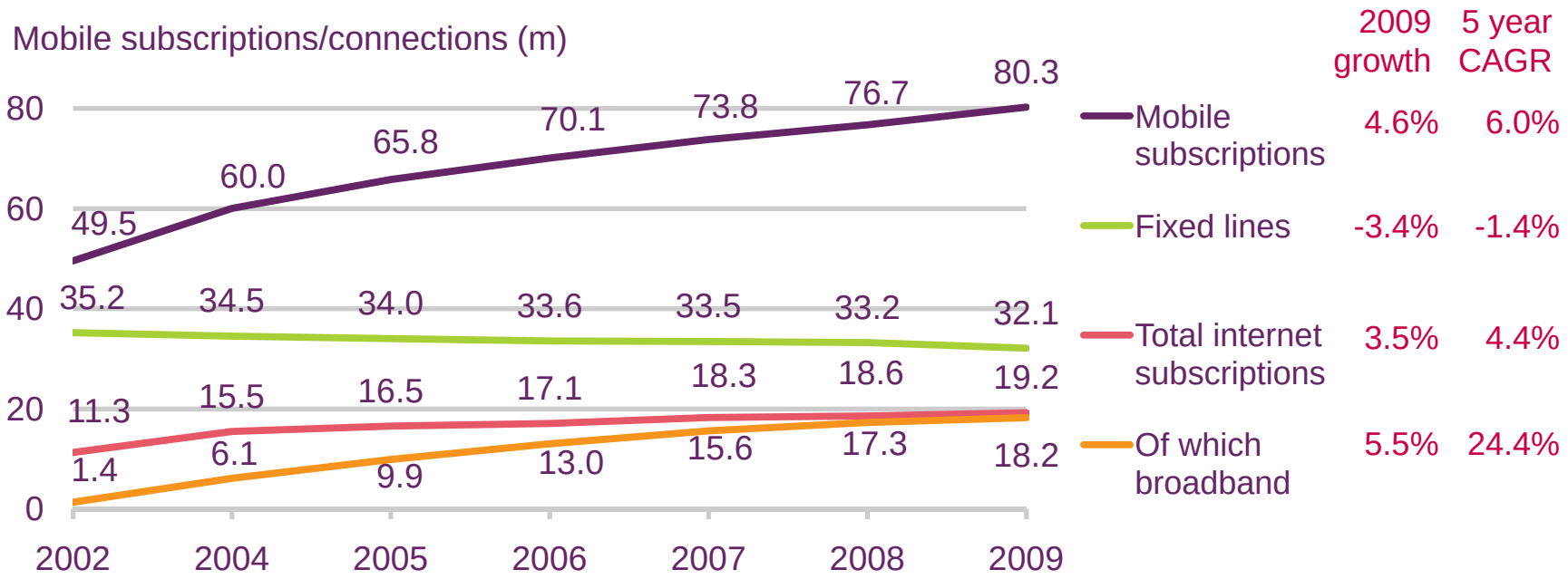
UK telecoms industry retail revenue



Source: Ofcom / operators / IDC

Figure 5.29

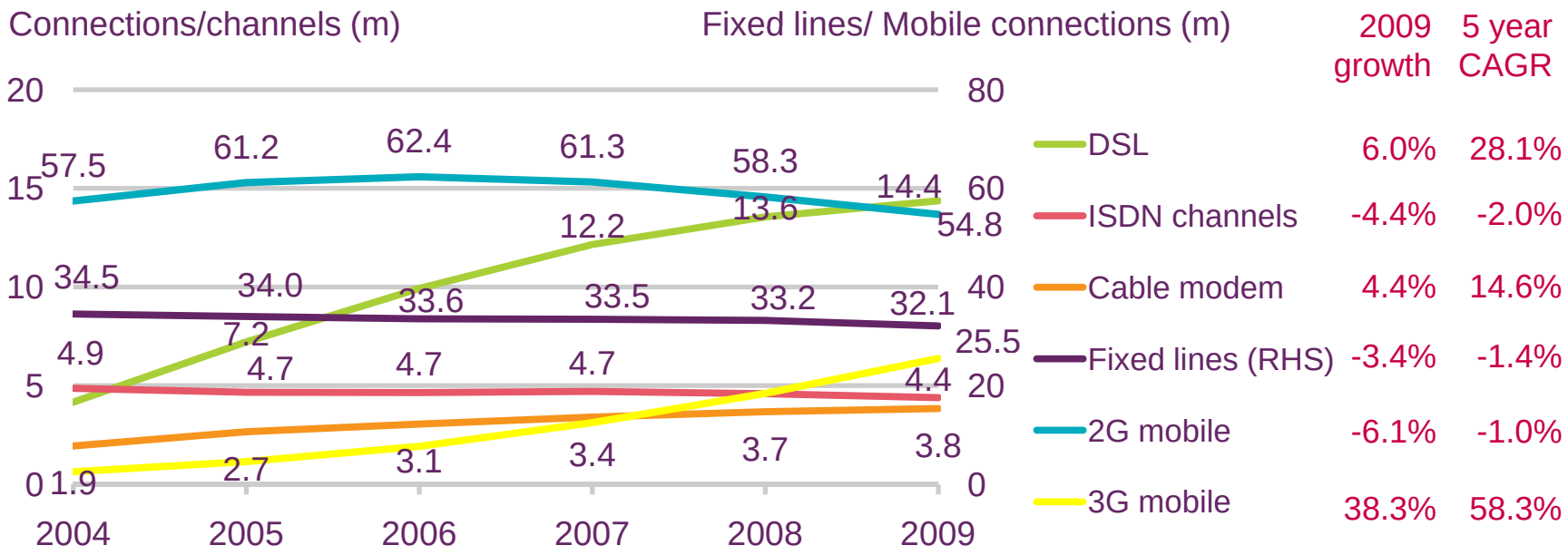
Total telecoms connections



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; broadband excludes corporate connections

Figure 5.30

Fixed and mobile telecoms connections

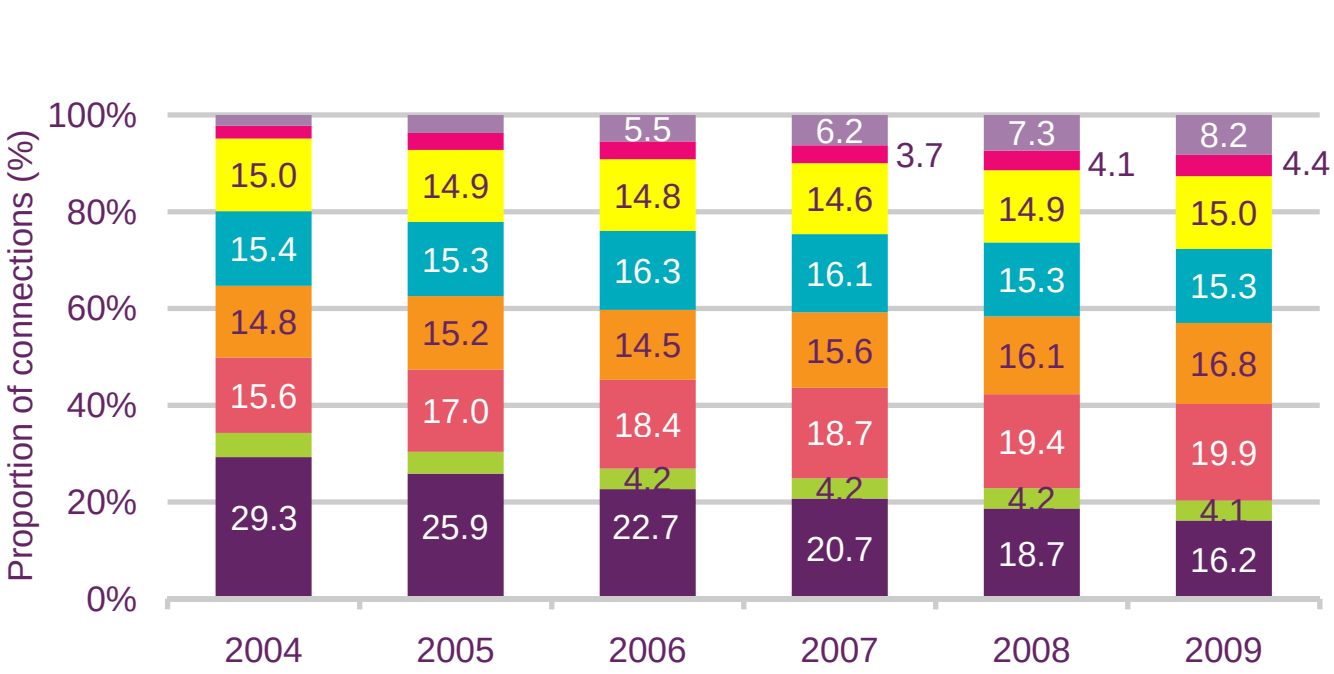


Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; broadband excludes corporate connections

Figure 5.31

Share of total UK fixed and mobile telecoms connections



	%age point change	
	One year	Five years
Other	0.9	6.0
3UK	0.3	1.8
Orange	0.1	0.0
T-Mobile	0.0	-0.1
Vodafone	0.7	1.9
O2	0.5	4.4
Virgin Media	-0.1	-0.9
BT	-2.5	-13.1

Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators; 'Other' includes carrier pre-selection and wholesale line rental in additional to fixed other licensed operators. MVNOs and mobile service provider connections are included within the network operator figures

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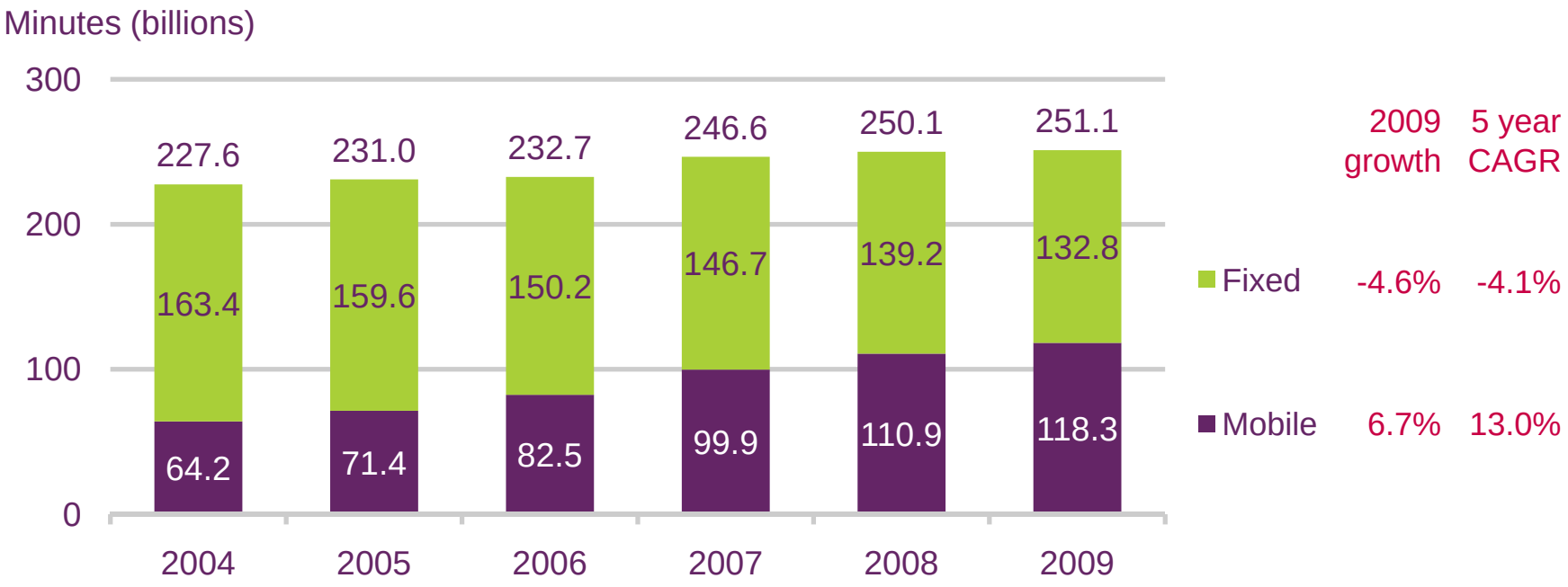
Figure 5.32

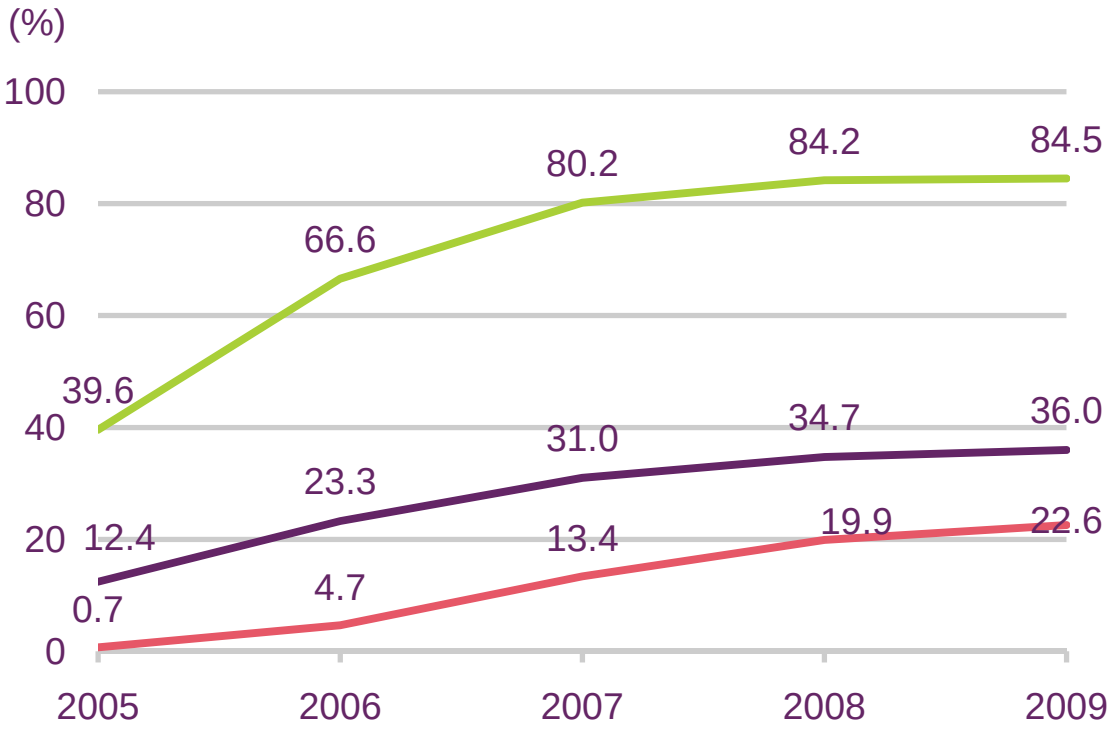
Mobile voice call volumes



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

Figure 5.33

Proportion of unbundled exchanges and connected premises



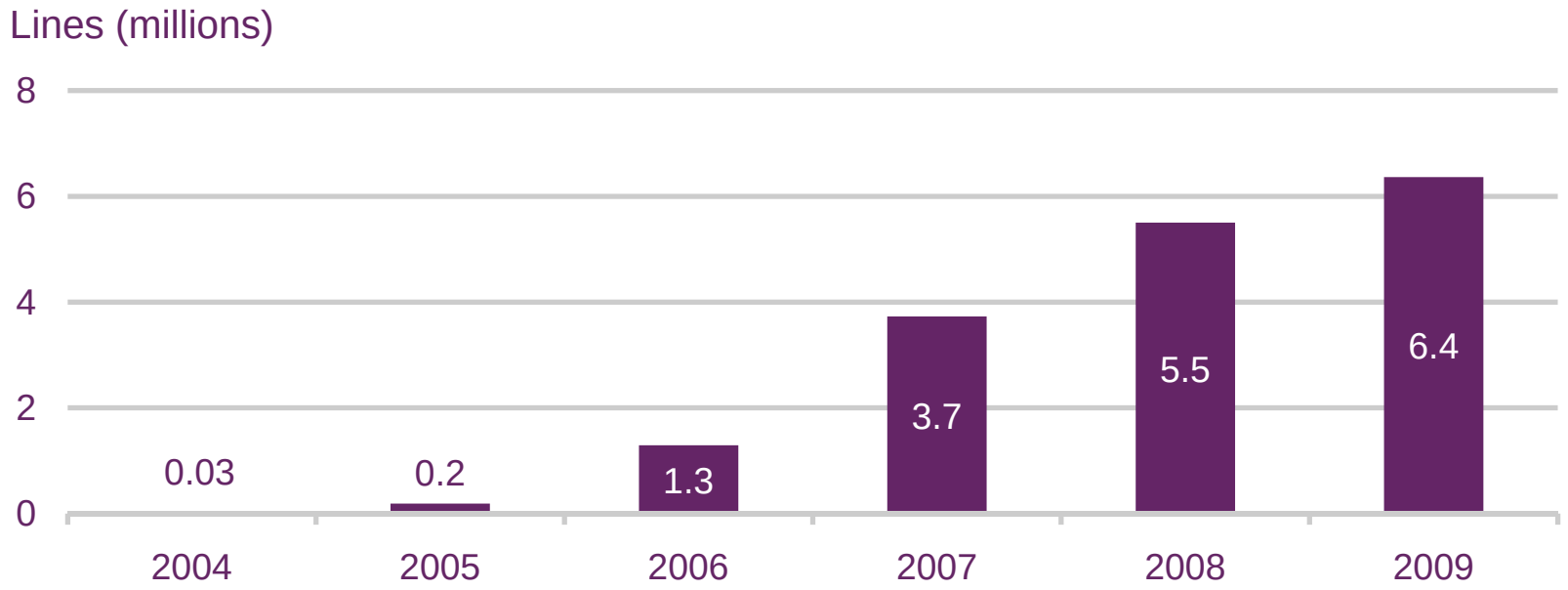
	%age point change	
	One year	Three years
Proportion of premises connected to unbundled BT exchange	0.4	8.3
Proportion of BT exchanges that have been unbundled	3.6	15.6
Proportion of total lines that have been unbundled	13.4	69.0

Source: Ofcom / operators

©Ofcom

Figure 5.34

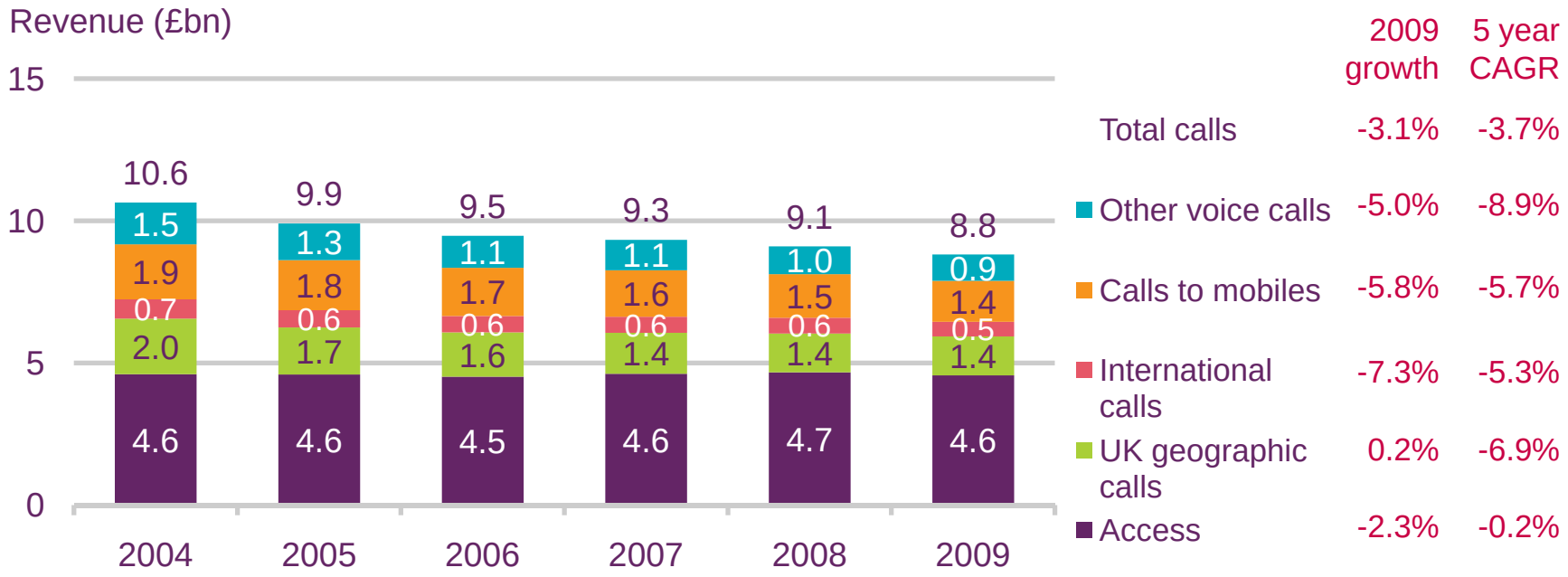
Fully and partially unbundled lines



Source: Ofcom / operators

Figure 5.35

Fixed voice telecoms revenue



Source: Ofcom / operators

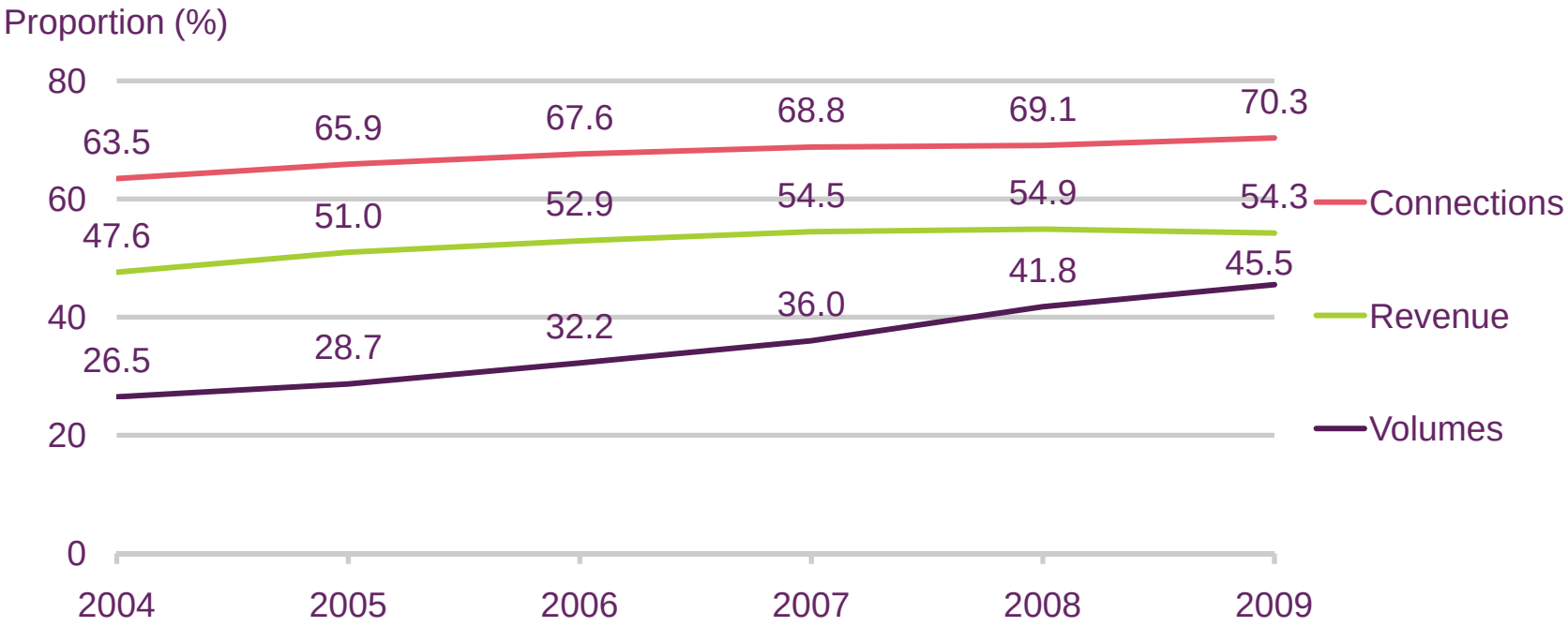
Figure 5.36

Average monthly voice revenue per fixed line

Source: Ofcom / operators
Note: Includes spend on non-geographic voice calls

Figure 5.37

Mobile share of total voice connections, revenues and volumes

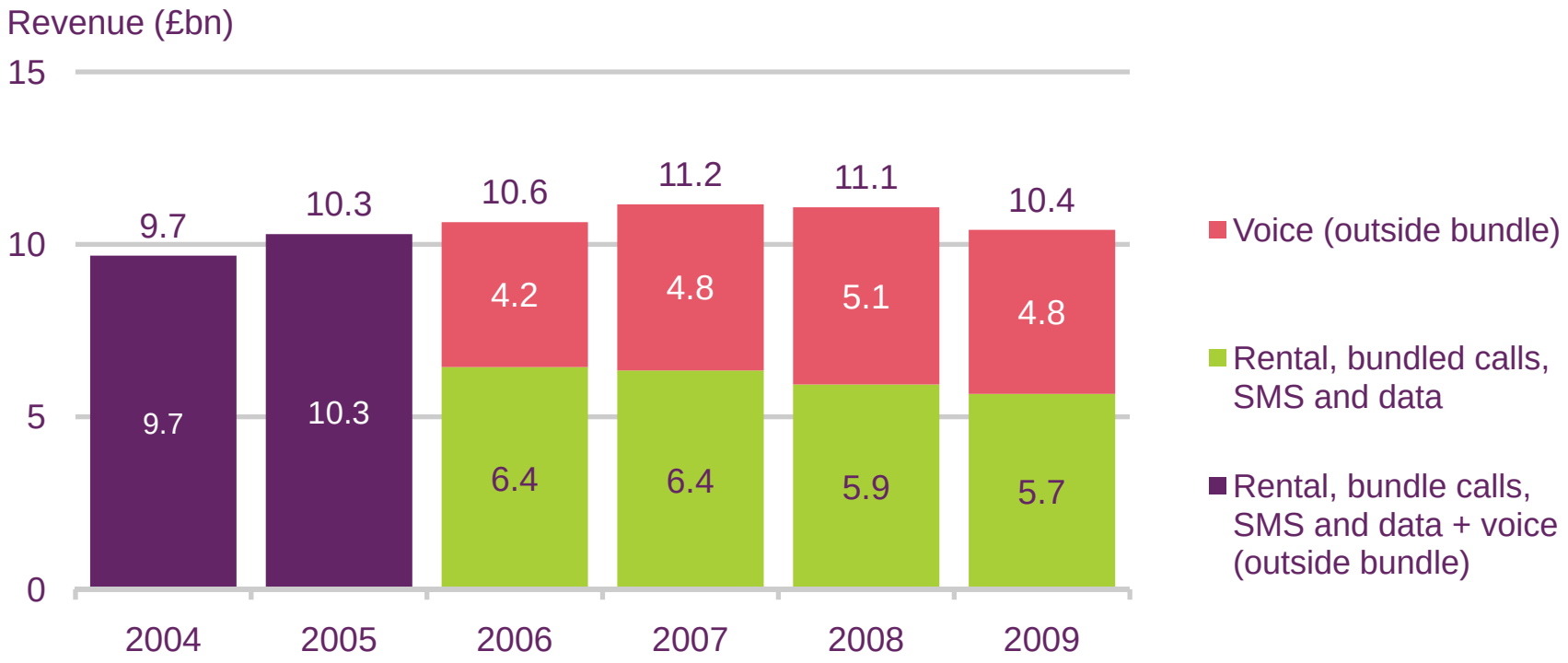


Source: Ofcom / operators

Note: Includes estimates where Ofcom does not receive data from operators. Mobile figures do not include dongles/PC datacard connections

