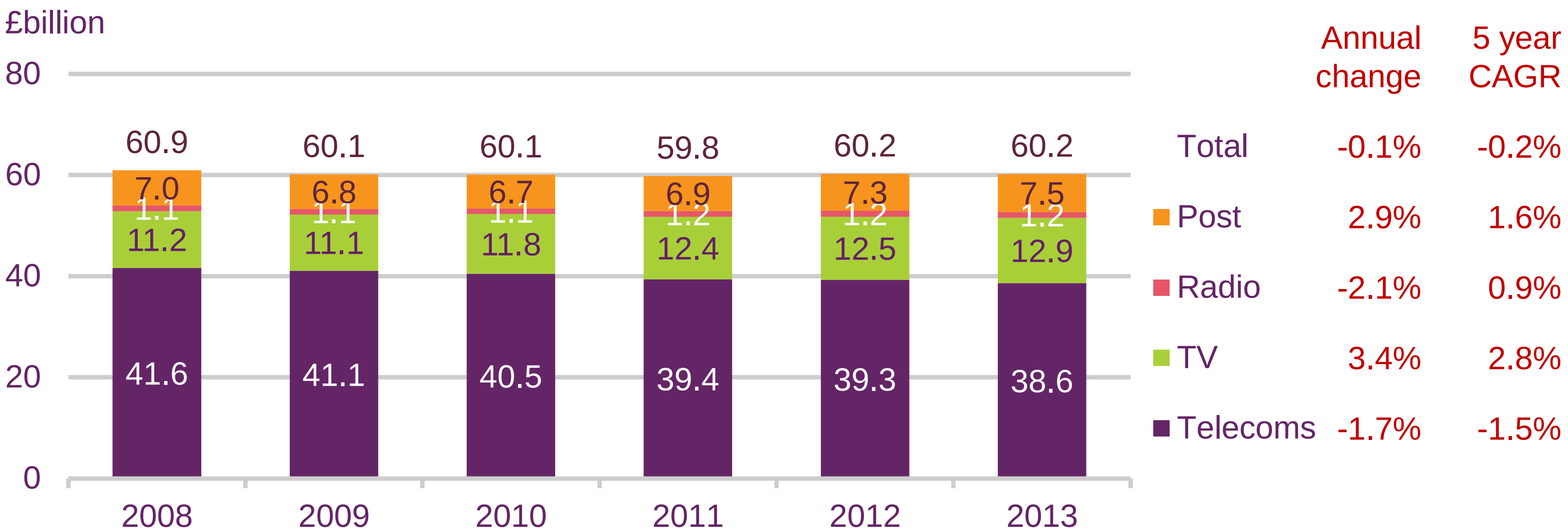
Figure 1.1

Communications industry revenue: telecoms, TV, radio, post



Source: Ofcom/ operators

Note: Includes licence fee allocation for radio and TV, Figures are in nominal terms

Figure 1.2

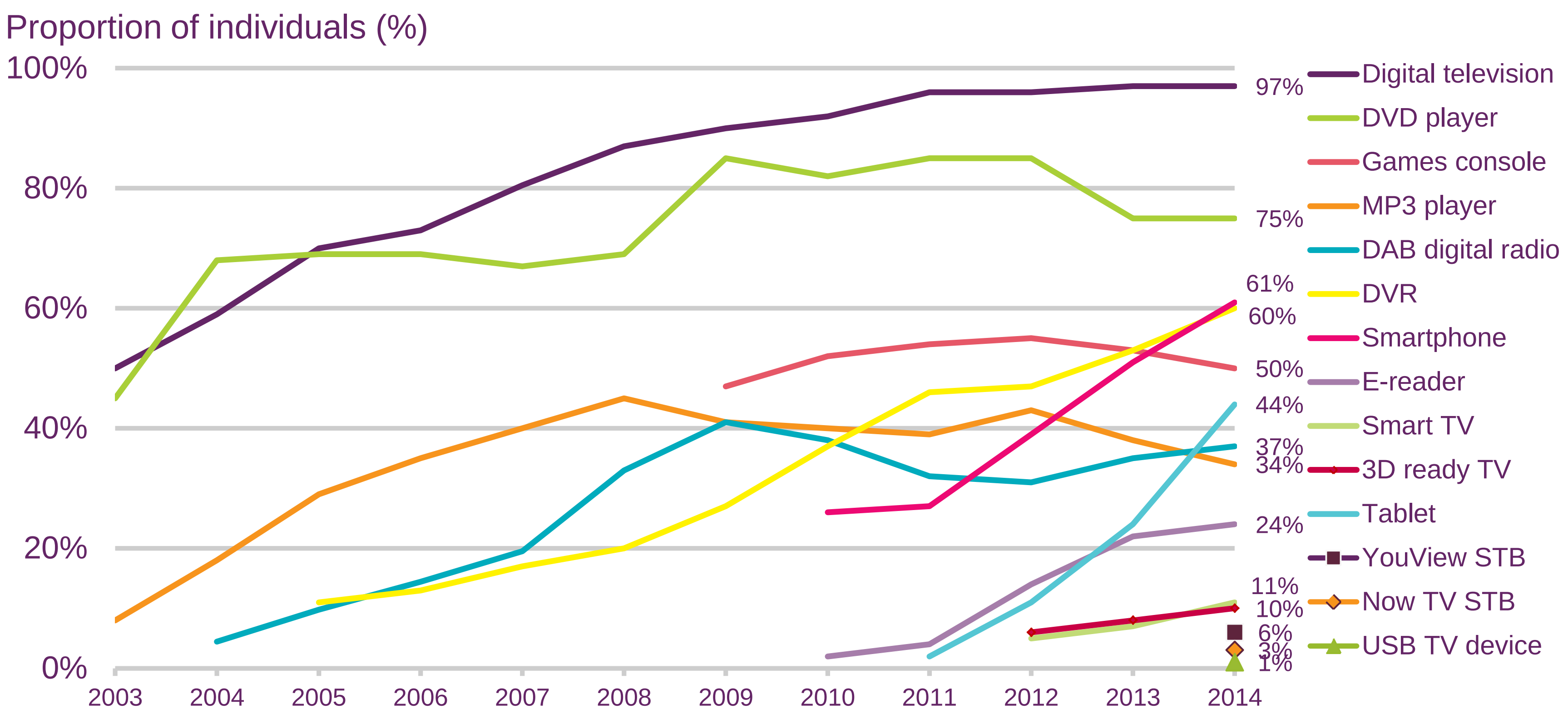
Digital communications services availability

Platform	UK 2013	UK 2012	UK change	England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0pp	100%	100%	100%	100%
2G mobile[1]	99.7%	99.6%	0.1pp	99.9%	99.5%	99.0%	98.9%
3G mobile[2]	99.5%	99.1%	0.4pp	99.8%	97.3%	98.3%	99.0%
4G mobile[3]	73.0%	n/a	n/a	76.3%	56.8%	44.9%	79.2%
LLU ADSL broadband[4]	95%	94%	+1pp	96%	88%	93%	87%
Virgin Media cable broadband[5]	44%	n/a	n/a	47%	35%	21%	26%
BT Openreach/Kcom fibre broadband[6]	69%	n/a	n/a	71%	48%	55%	92%
NGA broadband[7]	78%	n/a	n/a	80%	64%	58%	95%
Digital satellite TV	98%	98%	0pp	No data	No data	No data	No data
Digital terrestrial TV[8]	99%	99%	0pp	99%	99%	98%	97%
DAB BBC Network[9]	94%	93%	+1pp	95.5%	90.9%	85.9%	85.4%
DAB commercial network (Digital One)[10]	89.5%	85%	+4.5pp	90.5%	75.4%	60%	73.8%

Sources: Ofcom and operators: 1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator, June 2014; 2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator, June 2014; 3. Proportion of premises that have outdoor 4G mobile coverage from at least one operator, June 2014; 4. Proportion of premises connected to an LLU-enabled BT local exchange area, December 2013; 5. Proportion of premises able to receive Virgin Media cable broadband services, June 2014; 6. Proportion of premises able to receive BT Openreach/Kcom fibre broadband services, June 2014; 7. Proportion of premises able to receive NGA broadband services, June 2014; 8. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom); 9. BBC National DAB network coverage in the nations as of April 2012 (http://stakeholders.ofcom.org.uk/broadcasting/radio/coverage/dab-coverage/) UK 2012 and 2013 coverage from *BBC Annual Report and Accounts 2012/13* (http://downloads.bbc.co.uk/annualreport/pdf/2012-13/bbc-bbcexecutive-annualreport-review-and-assessment-2012-13.pdf) and refers to financial years 2011-12 and 2012-1

Figure 1.3

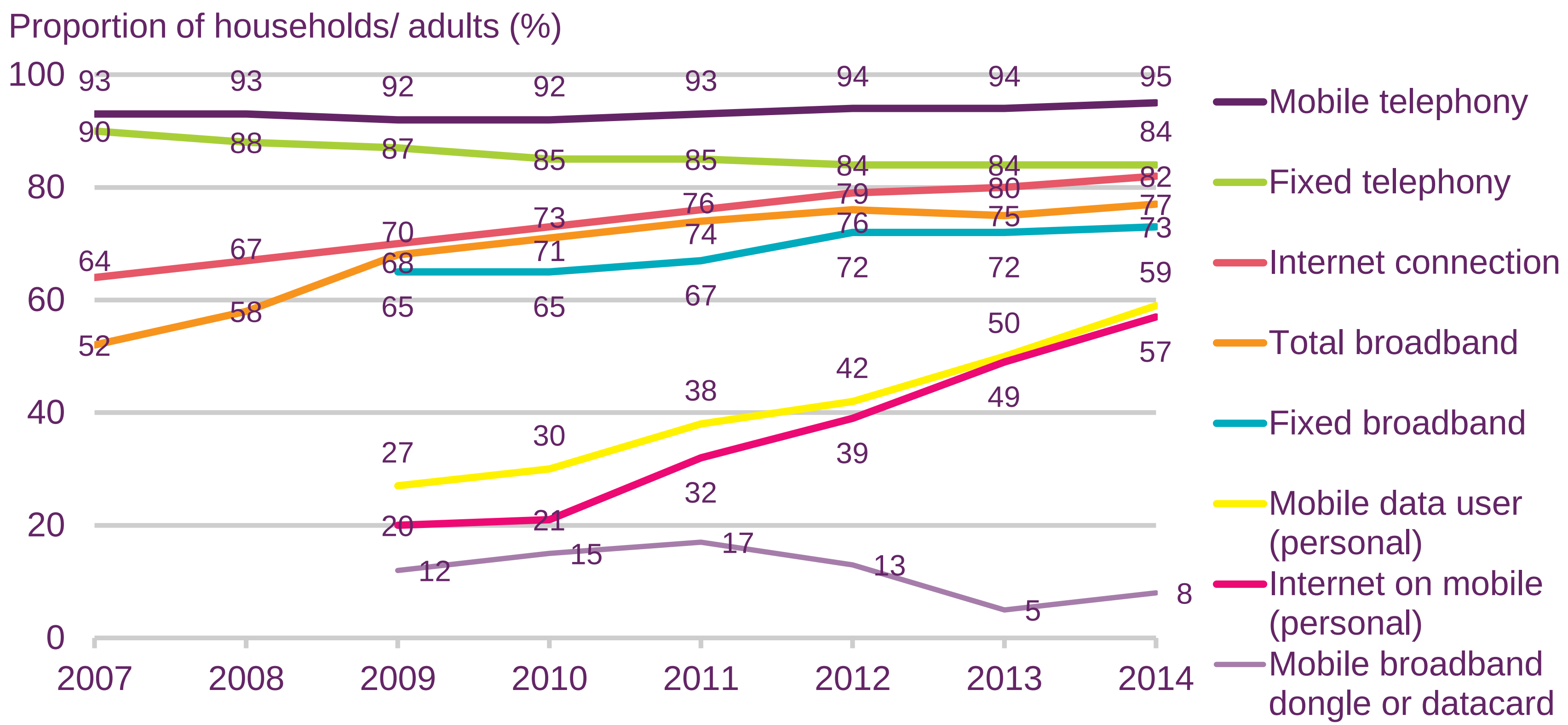
Household take-up of digital communications/ AV devices: 2003-2014



Source: Ofcom technology tracker. Data from Q1 of each year
Note: The Question wording for DVD Player and DVR was changed in Q1 2009 so data is not directly comparable with previous years.
Base: All adults aged 16+ (2014 n=3740).

Figure 1.4

Household take-up of communications services

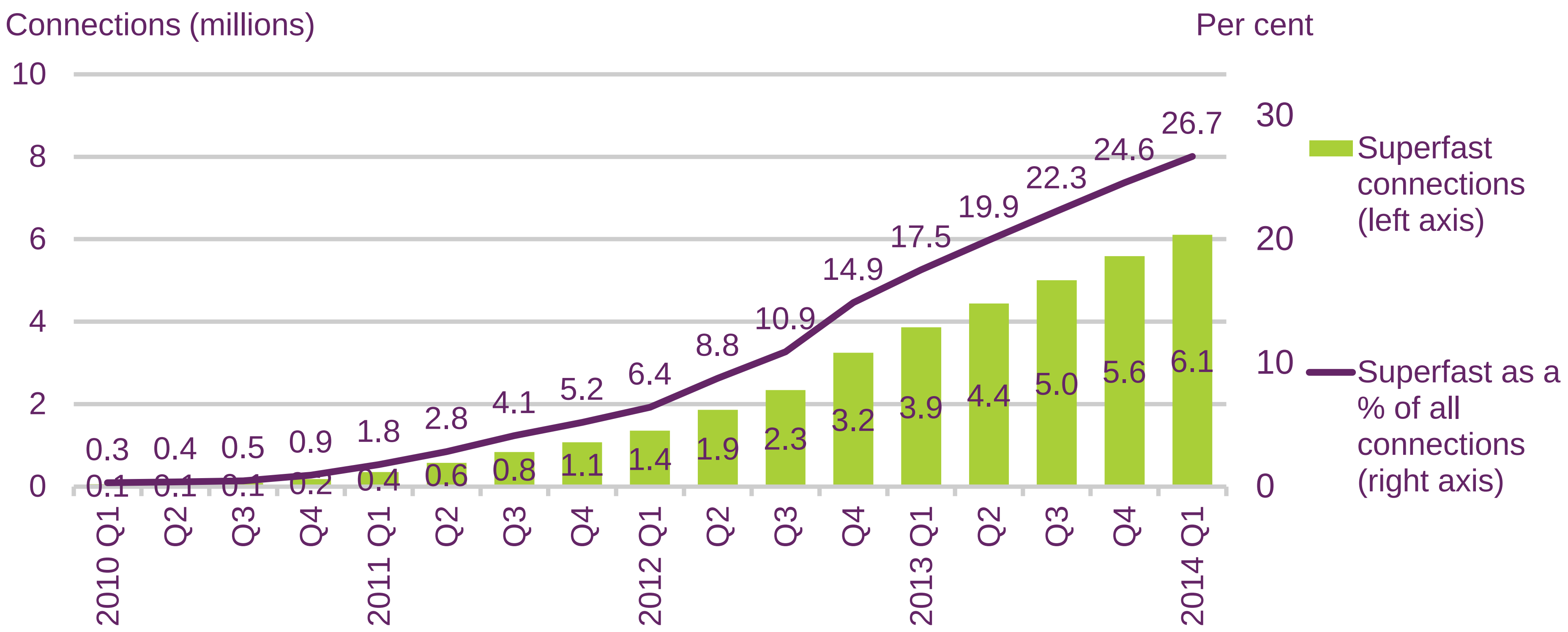


QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the internet/ World Wide Web at home (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the internet at home? NB mobile data user is defined as consumers using either mobile broadband or internet on their mobile phone. This measure, and use of internet on mobile are personal take-up measures, whereas the pther data relate to household take-up.

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

Figure 1.5

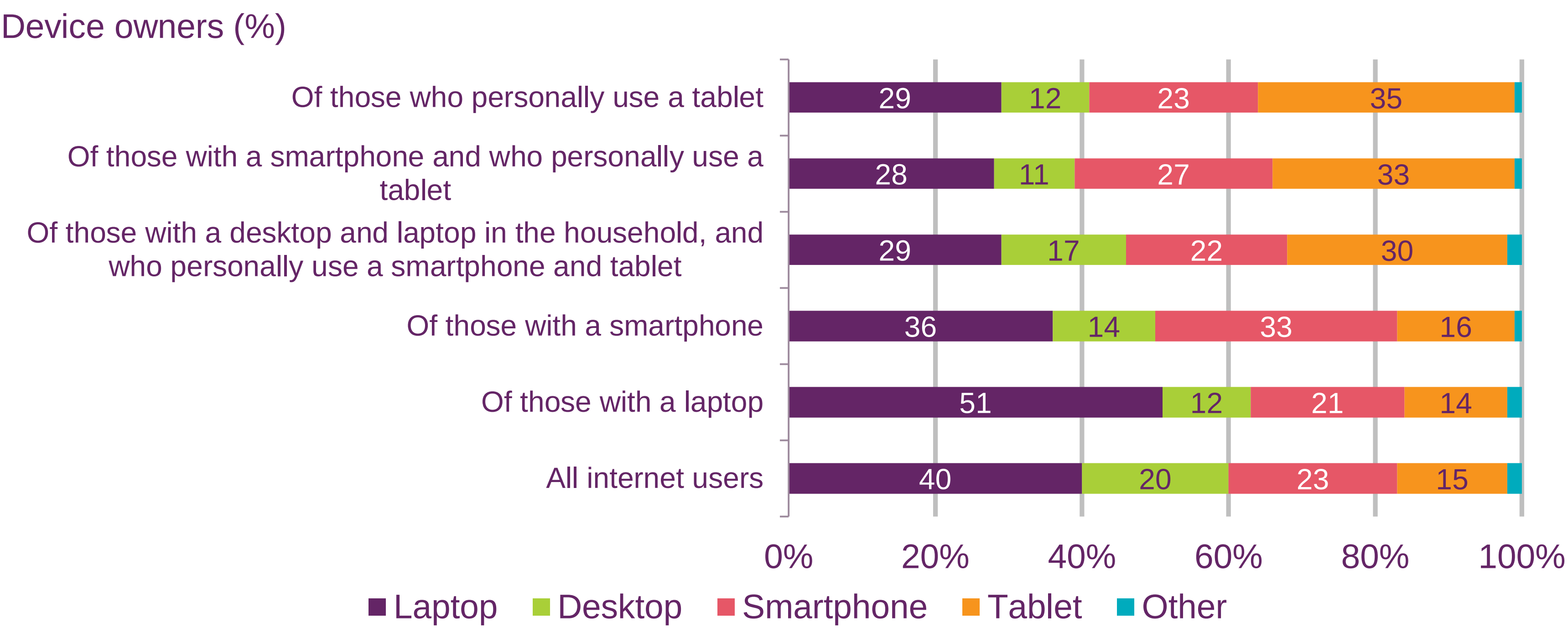
Take-up of superfast broadband services



Source: Ofcom / operator data
Note: Includes estimates where Ofcom does not receive data from operators; the total connections figure used to calculate the percentages above does not include an adjustment for corporate connections which is used elsewhere in this report.

Figure 1.6

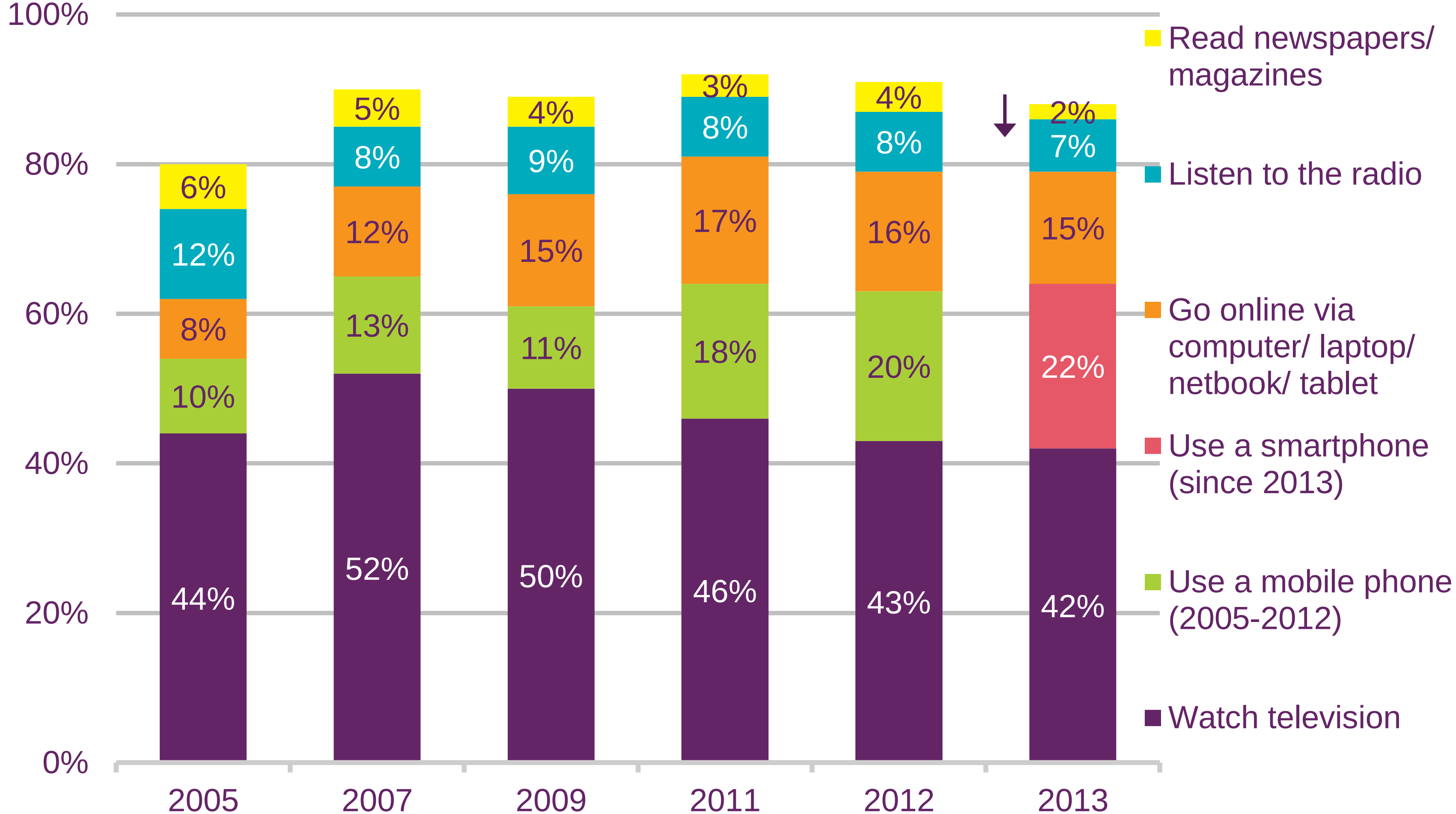
Most important device for connecting to the internet



Source: Ofcom research, Q1 2014
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2976 UK). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “Netbook”, “Games console”, “Other device”, “None” and “don’t know”.

Figure 1.7

Most-missed media activity

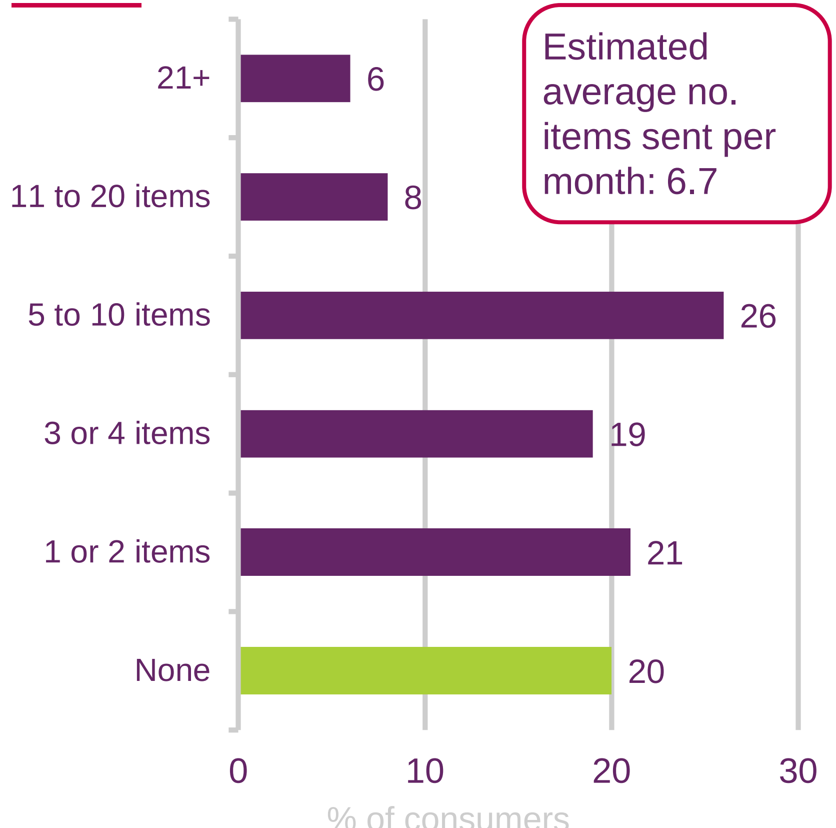


A2 – Which one of these would you miss doing the most? (Prompted responses, single coded) – NB Showing the five most popular responses in 2013 at an overall level. Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 1824 in 2009, 1823 in 2011, 1805 in 2012, 1642 in 2013).
Significance testing shows any change between 2012 and 2013 – where it is possible to make a comparison
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