Figure 5.38

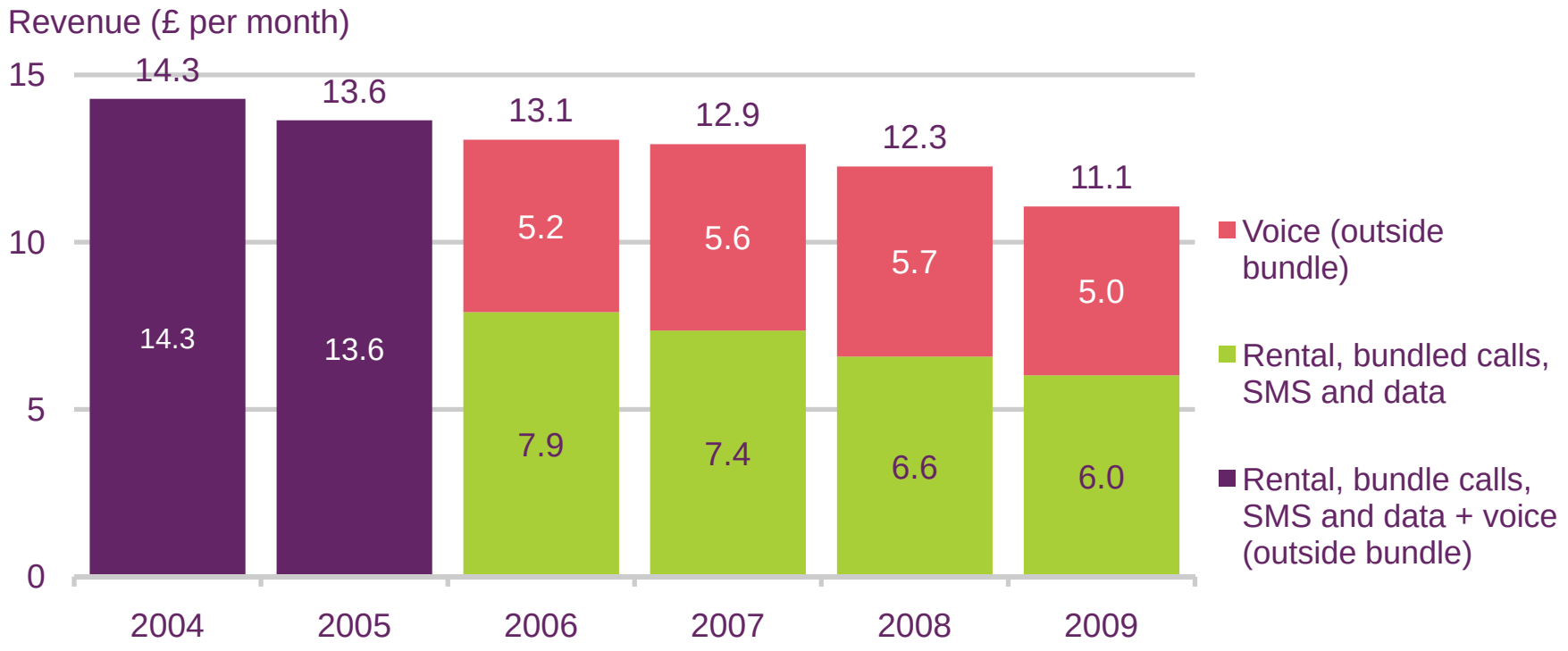
Estimated mobile telecom retail revenue from bundles and voice services



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Figure 5.39

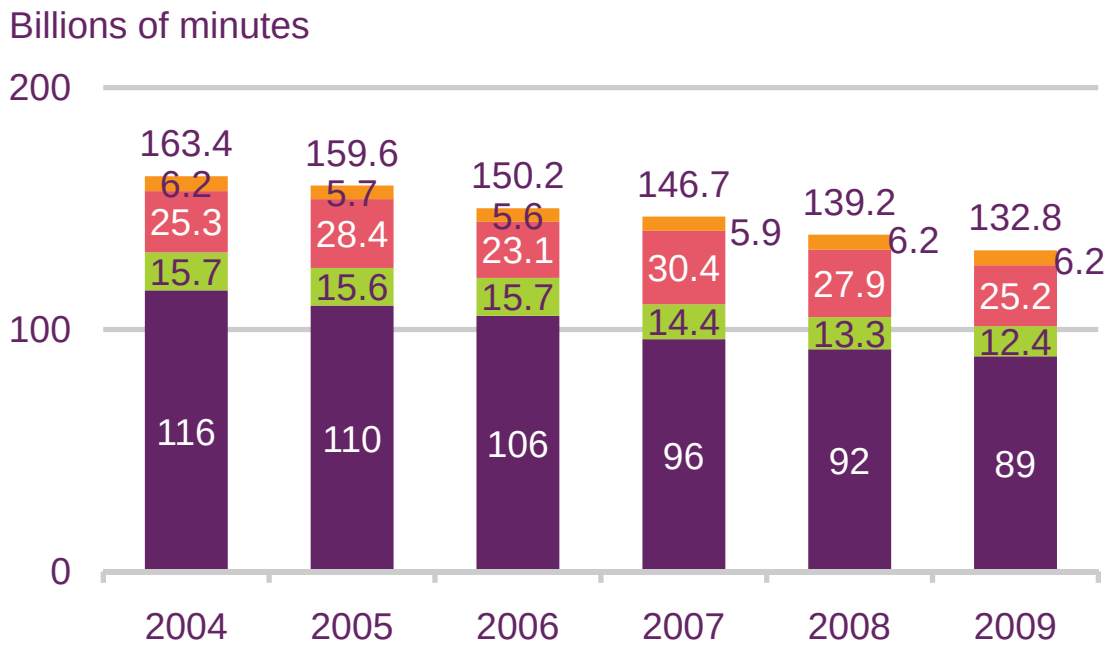
Average monthly retail revenue per mobile subscription 2004 - 2009



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Figure 5.40

Fixed telecom call volumes



	2009 growth	5 year CAGR
International calls	0.3%	0.1%
Other calls	-9.7%	-0.1%
Calls to mobiles	-6.3%	-4.5%
UK geographic calls	-3.2%	-5.2%

Source: Ofcom / operators

Figure 5.41

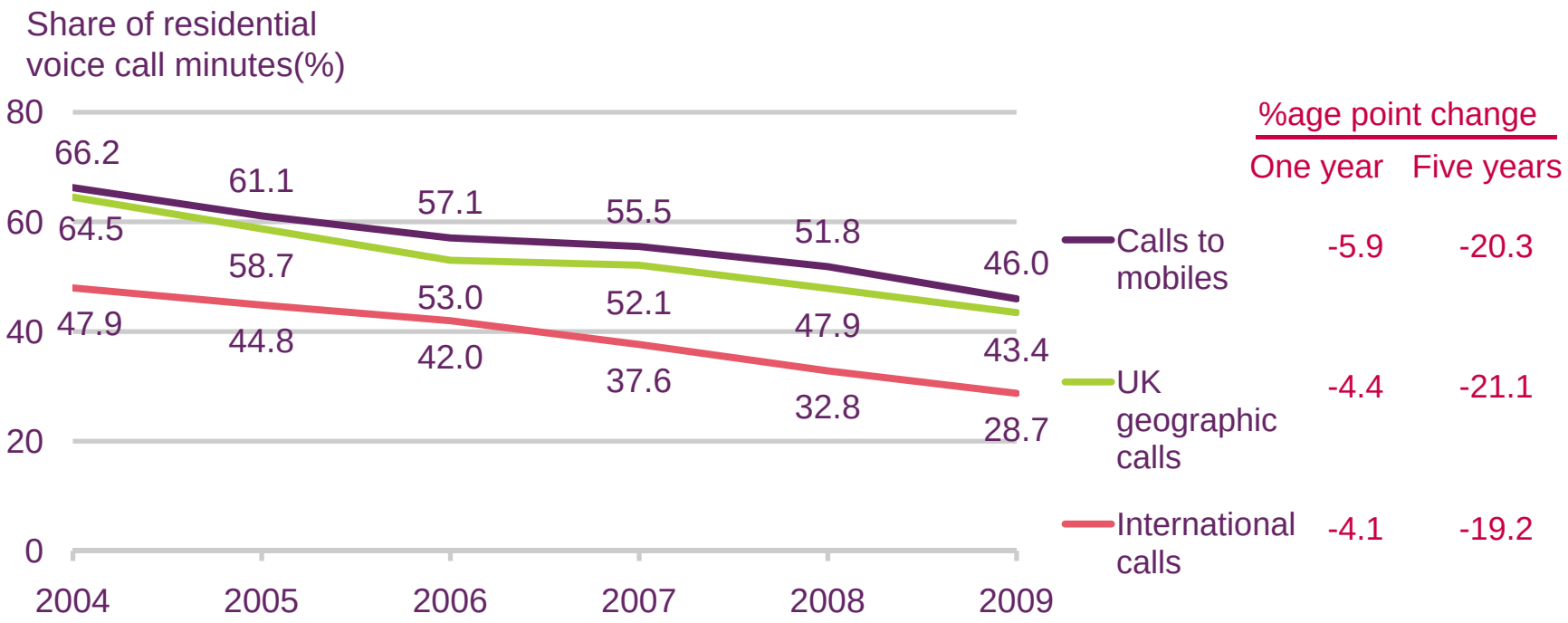
Share of retail residential voice call volumes

	%age point change	
	One year	Five years
Other Direct Access	1.5	5.0
Virgin Media	-0.7	-1.2
Other Indirect Access	3.3	11.3
BT	-4.0	-15.1

Source: Ofcom / operators
Excludes NTS calls

Figure 5.42

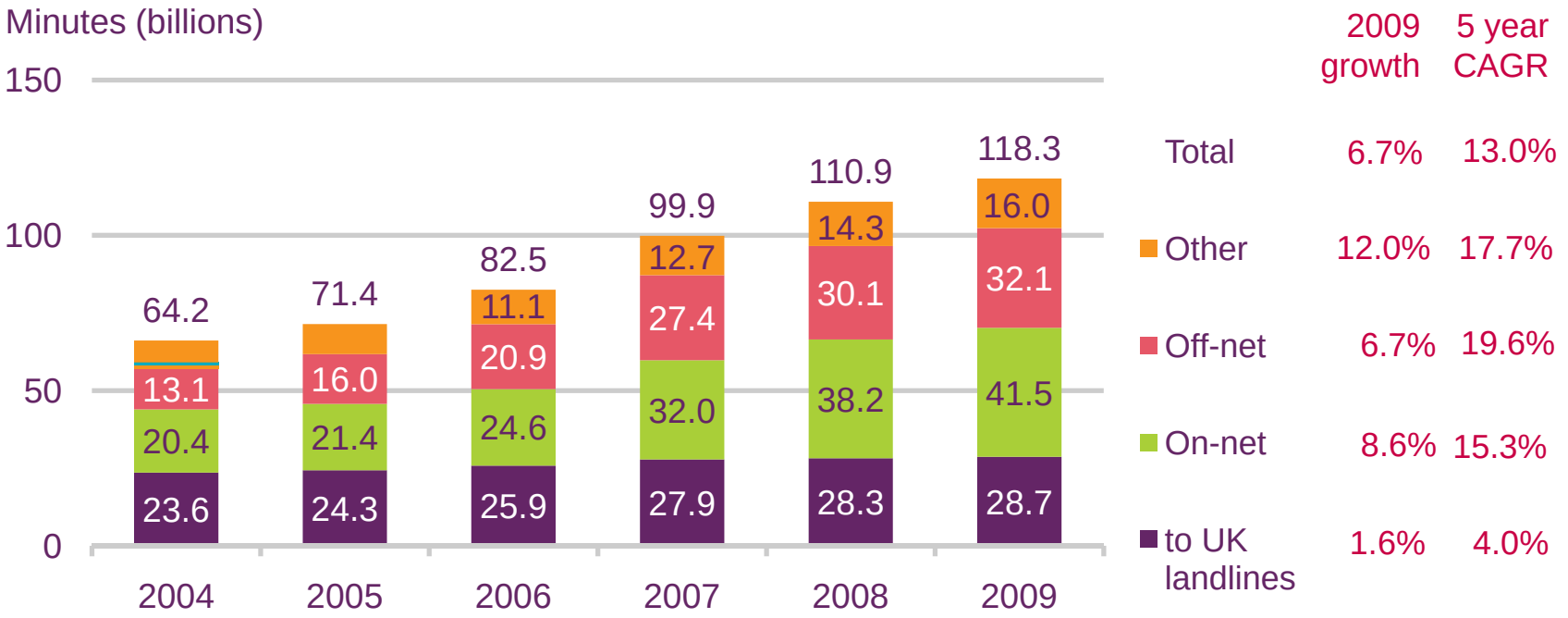
BT share of retail residential voice call volumes by type



Source: Ofcom / operators

Figure 5.43

Mobile telecom call volumes

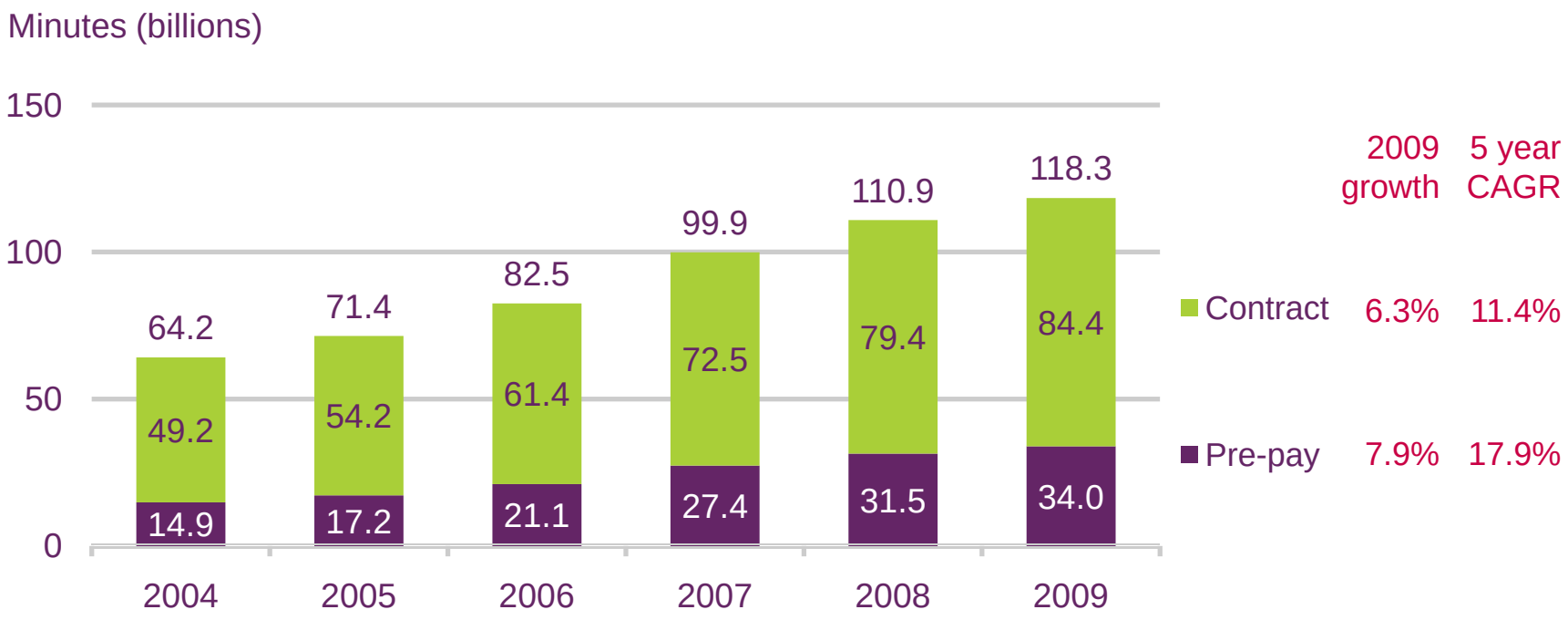


	2009 growth	5 year CAGR
Total	6.7%	13.0%
Other	12.0%	17.7%
Off-net	6.7%	19.6%
On-net	8.6%	15.3%
to UK landlines	1.6%	4.0%

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

Figure 5.44

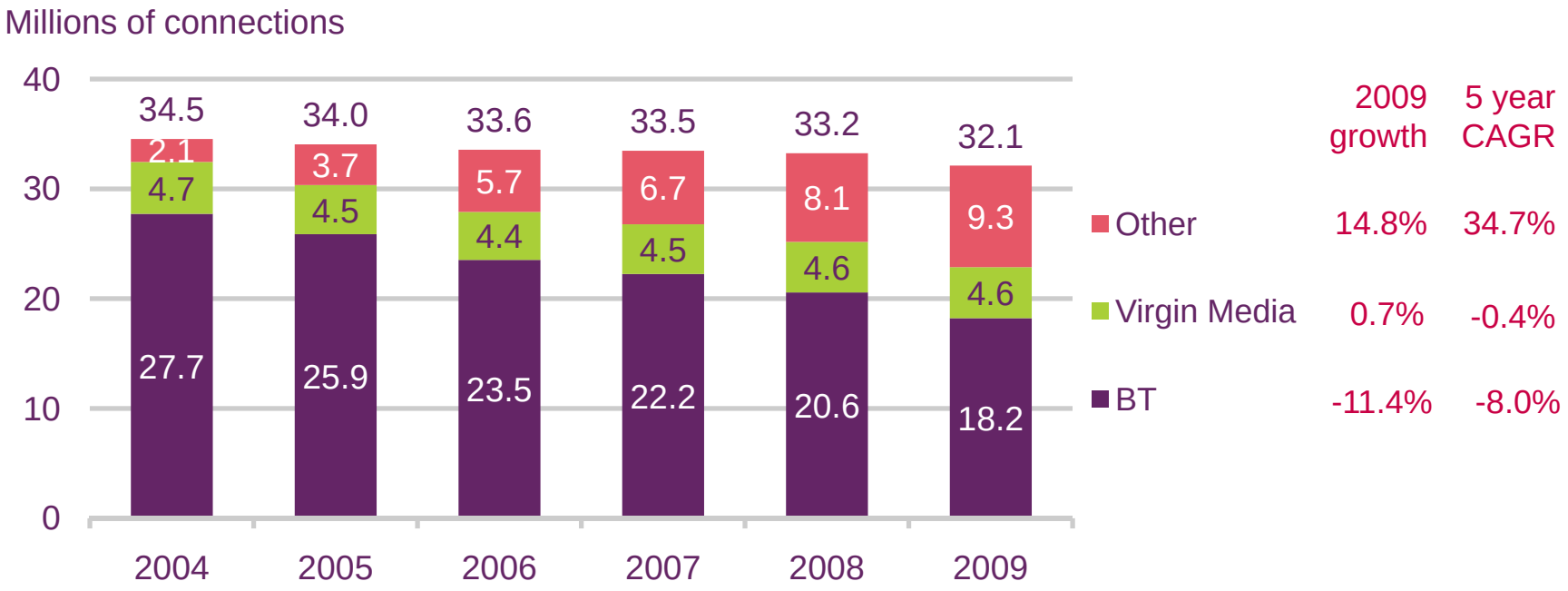
Mobile voice call volumes, by subscription type



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

Figure 5.45

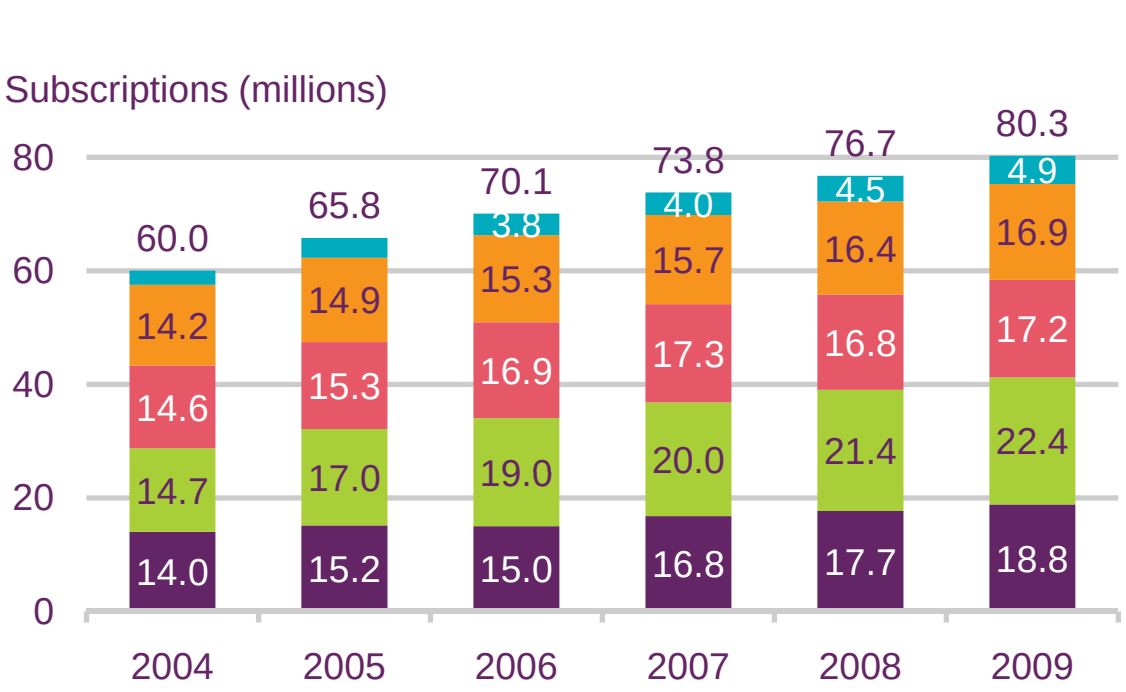
Fixed-line connections by operator



Source: Ofcom / operators

Figure 5.46

Mobile subscriptions, by operator



	2009 growth	5 year CAGR
3UK	9.9%	14.6%
Orange	3.0%	3.5%
T-Mobile (including Virgin Mobile)	2.3%	3.3%
O2 (including Tesco Mobile)	4.8%	8.8%
Vodafone	6.6%	6.1%

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

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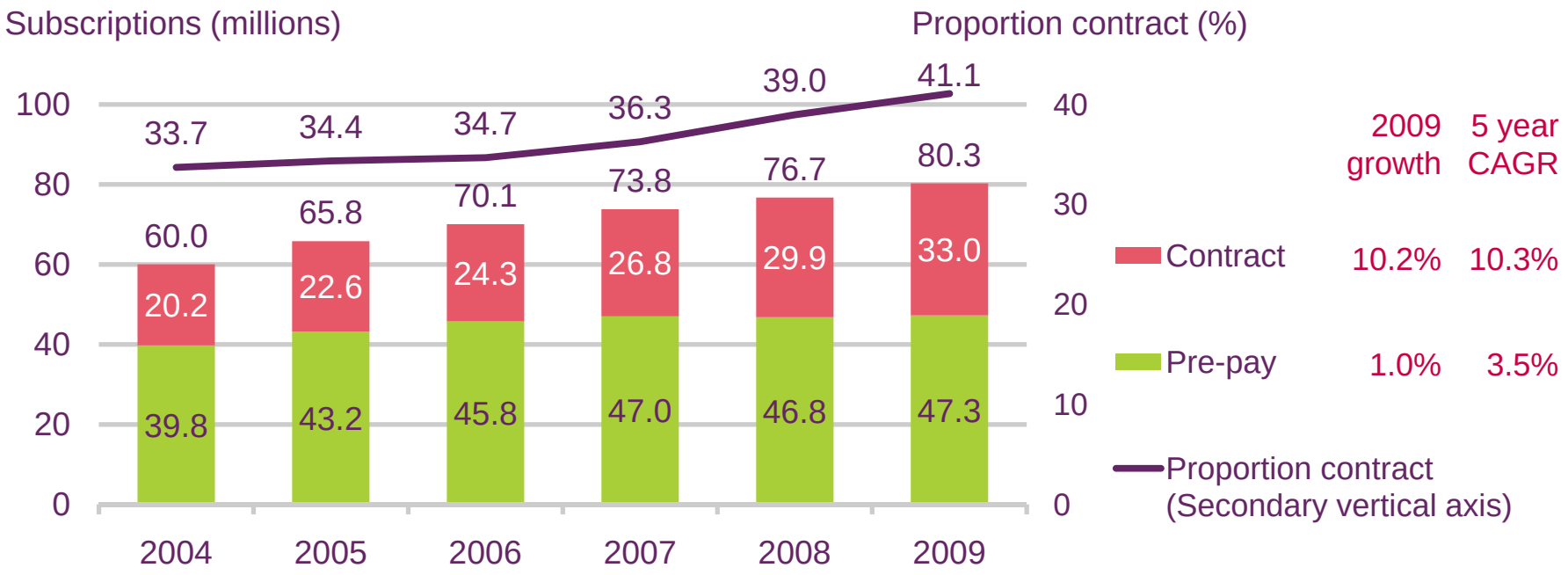
Figure 5.47

Pre-pay and contract mobile subscriptions



Source: Ofcom / operators
Notes: Based on network operator reported figures; includes estimates where Ofcom does not receive data from the operators

Figure 5.48

Voice and data operator-reported UK telecoms industry retail revenue

Source: Ofcom / operators

The bundling of messaging and data services in with monthly rental tariffs means voice revenue will include an element of mobile data revenue

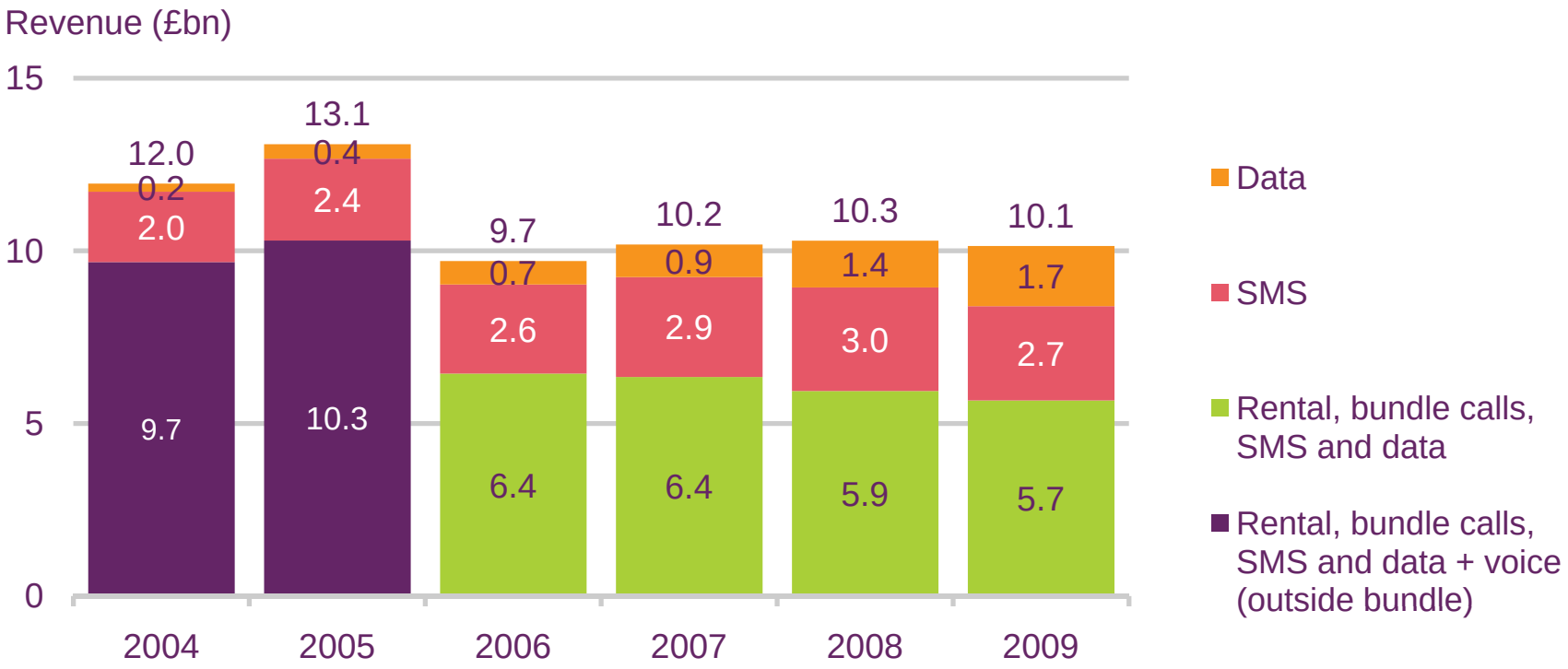
Figure 5.49

Estimated UK internet and broadband retail revenue

Source: Ofcom / operators

Figure 5.50

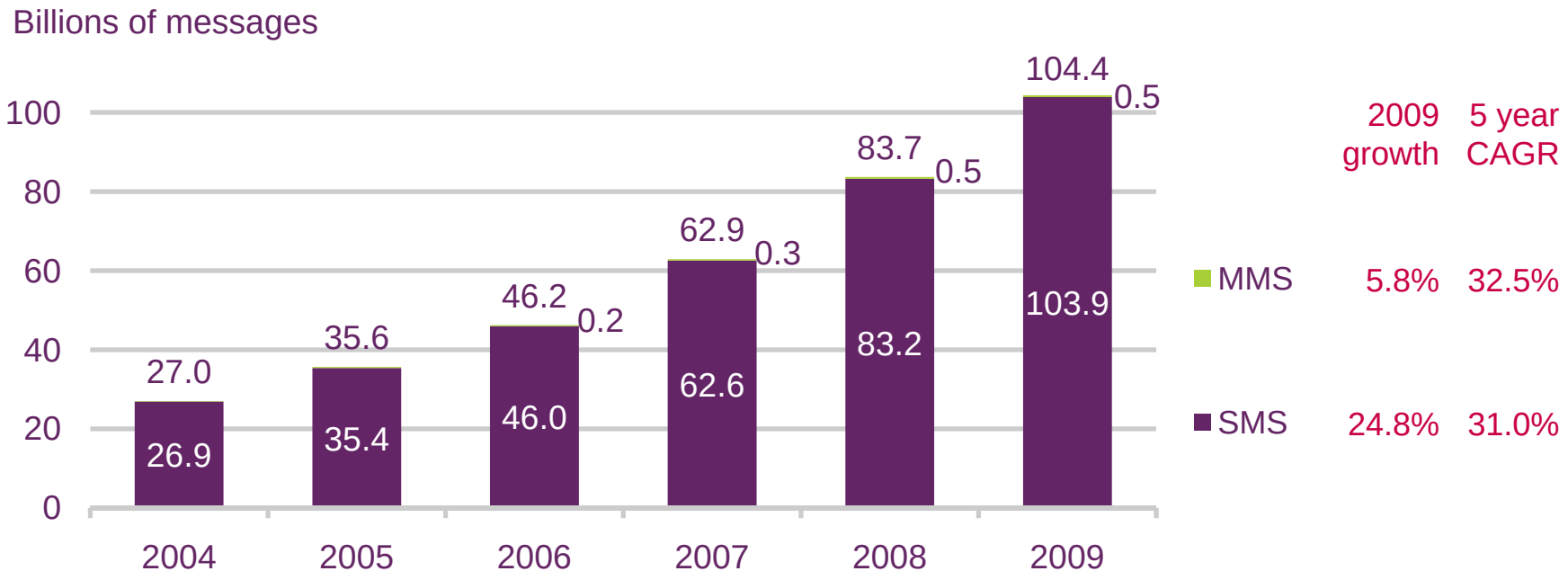
Mobile data revenues



Source: Ofcom/Operators
Note: The split between revenue from rental, bundled calls and SMS AND voice revenue (outside bundle) is only available from 2006 onwards.

Figure 5.51

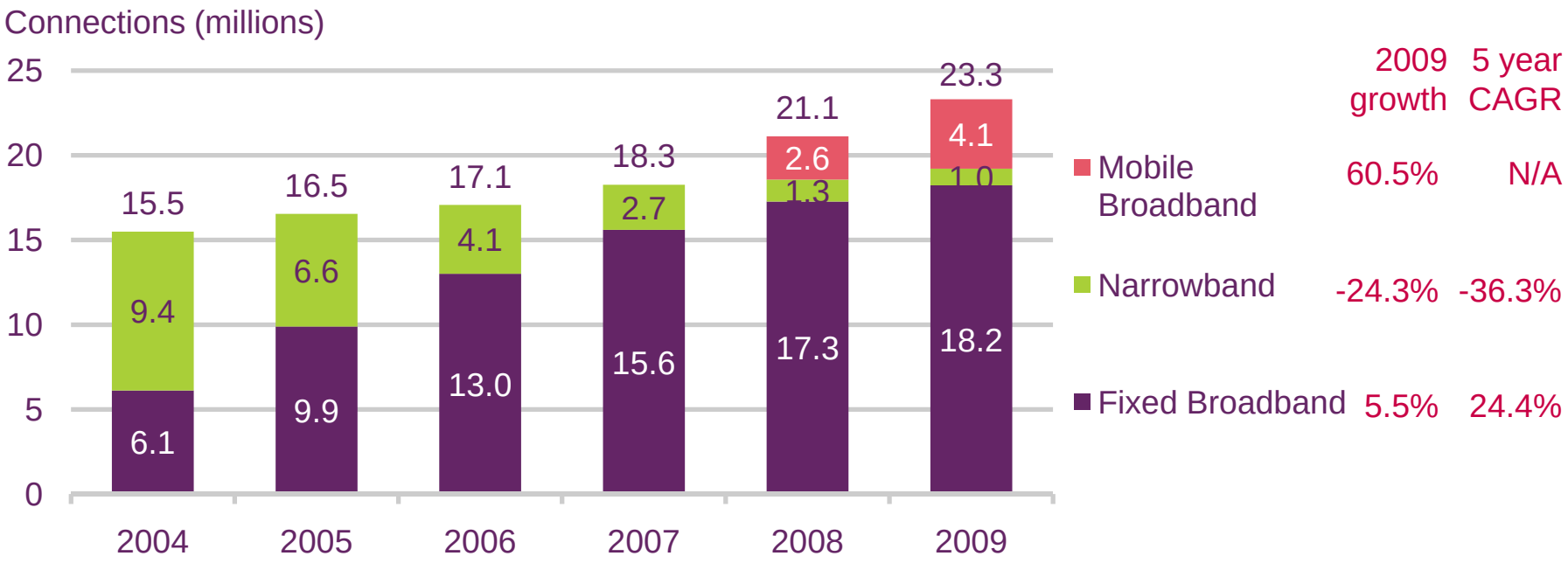
Mobile messaging volumes



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

Figure 5.52

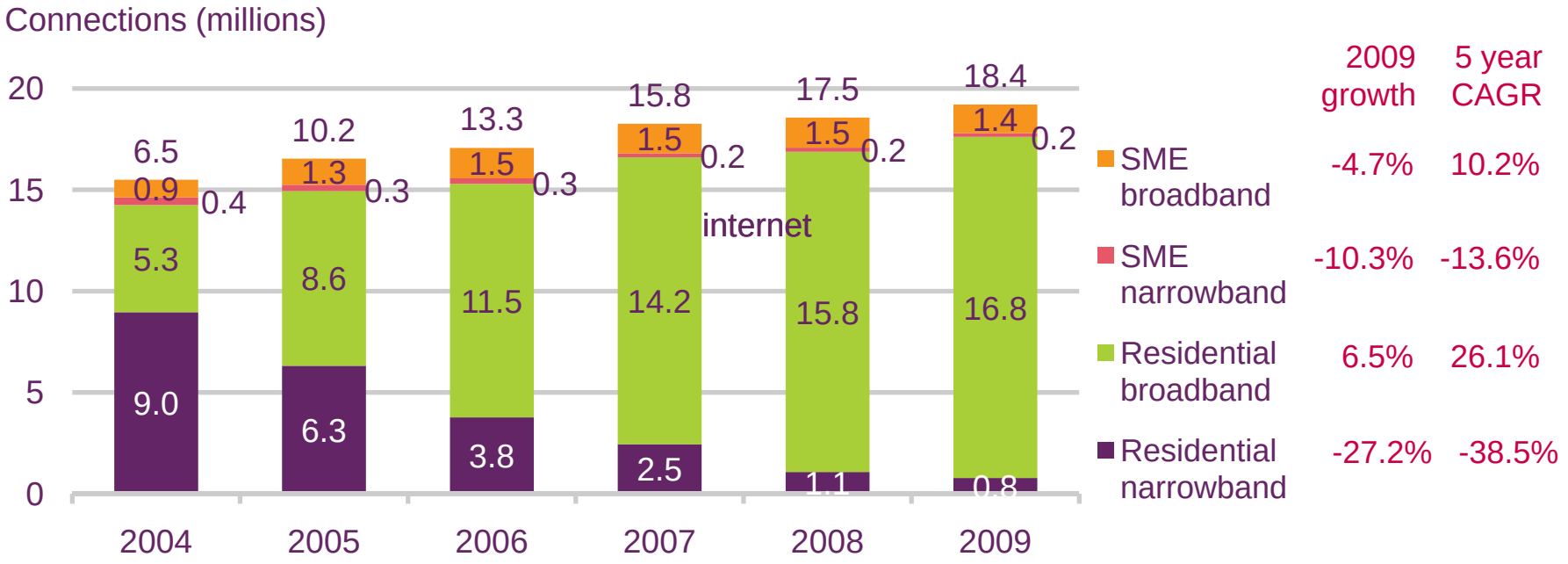
Estimated UK internet and broadband connections



Source: Ofcom / operators
Mobile broadband is defined as connection to the internet via a PC datacard or dongle

Figure 5.53

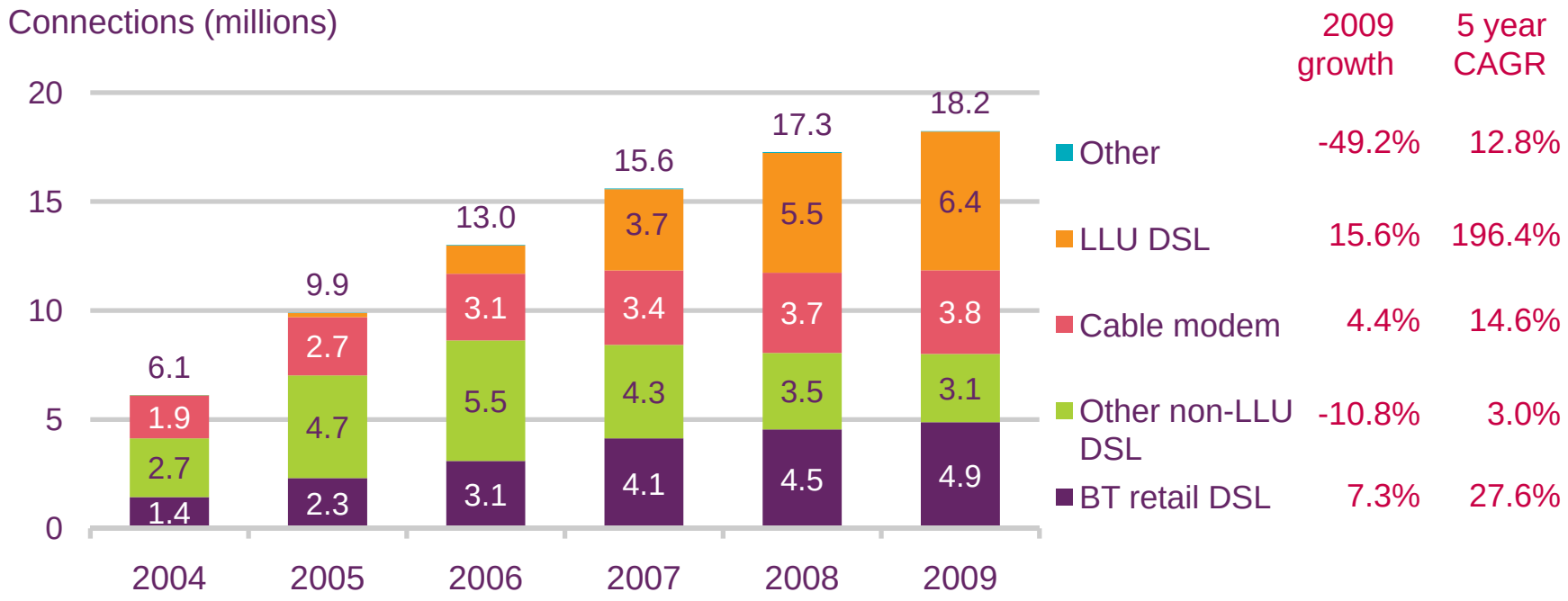
UK residential and small business internet connections



Source: Ofcom / operators
Note: SME broadband includes some connections over leased lines

Figure 4.54

UK residential and small business broadband connections



Source: Ofcom / operators
Note: Excludes connections made over cellular networks

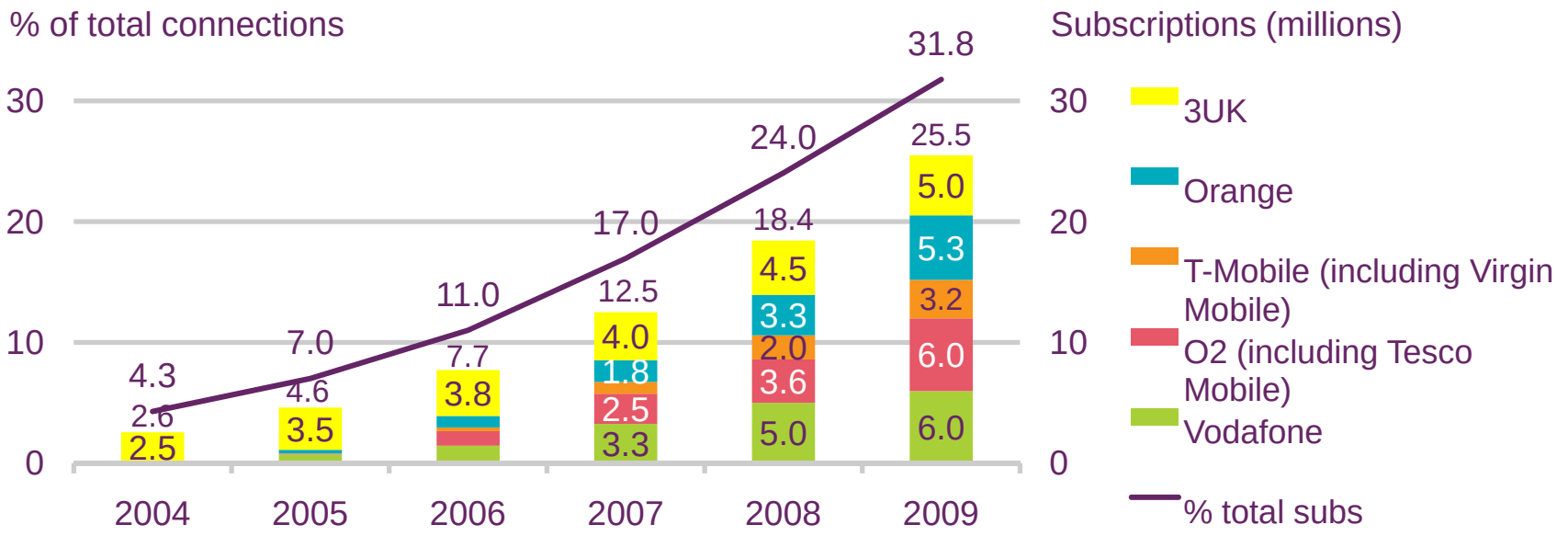
Figure 5.55

2G and 3G share of mobile subscriptions

Source: Ofcom / operators /

Figure 5.56

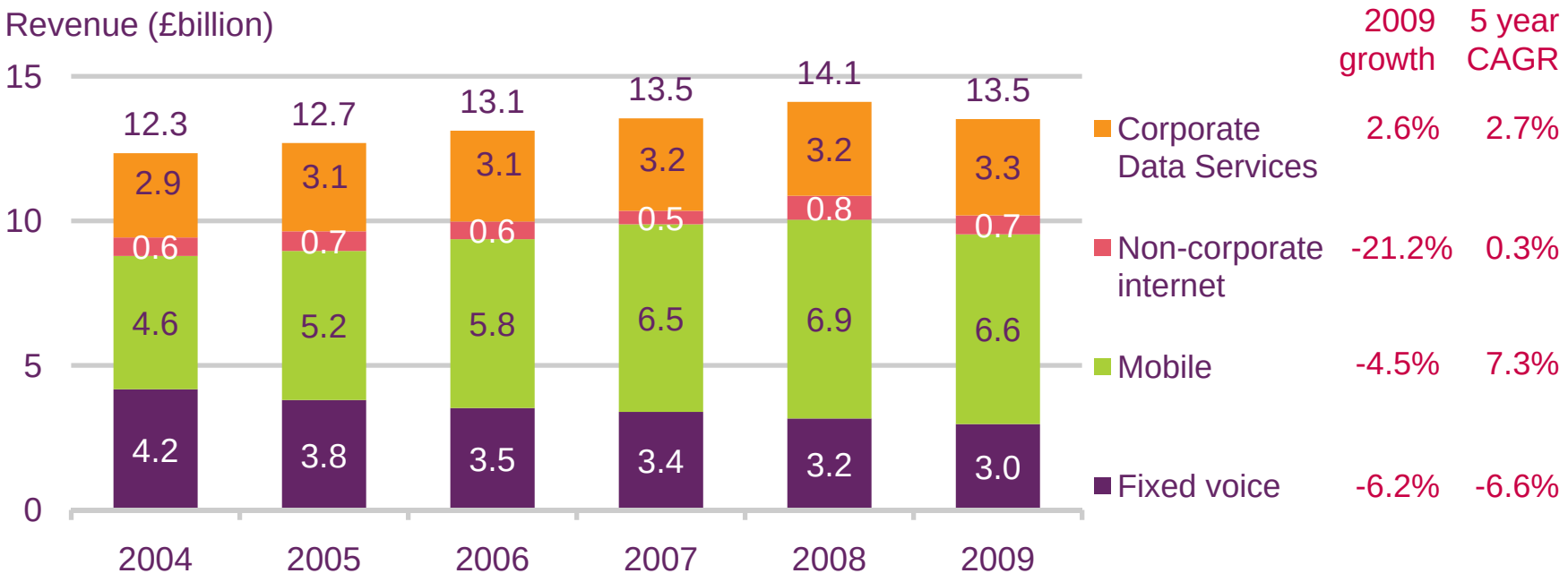
3G subscriptions, by network operator



Source: Ofcom / operators
Note: 3G includes connections made via laptops/dongles as well as handsets