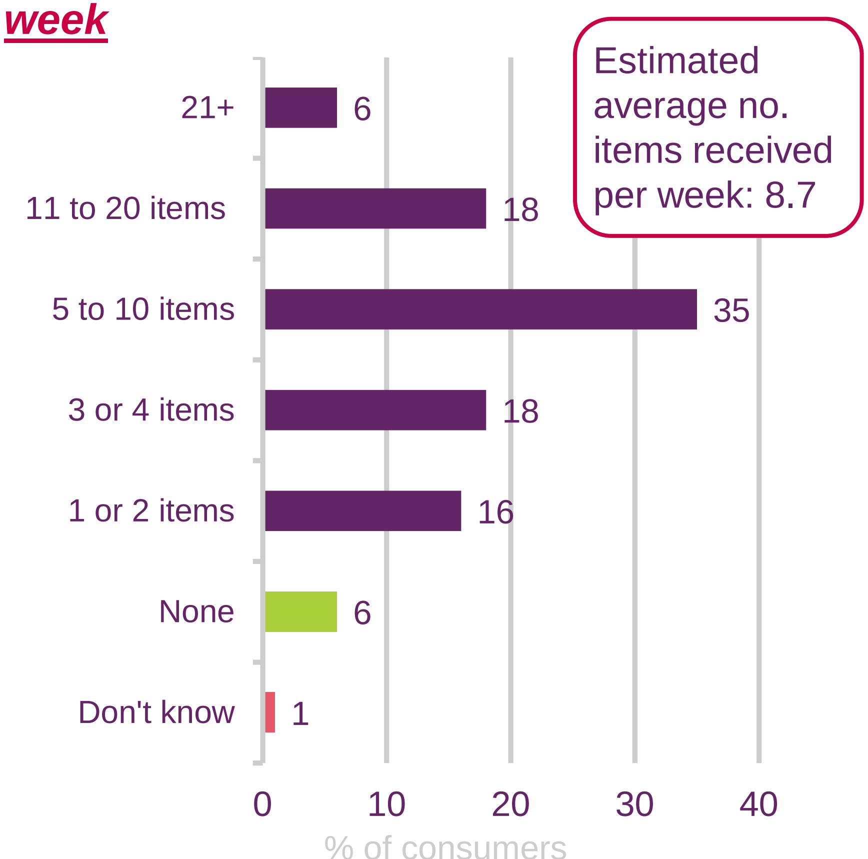
Figure 1.8

Approximate number of items sent and received by post

Claimed volume of items ***sent*** in the last ***month***



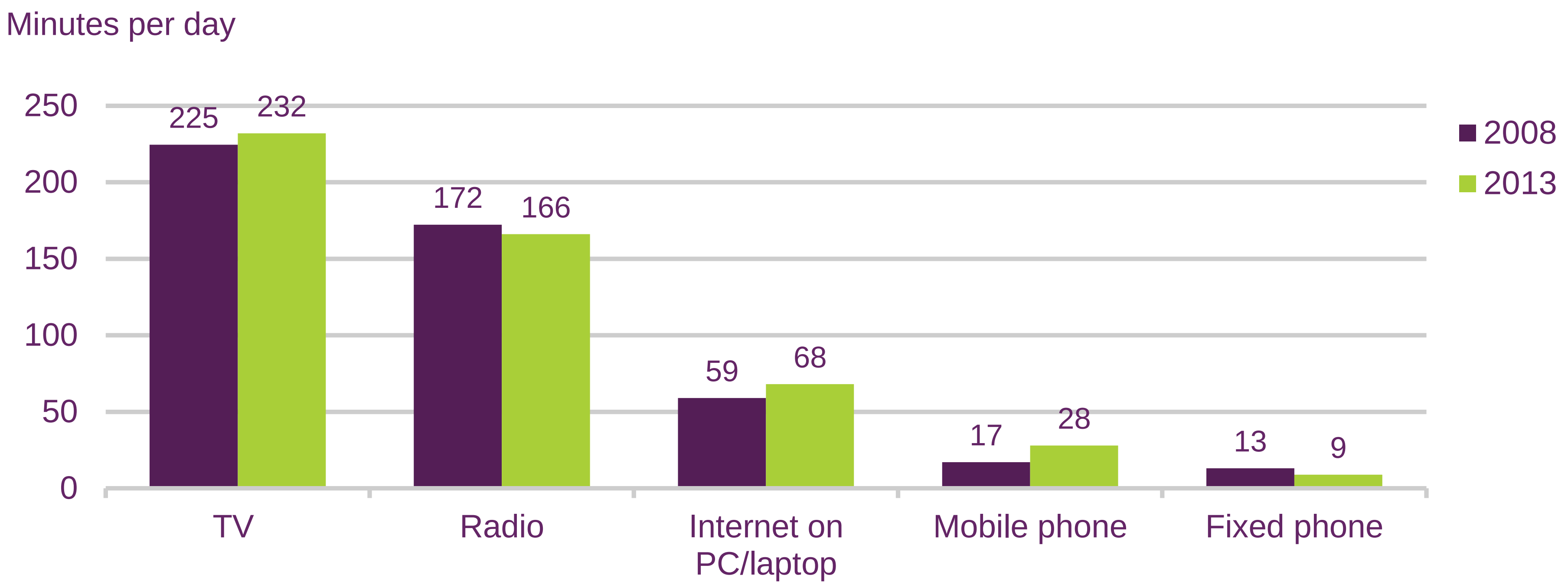
Claimed volume of items ***received*** in the last ***week***



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+)
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?/ QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

Figure 1.9

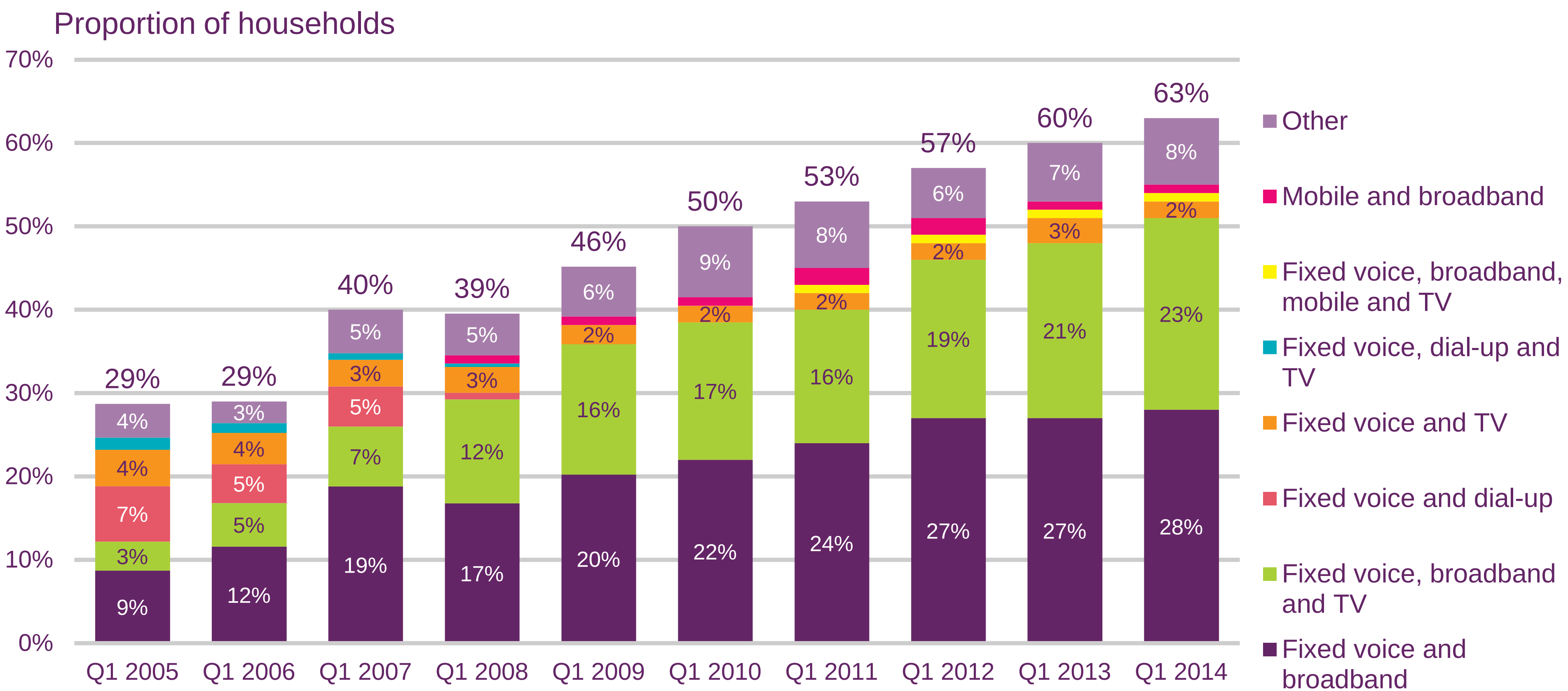
Average time per day spent using communications services



Source: Ofcom / BARB / RAJAR / comScore MMX, home and work panel/ Operator data/ Strategy Analytics
Base: TV: Individuals aged 4+ in TV households; Radio: All adults aged 15+; Internet: Average minutes per internet user
Note: Daily figures for mobile voice & data and fixed voice were calculated from monthly data on the assumption that there are 30.4 days in the average month; internet consumption figures relate to monthly averages of Jan-Dec for each year for PC/laptop webpage use only at home and work amongst internet users; this excludes time spent listening to streamed audio or watching streamed video; mobile telephony figures include time spent messaging and on voice calls (excluding mobile internet use). Data are Ofcom estimates based on message volume data and Ofcom Digital Day research conducted in 2010

Figure 1.10

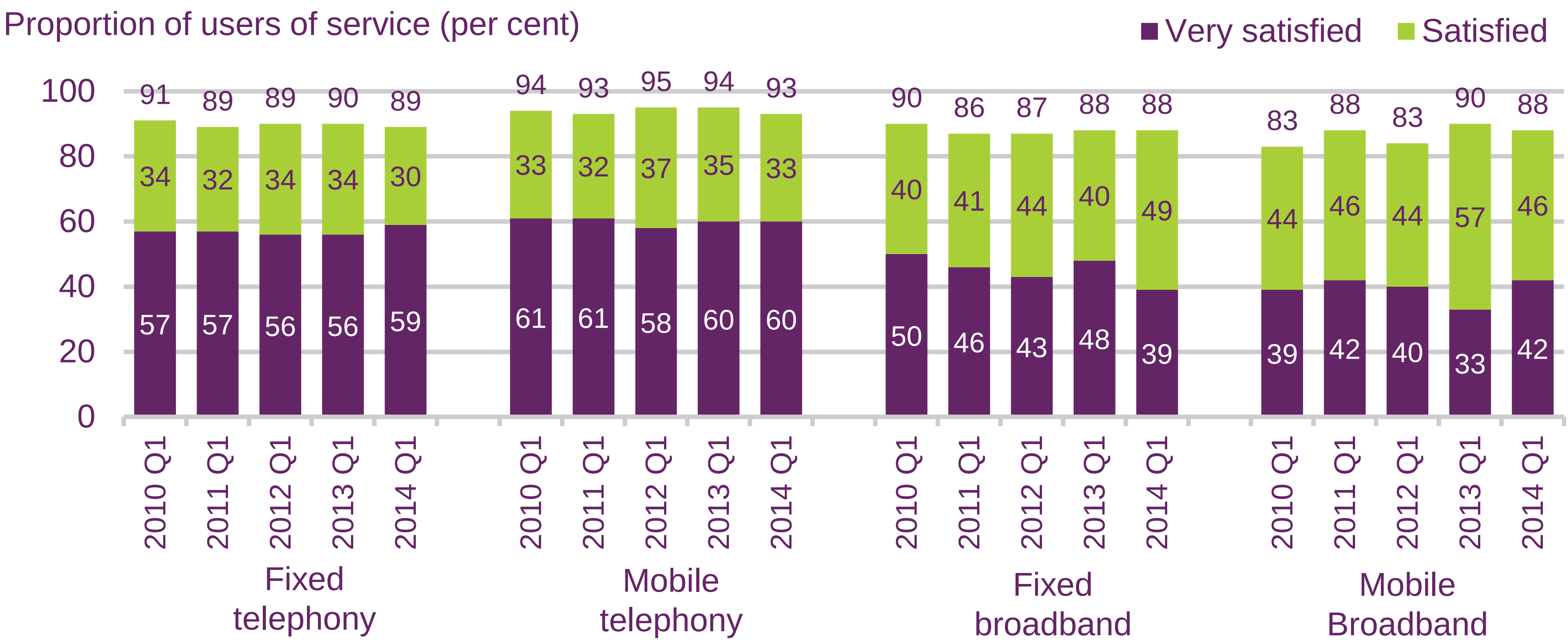
Take-up of bundled services



Source: Ofcom technology tracker
Base: All adults aged 16+ (2014 n=3740)
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?

Figure 1.11

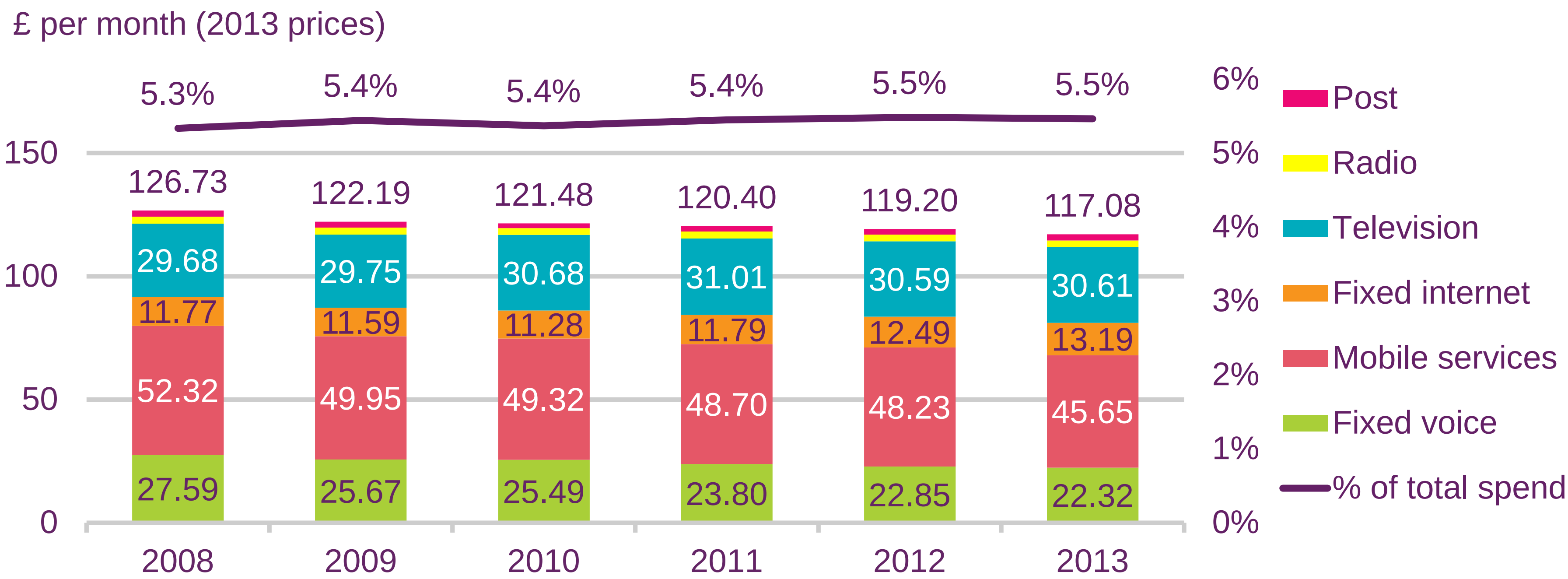
Overall satisfaction with communication services



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

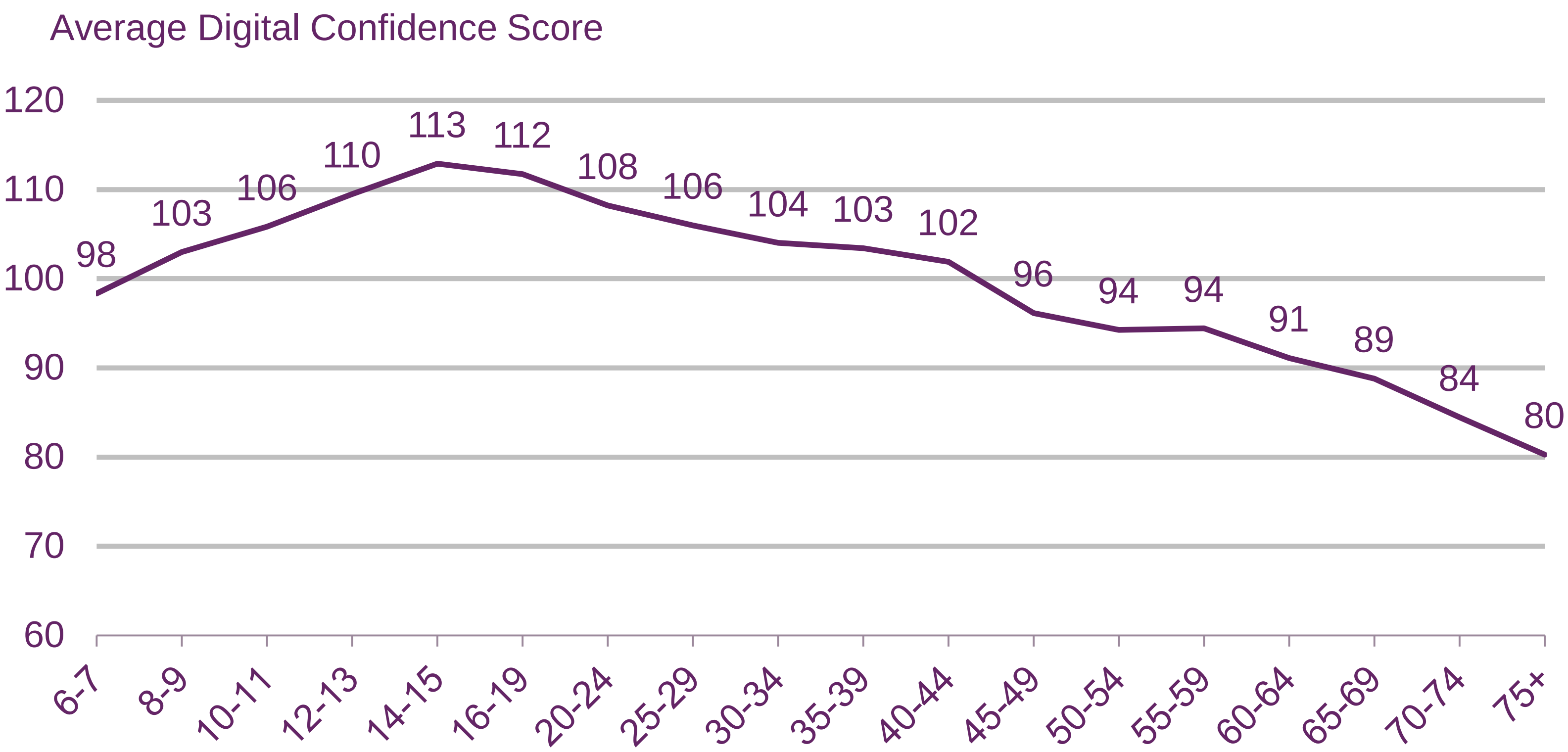
Figure 1.12

Average household spend on communications services



Source: Ofcom / operators/ ONS
Notes: Adjusted for CPI; includes VAT.

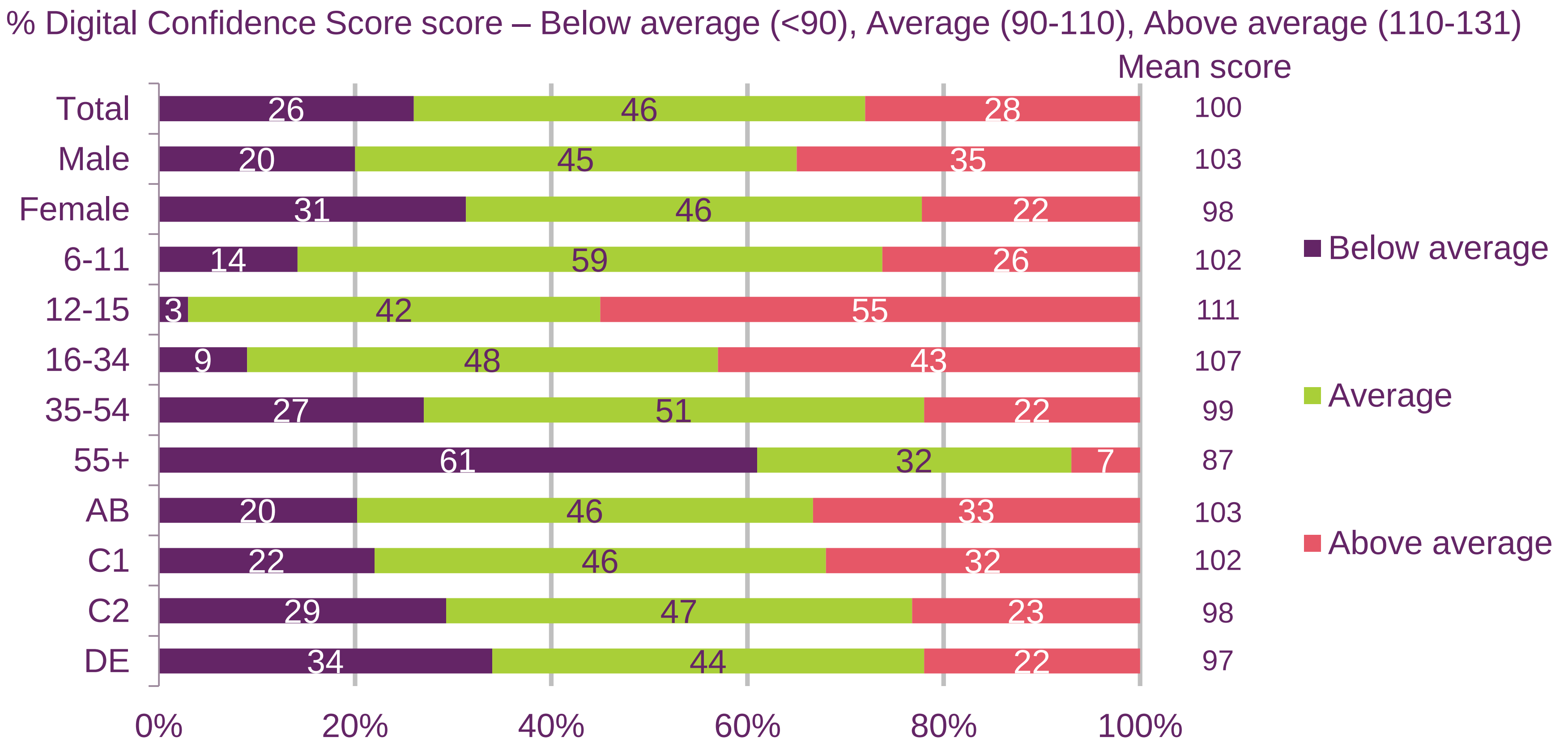
Figure 1.13
Digital confidence score, by age group



Source: Ofcom research
Base: All GB (2,753)

Figure 1.14

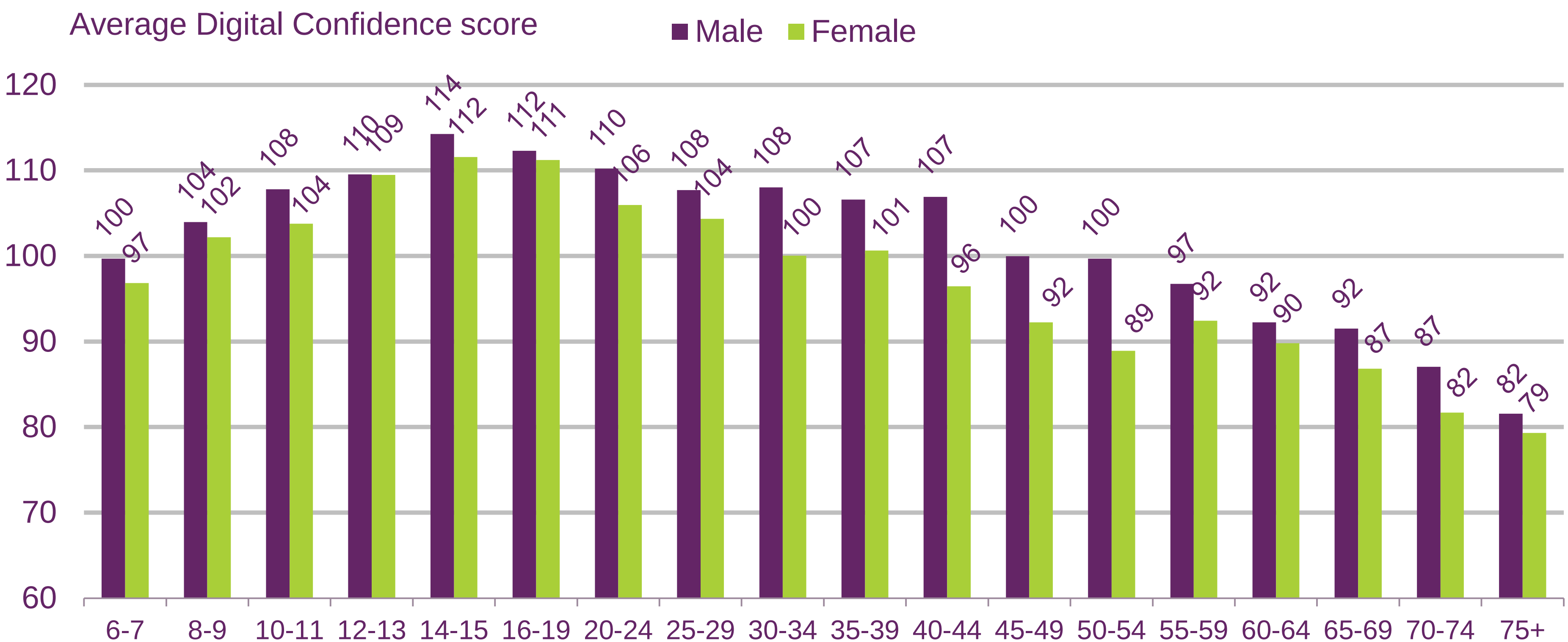
Digital confidence score, by demographics



Source: Ofcom research
Base: All GB (2,753)

Figure 1.15

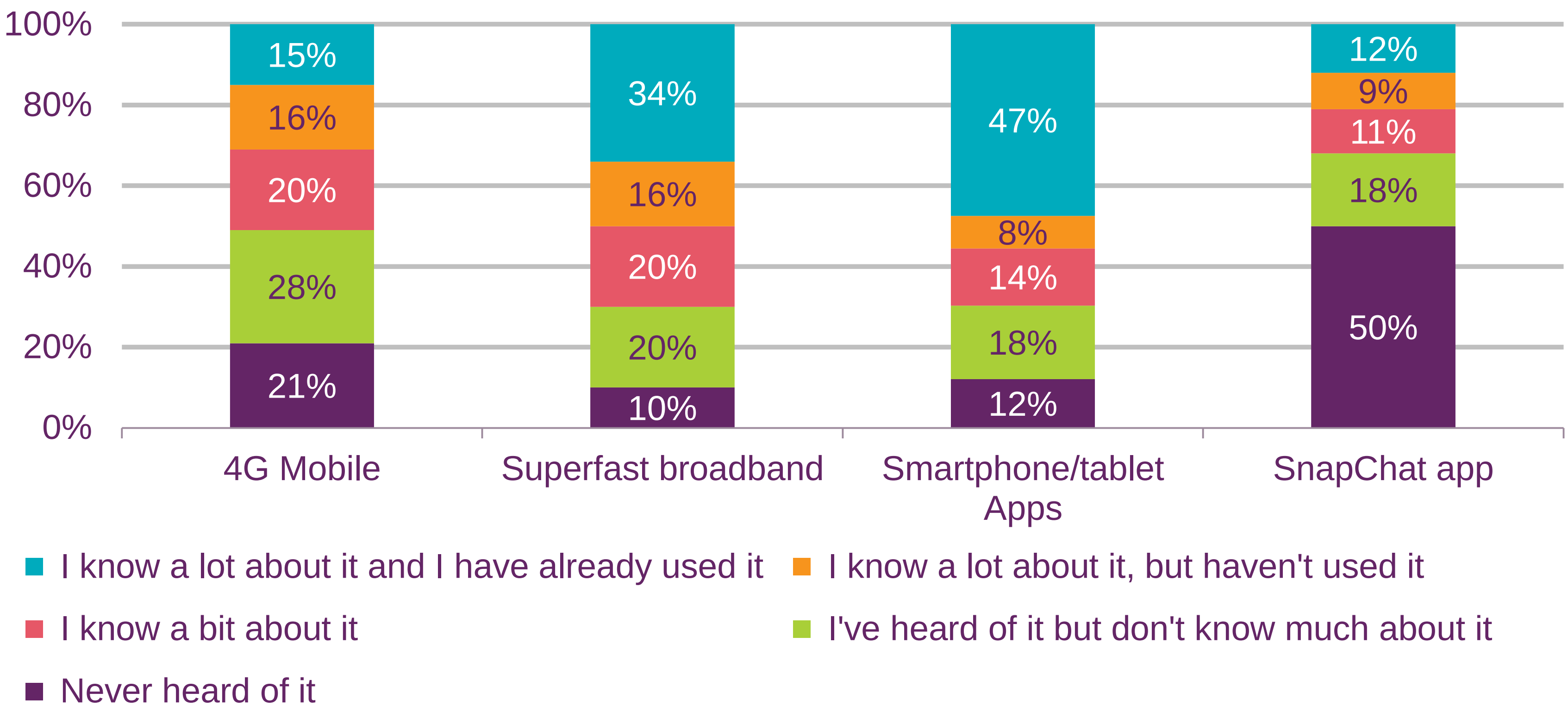
Digital confidence score, by age group



Source: Ofcom research
Base: All GB (2,753)