Figure 5.57

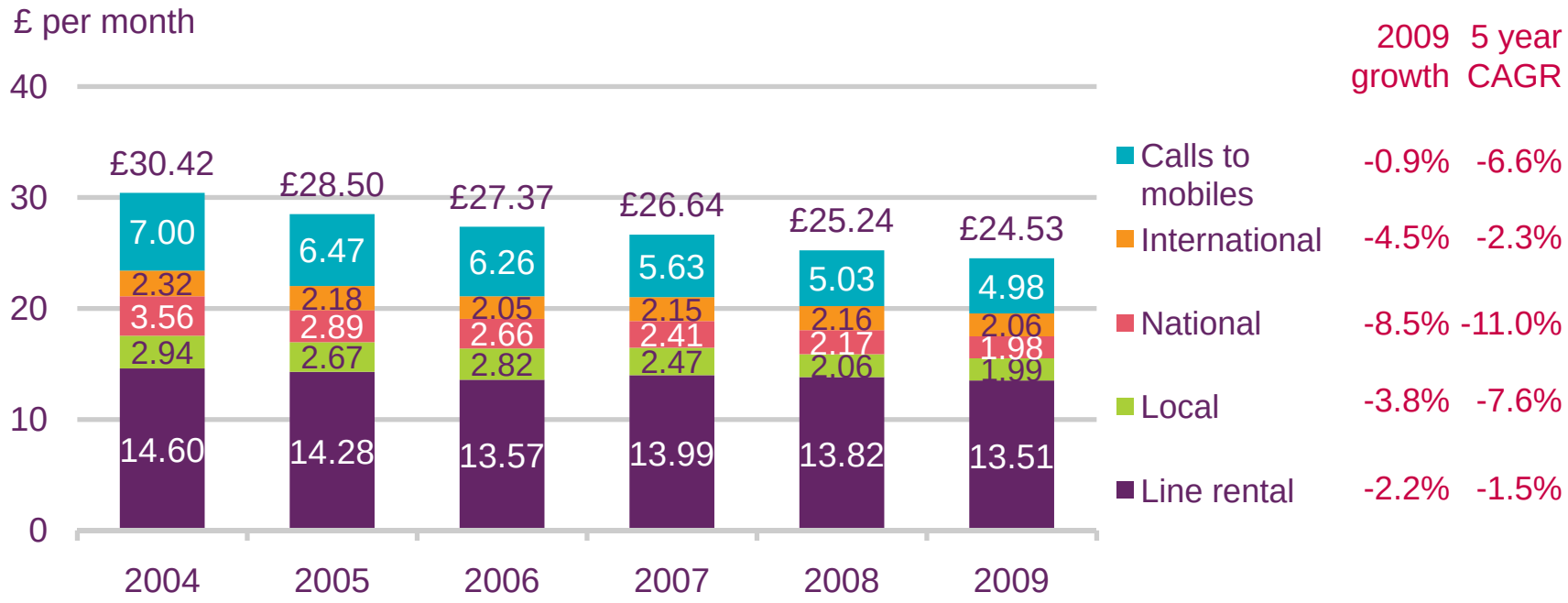
UK business telecoms services revenue



Source: Ofcom / operators / IDC

Figure 5.58

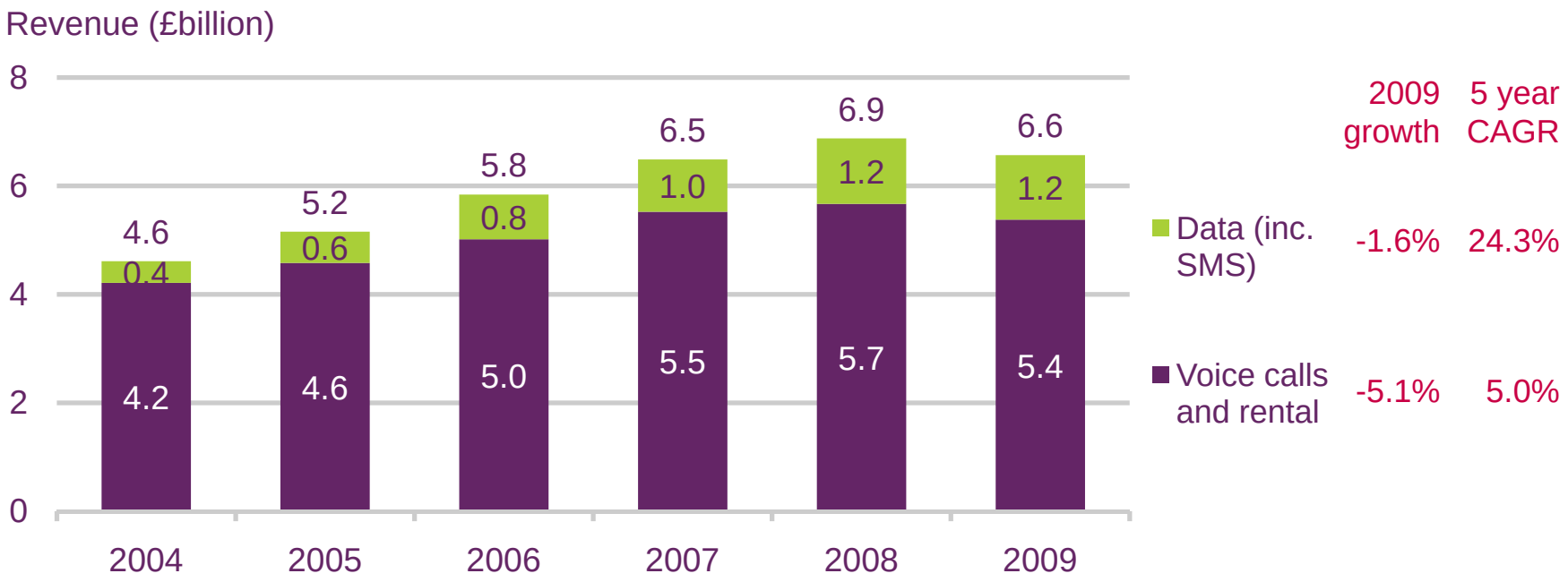
Average monthly voice revenue per business fixed line



Source: Ofcom / operators
Note: Excludes revenues from non-geographic voice calls

Figure 5.59

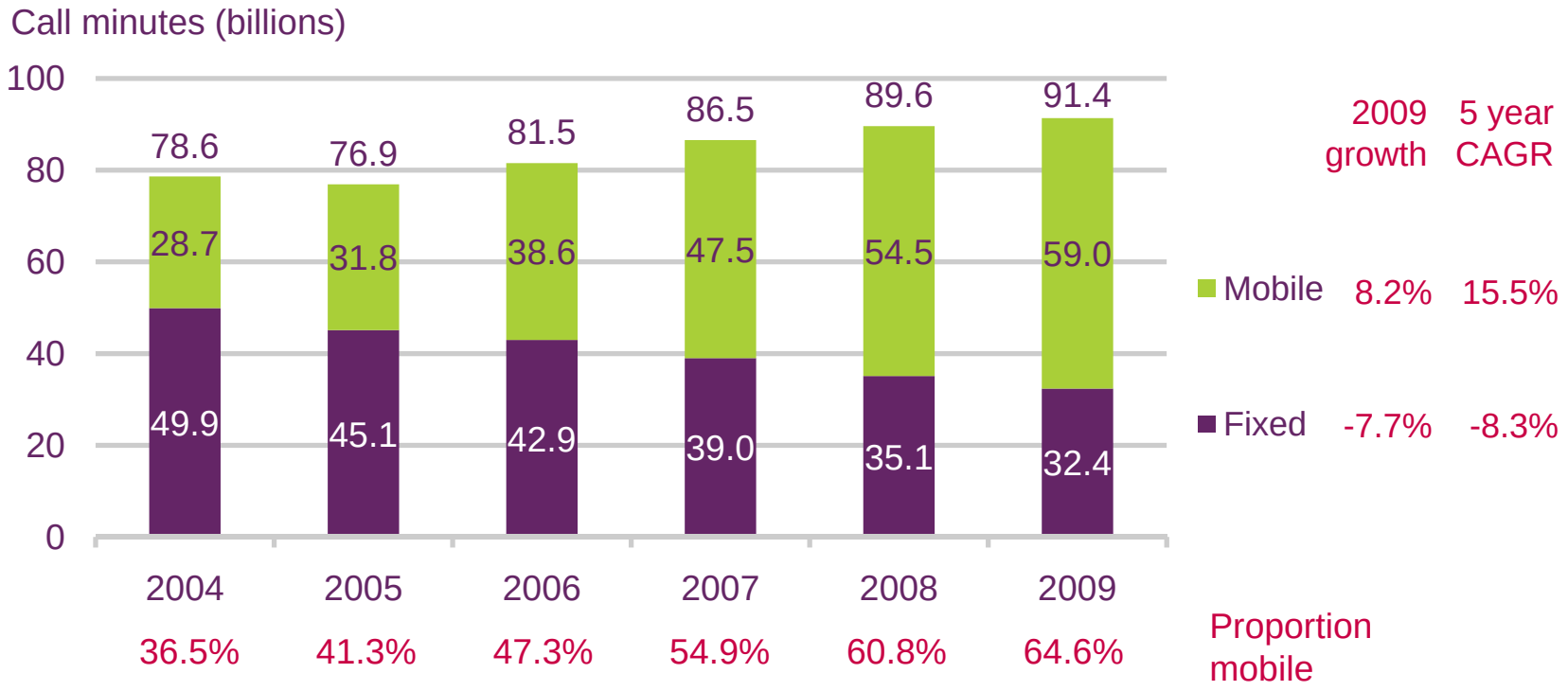
Breakdown of business mobile revenue



Source: Ofcom / operators

Figure 5.60

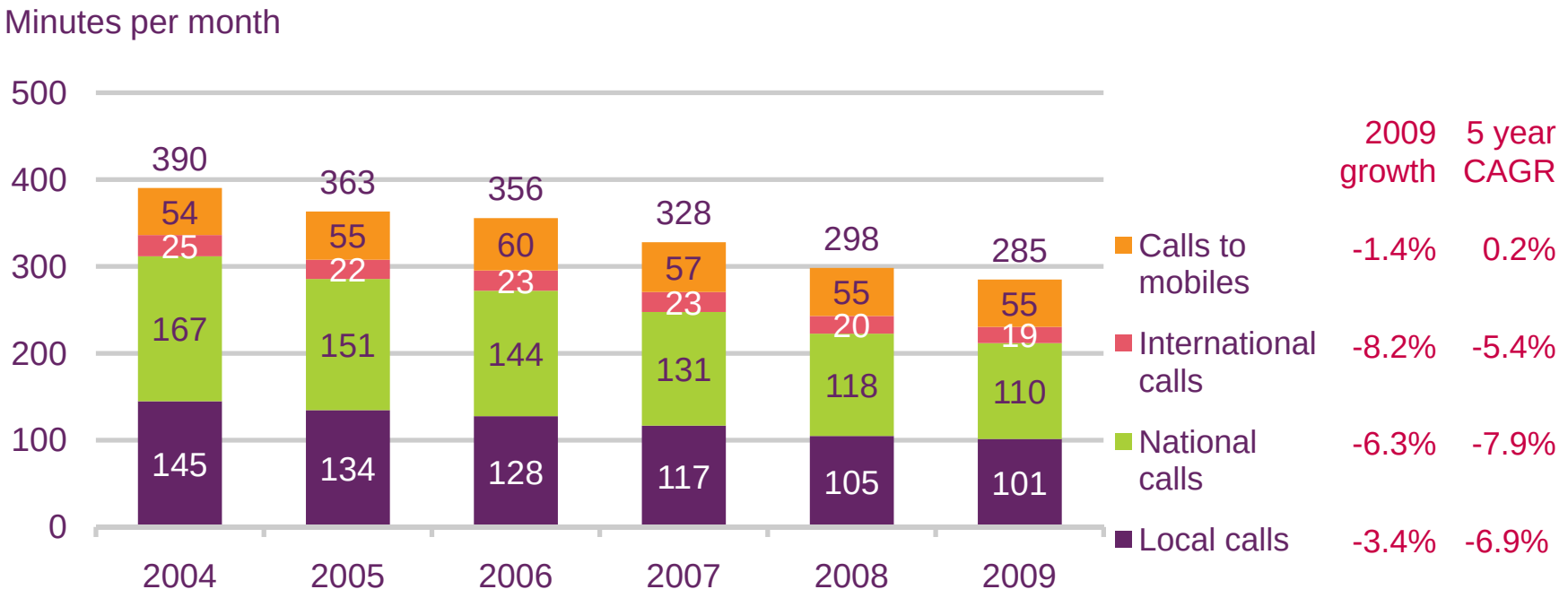
Business voice call volumes



Source: Ofcom / operators
Note: Fixed data excludes non-geographic voice call volumes

Figure 5.61

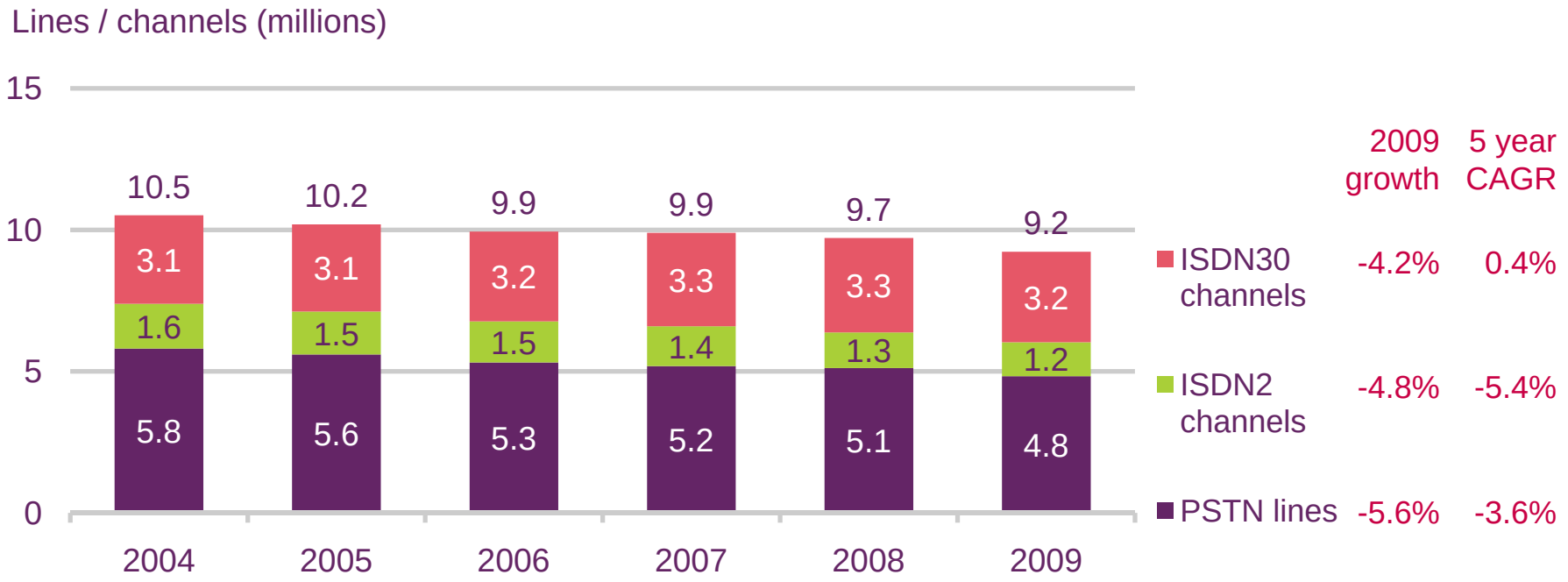
Average monthly outbound voice call volumes per business fixed line



Source: Ofcom / operators
Note: Excludes non-geographic voice call volumes

Figure 5.62

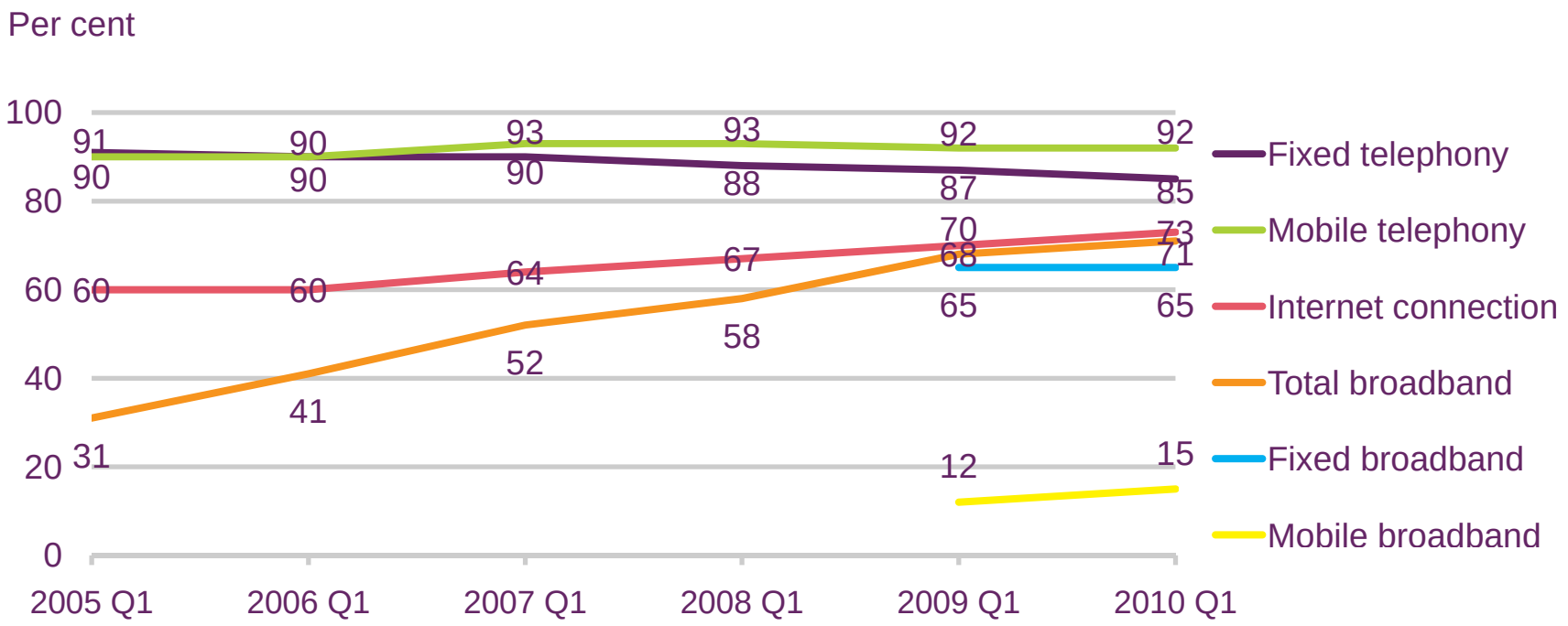
Business fixed lines, by type



Source: Ofcom / operators
Note: Figures may be overstated due to an element of double-counting of WLR lines

Figure 5.63

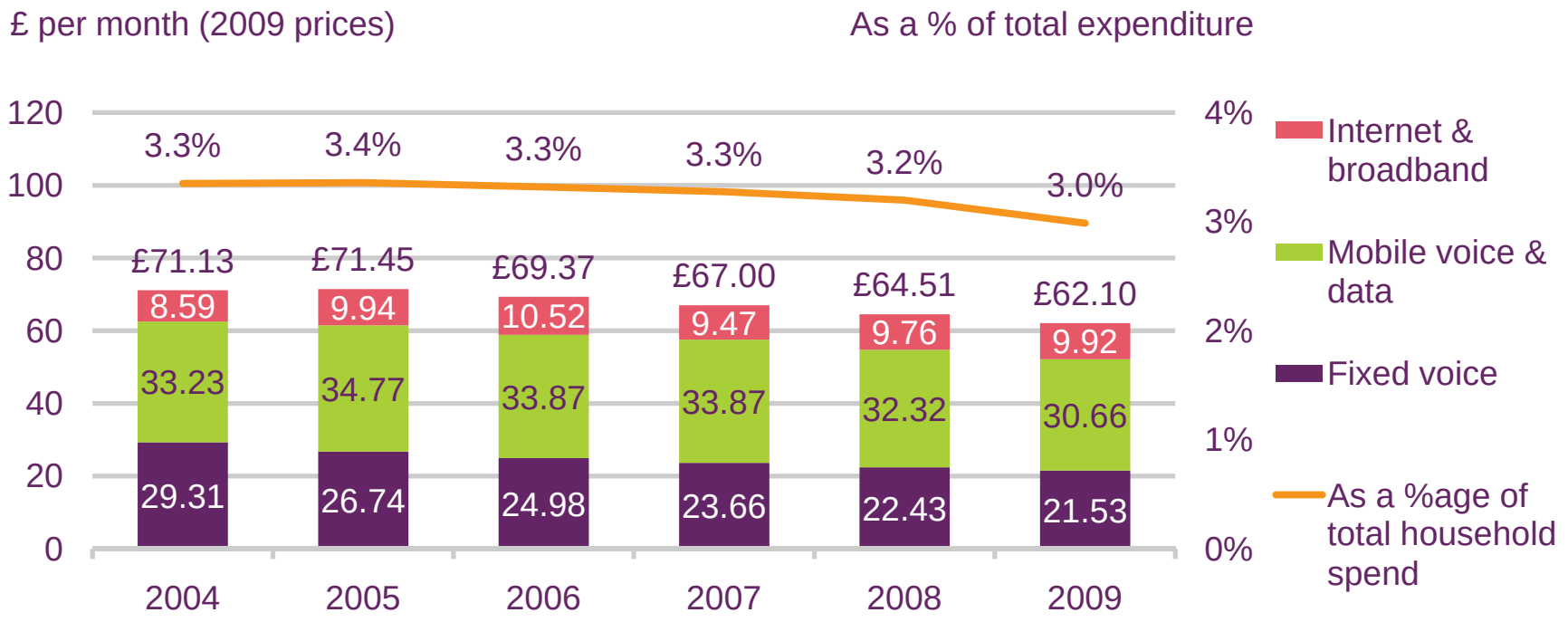
Household take-up of key telecoms technologies



Source: Ofcom research
Base: All adults aged 15+

Figure 5.64

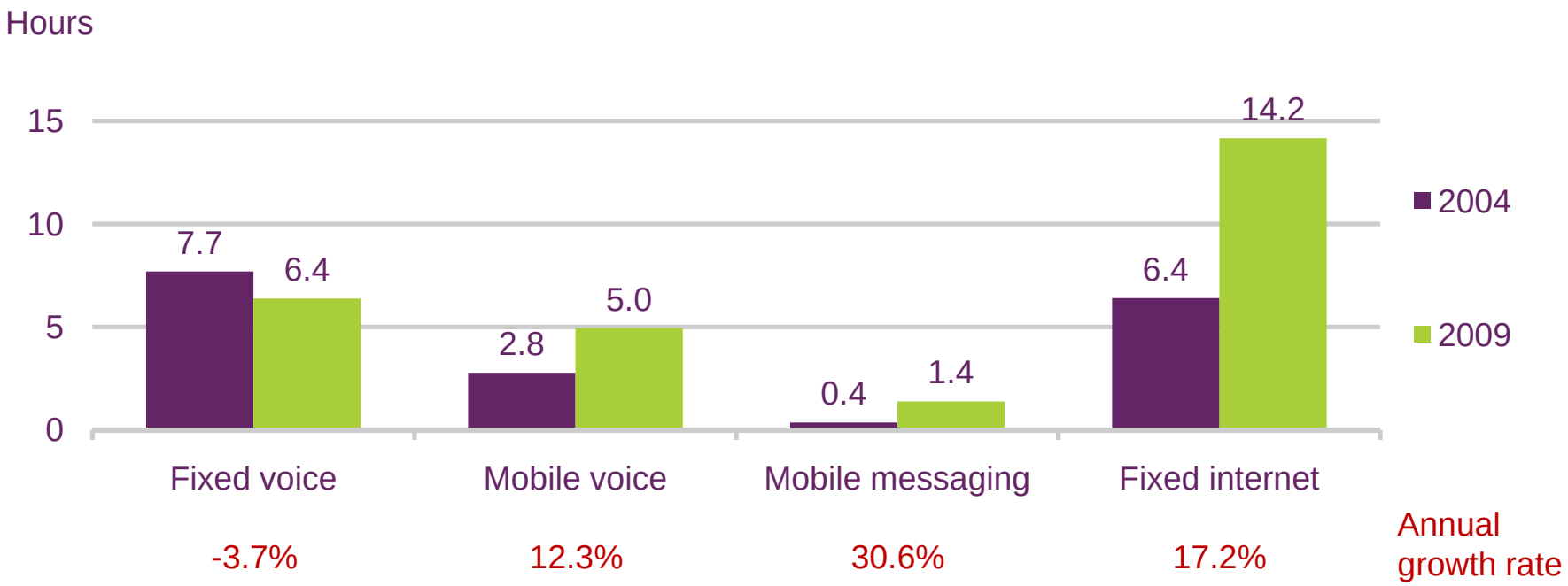
Average household spend on telecoms services



Source: Ofcom / operators / ONS
Notes: Includes estimates where Ofcom does not receive data from operators; adjusted to RPI; includes VAT

Figure 5.65

Average monthly time per person spent using telecoms services



Source: Ofcom / operators / Nielsen / UKOM

Note: Includes estimates where Ofcom does not receive data from operators; fixed voice call figures include NTS voice calls; mobile messaging figures assume an average of 35 seconds per message; Ofcom estimate of fixed internet use per person is based on Nielsen's data on the average monthly time spent online at home including the use of applications across the online population only; Nielsen's methodology changed in October 2006 so comparisons before this period should be treated with caution; fixed internet use figures are for May of the following year.

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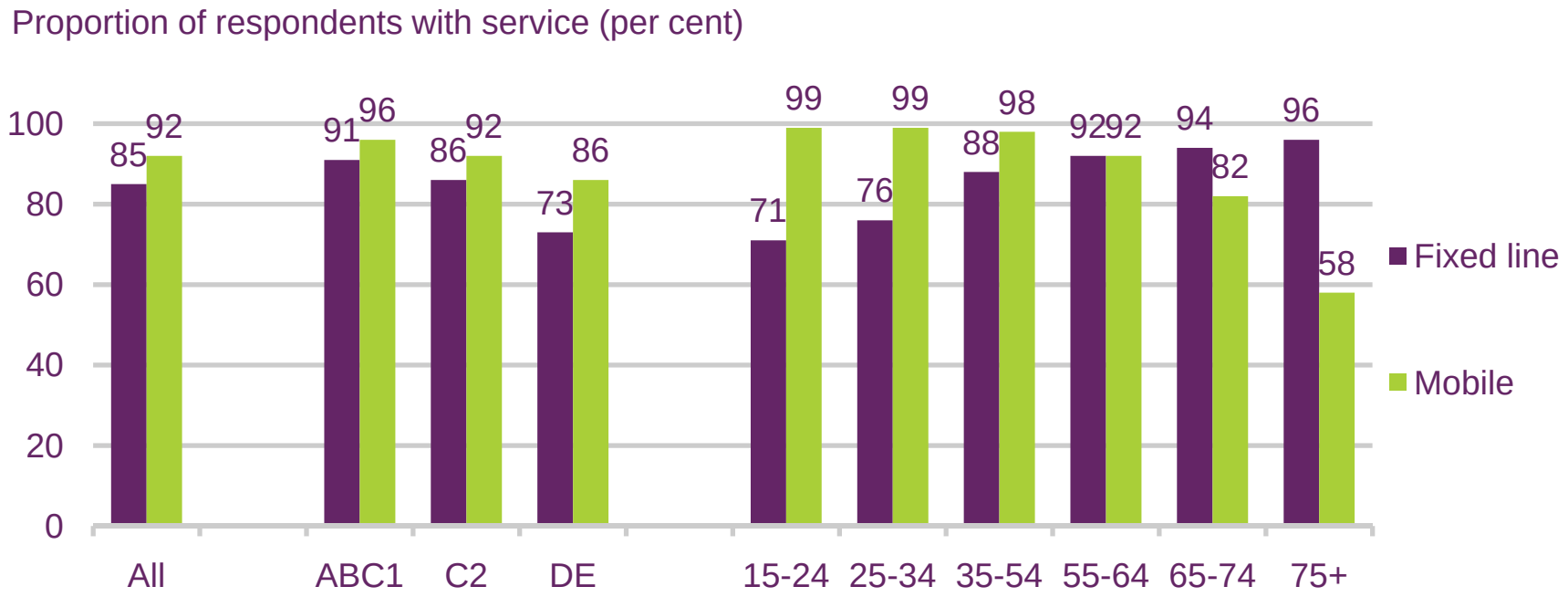
Figure 5.66

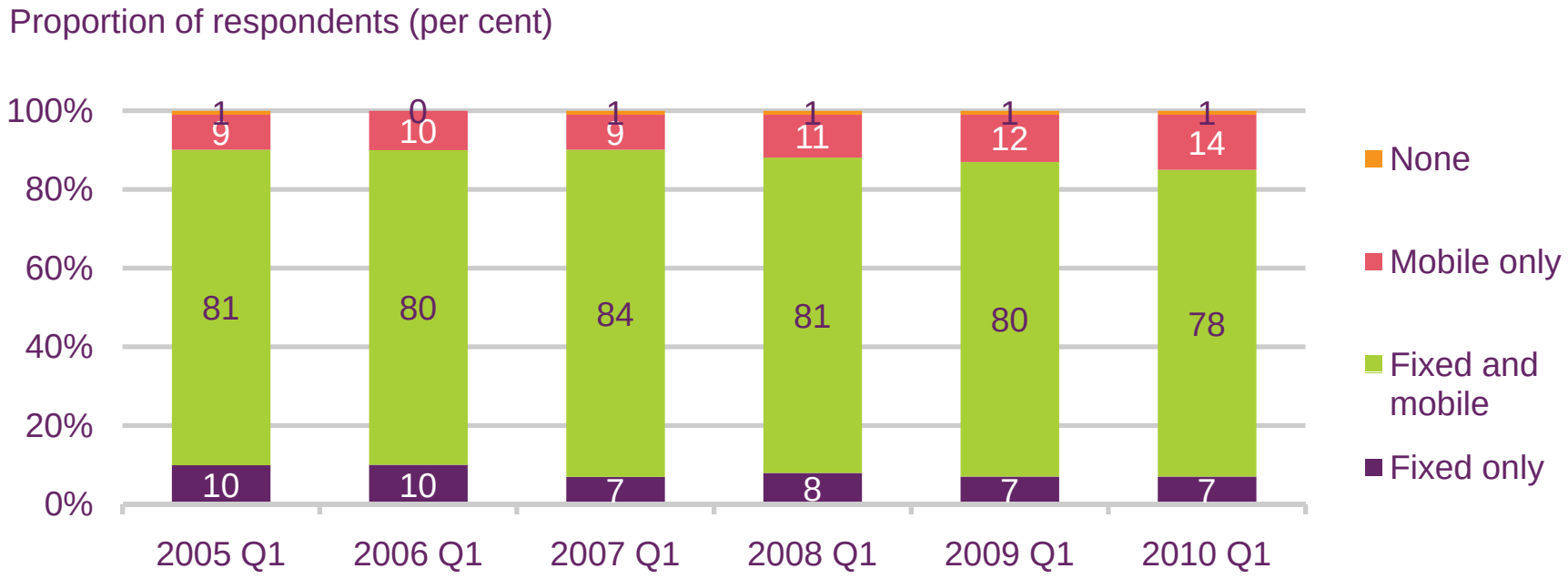
Household telecoms connections, by socio-economic group and age



Source: Ofcom research, Q1 2009
Base: All adults aged 15+

Figure 5.67

Household penetration of fixed and mobile telephony

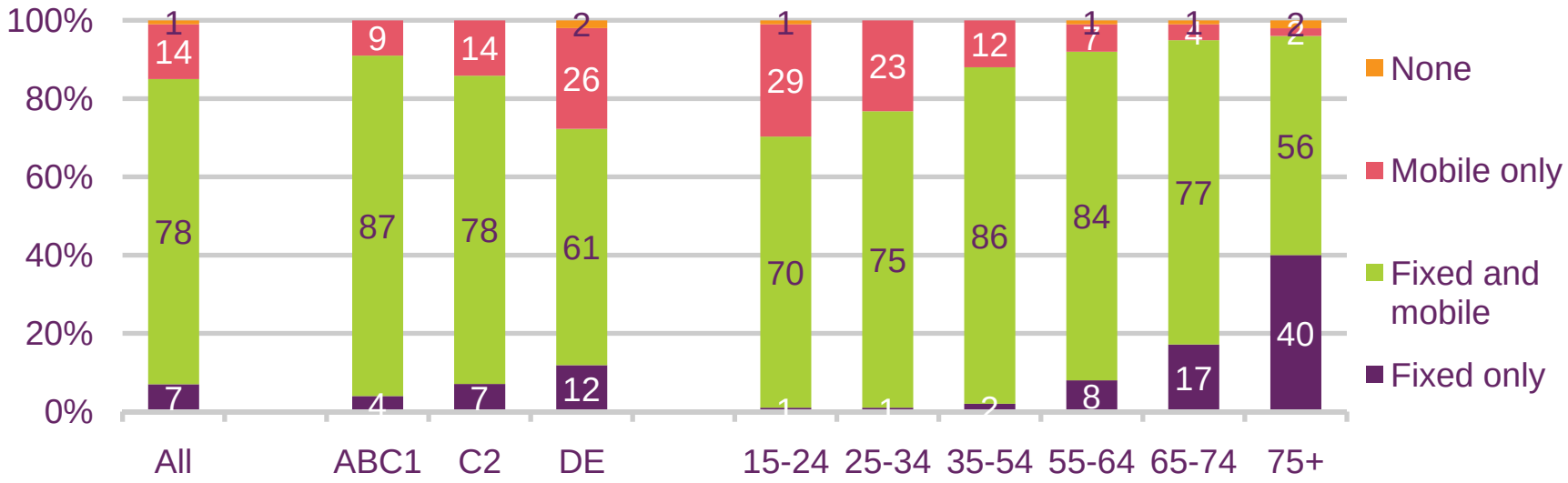


Source: Ofcom research
Base: All adults aged 15+

Figure 5.68

Household penetration of fixed and mobile telephony, by socio-economic group and age

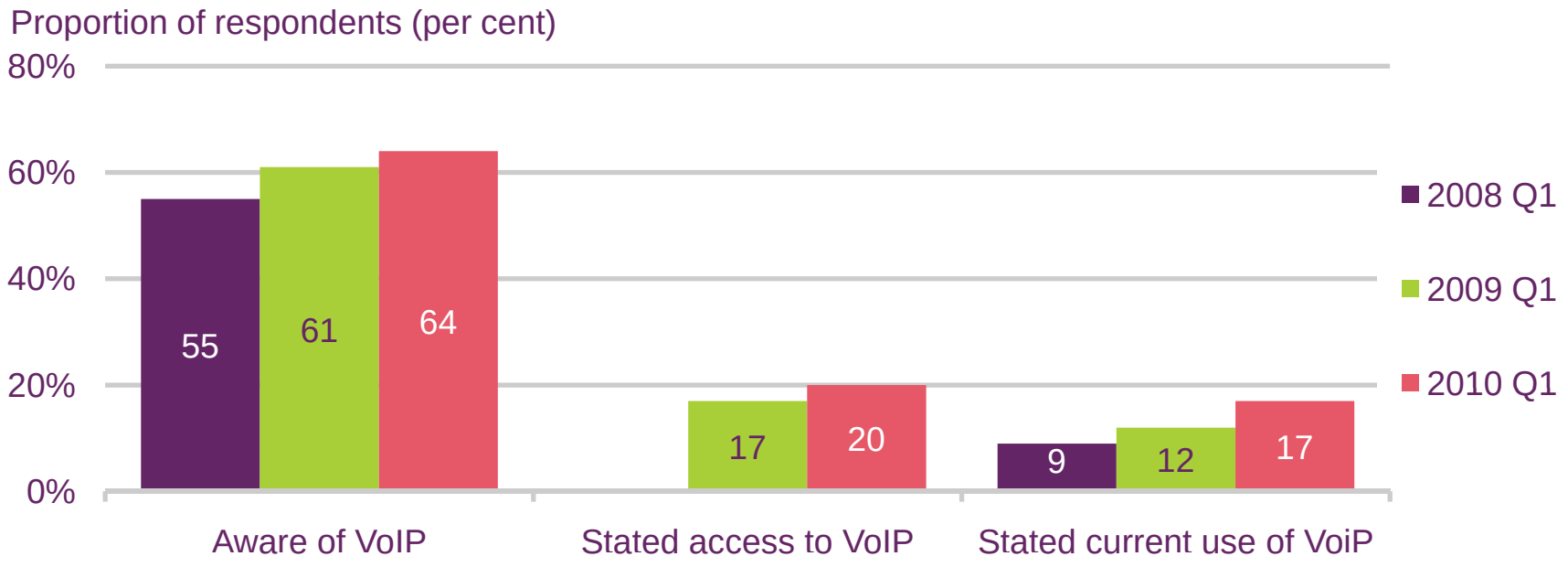
Proportion of respondents (per cent)



Source: Ofcom research
Base: All adults aged 15+

Figure 5.69

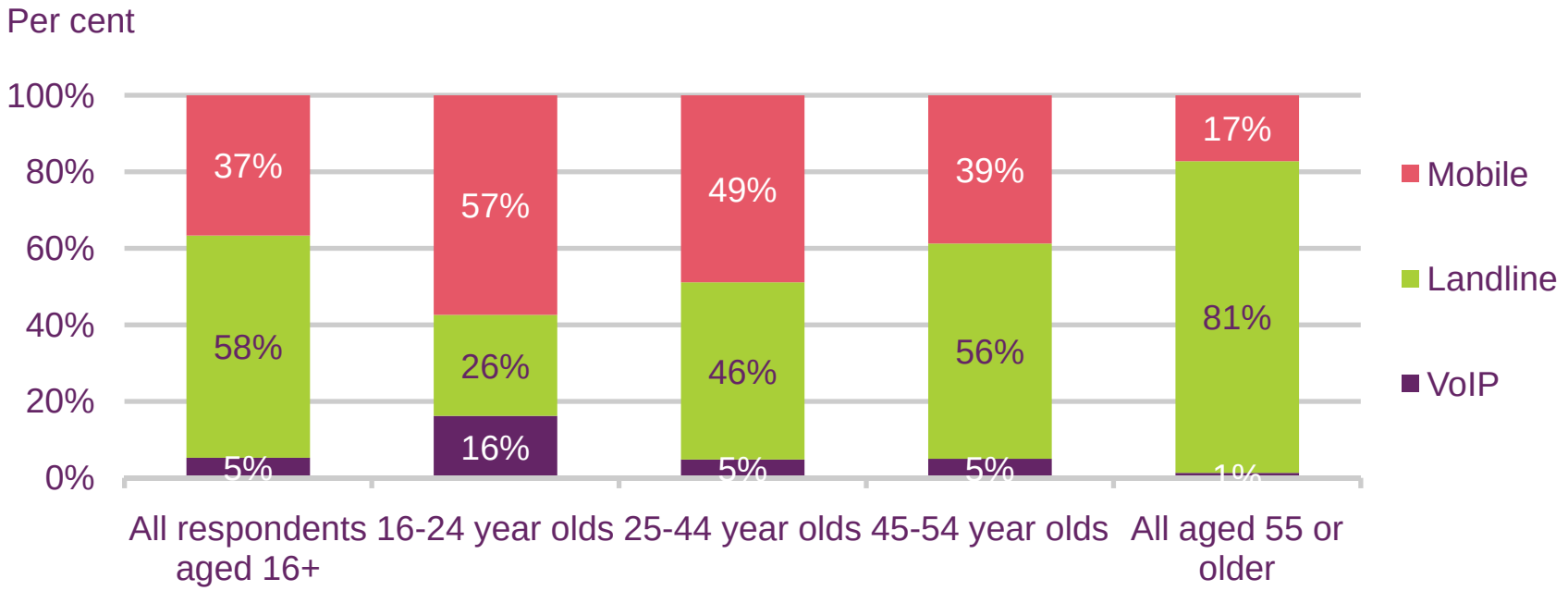
Awareness, stated access to and use of VoIP



Source: Ofcom research
Base: All adults aged 15+
Note: Question wording changed in 2009 so treat comparisons with previous data with caution; stated access not collected in 2008.

Figure 5.70

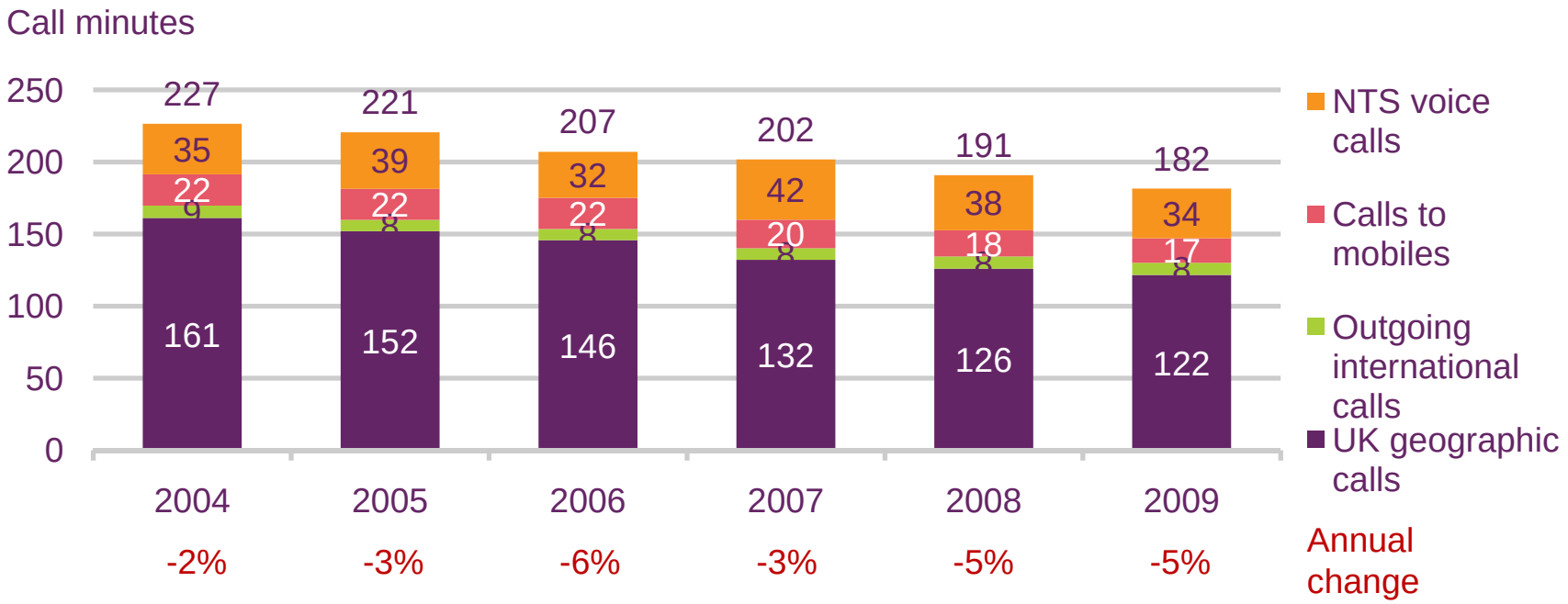
Use of voice communication services in the home



Source: Ofcom research
Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 5.71

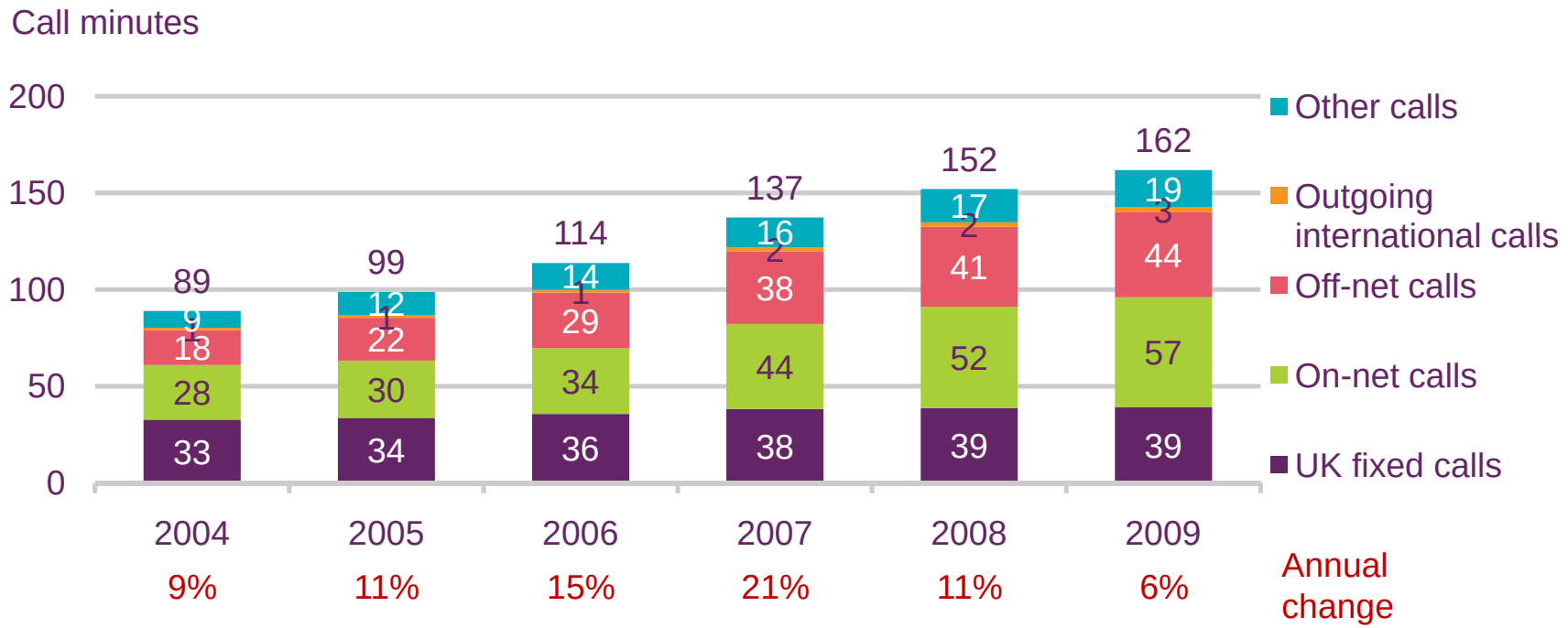
Average monthly outbound fixed voice call volumes per person