Figure 1.16

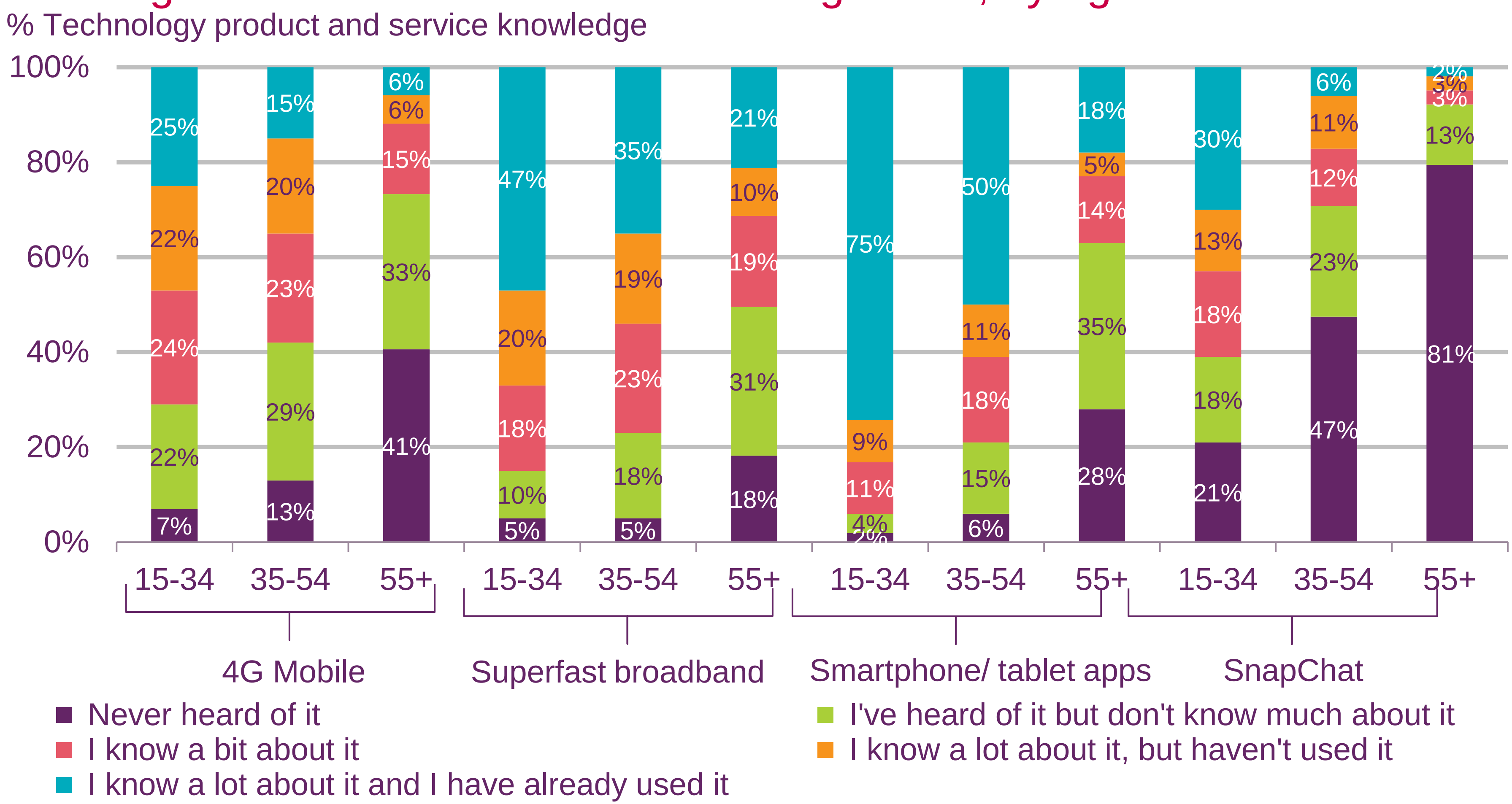
Knowledge and use of new services among adults



Base: All GB adults aged 15+ (1,982)
QD3A: Which statement best applies to each of the following gadgets or services?

Figure 1.17

Knowledge and use of new services among adults, by age

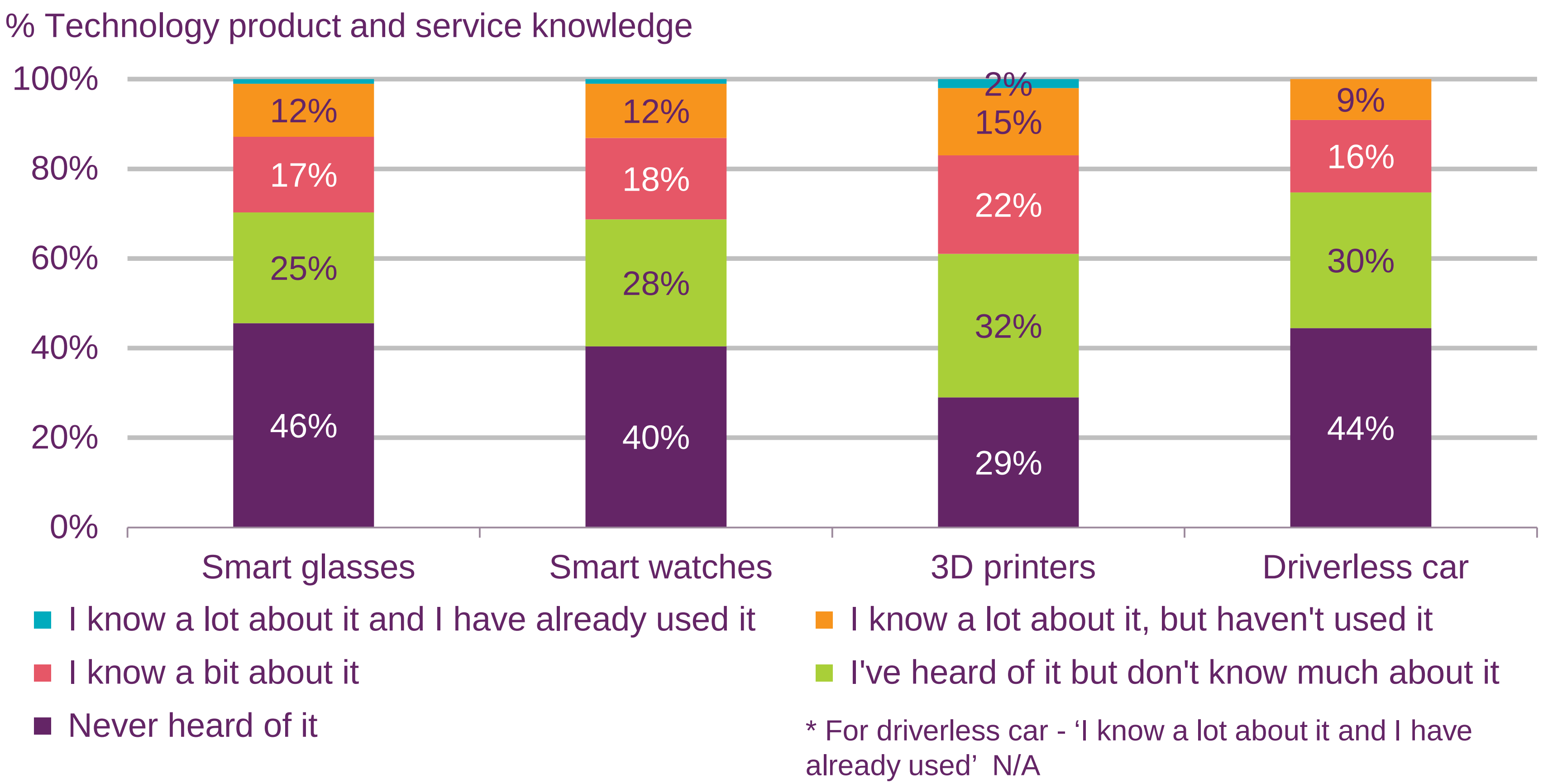


Base: All GB adults aged 15-34 (633), 35-54 (624), 55+ (725)

QD3A: Which statement best applies to each of the following gadgets or services?

Figure 1.18

Adults' knowledge of smart glasses, smart watches, 3D printers and driverless cars

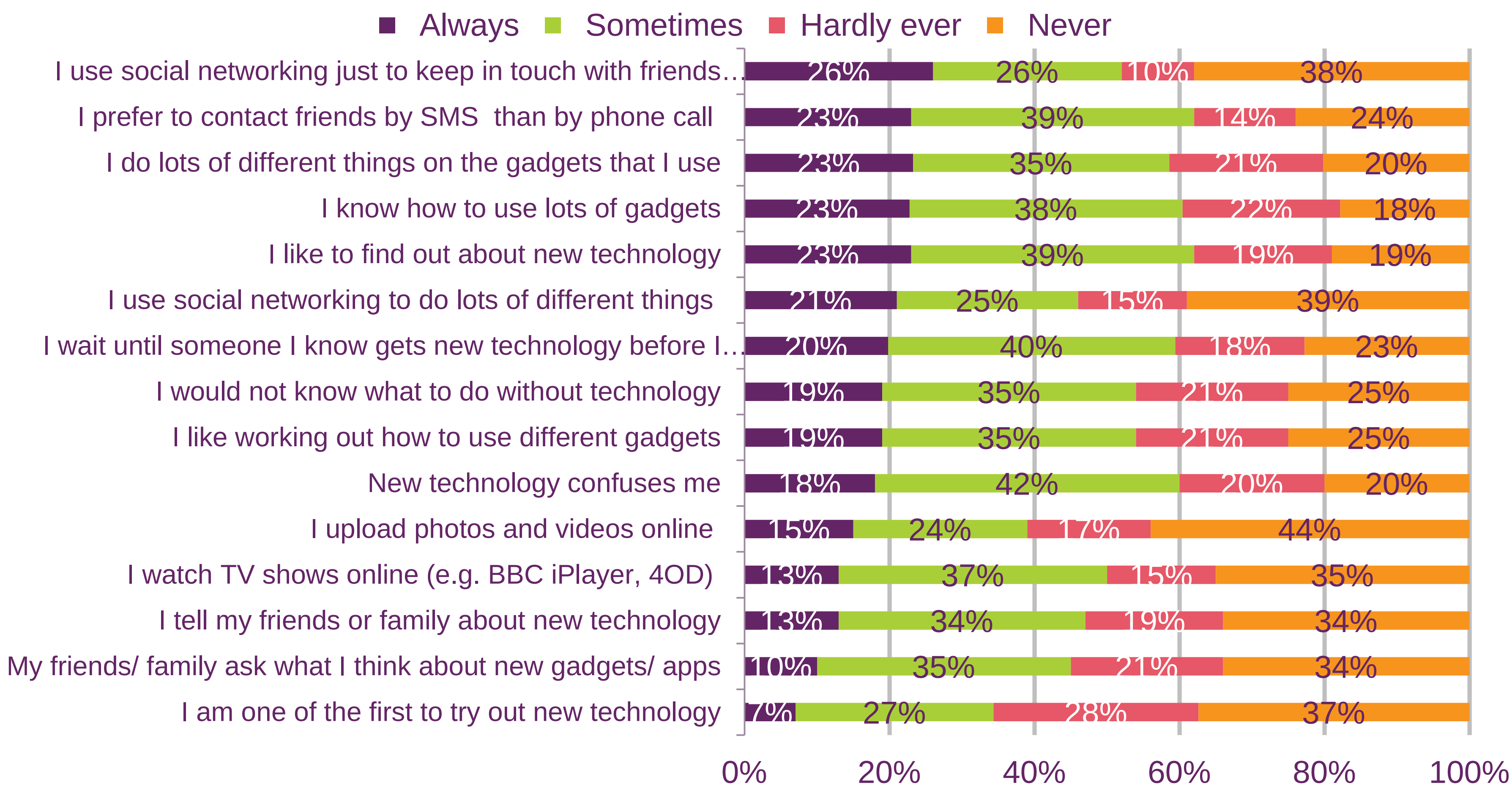


* For driverless car - 'I know a lot about it and I have already used' N/A

Base: All GB adults aged 15+ (1,982)
QD3B: Which statement best applies to each of the following NEW gadgets?

Figure 1.19

Attitudes towards communications technology among adults

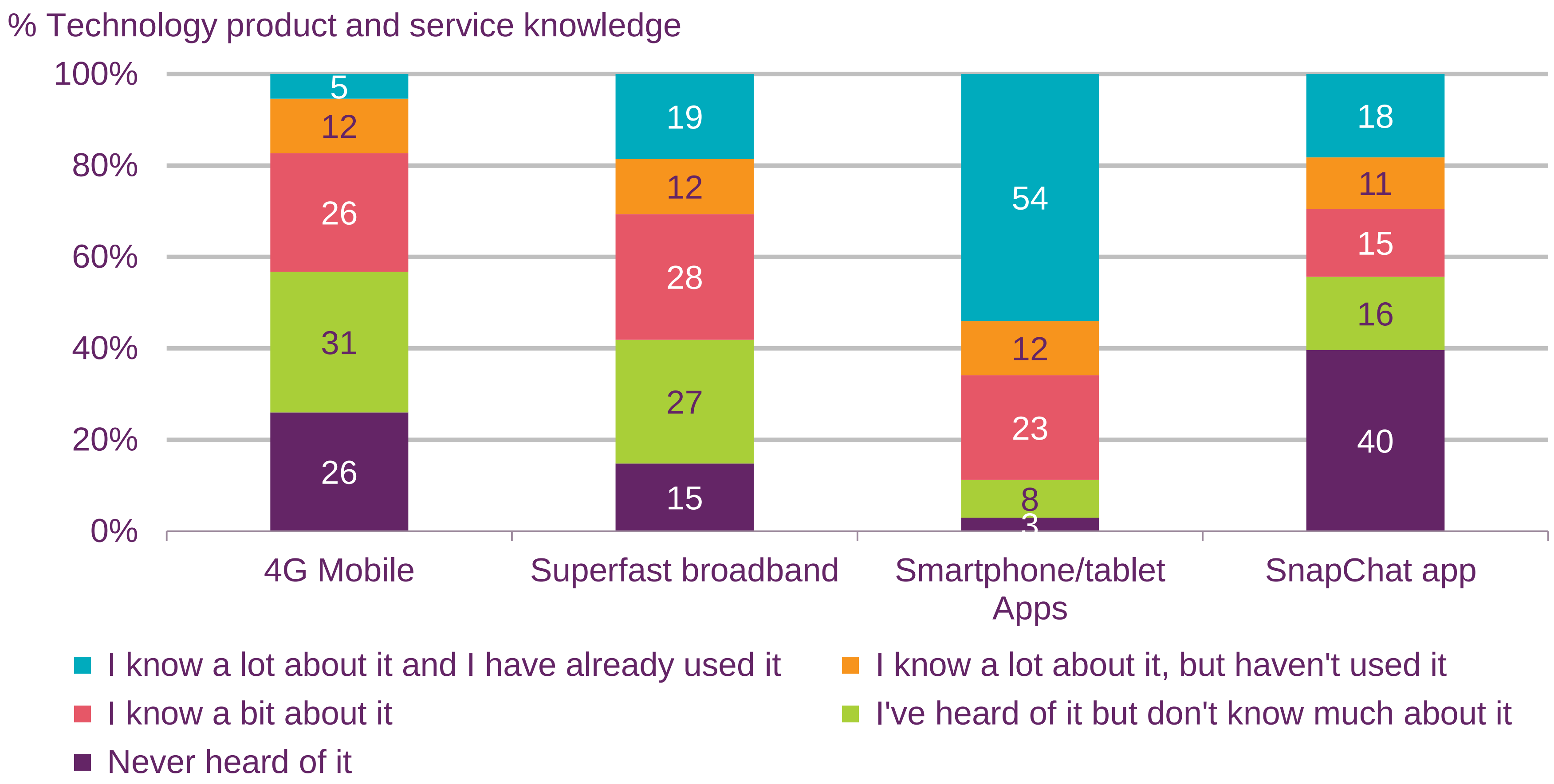


Base: All GB adults aged 15+ (1,982)

QD4: Please tell us how much each of these applies to you?

Figure 1.20

Knowledge and use of new services among children

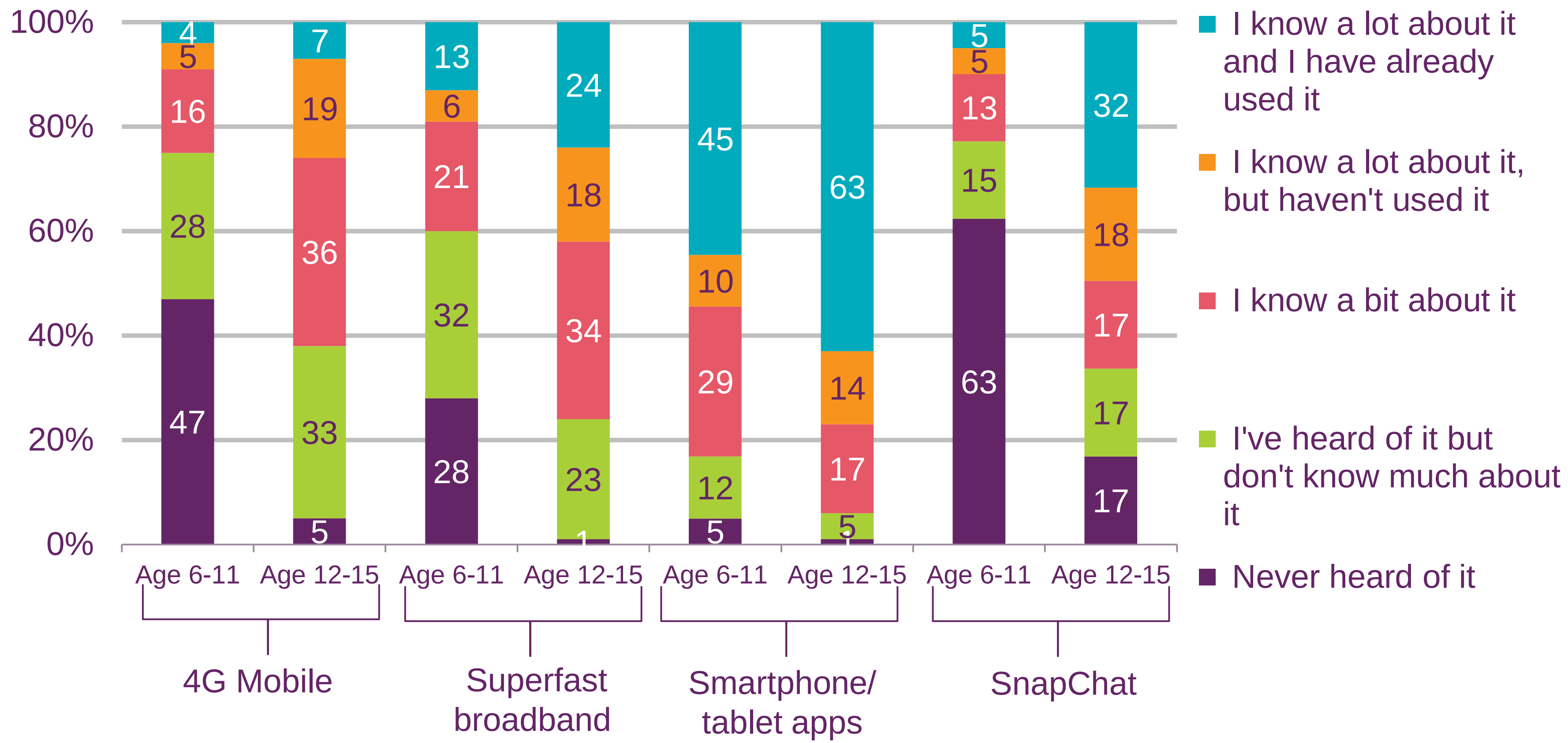


QD3A: Which sentence best describes how much you know about the following gadgets or services?
Base: GB children aged 6-15 (800)

Figure 1.21

Knowledge and use of new services among children, by age

% Technology product and service knowledge

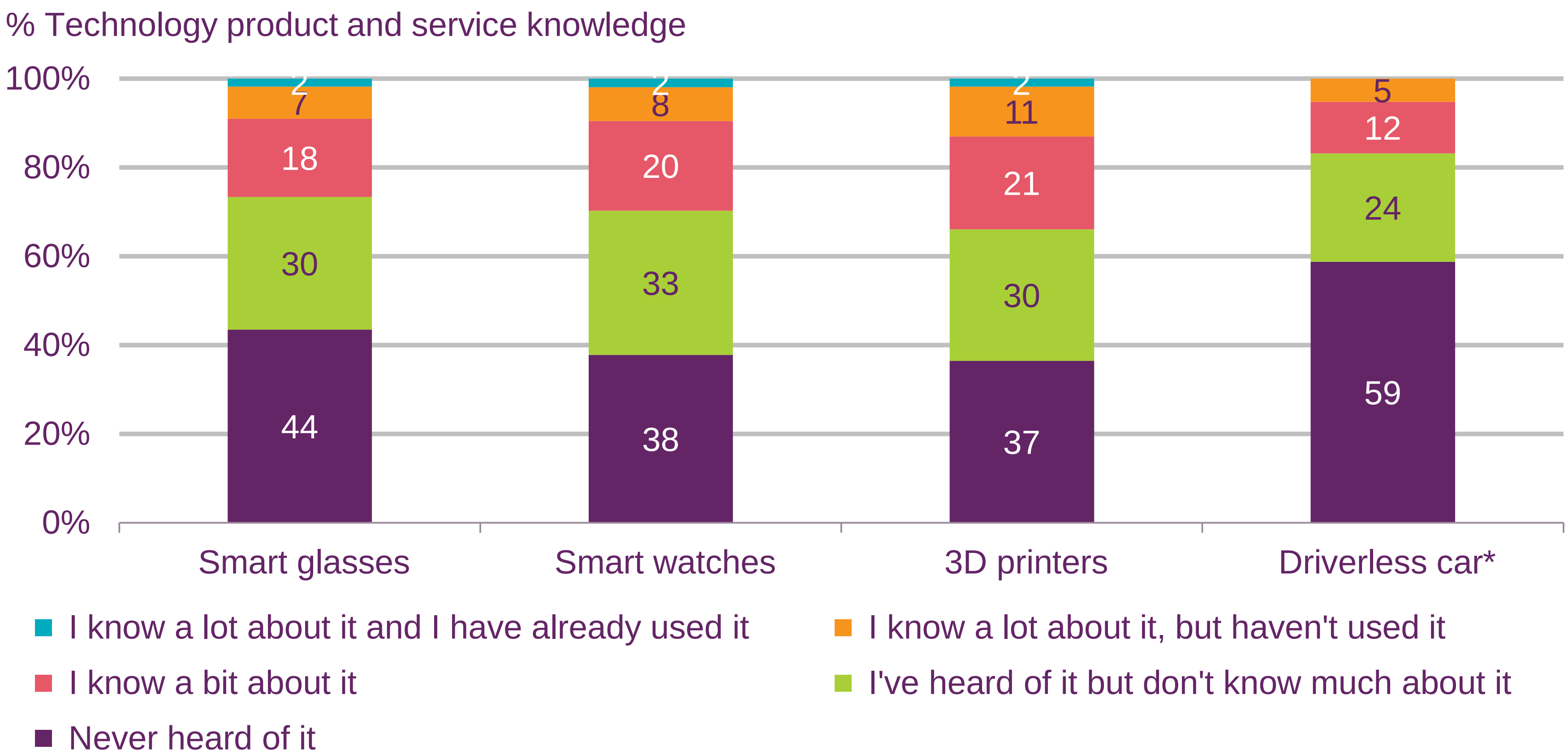


Base: GB children aged 6-11 (400), aged 12-15 (400)

QD3A: Which sentence best describes how much you know about the following gadgets or services?

Figure 1.22

Children's knowledge of smart glasses, smartwatches, 3D printers and driverless cars

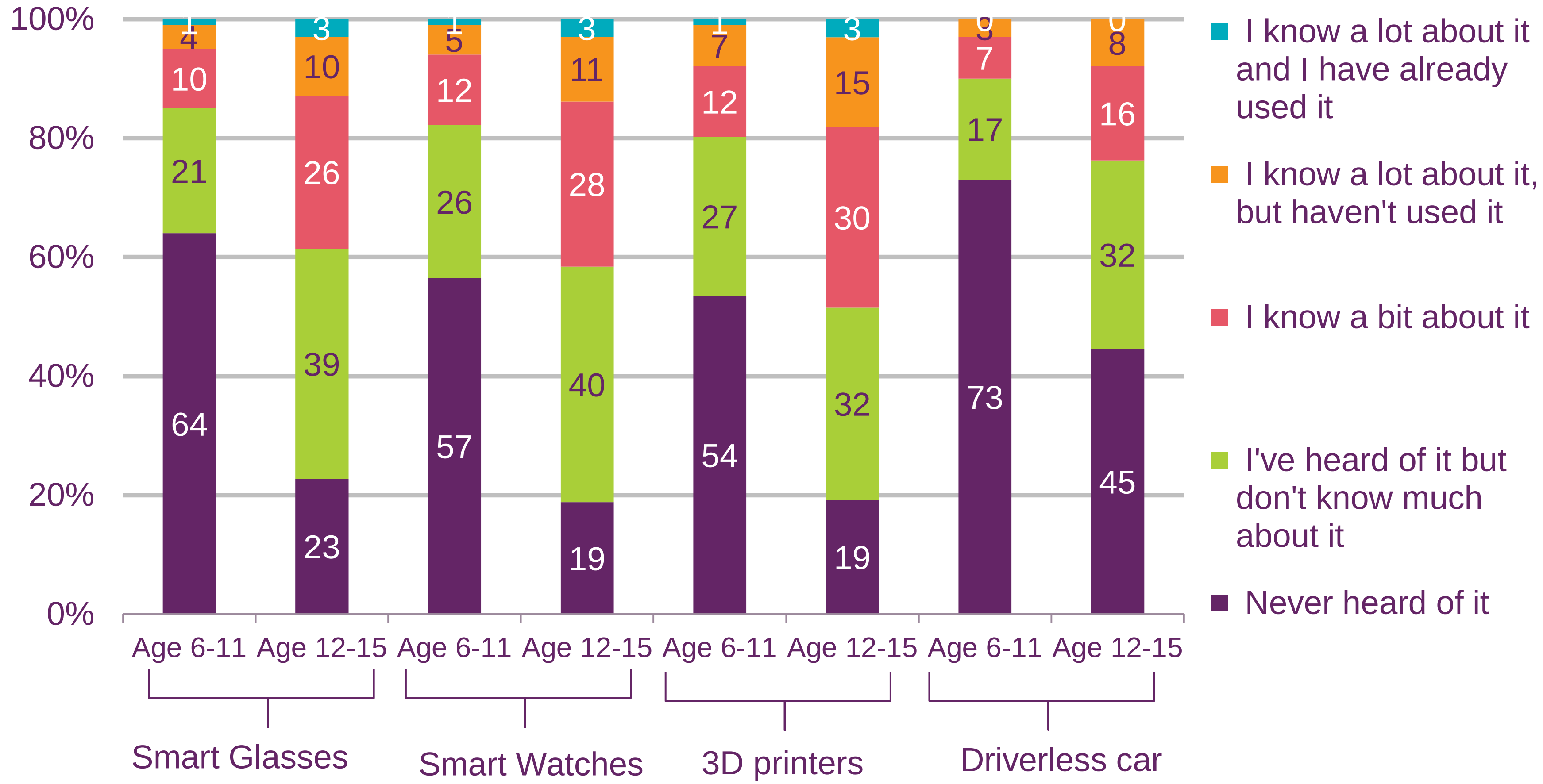


Base: GB children aged 6-15 (800)
QD3B: Which sentence best describes how much you know about the following NEW gadgets?
* For driverless car - 'I know a lot about it and I have already used' is N/A

Figure 1.23

Children's knowledge of smart glasses, smartwatches, 3D printers and driverless cars, by age

% Technology product and service knowledge

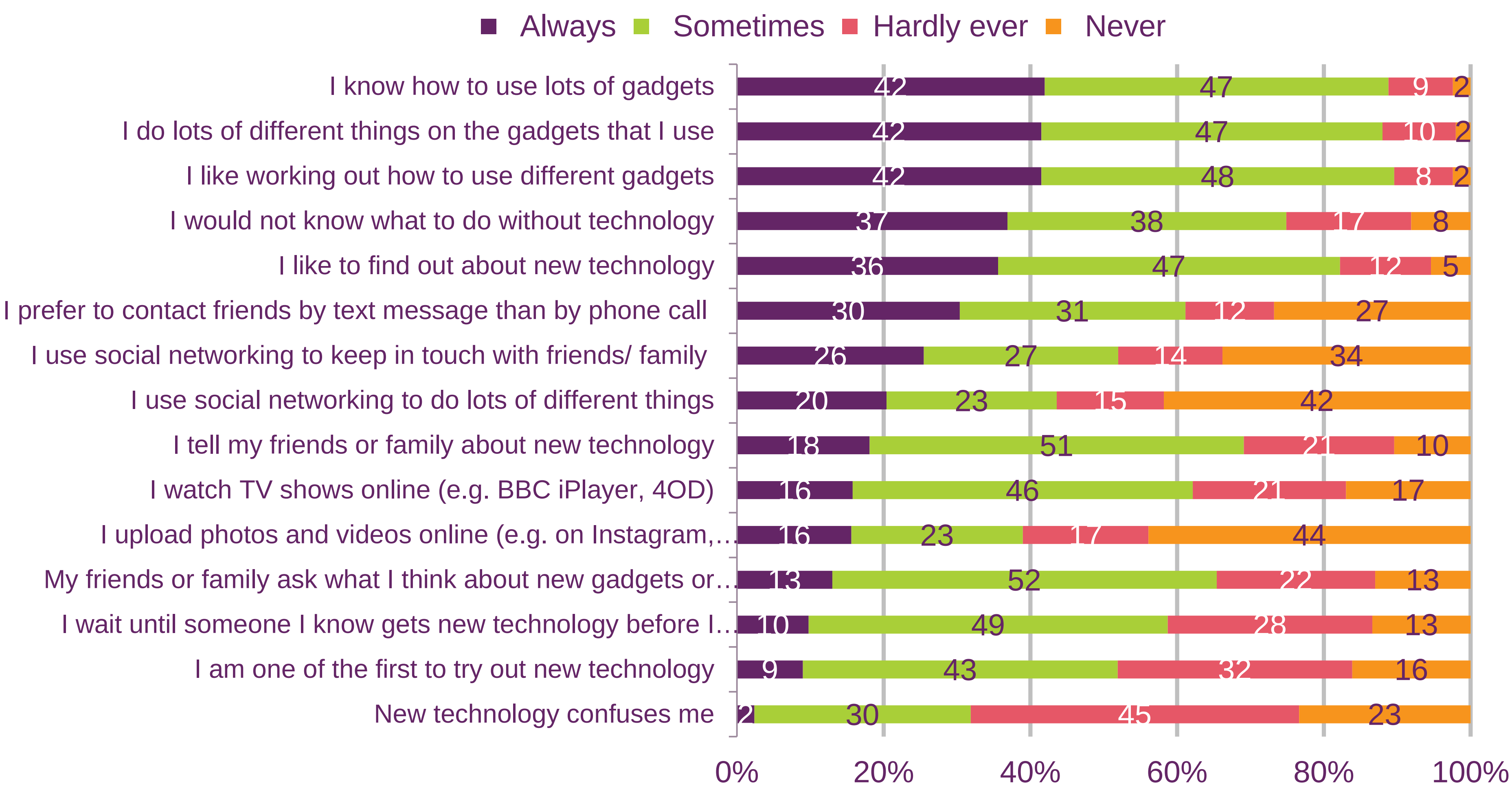


Base: GB children aged 6-11 (400), aged 12-15 (400)

QD3B: Which sentence best describes how much you know about the following NEW gadgets?

Figure 1.24

Attitudes towards communications technology, among children



QD4: Please tell us how much each of these applies to you?
Base: GB kids children 6-15 (800)

Figure 1.25

Key data among all adults and a selection of audience groups

	All 16+	16-24s	25-34s	35-44s	45-54	55-64	65+
Overall day							
Time Awake (mins per day)	939	884	929	942	953	961	956
Total time spent with media and comms (mins per day)	667	847	706	654	680	615	556
Amount of media and comms activity (mins per day)	521	548	523	504	549	517	495
Simultaneous and solus activity							
Proportion of media and comms time that is solus	79%	65%	75%	77%	81%	83%	89%
Proportion of media and comms time that is simultaneous	21%	35%	25%	23%	19%	17%	11%
Proportion of all media time spent on each grouped activity							
Watching TV or films on a TV set (% of all activity)	37%	24%	31%	34%	39%	45%	49%
Watching TV or films on another device (% of all activity)	2%	5%	3%	2%	1%	1%	1%
Watching other video (short clips) (% of all activity)	1%	3%	1%	0%	1%	0%	0%
Radio on radio set (% of all activity)	10%	2%	8%	12%	13%	13%	15%
Radio on another device (% of all activity)	2%	1%	3%	2%	3%	2%	1%
Other audio (% of all activity)	5%	9%	5%	5%	3%	3%	2%
Print media (% of all activity)	2%	1%	1%	1%	2%	3%	6%
Voice communications (% of all activity)	5%	5%	6%	6%	5%	4%	4%
Text communications (% of all activity)	16%	23%	20%	18%	14%	10%	7%
Games (% of all activity)	5%	9%	7%	4%	3%	3%	2%
Other internet media (% of all activity)	11%	11%	12%	10%	10%	10%	10%
Other non-internet media (% of all activity)	5%	7%	5%	5%	6%	5%	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: 7966

Figure 1.25b

Key data among all adults and a selection of audience groups

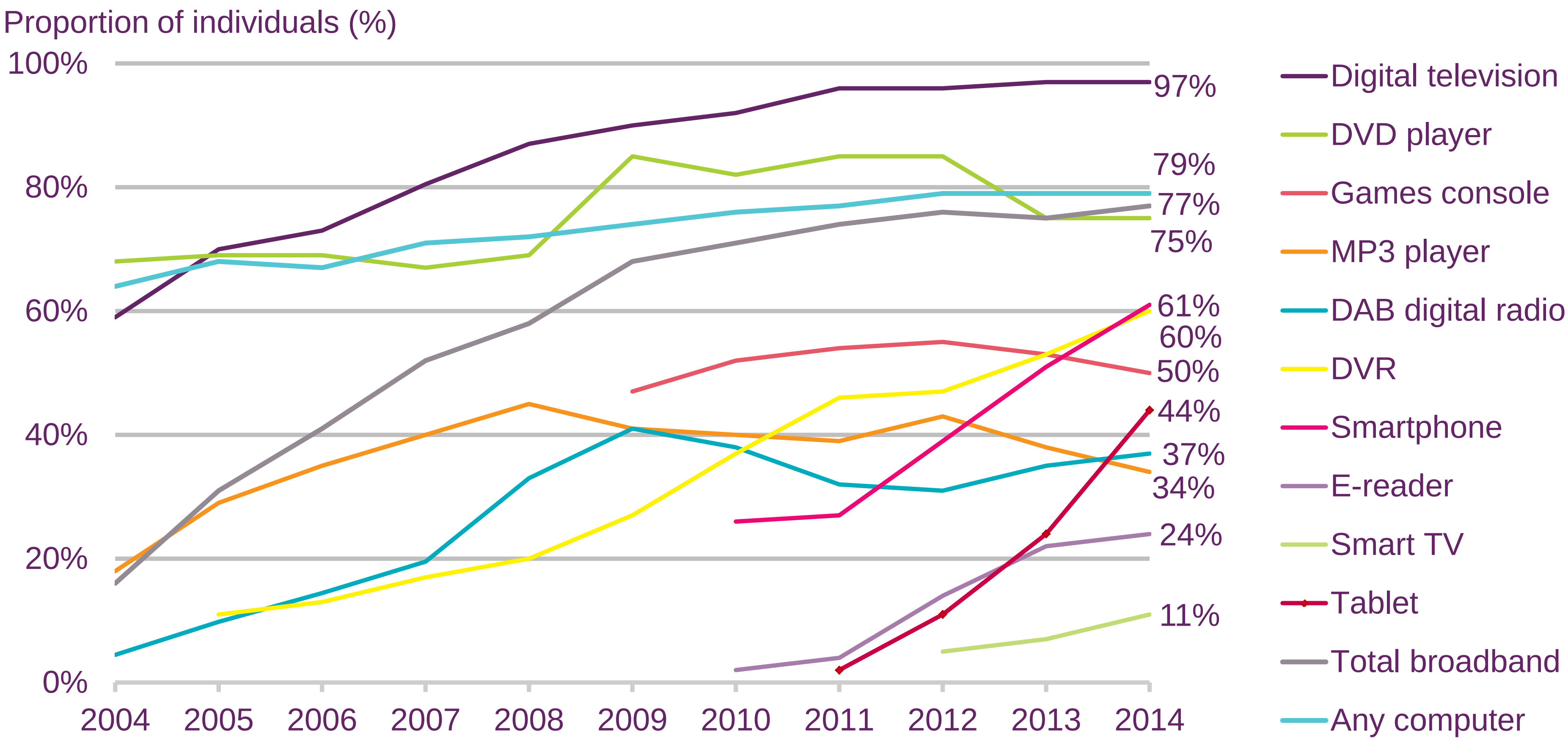
	All 16+	Men	Women	Working	Not Working
Overall day					
Time Awake (minutes per day)	939	945	934	939	939
Total time spent with media and comms (minutes per day)	667	687	648	672	658
Amount of media and comms activity (minutes per day)	521	535	507	515	525
Simultaneous and solus activity					
Proportion of media and comms time that is solus	79%	79%	78%	77%	81%
Proportion of media and comms time that is simultaneous	21%	21%	22%	23%	19%
Proportion of all media time spent on each grouped activity					
Watching TV or films on a TV set (% of all activity)	37%	34%	39%	33%	42%
Watching TV or films on another device (% of all activity)	2%	2%	2%	2%	2%
Watching other video (short clips) (% of all activity)	1%	1%	0%	1%	1%
Radio on radio set (% of all activity)	10%	11%	10%	11%	10%
Radio on another device (% of all activity)	2%	2%	2%	2%	2%
Other audio (% of all activity)	5%	5%	4%	4%	5%
Print media (% of all activity)	2%	2%	2%	1%	3%
Voice communications (% of all activity)	5%	5%	5%	6%	3%
Text communications (% of all activity)	16%	15%	16%	18%	12%
Games (% of all activity)	5%	6%	3%	4%	5%
Other internet media (% of all activity)	11%	10%	11%	10%	11%
Other non-internet media (% of all activity)	5%	5%	4%	6%	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: 7966

Figure 1.28

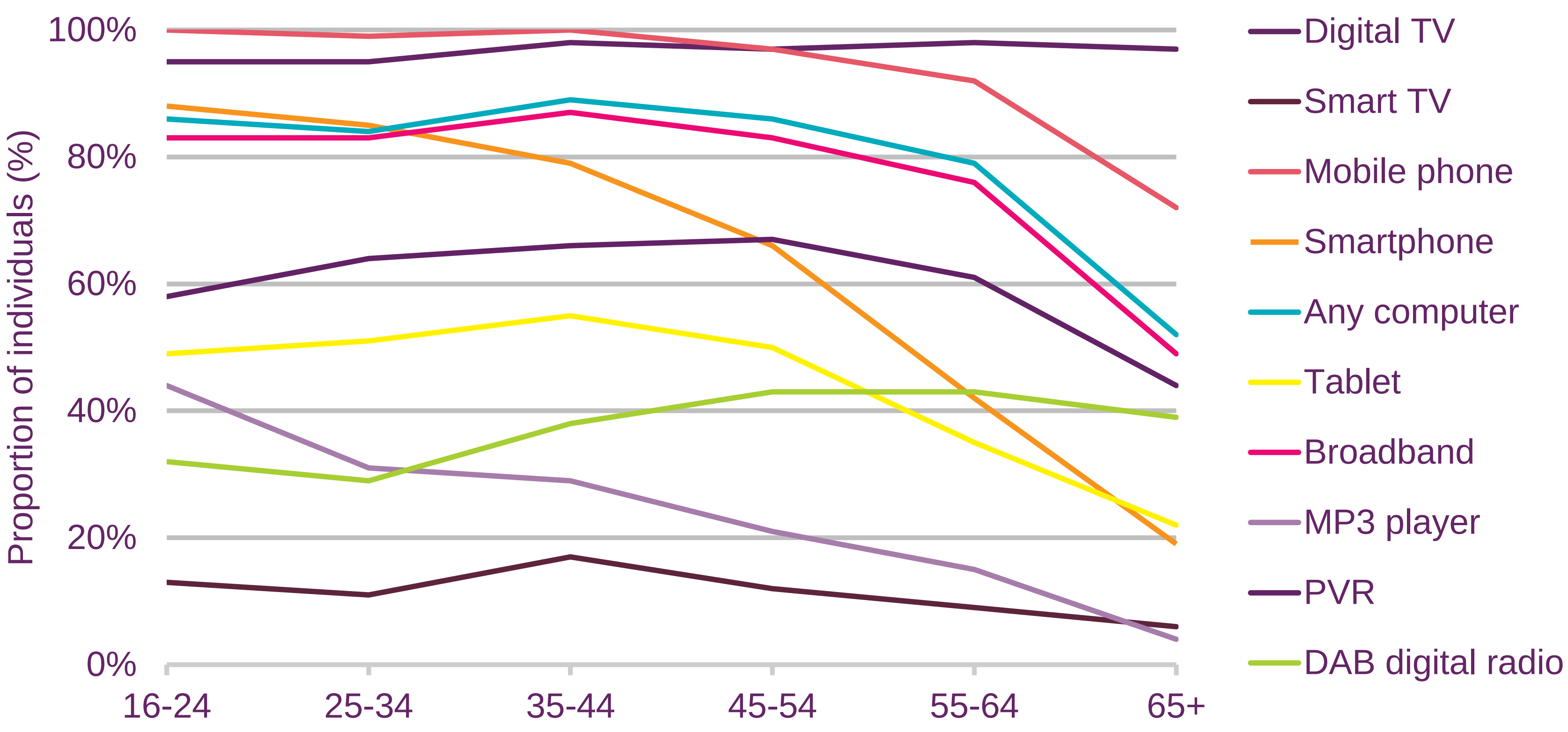
Household take-up of communications and media devices



Source: Ofcom technology tracker. Data from Q1 of each year
Note: The Question wording for DVD Player and DVR was changed in Q1 2009 so data is not directly comparable with previous years.
Base: All adults aged 16+ (2014 n=3740).

Figure 1.29

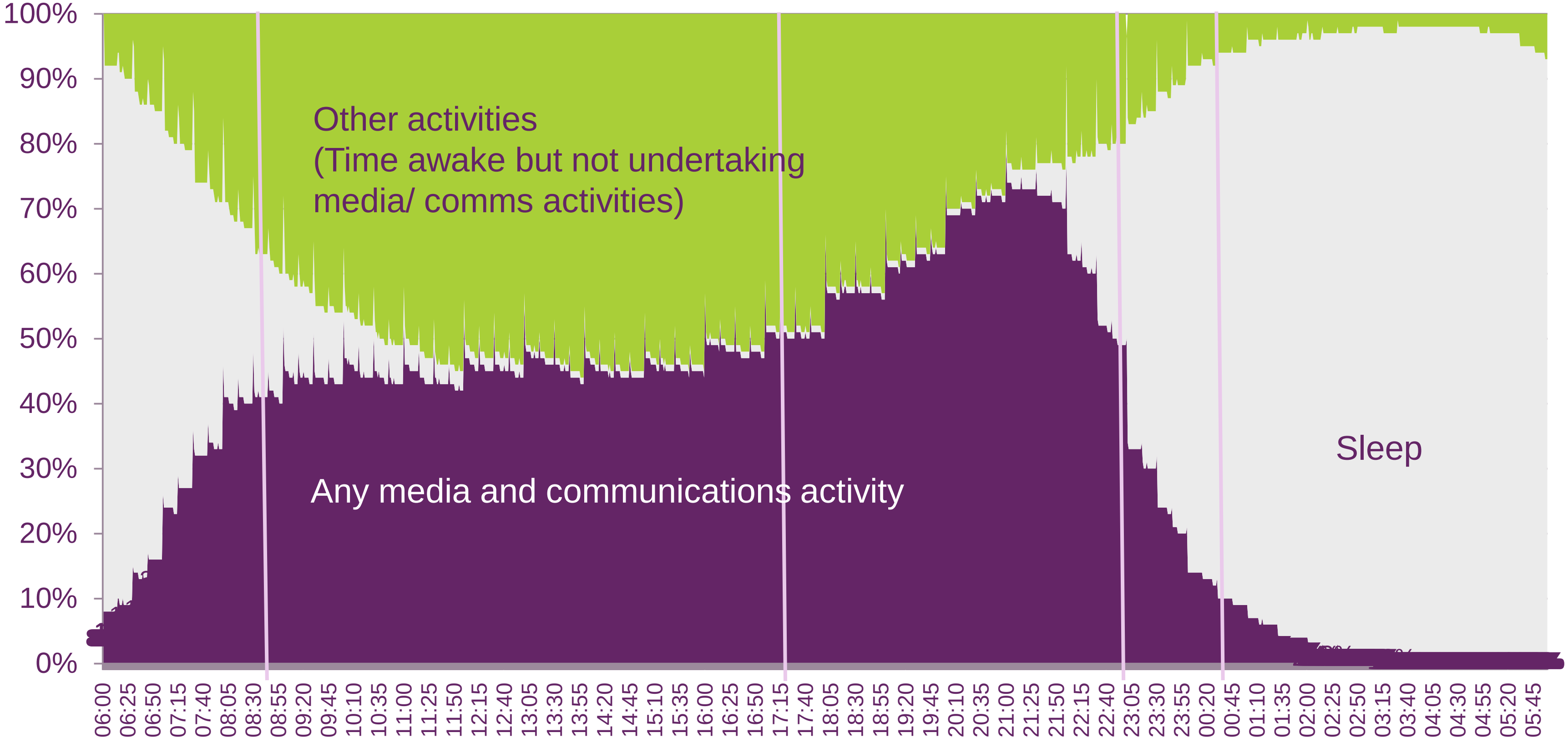
Adoption of new technologies, by age



Source: Ofcom Technology Tracker, Q1 2014, 536 16-24s; 567 25-34s; 624 35-44s; 541 45-54s; 644 55-64s; 828 65+5+

Figure 1.30

Proportion of media and communications activities across the day



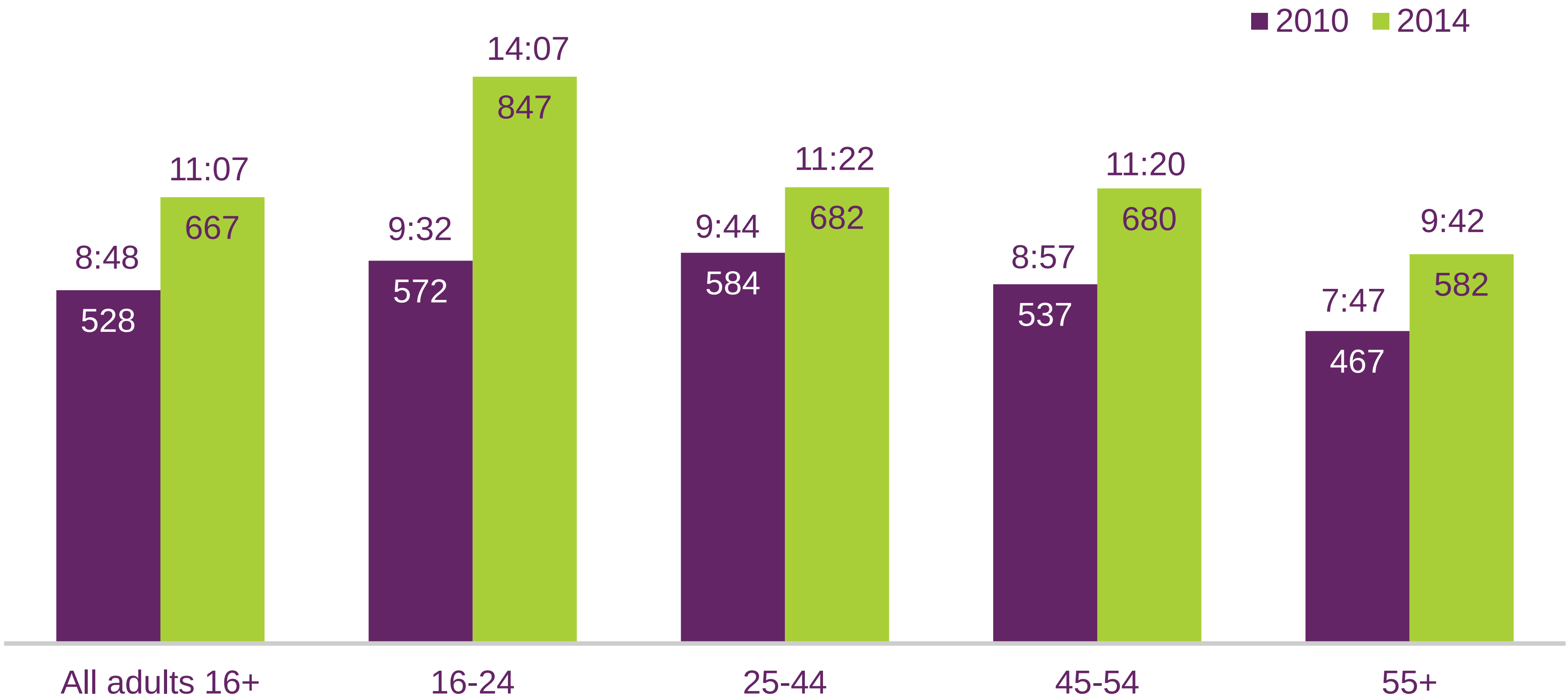
Breakfast time	Day time	Peak	Post peak	Night time
6:00am to 8.59am	9:00am to 5.30pm	5:30pm to 10.59pm	11:00pm to 12.29am	12:30pm to 5.59am

Source: Digital Day 7-day diary

Base: All minutes (14021) for each day, all adults 16+ (1644)

Figure 1.31

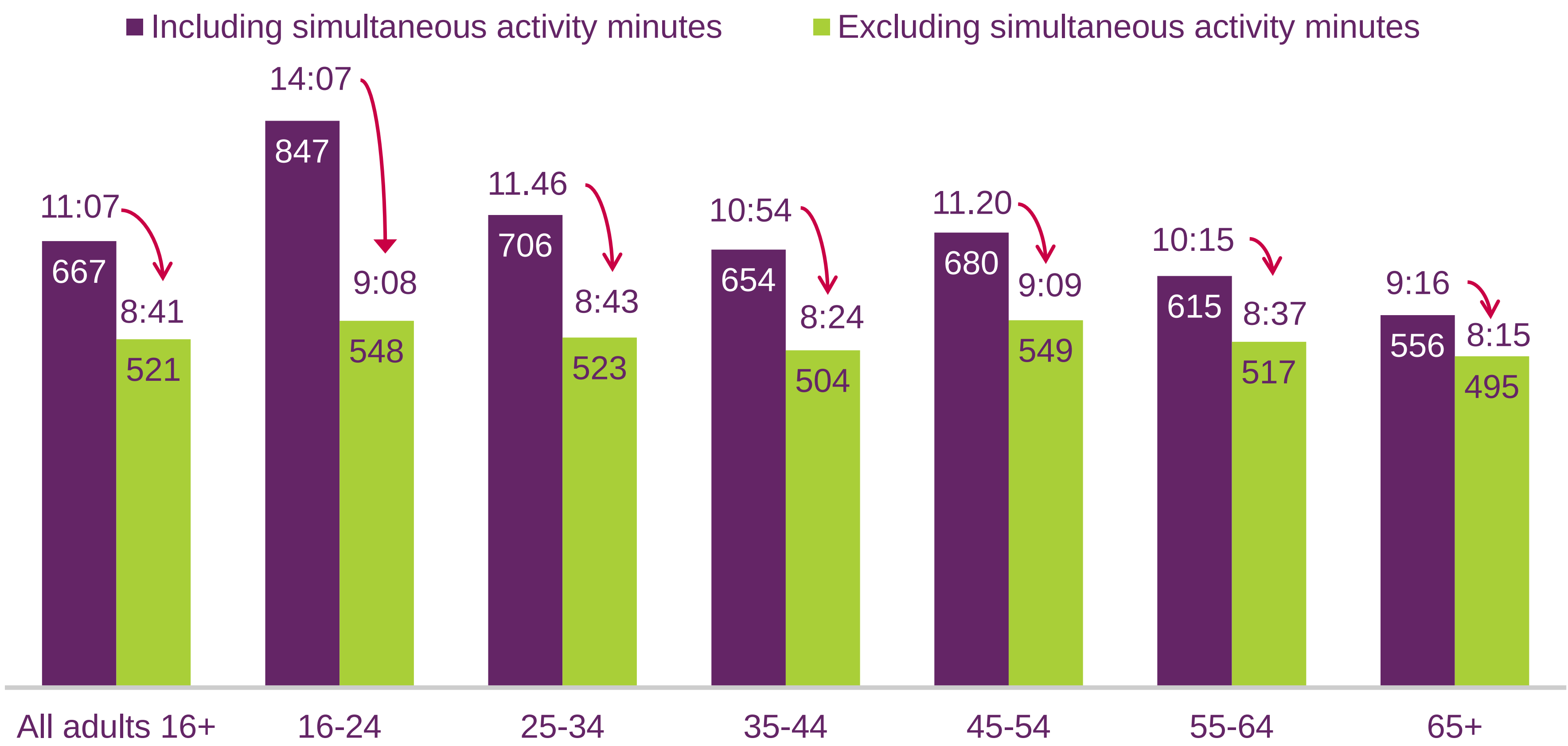
Total time spent consuming media and communications per day, 2010 vs. 2014