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

Figure 5.72

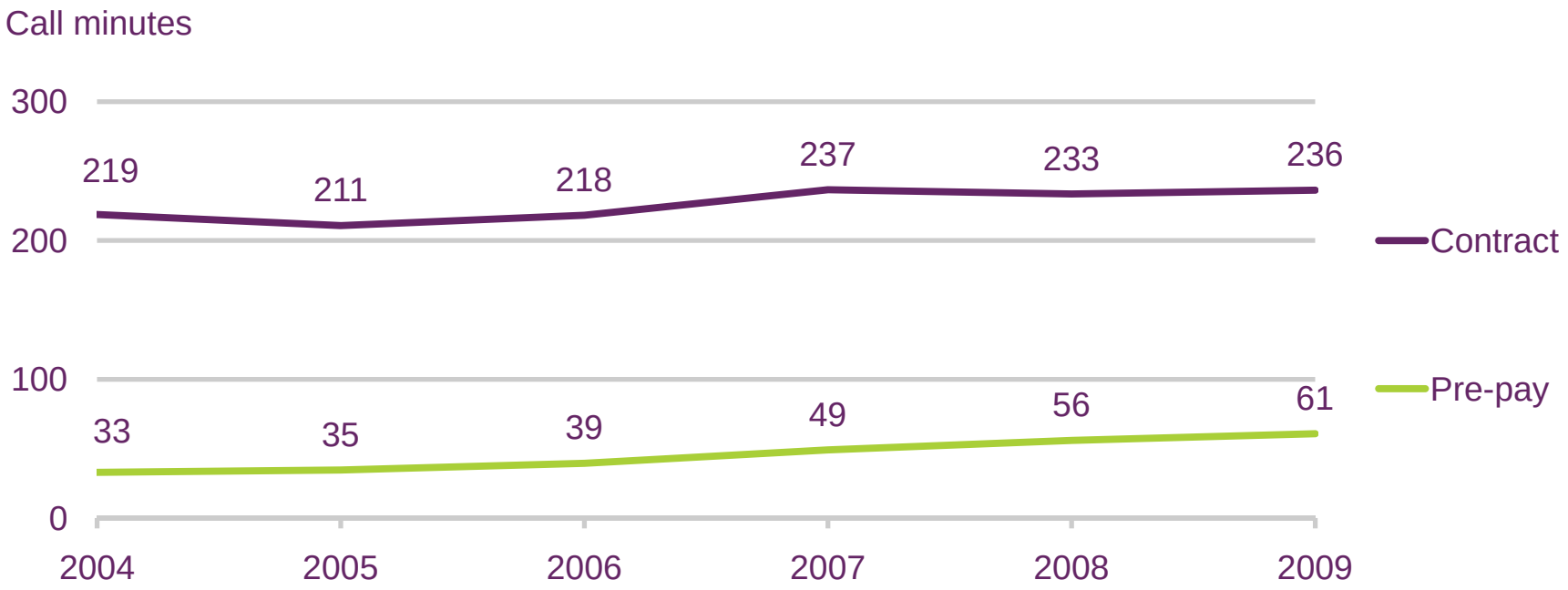
Average monthly outbound mobile voice minutes per person



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes 3UK; calculation excludes mobile broadband connections

Figure 5.73

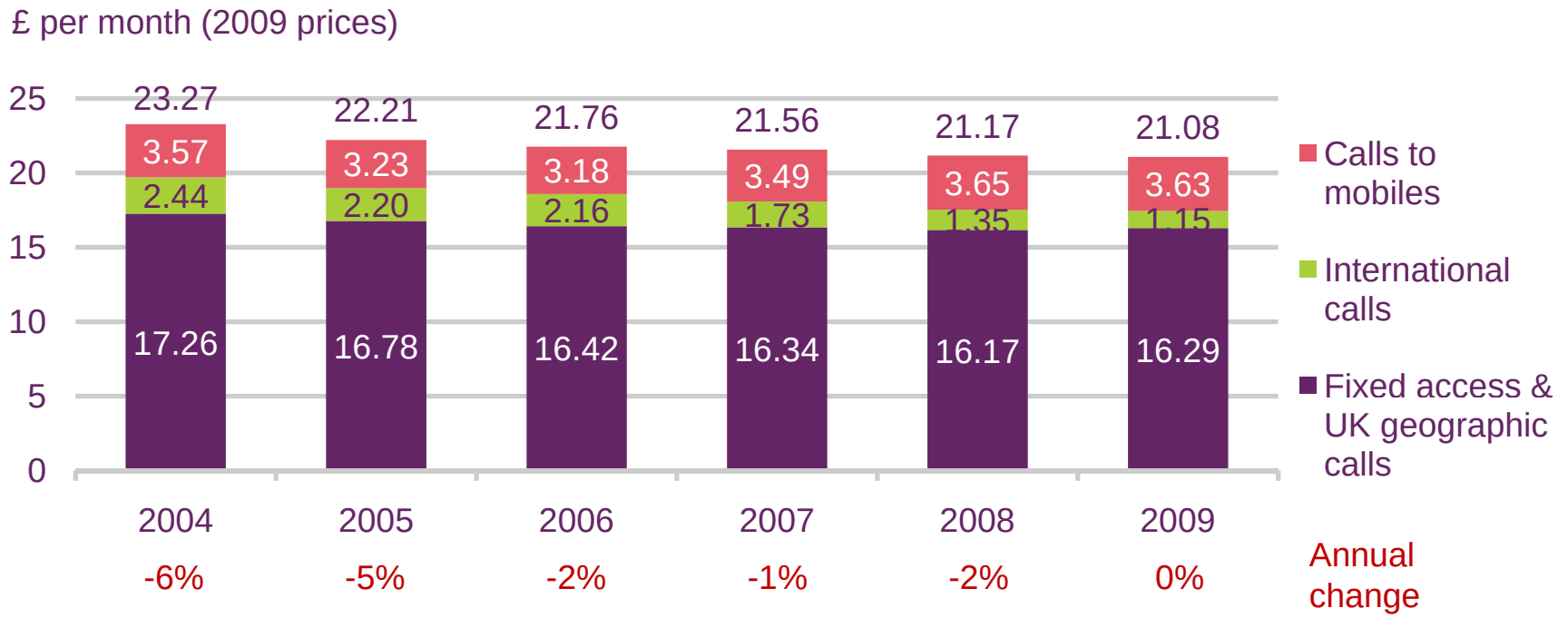
Average monthly outbound mobile call minutes, by subscription type



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes 3UK; calculation excludes mobile broadband connections

Figure 5.74

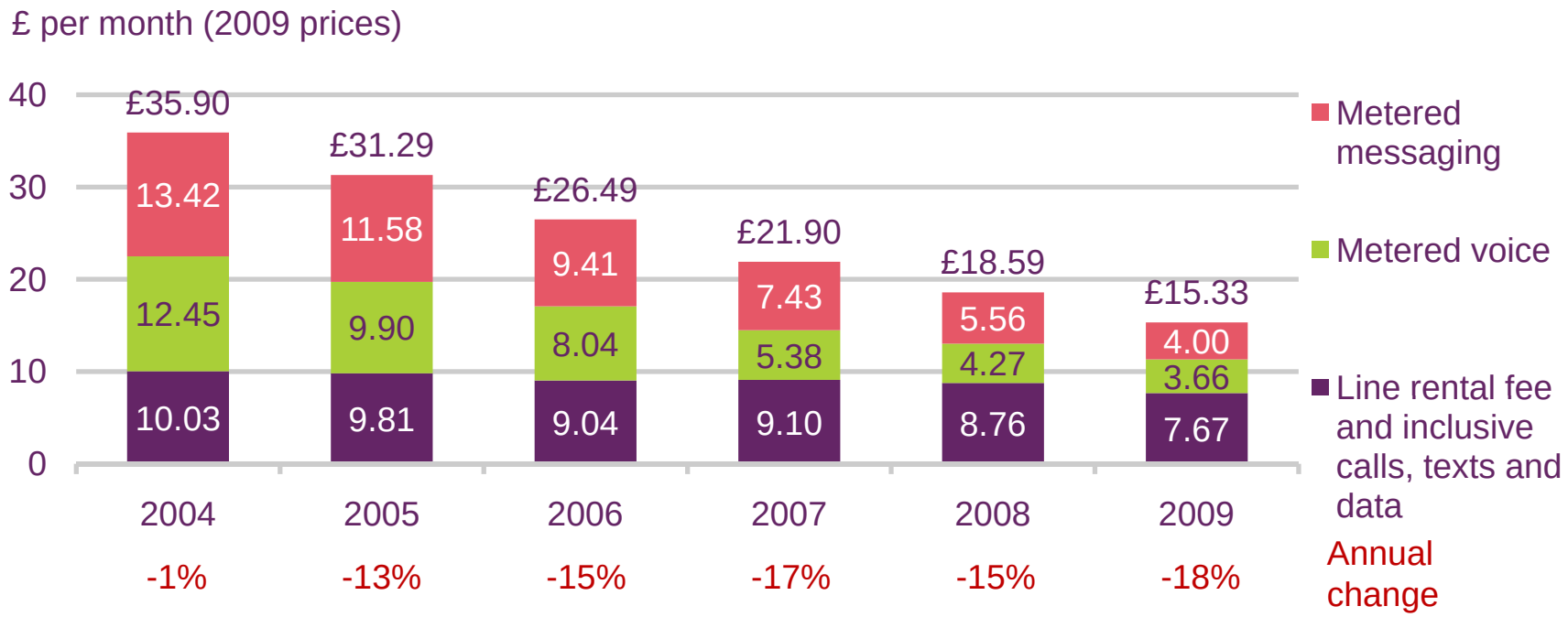
Cost of a basket of residential fixed voice services



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes non-geographic voice calls; adjusted for RPI; includes VAT

Figure 5.75

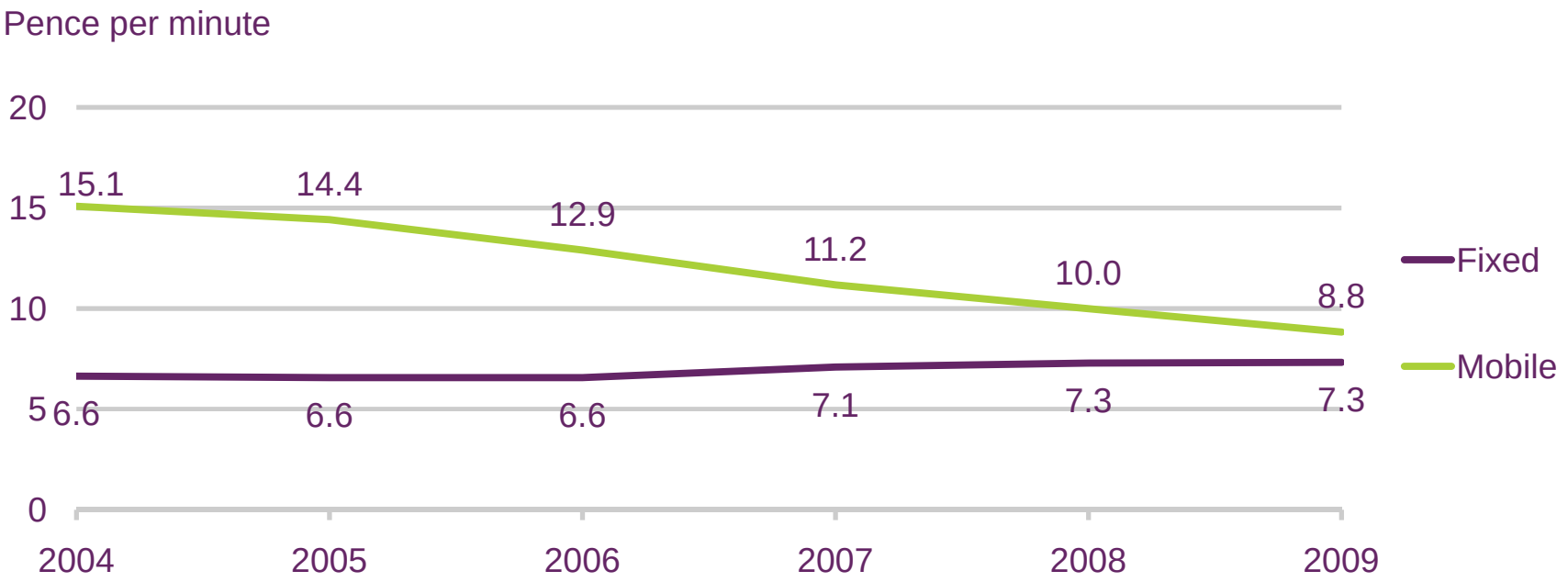
Cost of a basket of mobile services



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; excludes non-geographic voice calls; adjusted for RPI; includes VAT

Figure 5.76

Comparison of average fixed and mobile voice call charges



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; fixed calculation excludes non-geographic voice calls

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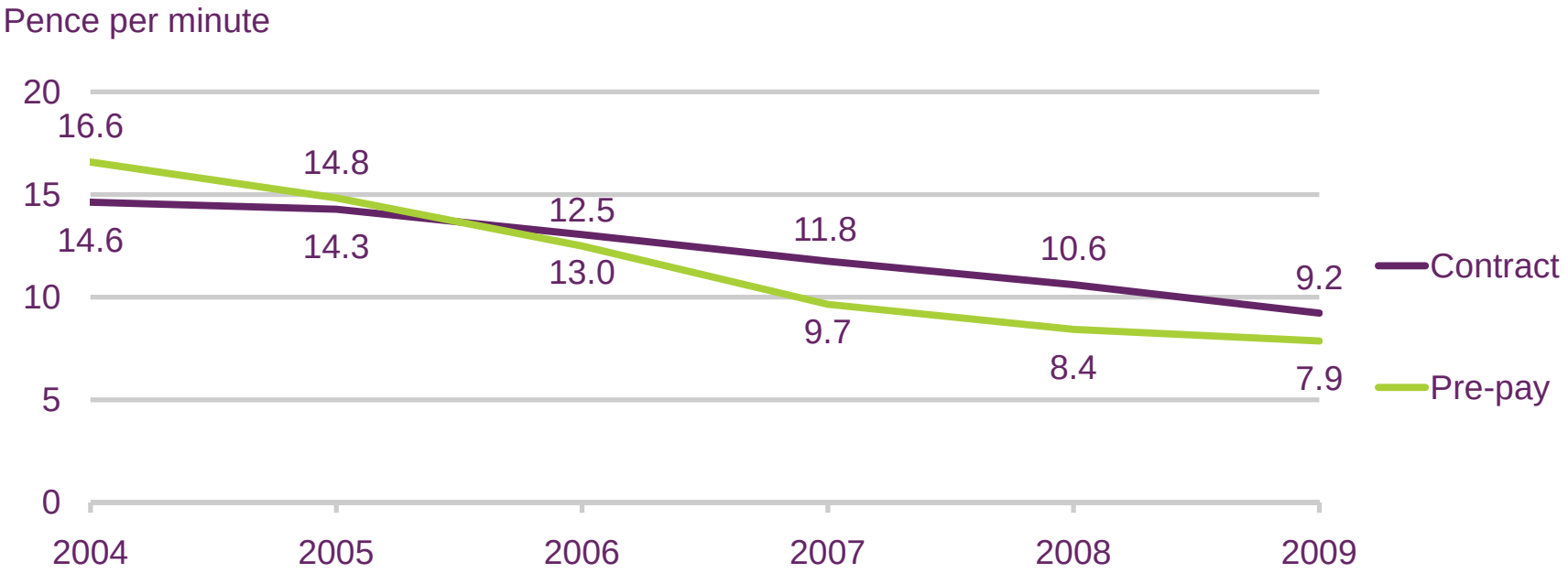
Figure 5.77

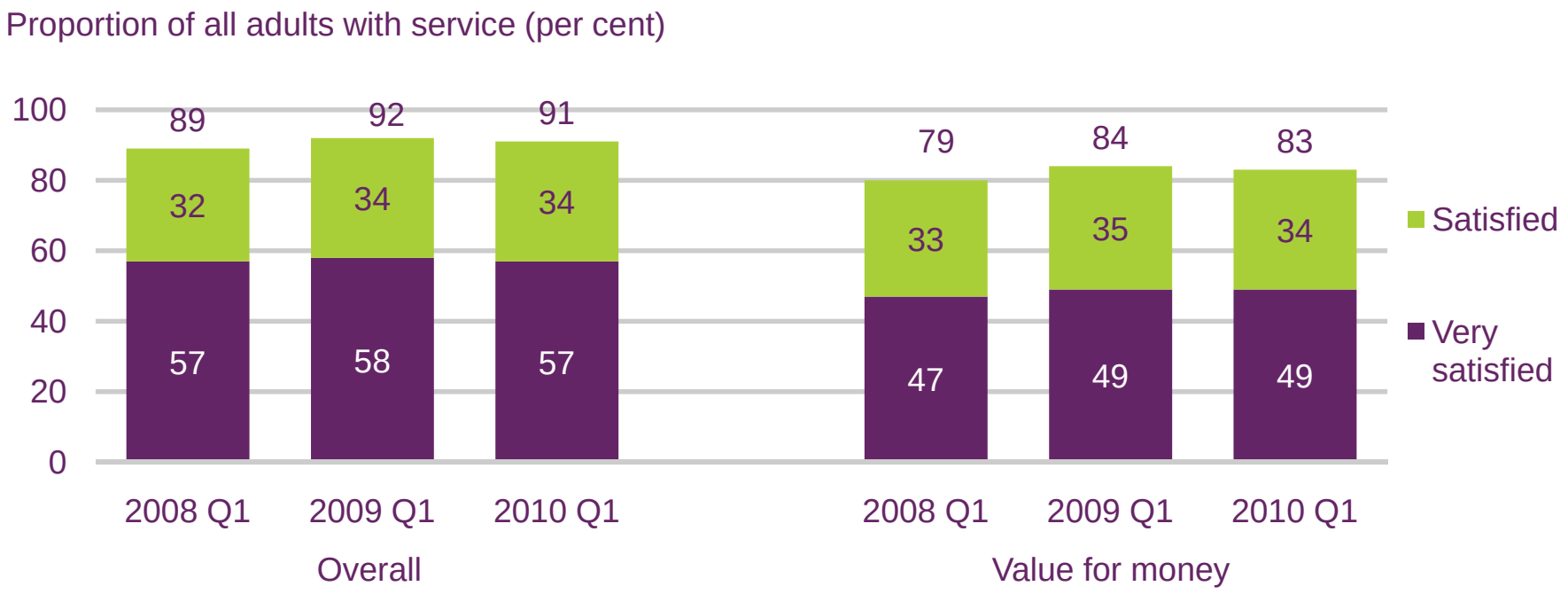
Average mobile cost per voice minute, by customer type



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; contract calculation includes rental element which will often includes a number of inclusive messages and data allowance; calculations use actual minutes of usage

Figure 5.78

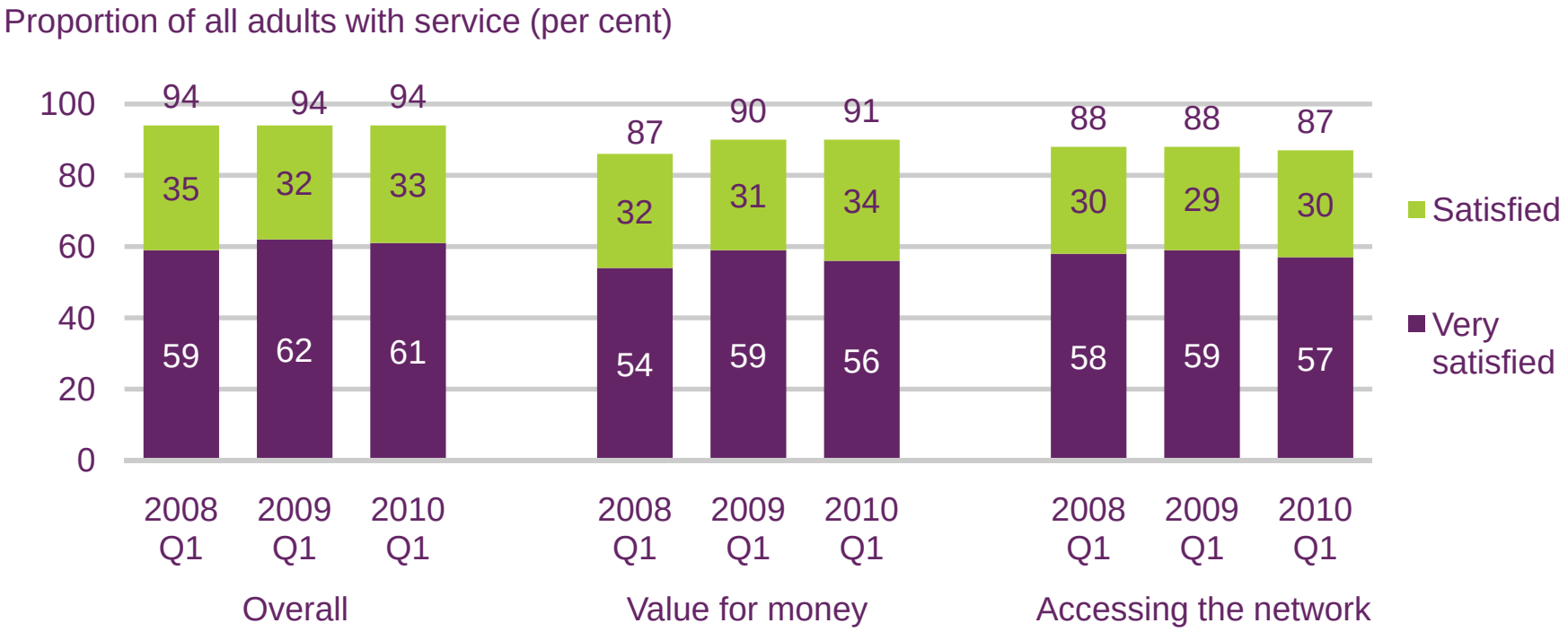
Residential consumer satisfaction with aspects of fixed line service



Source: Ofcom research
Base: All adults aged 15+ with a fixed line phone
Note: Includes only those who expressed an opinion

Figure 5.79

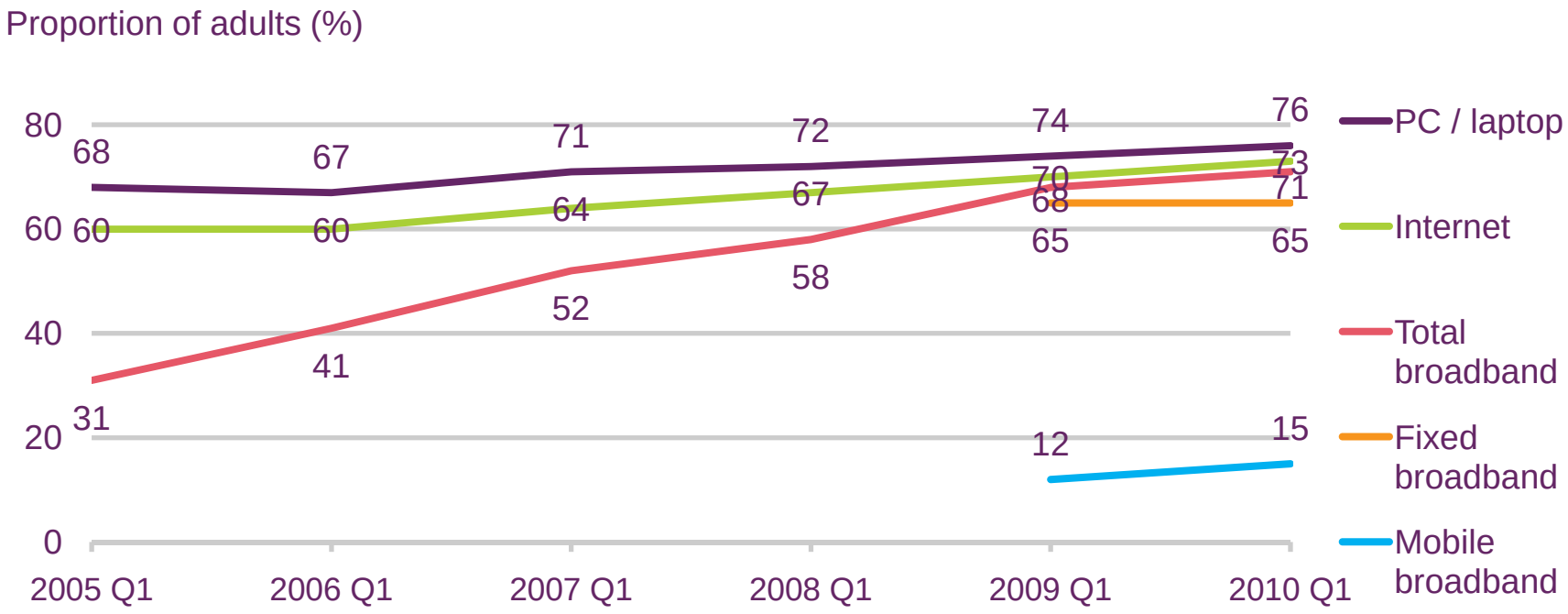
Residential consumer satisfaction with aspects of mobile service