Source: Digital Day 7-day diary, 2010 and 2014
Base: 2010 – Adults 16+ = 7966; 16-24 = 1106; 25-44 = 3003; 45-54 = 1484; 55+ = 2373
2014 – Adults 16+ = 108782;16-24 = 691; 25-44 = 4133; 45-54 = 2666; 55+= 13953
Figures inside bars represent minutes per day, figures above bars represent time converted to hours:minutes format

Figure 1.32

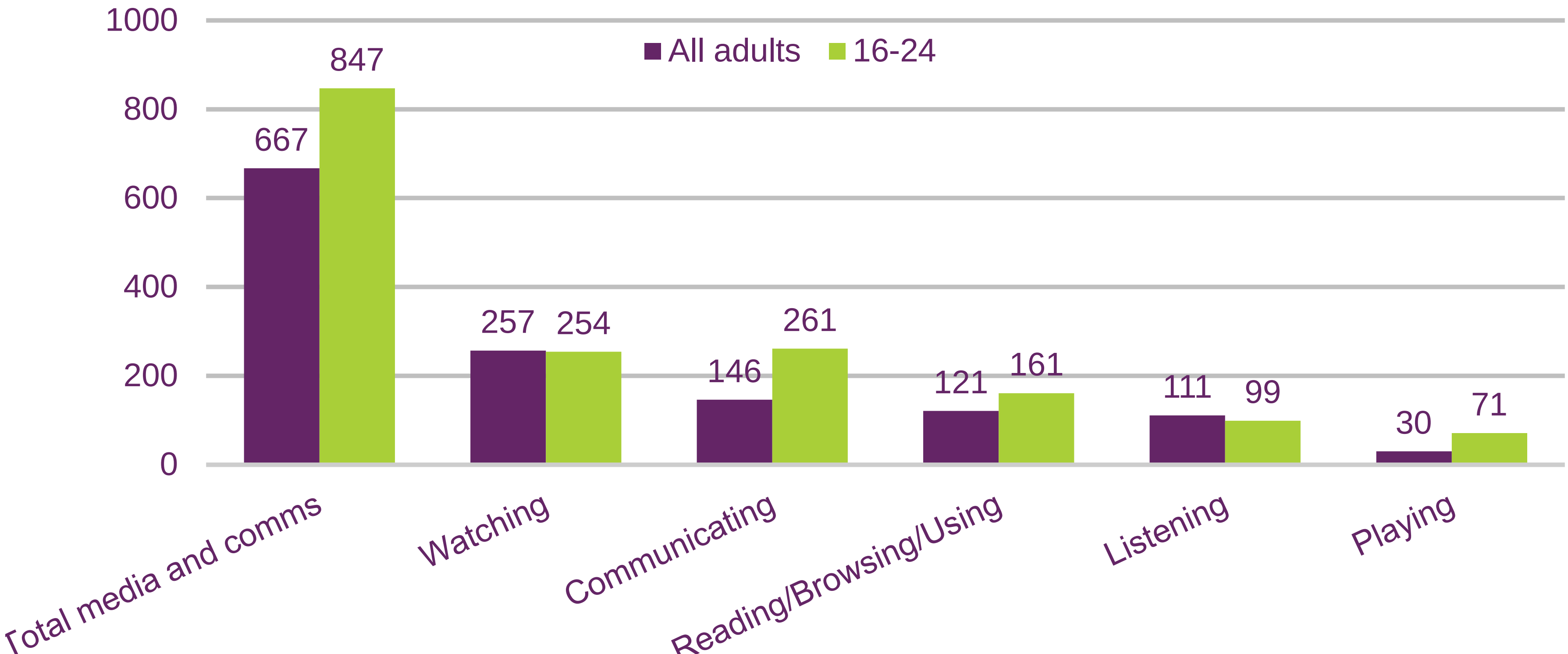
Average time spent using media and communications per day, by age group



Source: Digital Day 7 day diary
Base: All activity records for adults aged 16+ (108782), 16-24 (6910), 25-34 (16035), 35-44 (25304), 45-54 (26662), 55-64 (19918), 65+ (13953)

Figure 1.33

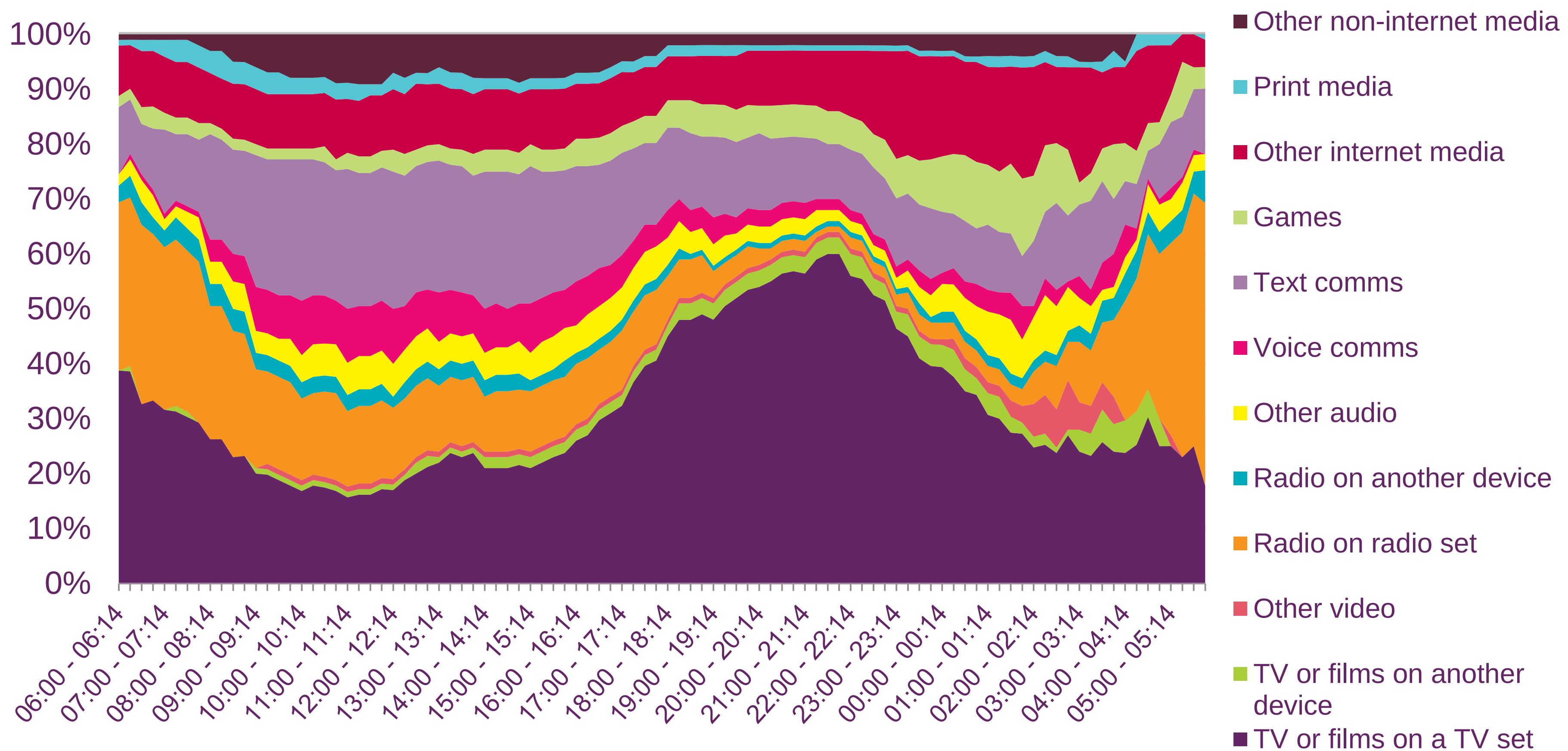
Average daily total media and communications time spent, including simultaneous activity



Note: For this analysis the calculations are made by generating mean times spent amongst all adults for each of the individual activities (including zeros). These mean times are then summed together to create total media and comms time, and time per activity type (hence includes all simultaneous activities).
Source: Digital Day 7 day diary
Base: All activity records (108782) for adults 16+ (1644)

Figure 1.34

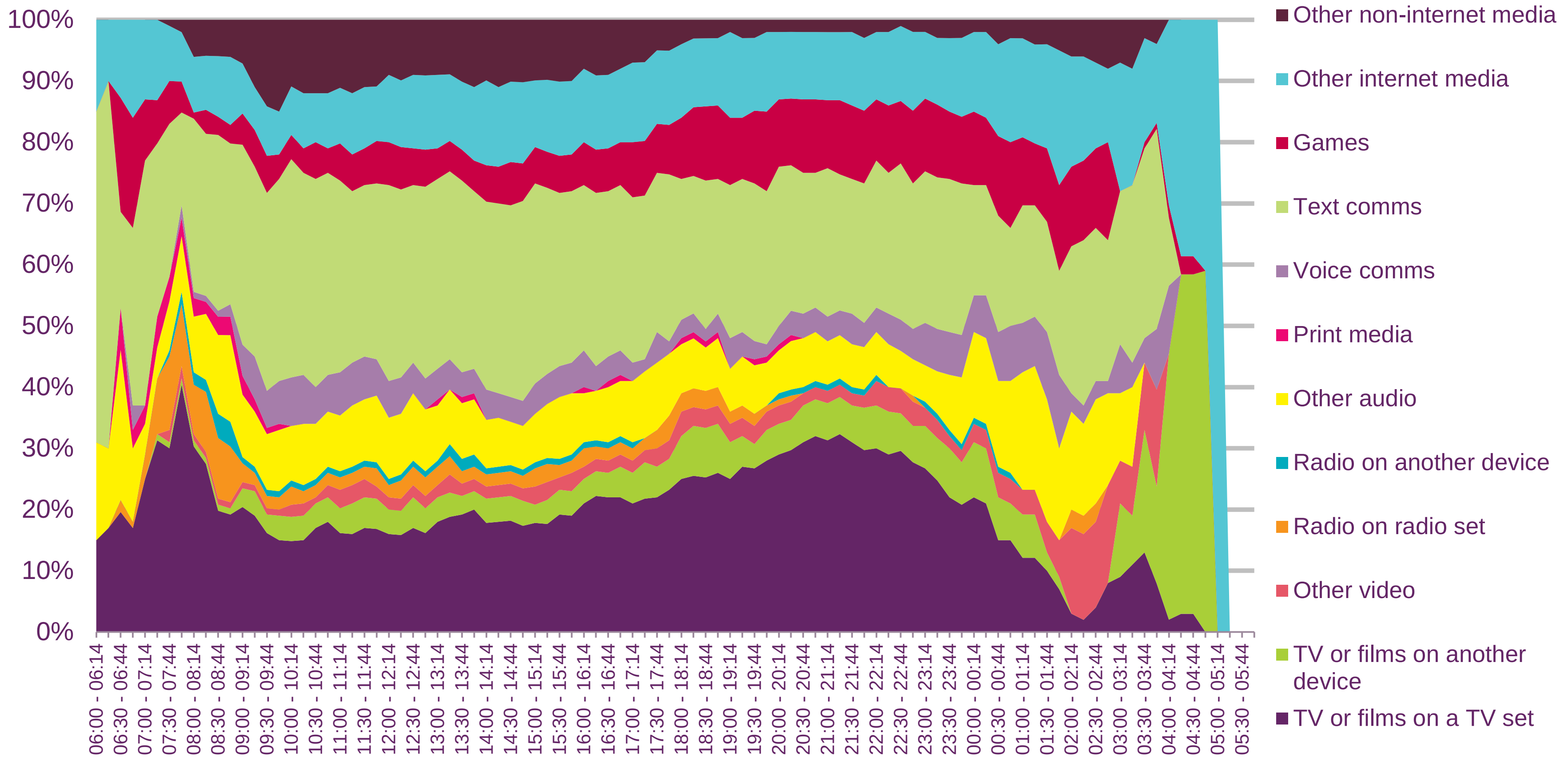
Proportion of media and communications activities across the day, all adults



Source: Digital Day 7 day diary
Base: All activity records for adults aged 16+ (108782) - data aggregated to 15 min slots
Note: The base of media activities changes every 15 min slot, so is much lower during sleeping hours

Figure 1.35

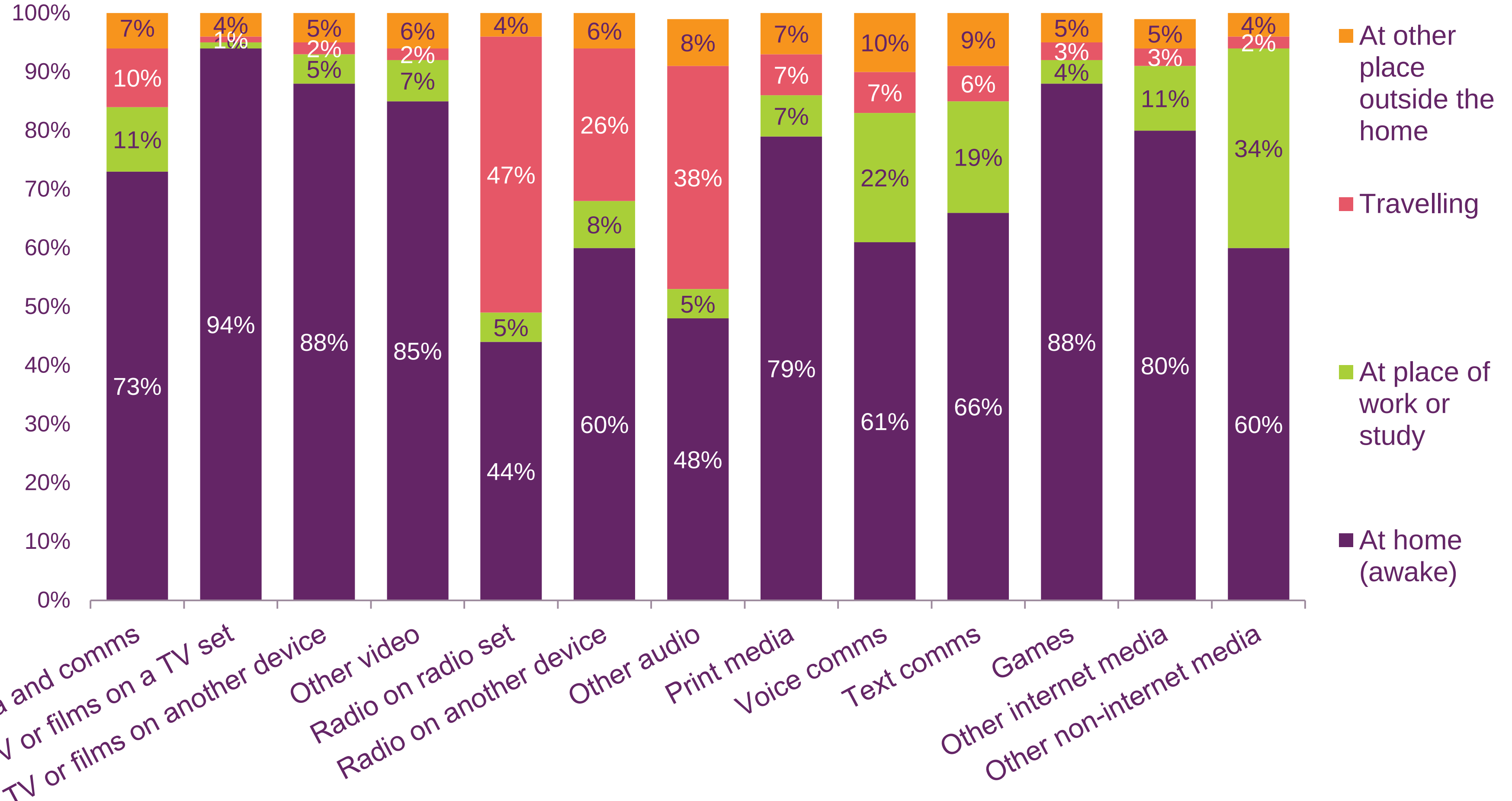
Proportion of media and communications activities across the day, 16-24 year olds



Source: Digital Day 7 day diary
Base: All activity records for adults aged 16-24 (6910) - data aggregated to 15 min slots
Note: The base of media activities changes every 15 min slot, so is much lower during sleeping hours

Figure 1.36

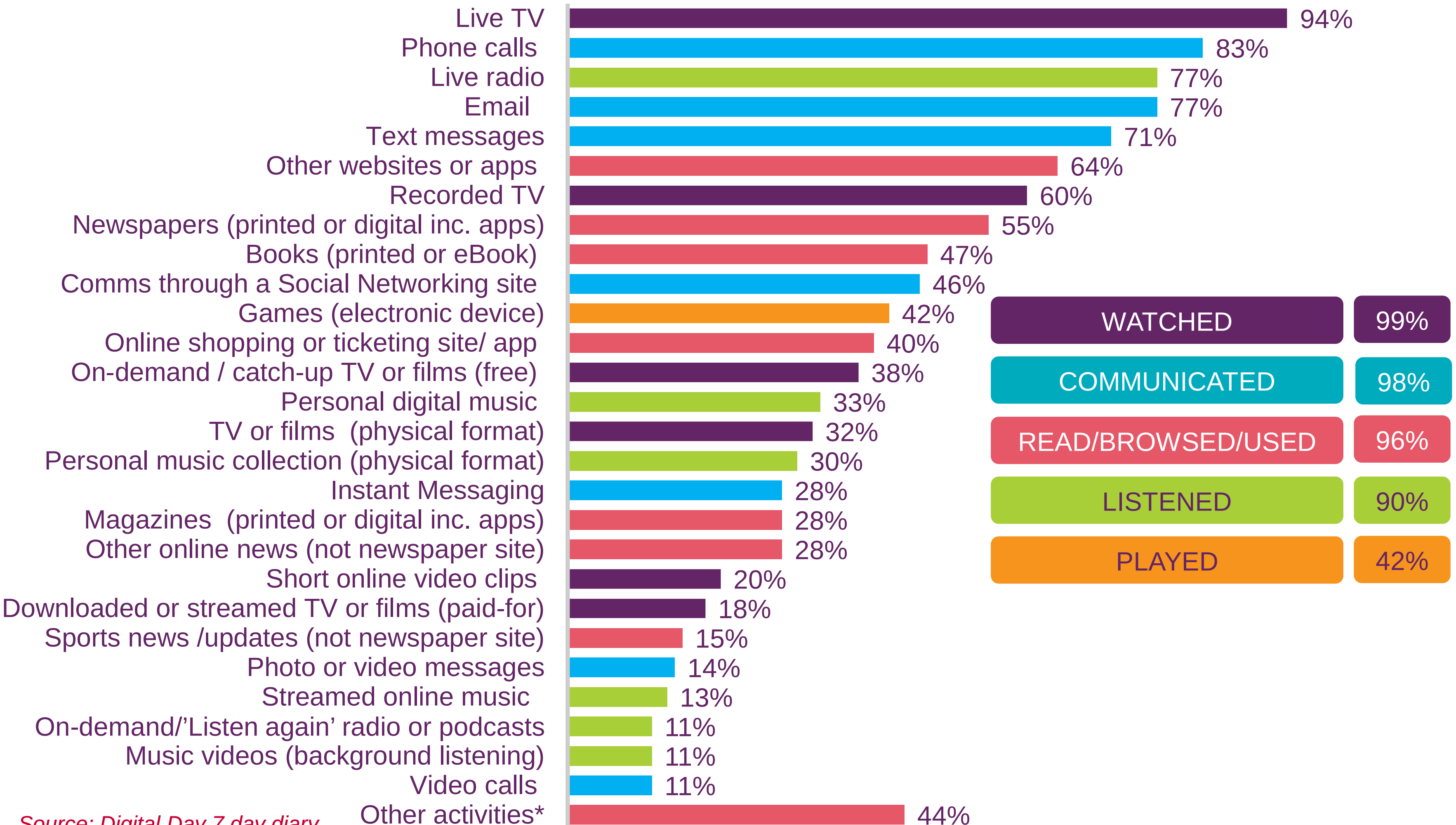
Proportion of media and communications activities, by location



Source: Digital Day 7 day diary
Base: All activity records for adults aged 16+ (108782)

Figure 1.37

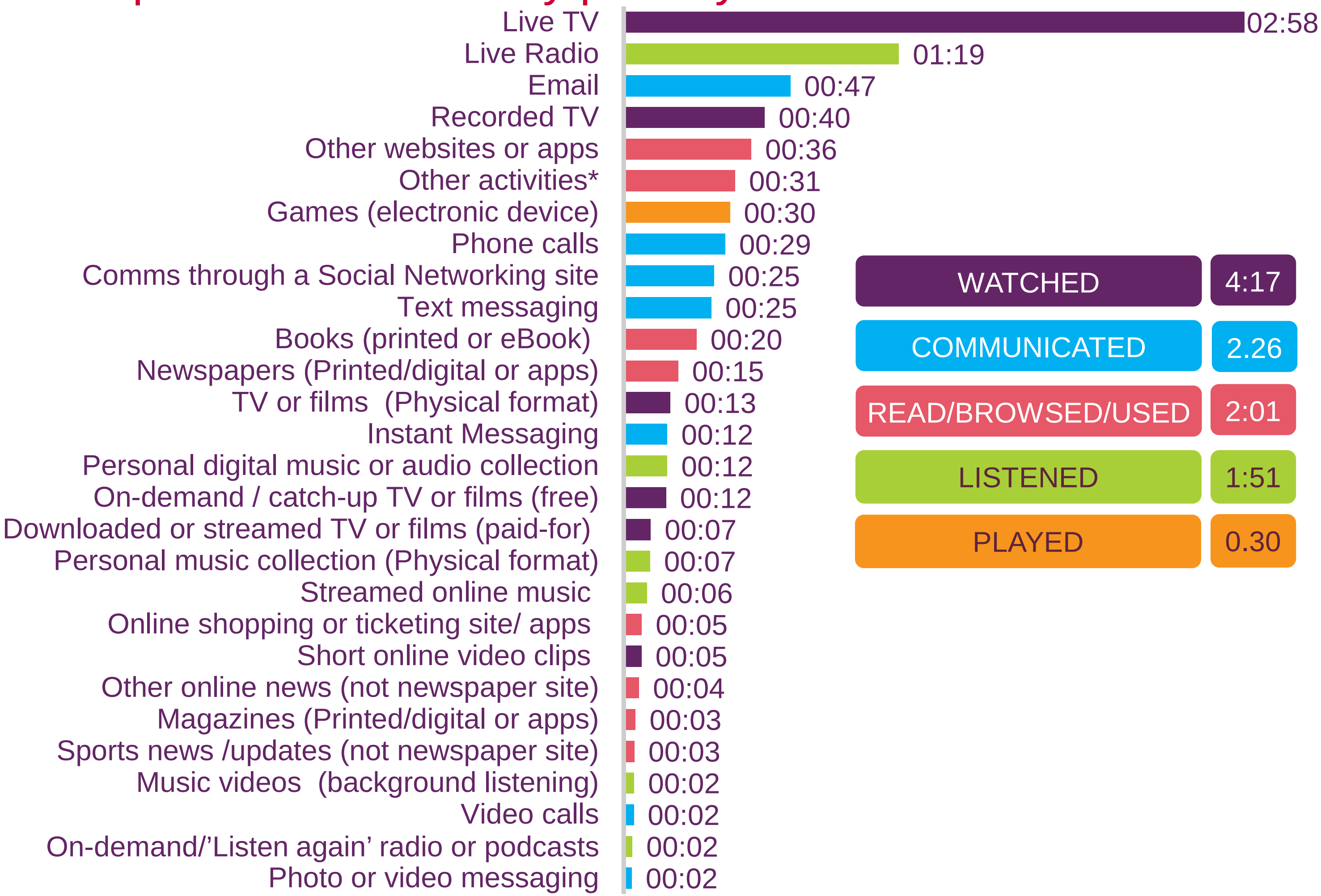
Weekly reach of each media and communication activity



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644)
**Other activities defined as 'other activities such as creating office documents/ spreadsheets, creating or editing videos/ music/ audio, etc. or other apps or software/ programs'.*

Figure 1.38

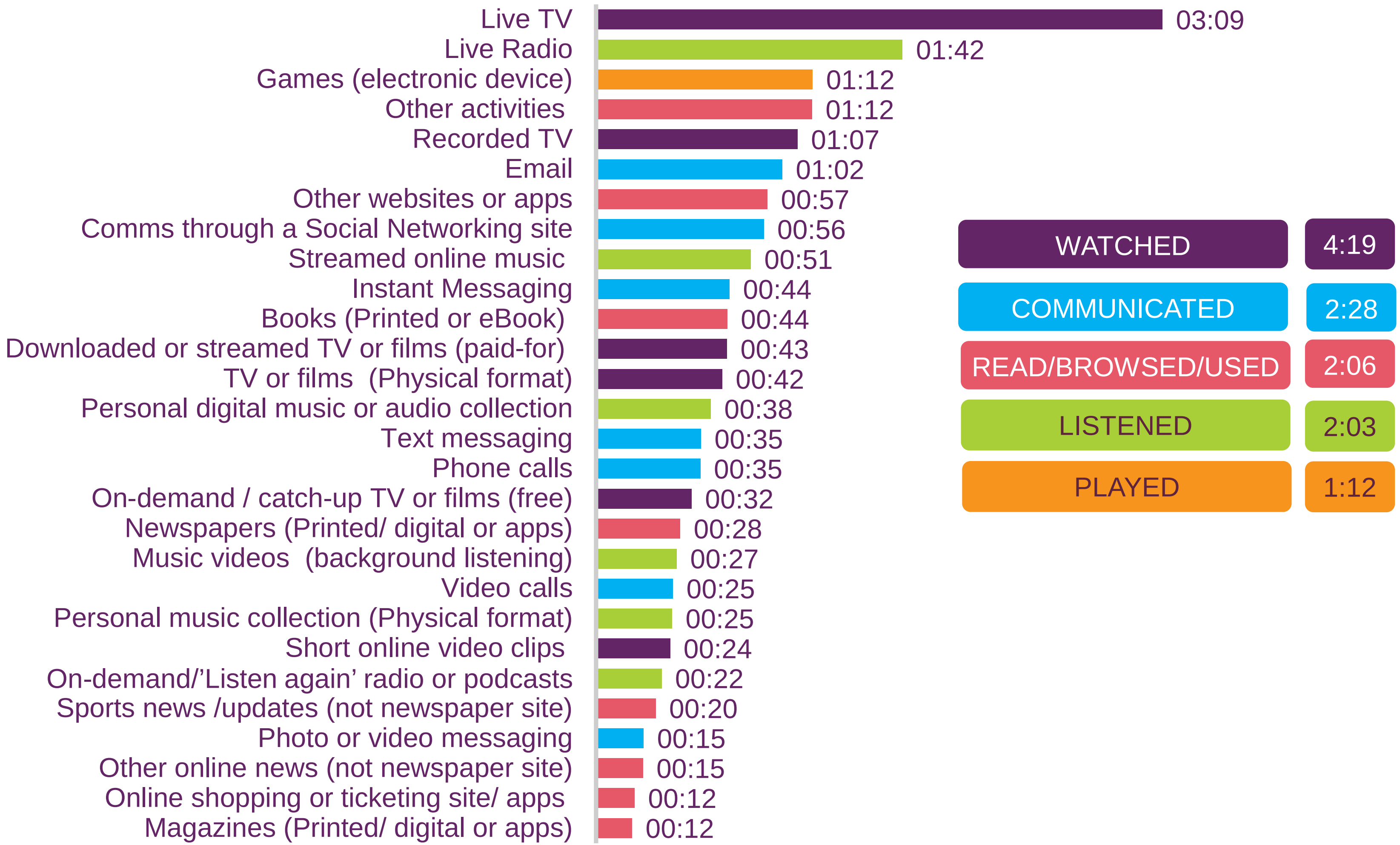
Average time spent on each activity per day



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644)
**Other activities defined as 'other activities such as creating office documents/ spreadsheets, creating or editing videos/ music/ audio, etc. or other apps or software/ programs'.*

Figure 1.39

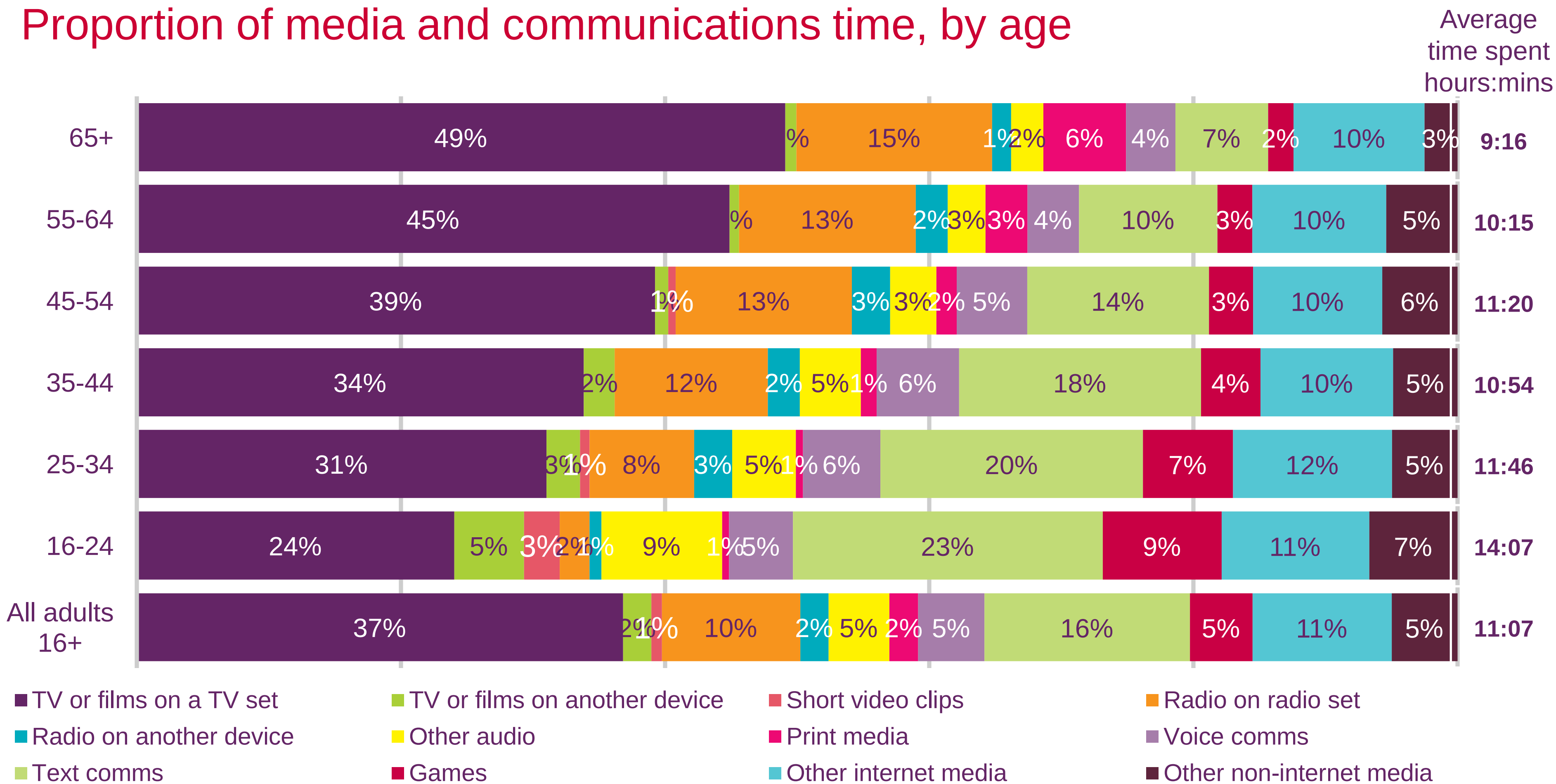
Average time spent on each activity per day, among users of activities



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644)
**Other activities defined as 'other activities such as creating office documents/ spreadsheets, creating or editing videos/ music/ audio, etc. or other apps or software/ programs'.*

Figure 1.40

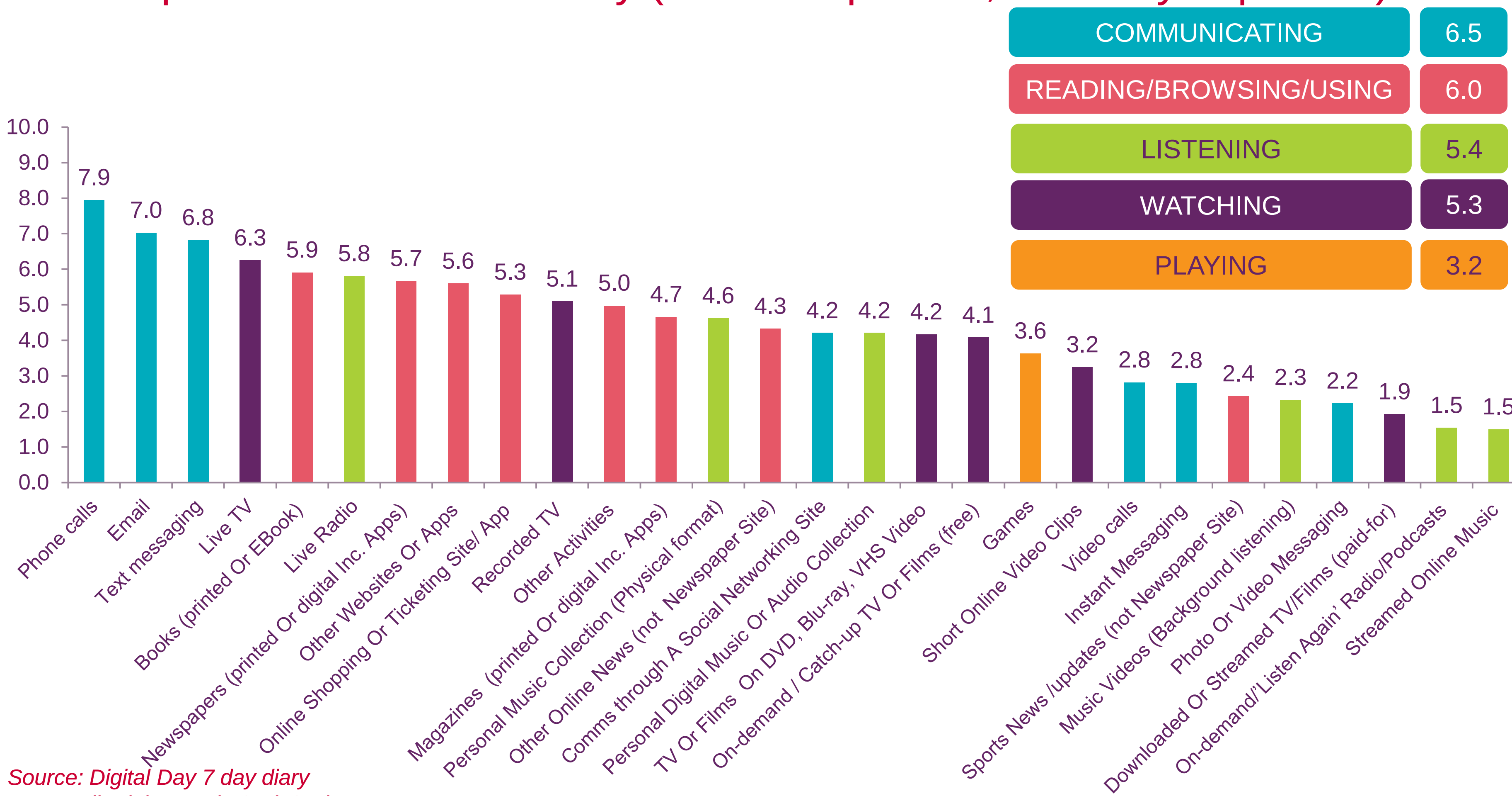
Proportion of media and communications time, by age



Source: Digital Day 7 day diary
Base: All adults 16+ (1644), All activity records (1644) (108782), 16-24 (6910), 25-34 (16035), 35-44 (25304), 45-54 (26662), 55-64 (19918), 65+ (13953)

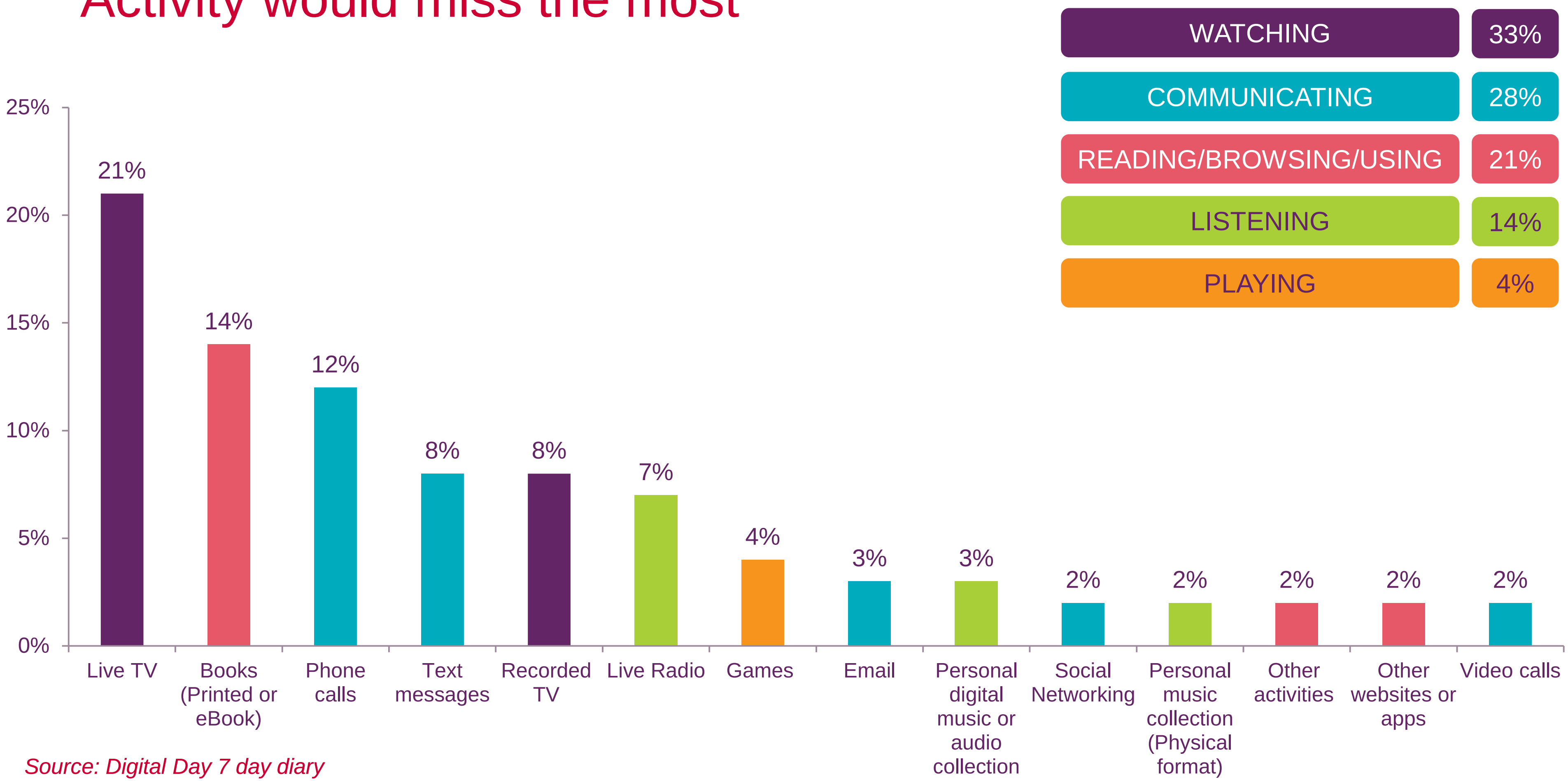
Figure 1.41

Mean importance of each activity (1= not important, 10= very important)



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644)
QA2. Using a scale from 1 to 10, where 1 means "Not at all important" and 10 means "Very important", how important are each of these activities to you?
Note: Question only asked among those who do each activity – mean scores rebased on everyone, with those who don't do the activity allocated a zero
'Other activities' defined as 'other activities such as creating office documents/ spreadsheets, creating or editing videos/ music/ audio, etc. or other apps or software/ programs'.

Figure 1.42
Activity would miss the most



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644)
QA3. If you were no longer able to do these activities, which ONE of them would you miss doing the most?
Note: only activities with 2% or above shown
'Other activities' defined as 'other activities such as creating office documents/ spreadsheets, creating or editing videos/ music/ audio, etc. or other apps or software/ programs'.

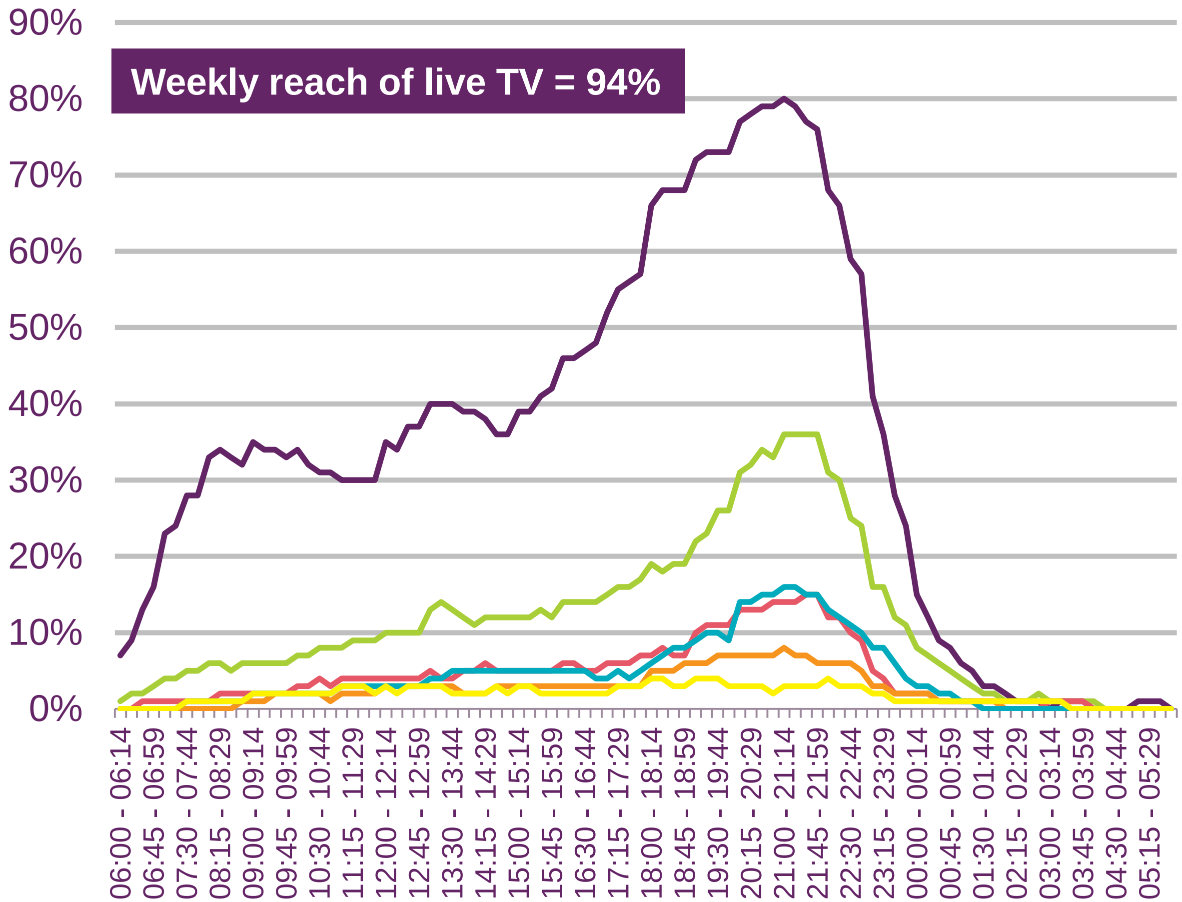
Figure 1.43
Top ten most-missed activities, adults 16-24 vs. 65+

Rank	Activity	Adults 16-24
1	Text messages	22%
2	Games	11%
3	Recorded TV	10%
4	Books (Printed or eBook)	7%
5	Phone calls	7%
6	Social Networking	6%
7	Personal digital music / audio	5%
8	Other activities	4%
9	Video calls	4%
10	Streamed online music	4%

Rank	Activity	Adults 65+
1	Live TV	31%
2	Books (Printed or eBook)	20%
3	Phone calls	12%
4	Live Radio	10%
5	Email	6%
6	Newspapers (Printed or digital)	3%
7	Text messages	2%
8	Recorded TV	2%
9	Social Networking	2%
10	Personal music (Physical)	2%

Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644), 16-24 (101)
QA3. If you were no longer able to do these activities, which ONE of them would you miss doing the most?
Note: only activities with 2% or above shown
'Other activities' defined as 'other activities such as creating office documents/ spreadsheets, creating or editing videos/ music/ audio, etc. or other apps or software/ programs'.

Figure 1.44
Weekly reach of watching activities, by time



Live / scheduled TV (at the time it is broadcast)

Recorded TV (programmes or films stored on your set top box using e.g. Sky+ or Freeview+)

On-demand / catch-up TV or film(s) through a free service or part of your TV package e.g. BBC iPlayer, 4oD, Sky on demand

Downloaded or streamed digital TV or film(s) through a paid-for service e.g. Lovefilm instant, Netflix, iTunes, Blinkbox

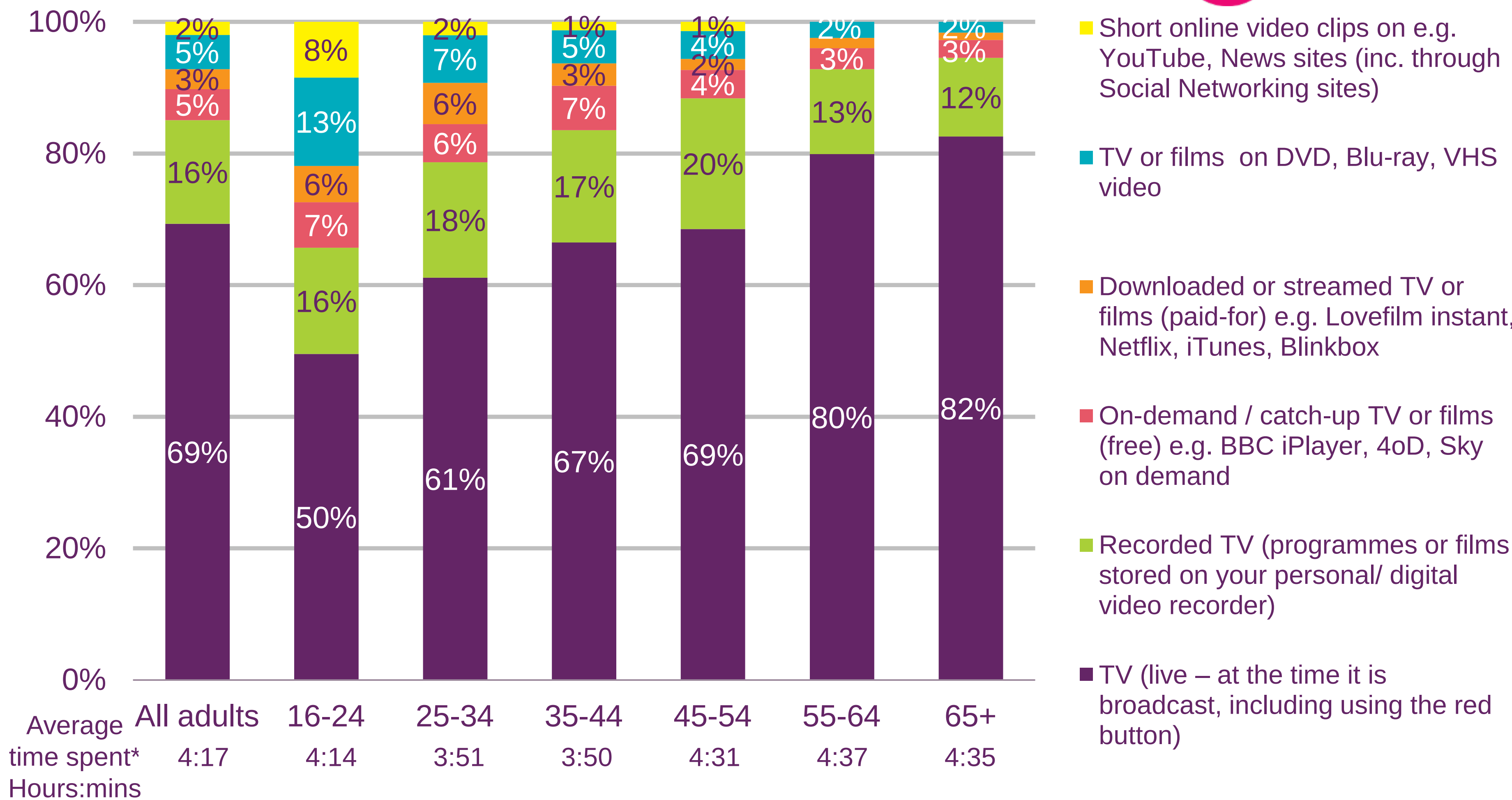
TV or film(s) on physical format e.g. DVD, Blu-ray, VHS

Short online video clip(s) e.g. YouTube, News sites (including those through Social Networking sites

Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

Figure 1.45

Proportion of watching activities, by age group



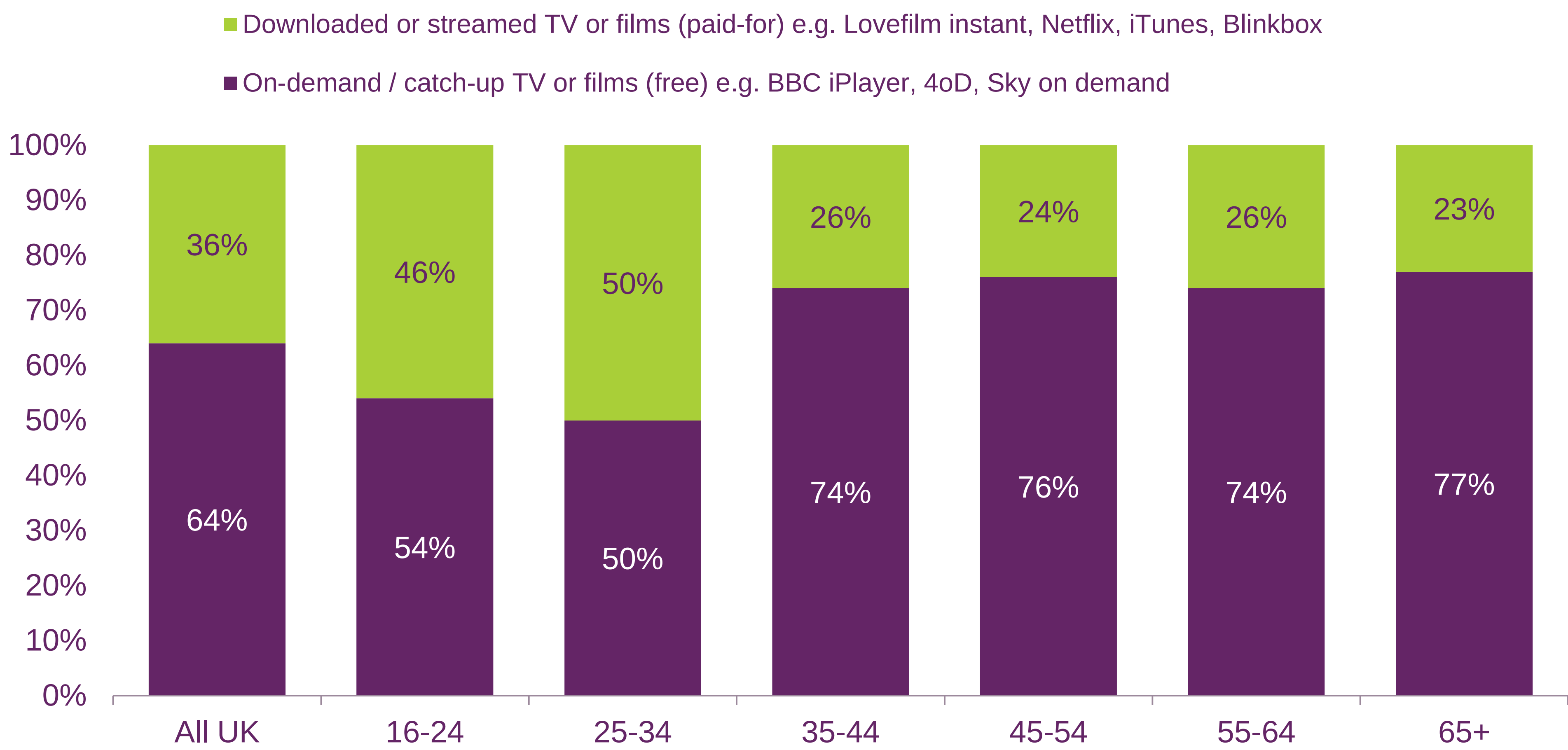
Source: Digital Day 7 day diary

Base: All watching activity records for adults 16+ (25272), 16-24 (1583), 25-34 (3390), 35-44 (5362), 45-54 (6012), 55-64 (4905), 65+ (4020)