Source: Ofcom research
Base: All adults aged 15+ with a mobile phone
Note: Includes only those who expressed an opinion

Figure 5.80

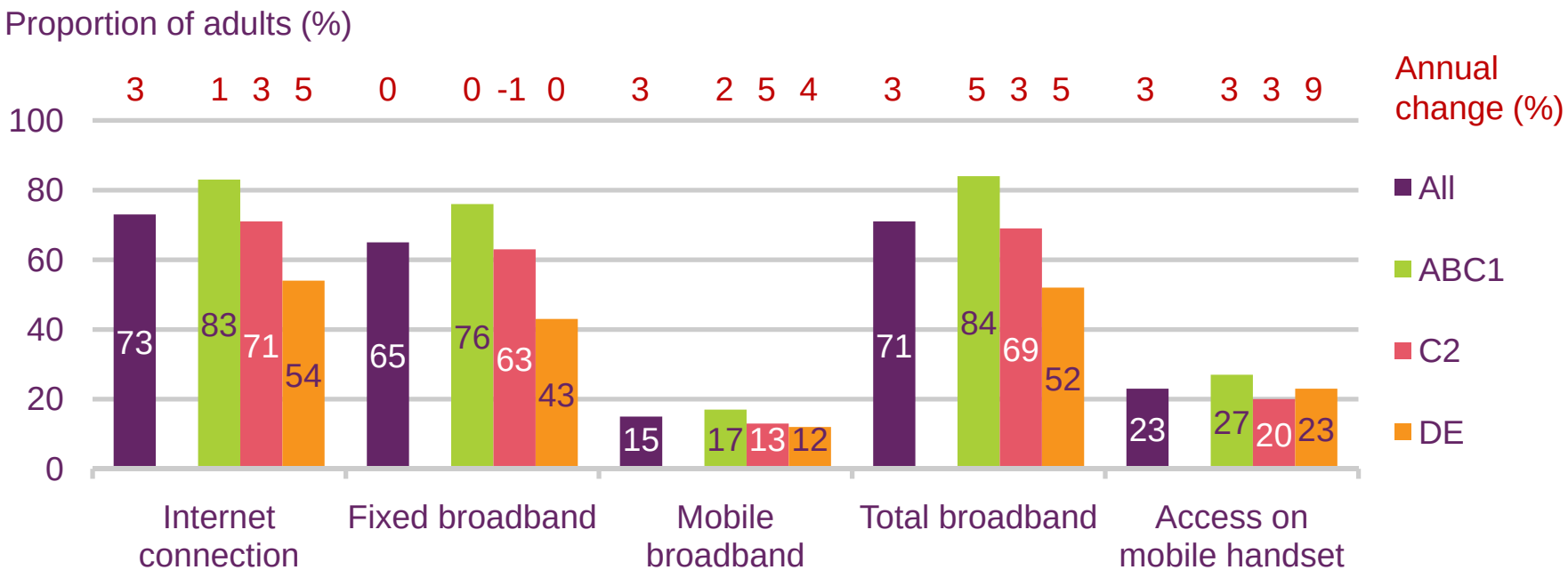
Household PC and internet take-up



Source: Ofcom research
Base: All adults aged 15+

Figure 5.81

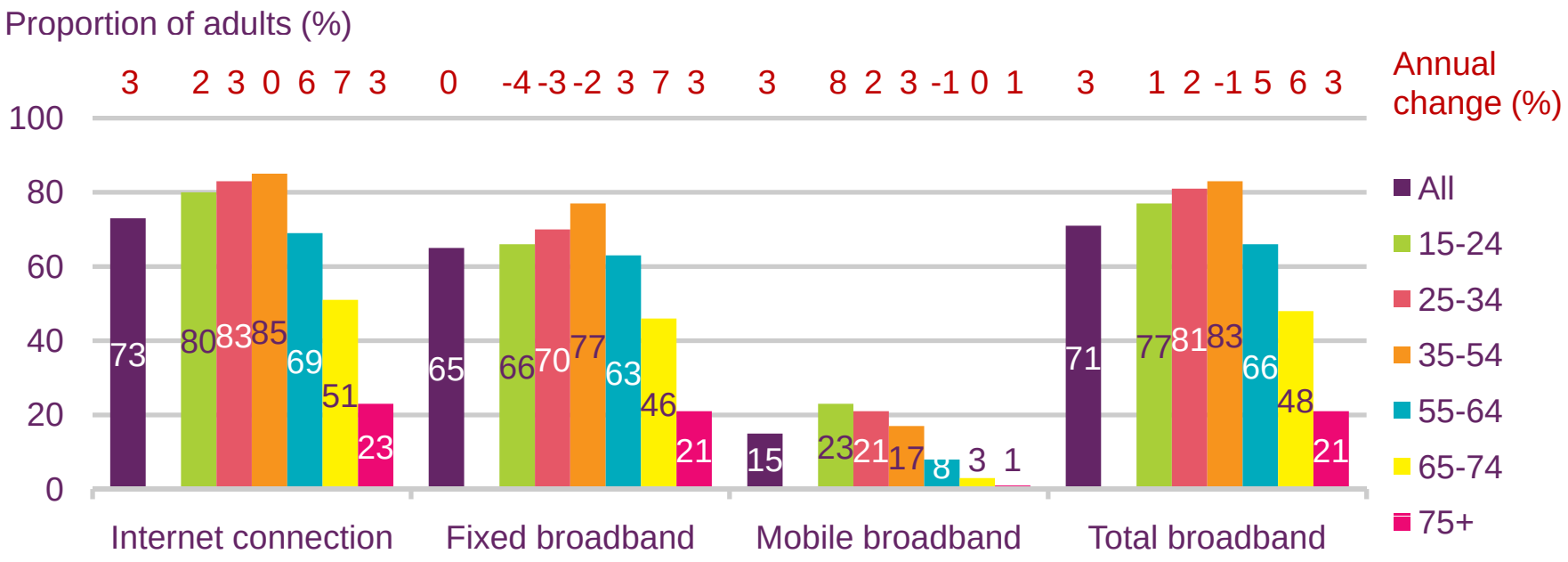
Household take-up of data services, by socio-economic group



Source: Ofcom research, 2010 Q1 data
Base: all adults ages 15+

Figure 5.82

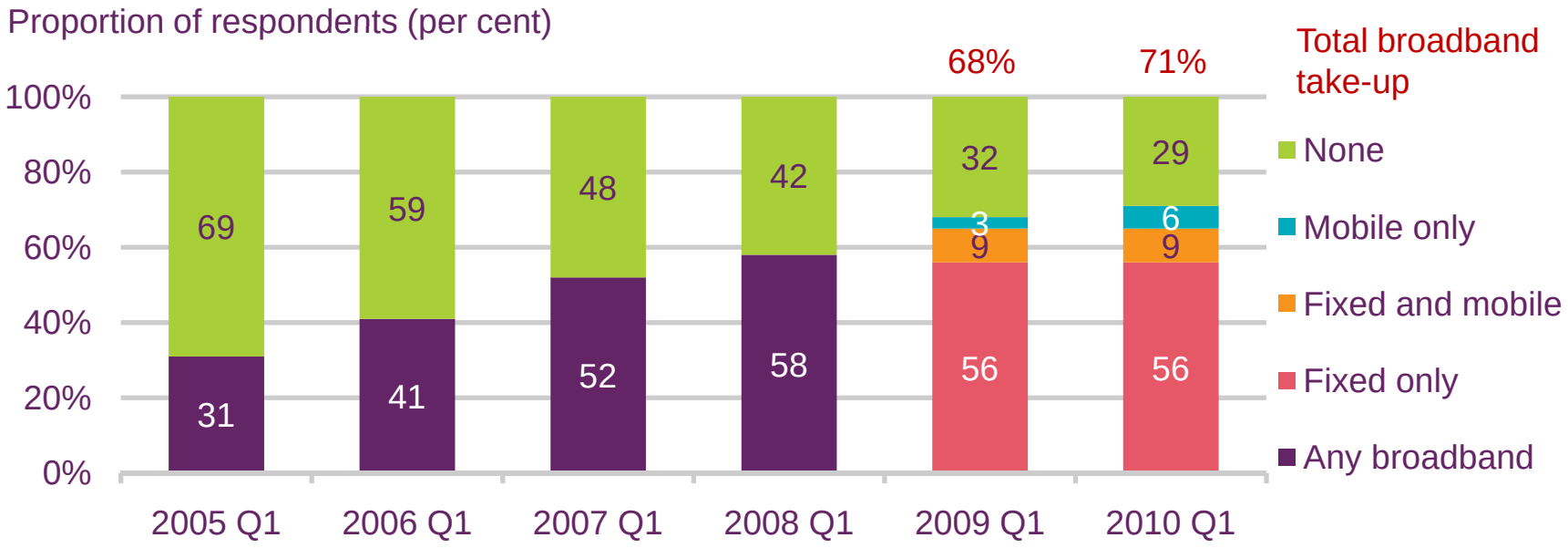
Household take-up of data services, by age



Source: Ofcom research, 2010 Q1 data
Base: all adults ages 15+

Figure 5.83

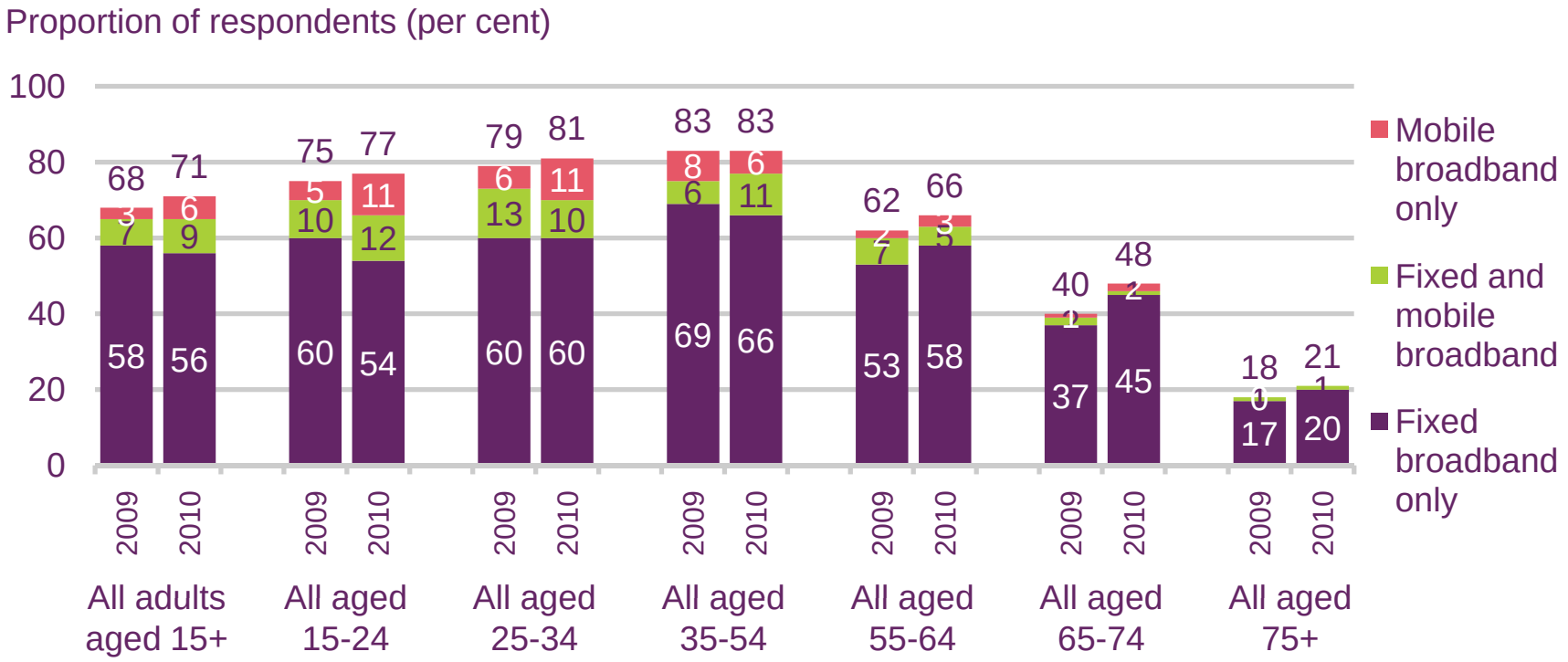
Household penetration of fixed and mobile broadband



Source: Ofcom research
Base: All adults aged 15+

Figure 5.84

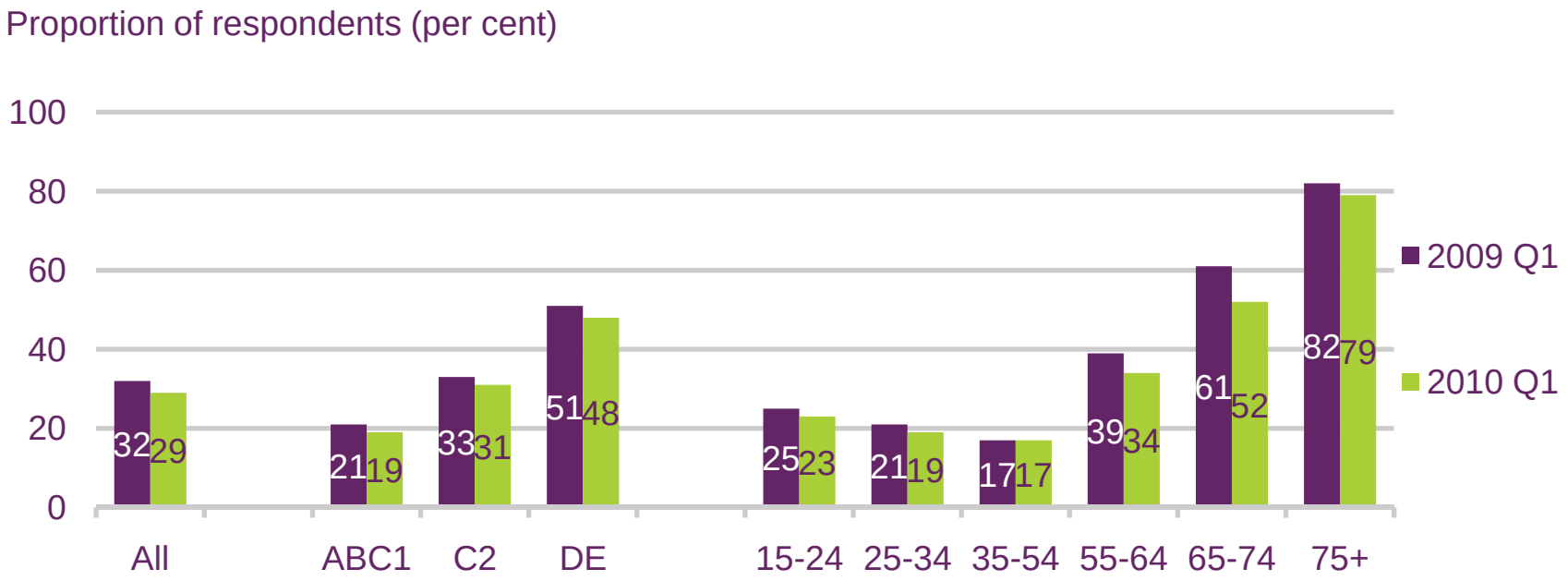
Take-up of fixed and mobile broadband services by age



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 15+

Figure 5.85

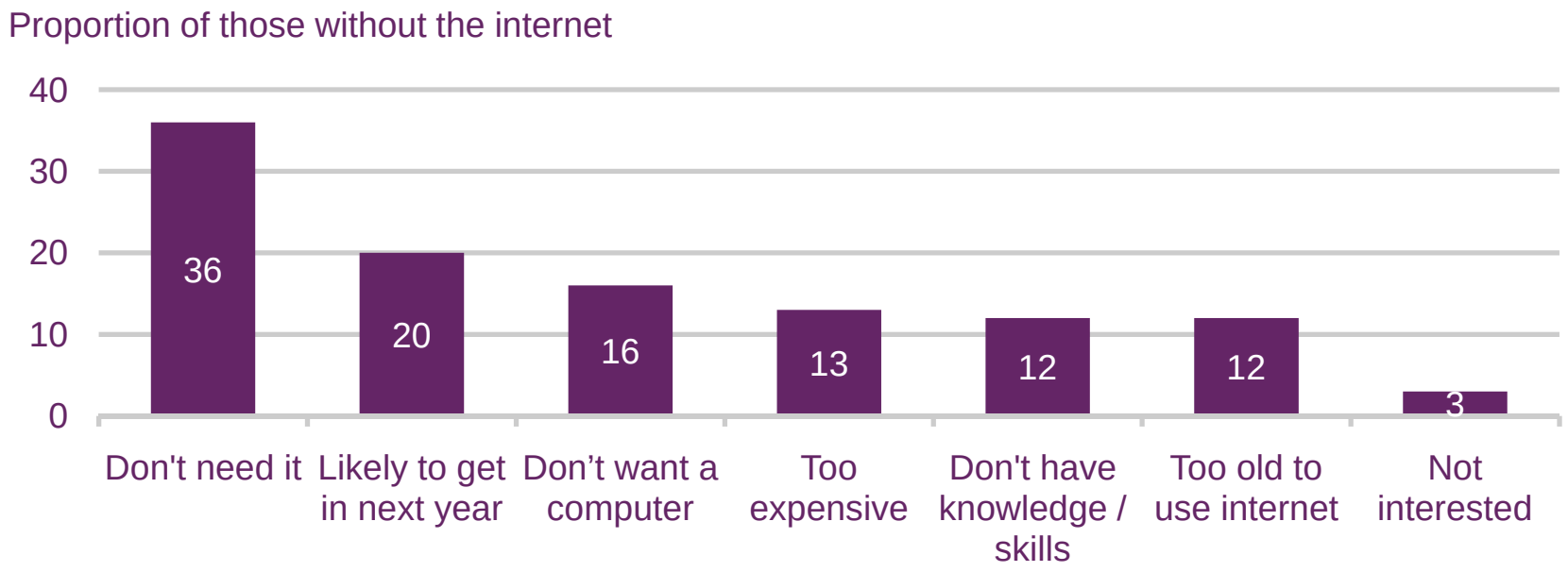
Non-ownership of home broadband, by socio-economic group and age



Source: Ofcom research, Q1 2009
Base: All adults 15+

Figure 5.86

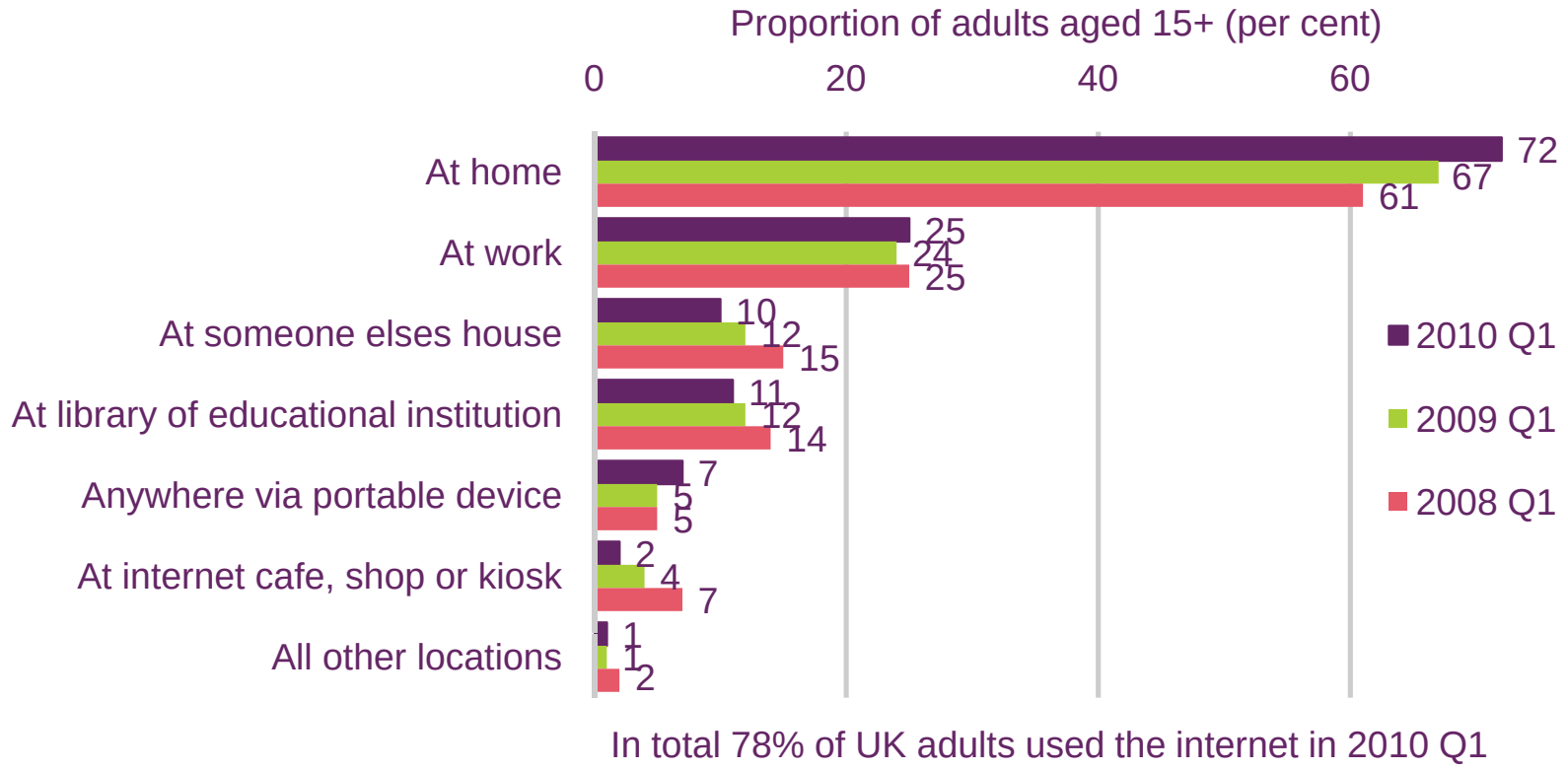
Main reasons for not having a home internet connection



Source: Ofcom research
Note: 4% of people without the internet did not know what their main reason was or provided an 'other' reason
Base: All adults without the internet aged 15+

Figure 5.87

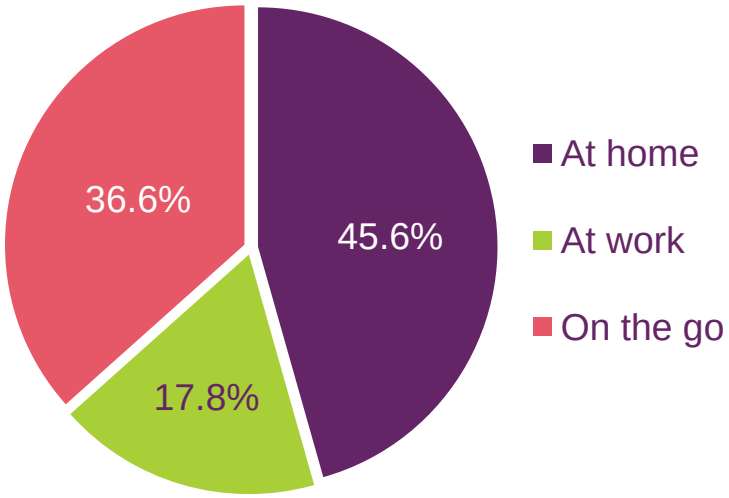
Location of internet access



Source: Ofcom research
Base: All internet users aged 15+

Figure 5.88

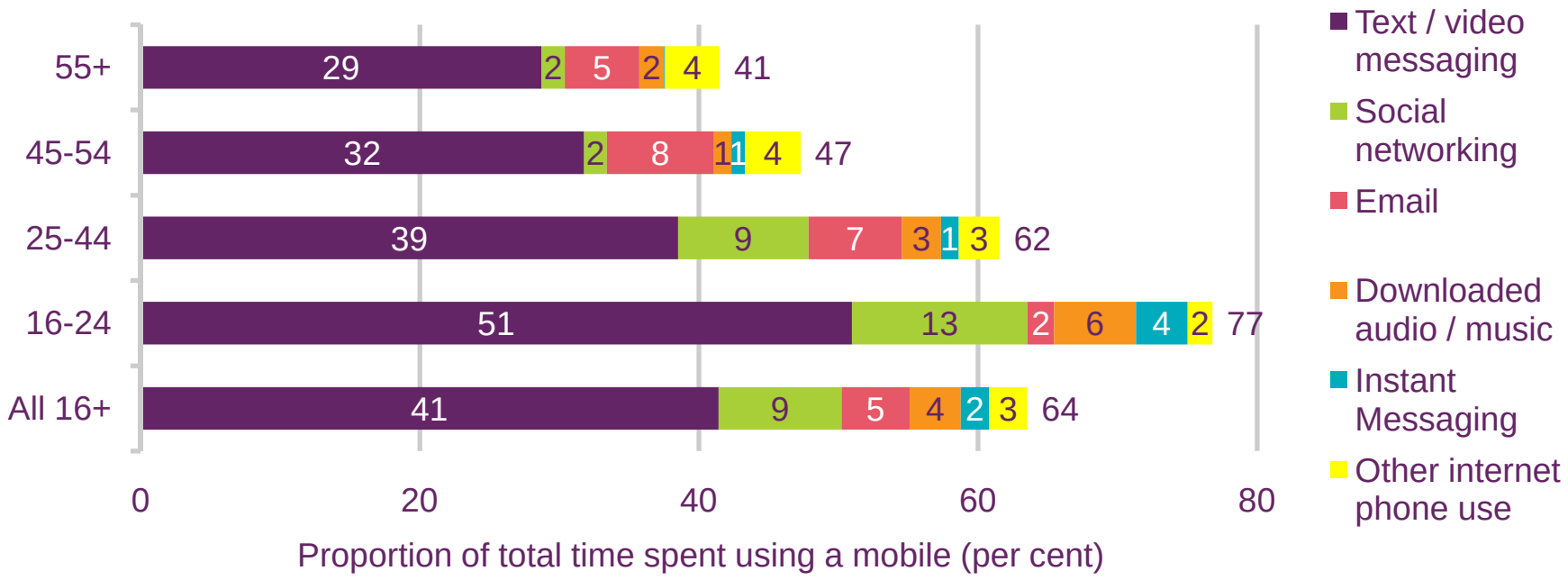
Location of internet access using a mobile device



Source: Cisco IBSG Connected Life Market Watch, 2009

Figure 5.89

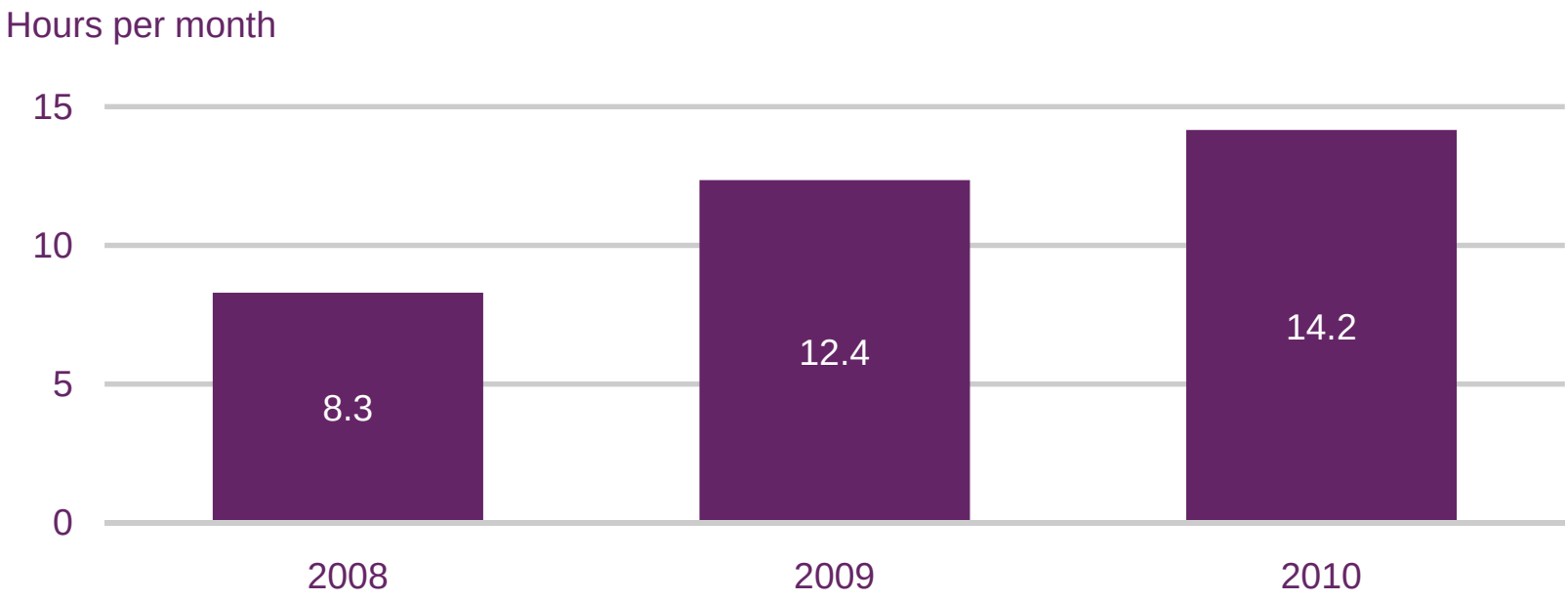
Mobile phone data services use as a proportion of total use



Source: Ofcom research
Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 5.90

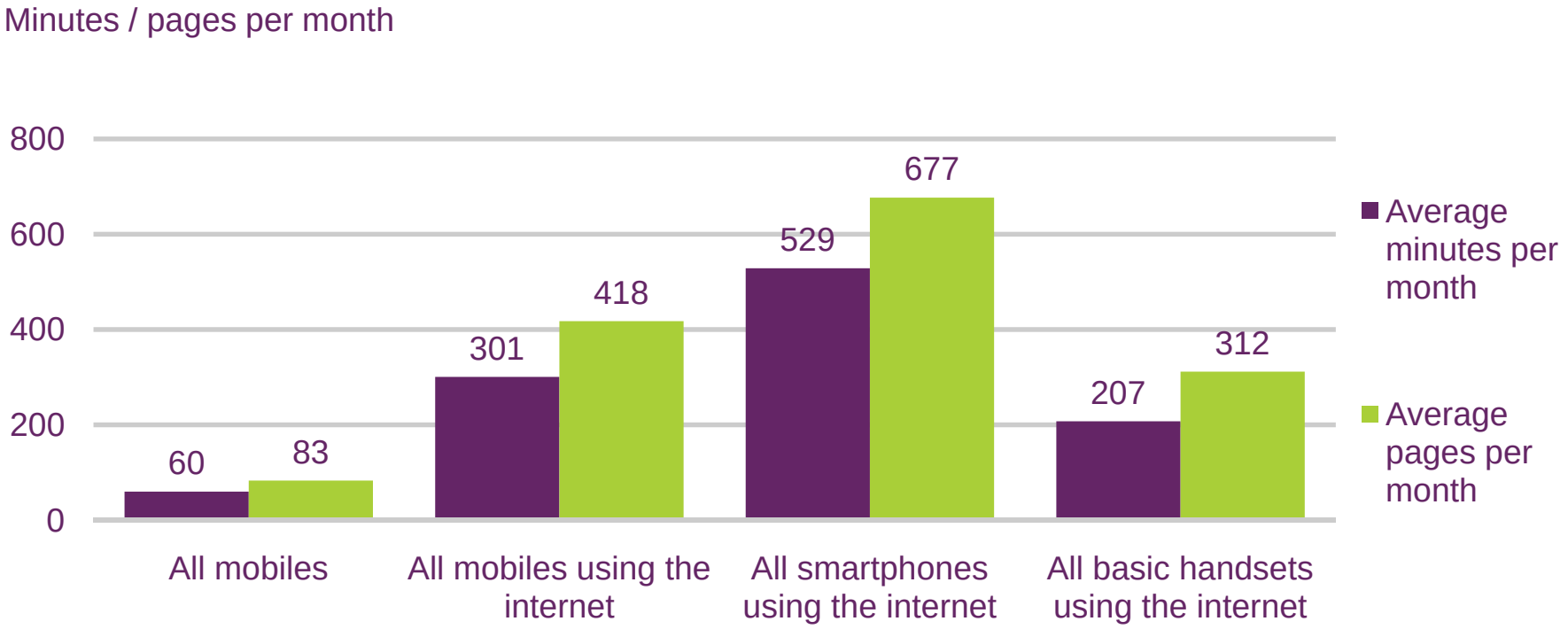
Average PC / internet time online at home, per person



Source: Ofcom / Nielsen / UKOM
Note: Ofcom estimate of fixed internet use per person is based on Nielsen's data on the average monthly time spent online at home including the use of applications across the online population only; data are for May of each year.

Figure 5.91

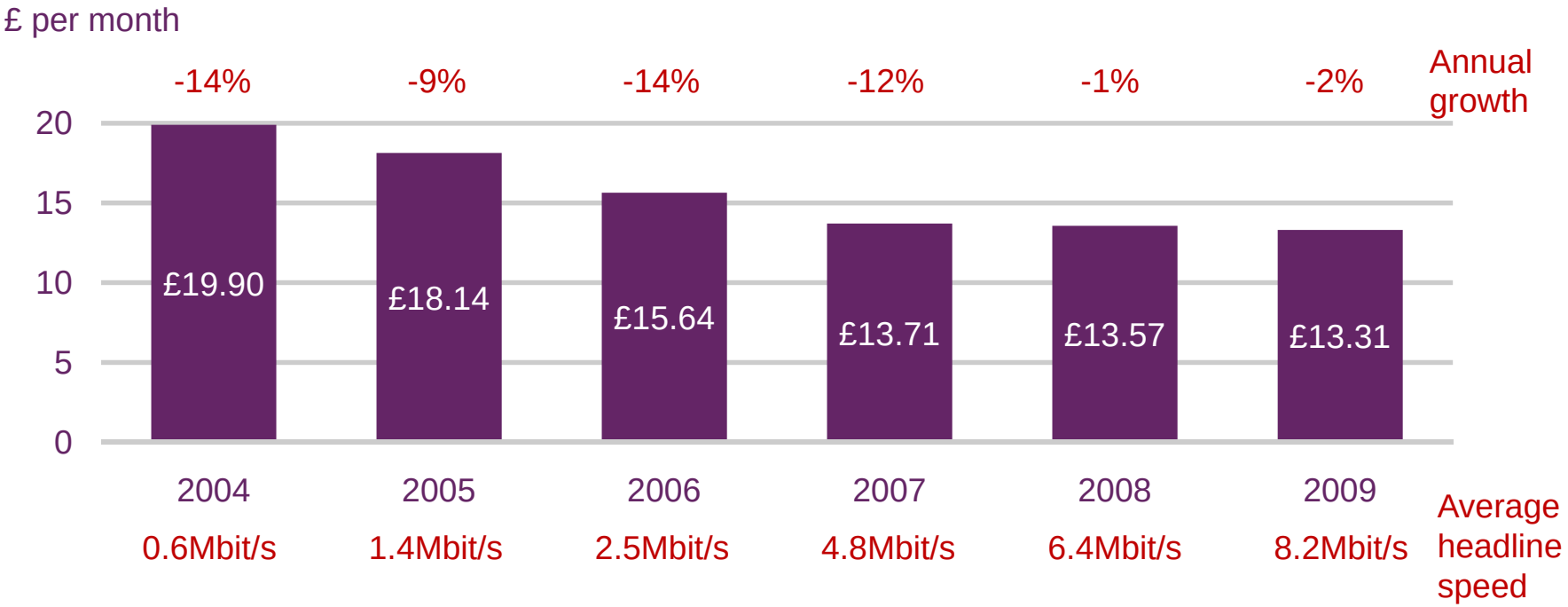
Average internet use per mobile subscription



Source: GSMA Mobile Media Metrics (http://www.gsmworld.com/newsroom/press-releases/2010/4614.htm)
Note: Based on pre-production data for December 2009

Figure 5.92

Estimated average monthly cost of a residential fixed broadband connection



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

Figure 5.93

Lowest cost fixed broadband options from major suppliers, July 2010

Provider	Broadband only	Broadband and fixed calls	Broadband and fixed line	Broadband and mobile	Broadband and pay-TV	Broadband, fixed line and mobile	Broadband, fixed line and pay-TV
AOL	£14.99 [1]	£9.99 [1]	£21.24	-	-	-	-
BSkyB	-	-	-	-	-	-	£29.00
BT	-	-	£26.03	-	-	-	£44.53
O2	£7.50 [1, 2]	-	-	£7.50 [1,2]	-	-	-
Orange Home	£9.00[1, 2]	-	£20.00	£9.00 [2]	-	£17.50 [2]	-
Plusnet	£6.49 [1]	-	£17.74	-	-	-	-
TalkTalk	-	-	£18.48	-	--	-	-
Virgin Media	£20.00		£24.49	£30.00	£30.50	£34.49	£25.99
Vodafone	-	-	£25.00	-	-	£25.00 [2]	-

Source: PurePricing UK Broadband, Bundling and Convergence Update, July 2010
Notes: All tariffs exclude activation charges and promotional discounts and include VAT; all tariffs are the lowest price available, contract lengths vary; allowances for fixed-line and mobile calls, plus availability of TV channels included within packages may differ by operator and option; 1 Also requires BT fixed line rental at £11.54 a month; 2 plus cost of mobile tariff

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Figure 5.94

Lowest cost standalone mobile broadband contracts by provider

Provider		Monthly charge	Data allowance	Minimum contract length	Charges above allowance	WiFi hotspot use
Vodafone	2009	£14.68	1GB	1 month	£14.68 / GB	Not included
	2010	£15.00	3GB	1 month	£15.00 / GB	Not included
O2	2009	£14.69	3GB	1 month	19.6p / MB	Unlimited
	2010	£10.00	1GB	1 month	2.4p / MB	Unlimited
T-Mobile	2009	£14.68	3GB fair use	18 months	n/a	Unlimited
	2010	£15.00	3GB fair use	18 months	n/a	Unlimited
Orange	2009	£9.79	1GB	18 months	1.43p / MB	Not included
	2010	£10.00	1.5GB	18 months	2p / MB	Not included
3UK	2009	£9.79	1GB	12 months	10p / MB	Not included
	2010	£7.50	1GB	18 months	10p / MB	Not included
Virgin Mobile	2009	£14.68	3GB	18 months	£14.68 / GB	Not included
	2010	£10.00	1GB	2 months	£15 / GB	Not included

Source: PurePricing
Note: Data as at June of each year

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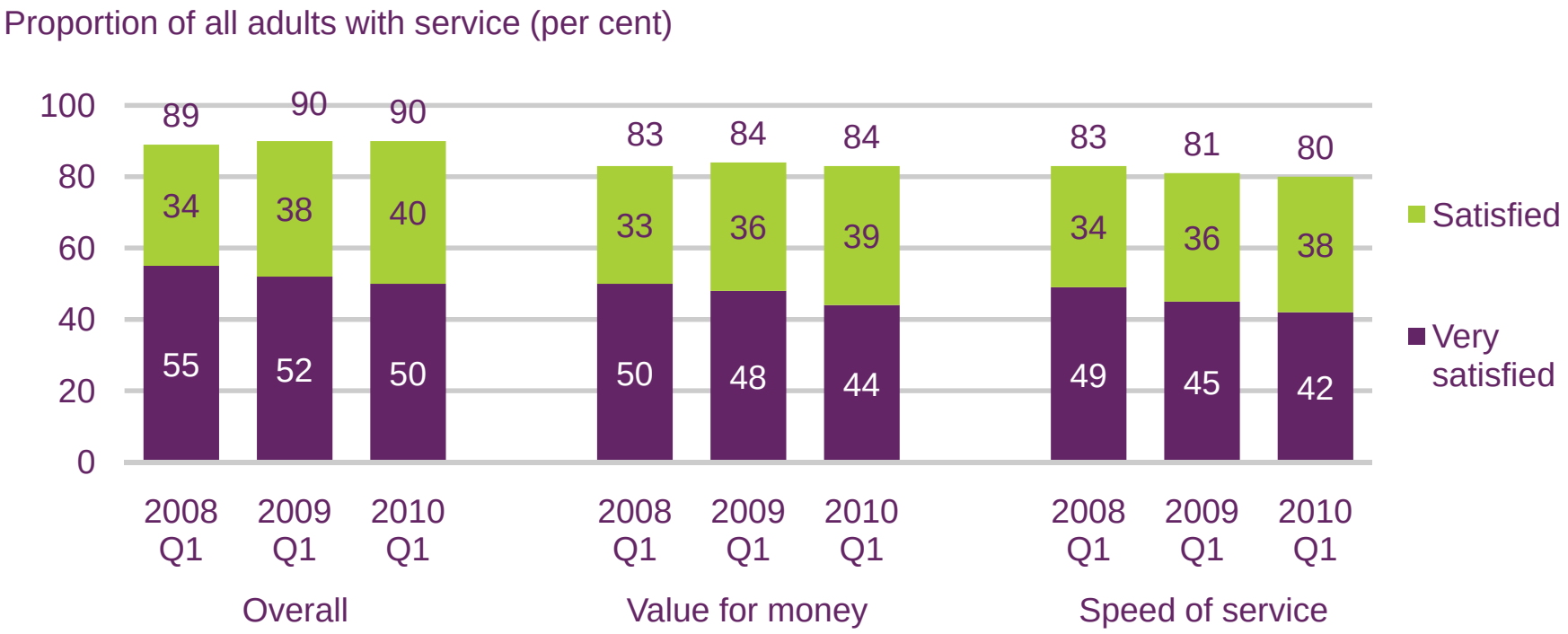
Figure 5.95

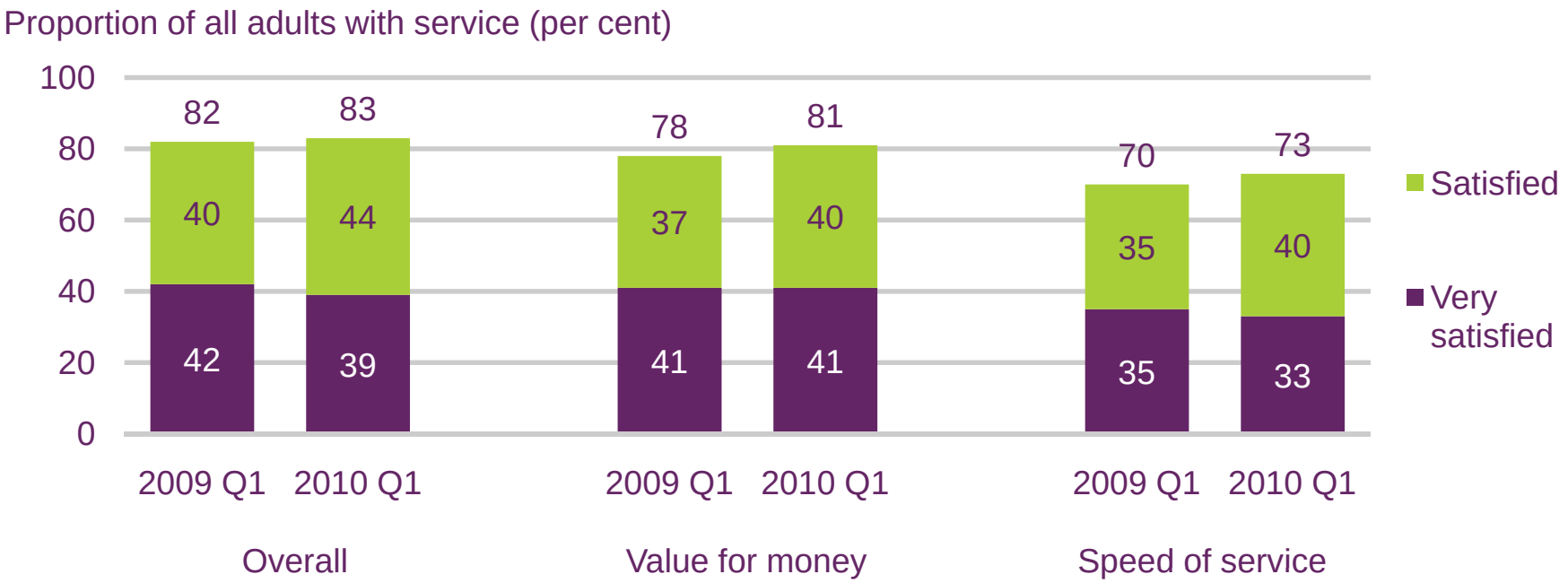
Residential consumer satisfaction with aspects of fixed broadband service



Source: Ofcom research
Base: All adults aged 15+ with a fixed broadband connection
Note: Includes only those who expressed an opinion

Figure 5.96

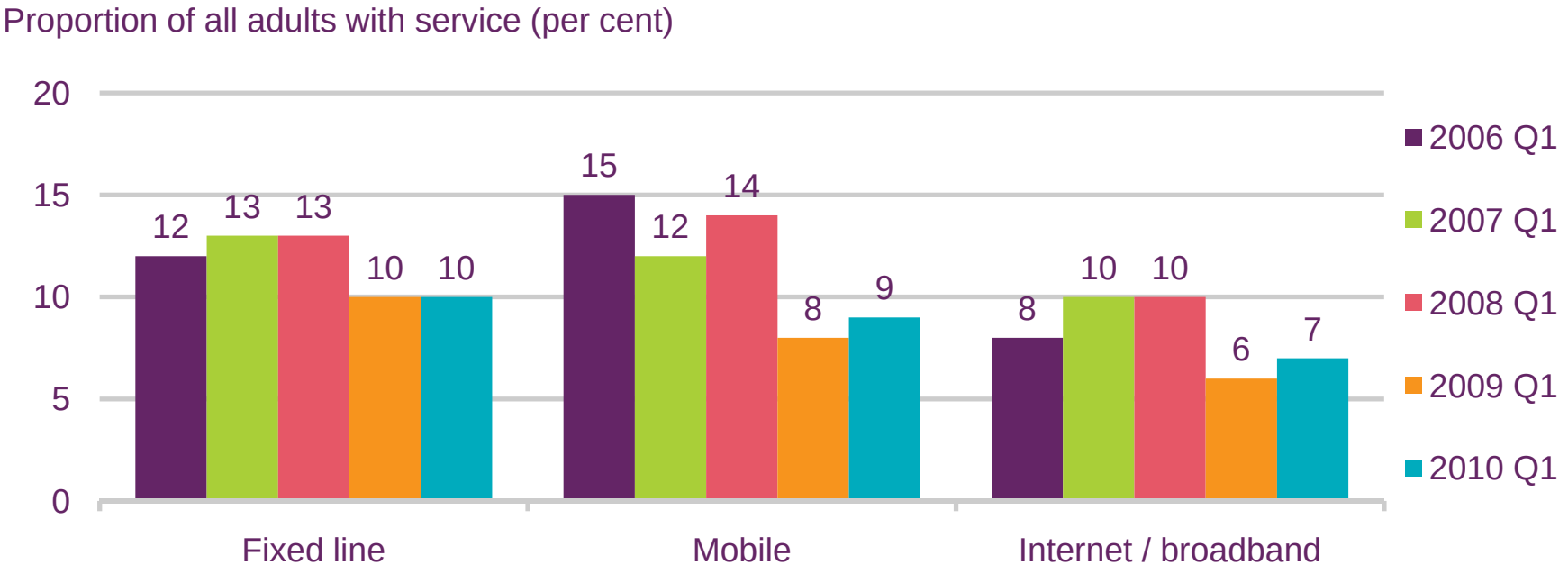
Residential consumer satisfaction with aspects of mobile broadband service



Source: Ofcom research
Base: All adults aged 15+ with a mobile broadband connection
Note: Includes only those who expressed an opinion

Figure 5.97

Proportion of consumers who switched provider in the previous 12 months



Source: Ofcom research

Note: 2008 and 2009 data is the proportion of broadband consumers who had changed broadband provider in the last 12 months and is not directly comparable with previous data which is the proportion of internet users who had switched; 2009 data is based on fixed broadband consumers; switching when moving home is excluded from this data.

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