**Average time spent is the total average daily time spent watching media, including simultaneous activity*

Figure 1.46

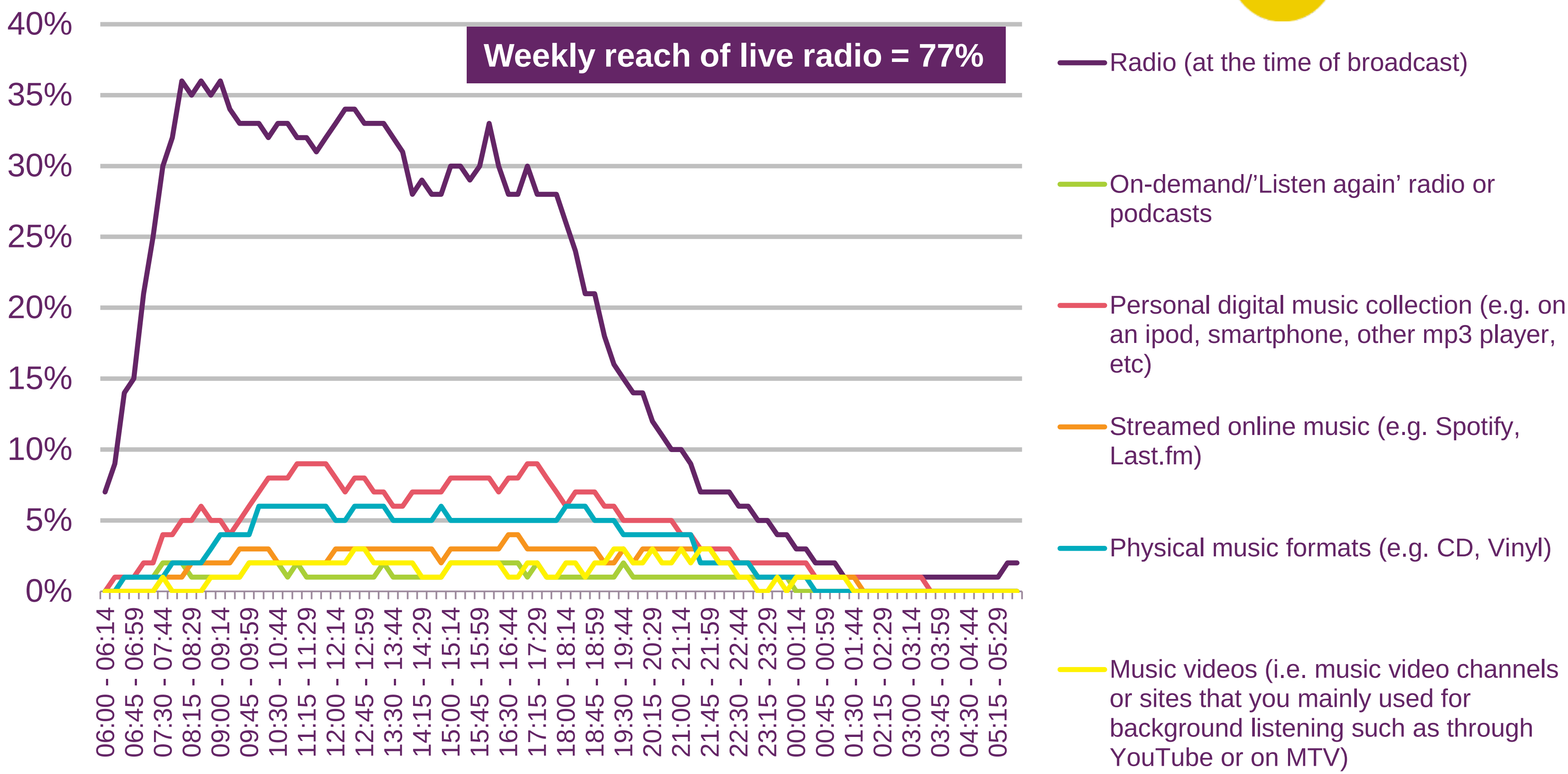
Proportion of paid versus free on-demand AV content, by age group



Source: Digital Day 7 day diary
Base: All on-Demand activity records for adults 16+ (1976), 16-24 (221), 25-34 (405), 35-44 (501), 45-54 (450), 55-64 (240), 65+ (159)

Figure 1.47

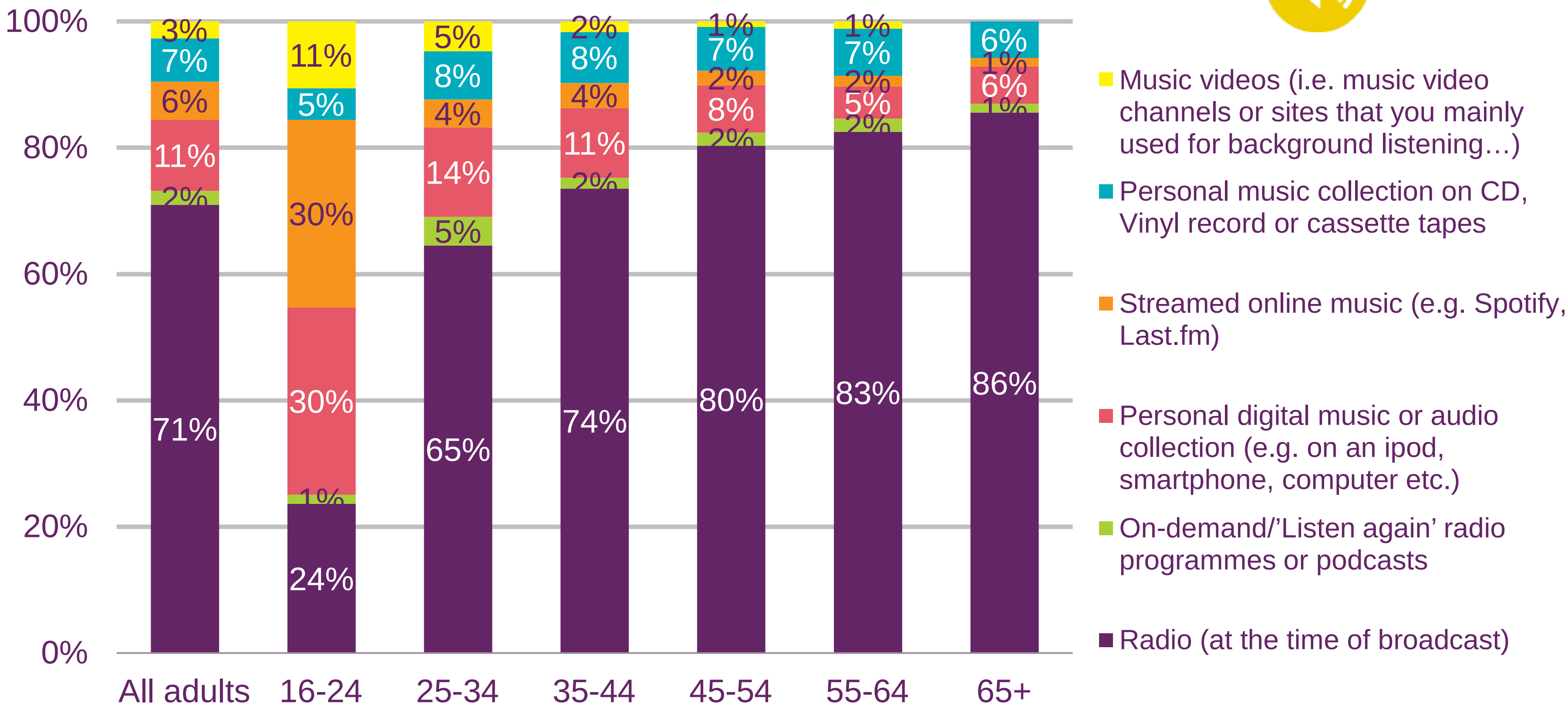
Weekly reach of listening activities, by time



Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

Figure 1.48

Proportion of listening activities, by age group



Average time spent* Hours:mins	All adults	16-24	25-34	35-44	45-54	55-64	65+
	1:51	1:39	1:44	1:56	2:11	1:52	1:42

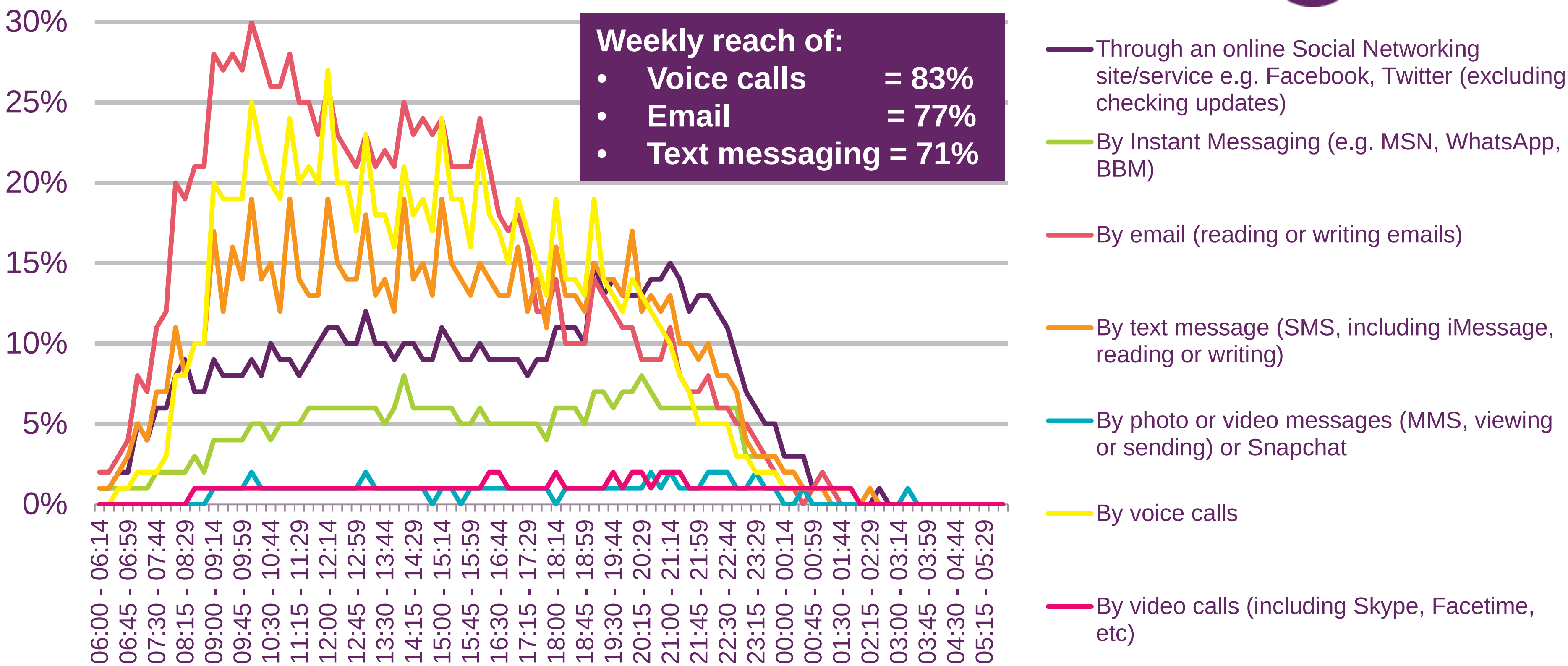
Source: Digital Day 7 day diary

Base: All listening activity records for adults 16+ (17290), 16-24 (999), 25-34 (2342), 35-44 (4113), 45-54 (4334), 55-64 (3284), 65+ (2218)

**Average time spent is the total average daily time spent listening to media, including simultaneous activity*

Figure 1.49

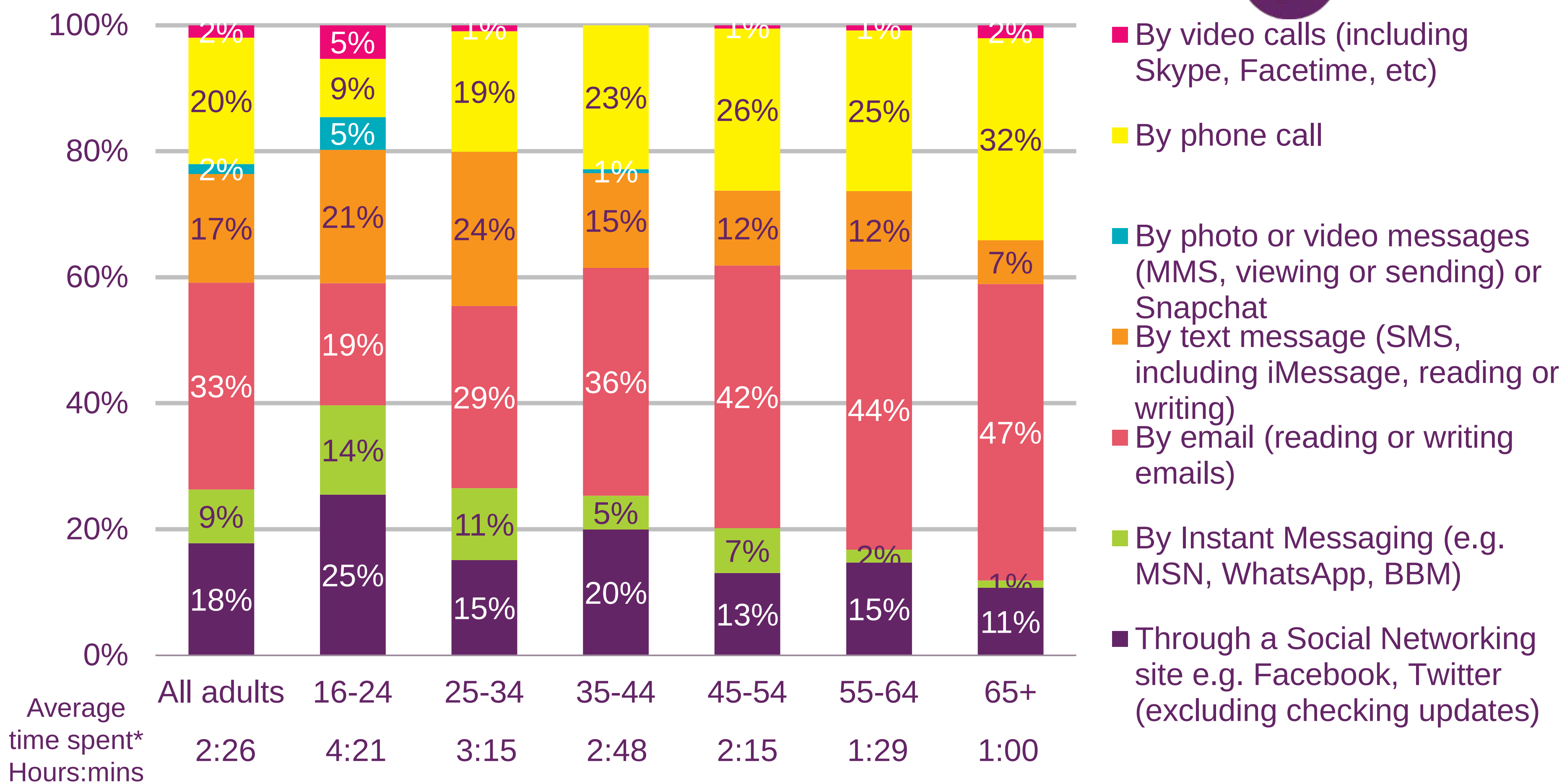
Weekly reach of communication activities, by time



Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

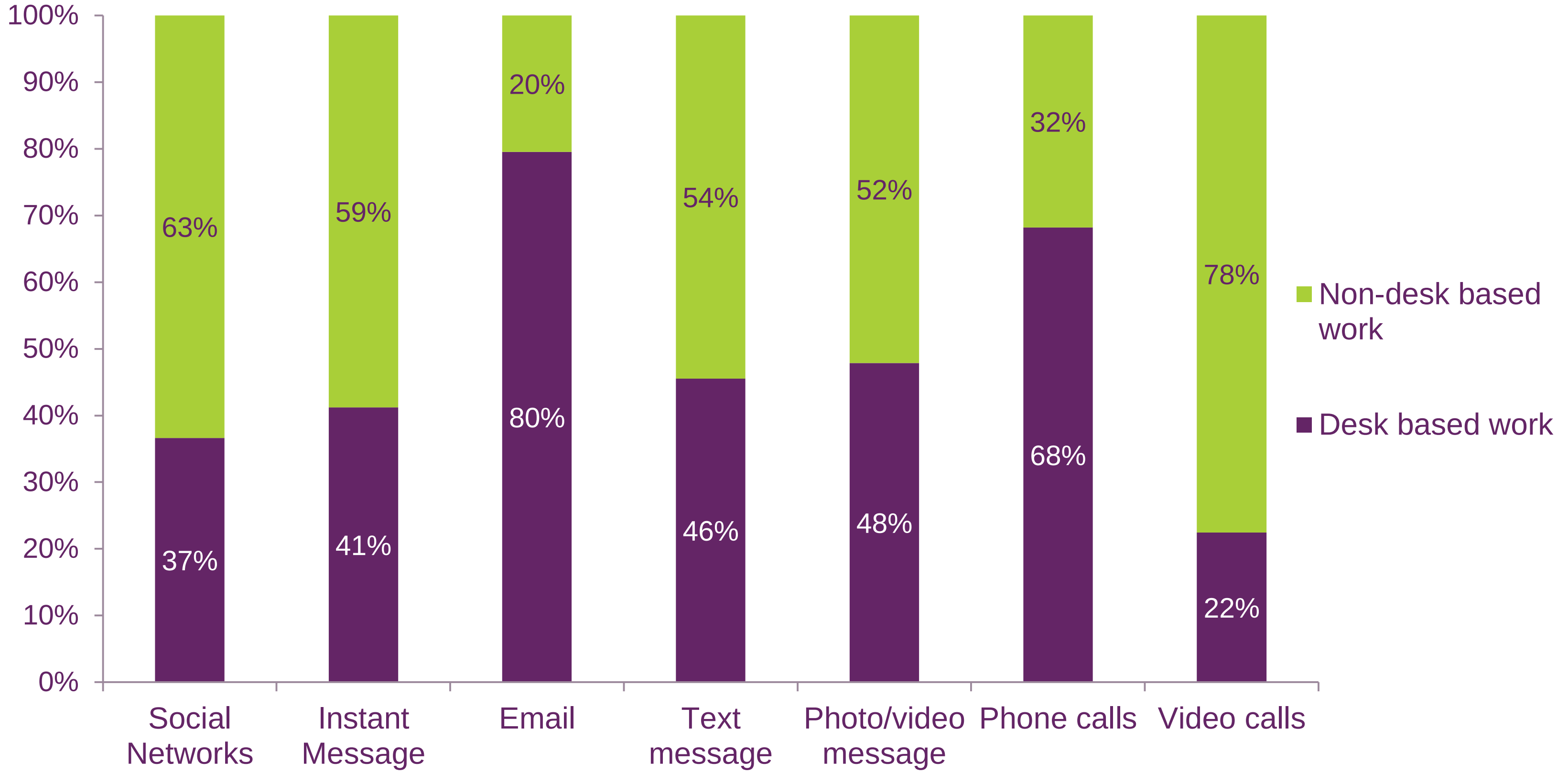
Figure 1.50

Proportion of communication activities, by age group



Source: Digital Day 7 day diary
Base: All communication activity records for adults 16+ (37827), 16-24 (2626), 25-34 (5958), 35-44 (9330), 45-54 (9450), 55-64 (6459), 65+ (4004)
**Average time spent is the total average daily time spent communicating through any device, including simultaneous activity*

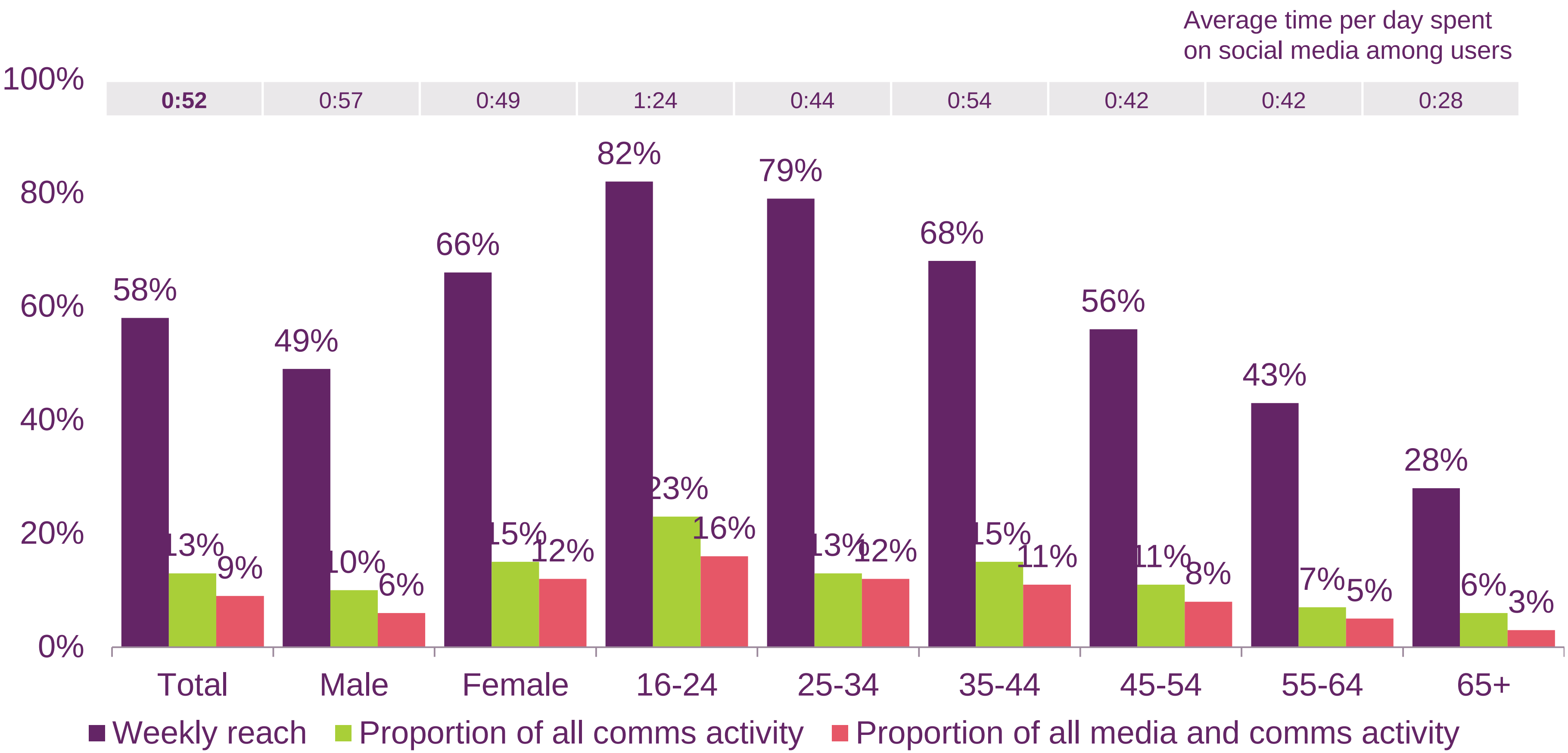
Figure 1.51
Use of communication activities, by broad type of work



Source: Digital Day 7 day diary
Base: All working adults 16+ (691)

Figure 1.52

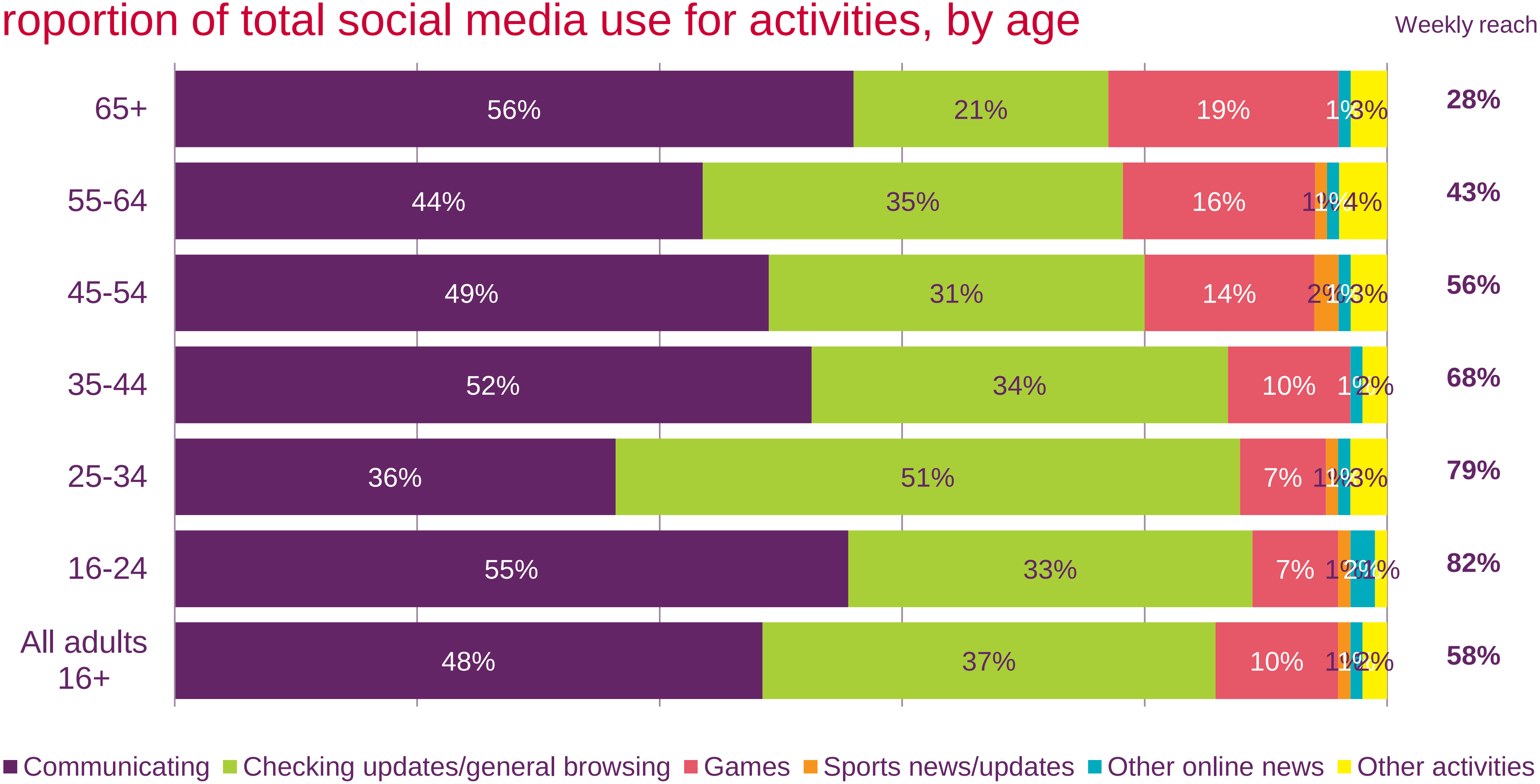
Social media: use by age group



Source: Digital Day 7 day diary
Base: All adults 16+, (1644), comms records (37827), media and comms records (108782)

Figure 1.53

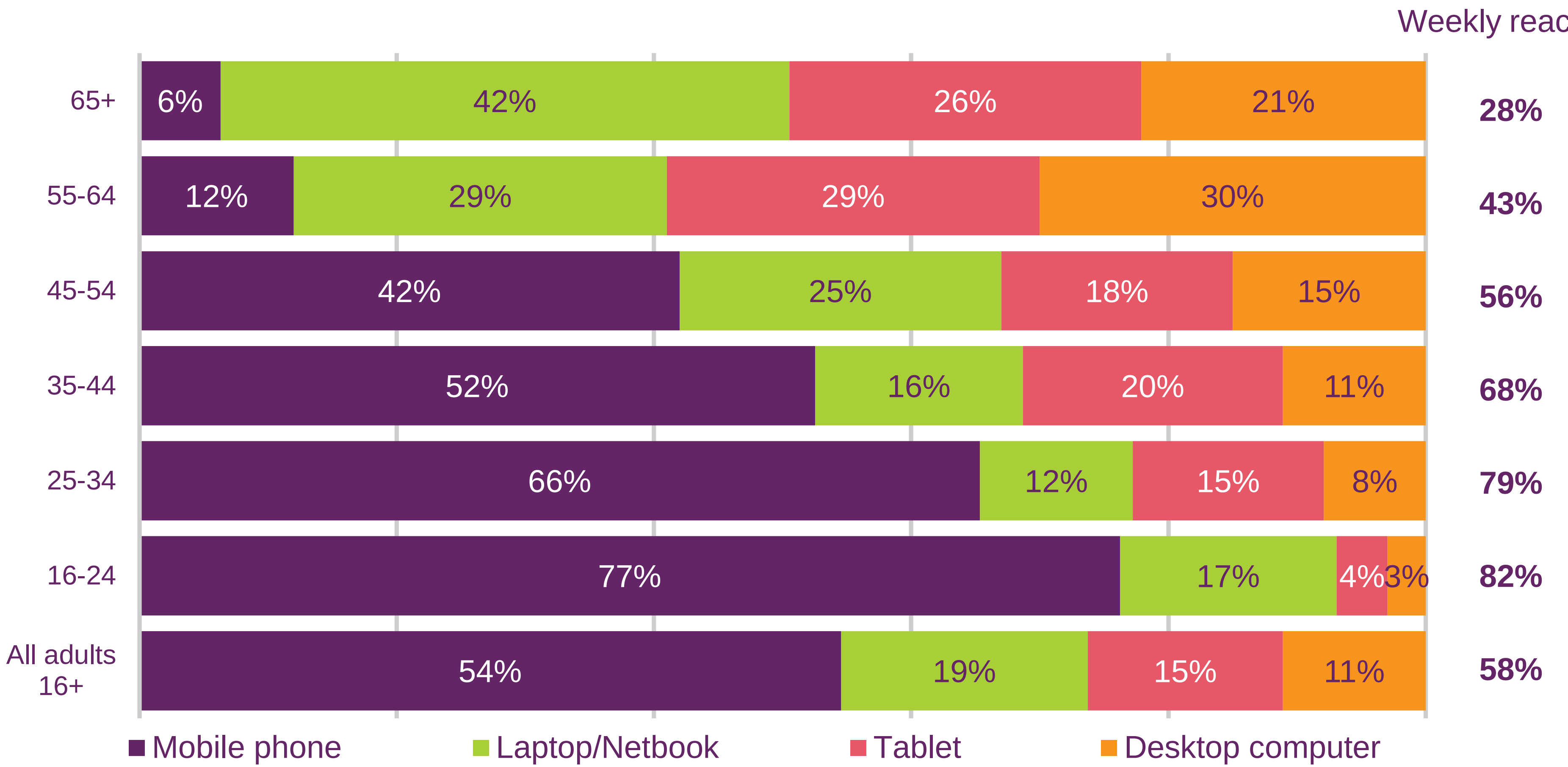
Proportion of total social media use for activities, by age



Source: Digital Day 7 day diary
Base: Base: All social media records (9850), 16-24s (1011), 25-34 (2194), 35-44 (2737), 45-54 (2314), 55-64 (1149), 65+ (445); media and comms records (108782)

Figure 1.54

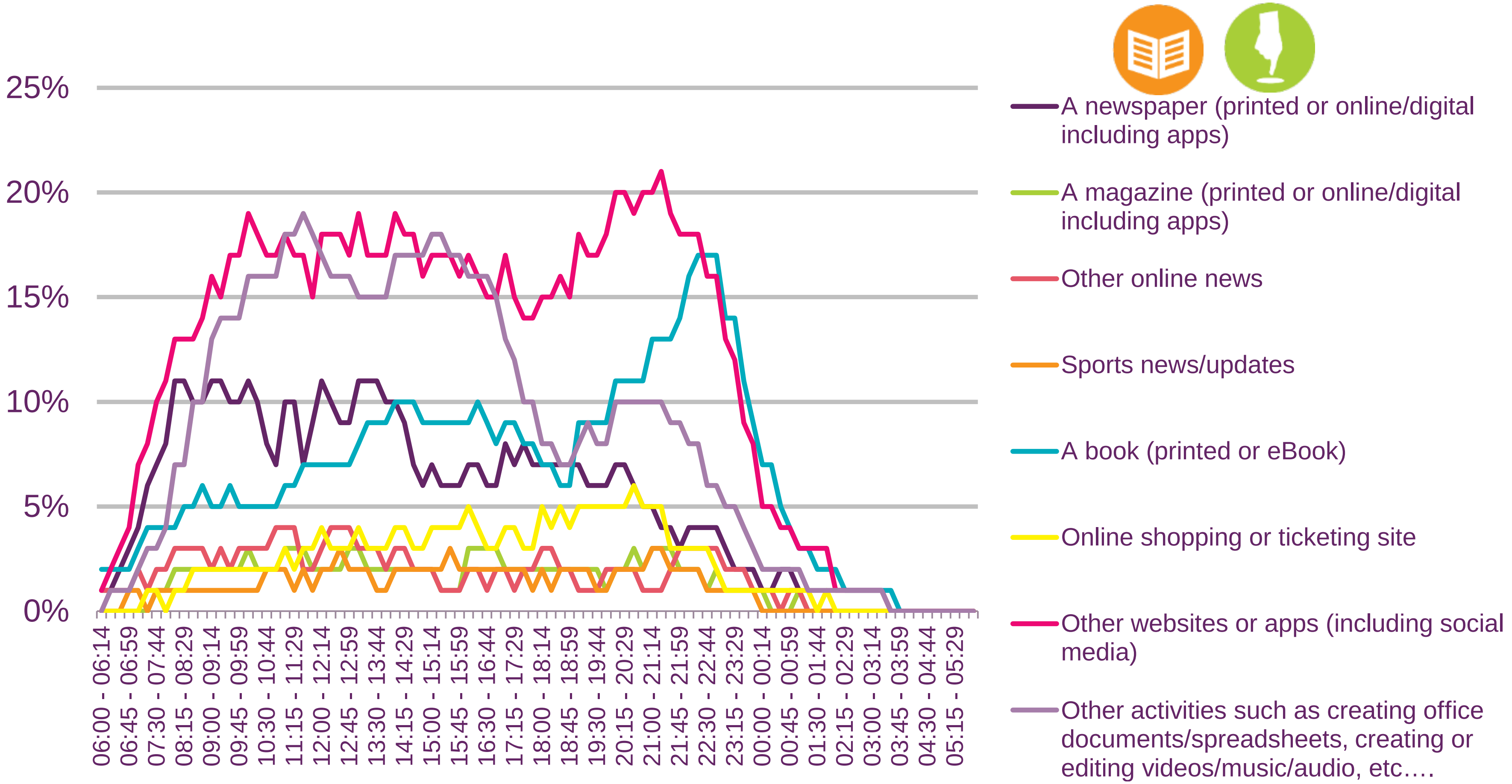
Proportion of total social media use on devices, by age



Source: Digital Day 7 day diary
Base: All social media records (9850), 16-24s (1011), 25-34 (2194), 35-44 (2737), 45-54 (2314), 55-64 (1149), 65+ (445)

Figure 1.55

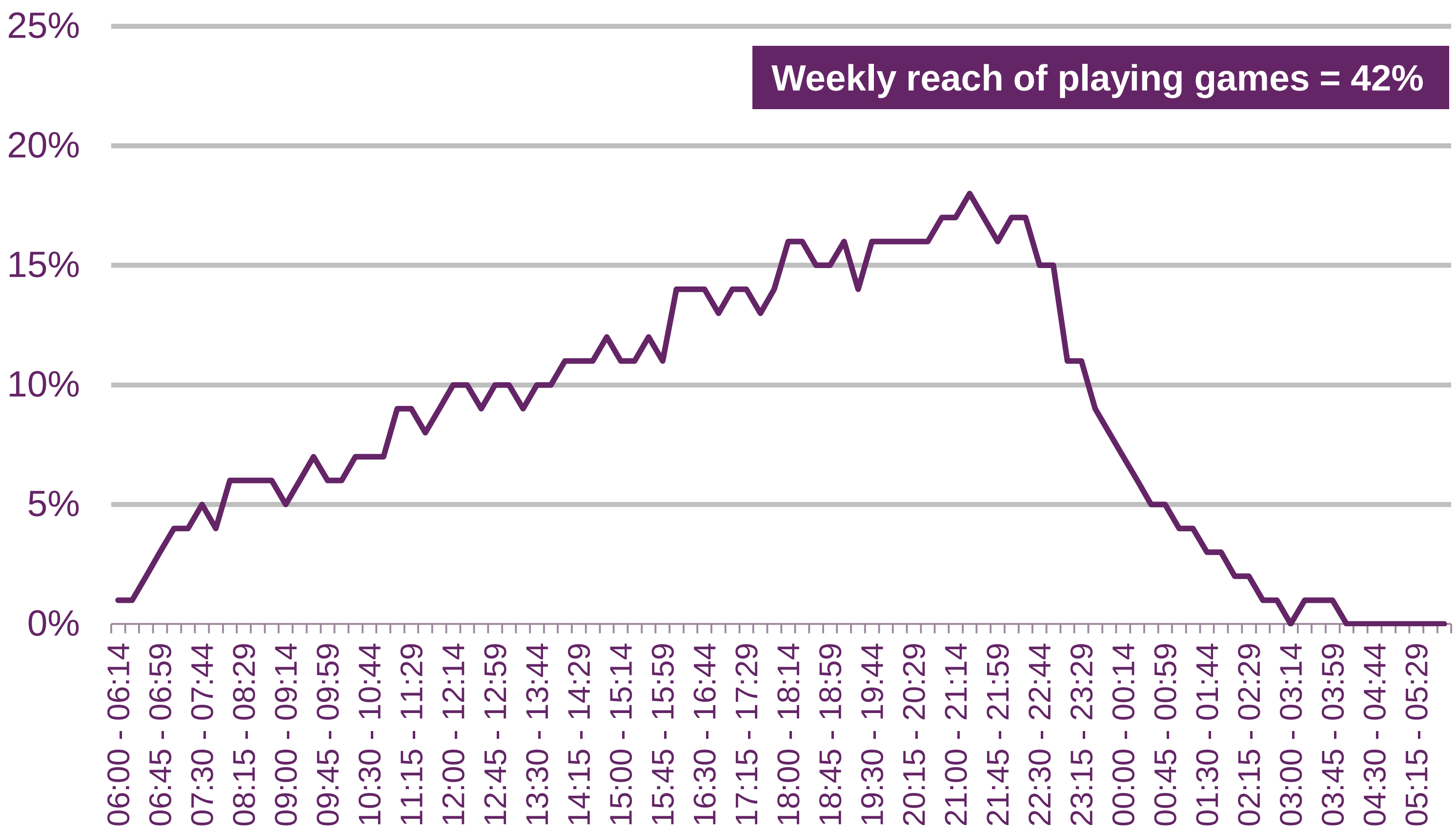
Weekly reach of reading/browsing/using activities, by time



Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

Figure 1.56

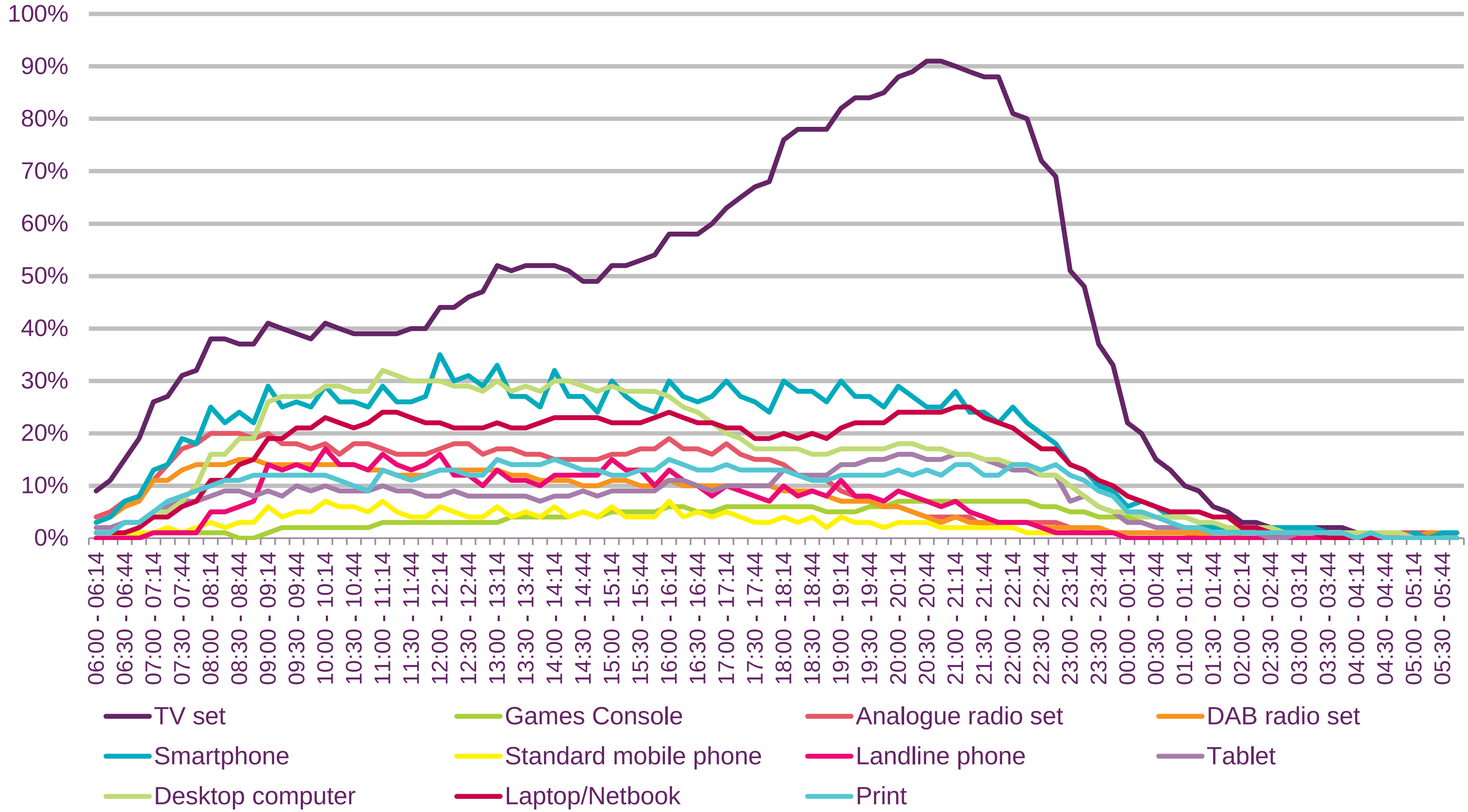
Weekly reach of playing games on an electronic device, by time



Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

Figure 1.57

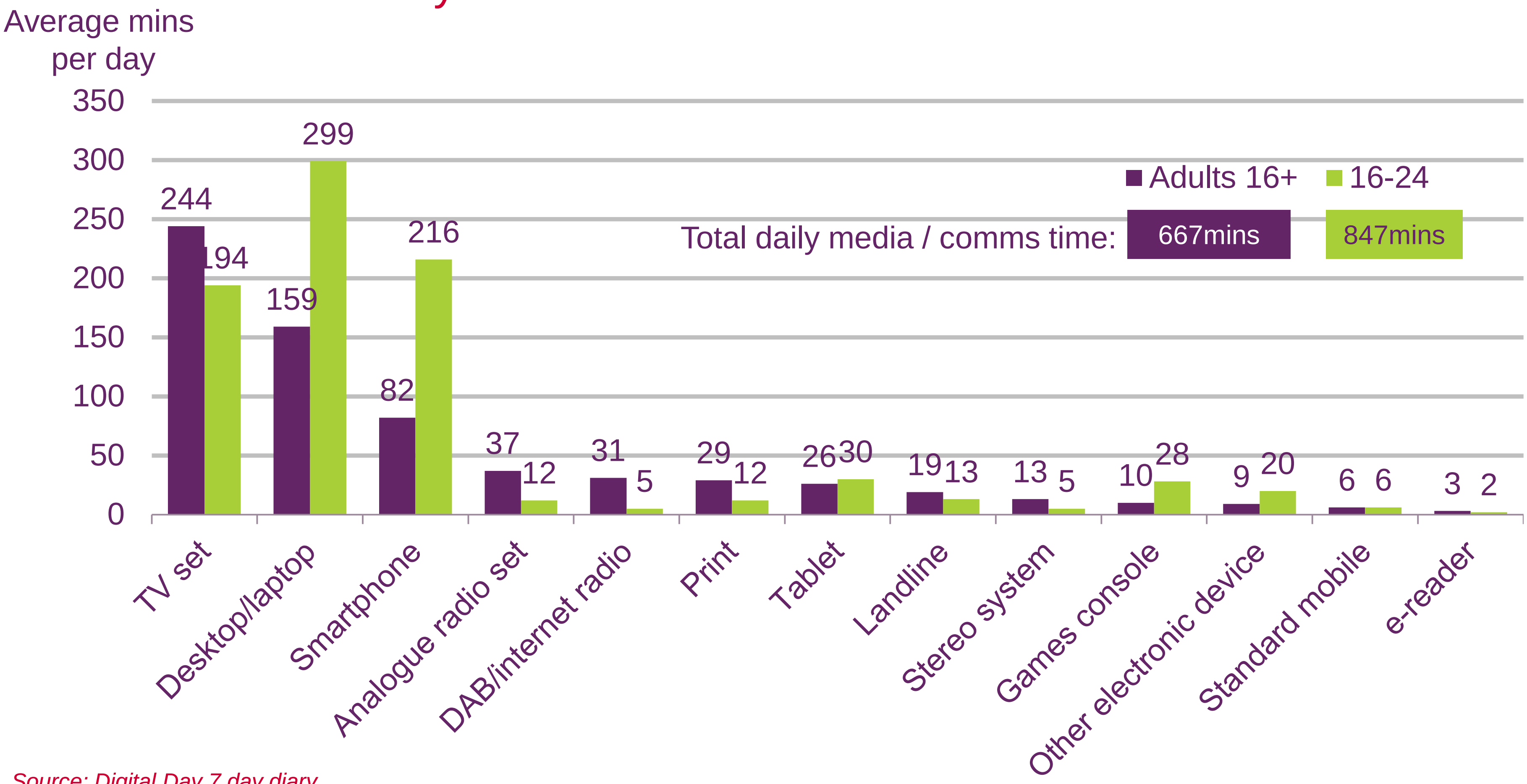
Weekly reach of devices across the day



Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

Figure 1.58

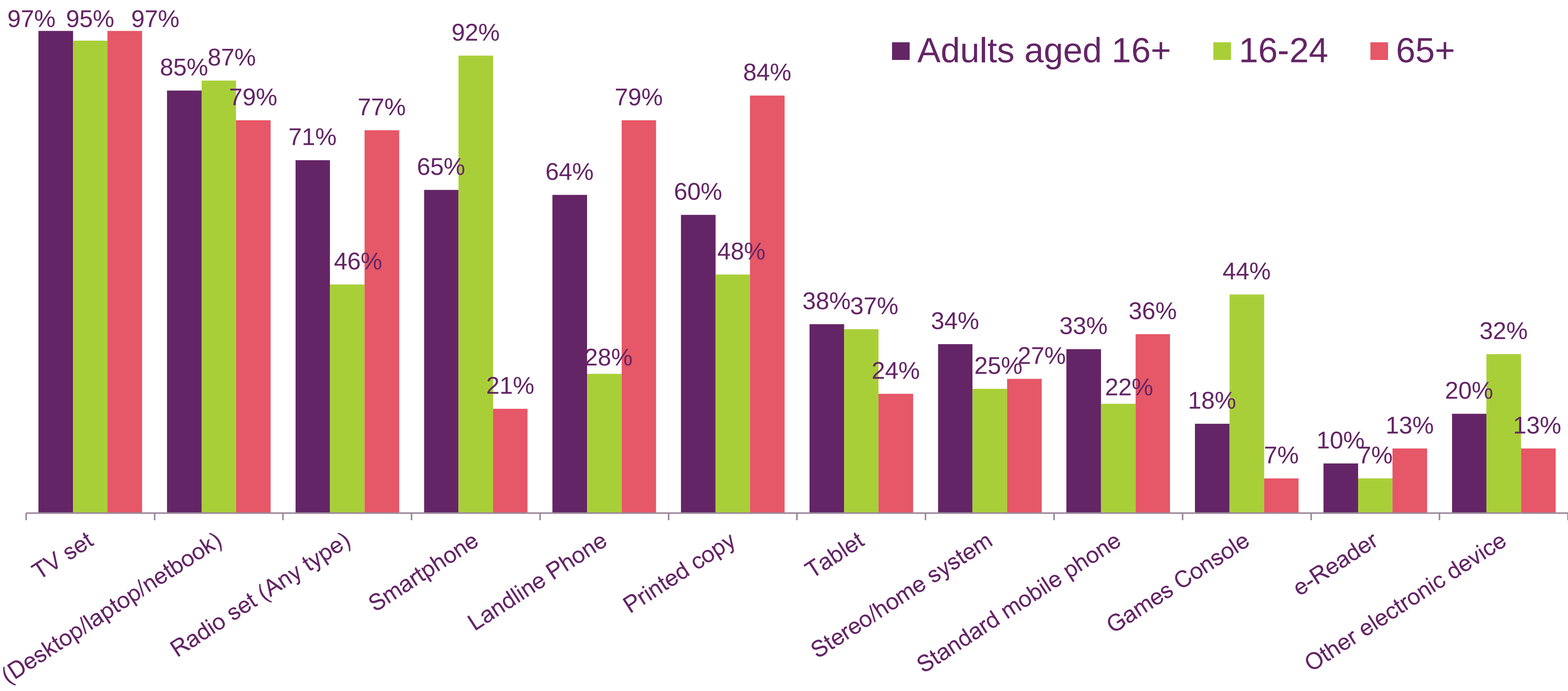
Average daily total device time for media and communications, including simultaneous activity



Source: Digital Day 7 day diary
Base: All activity records (108782) for adults 16+ (1644); All activity records (6910) for adults 16-24 (101)
Note: For this analysis the calculations are made by generating mean times spent amongst all adults for each of the individual devices (including zeros). These mean times are then summed together to create total media and comms time, and time per device type (hence includes simultaneous activities).

Figure 1.59

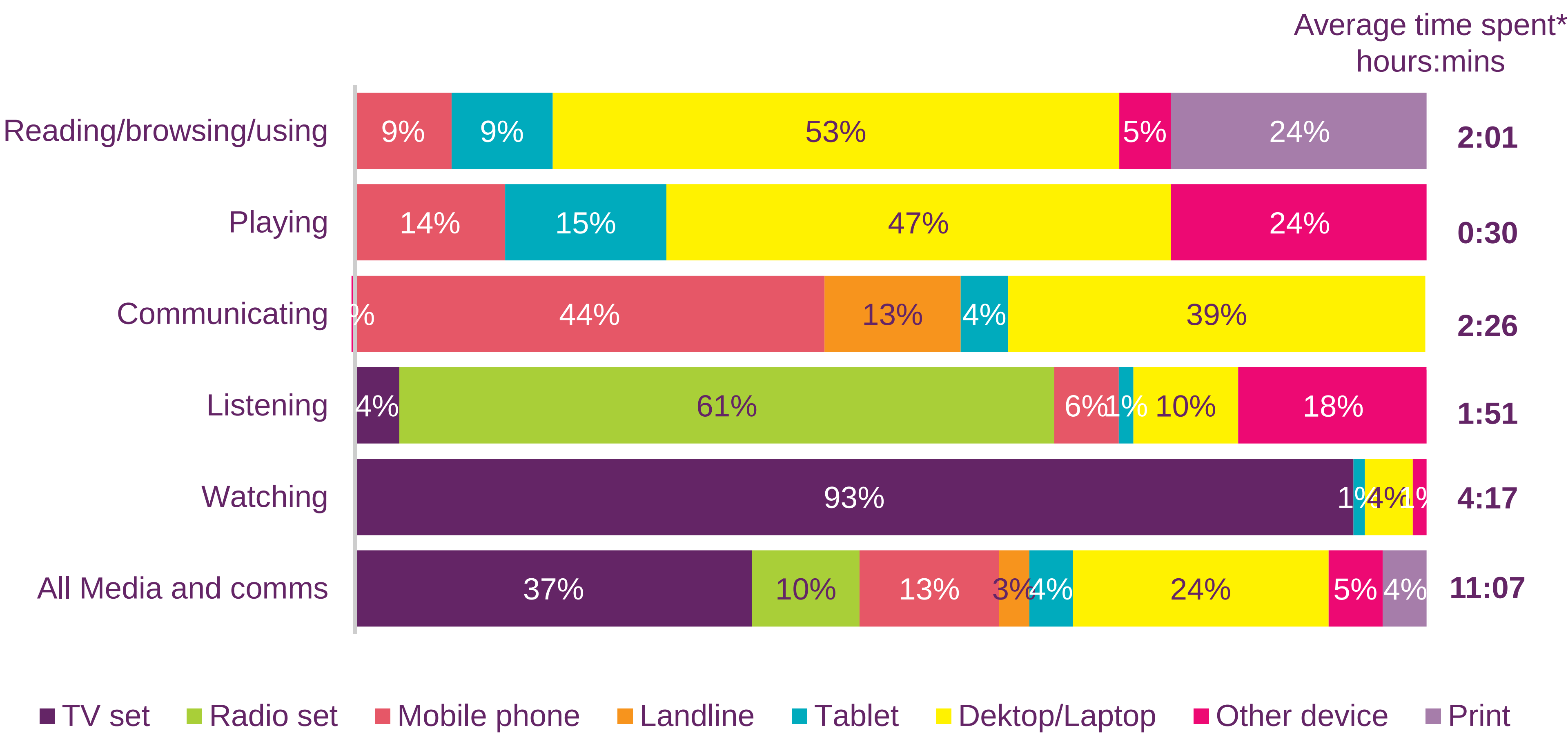
Weekly reach of devices, by age 16-24 and 65+



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644), 16-24 (101), 65+ (259)

Figure 1.60

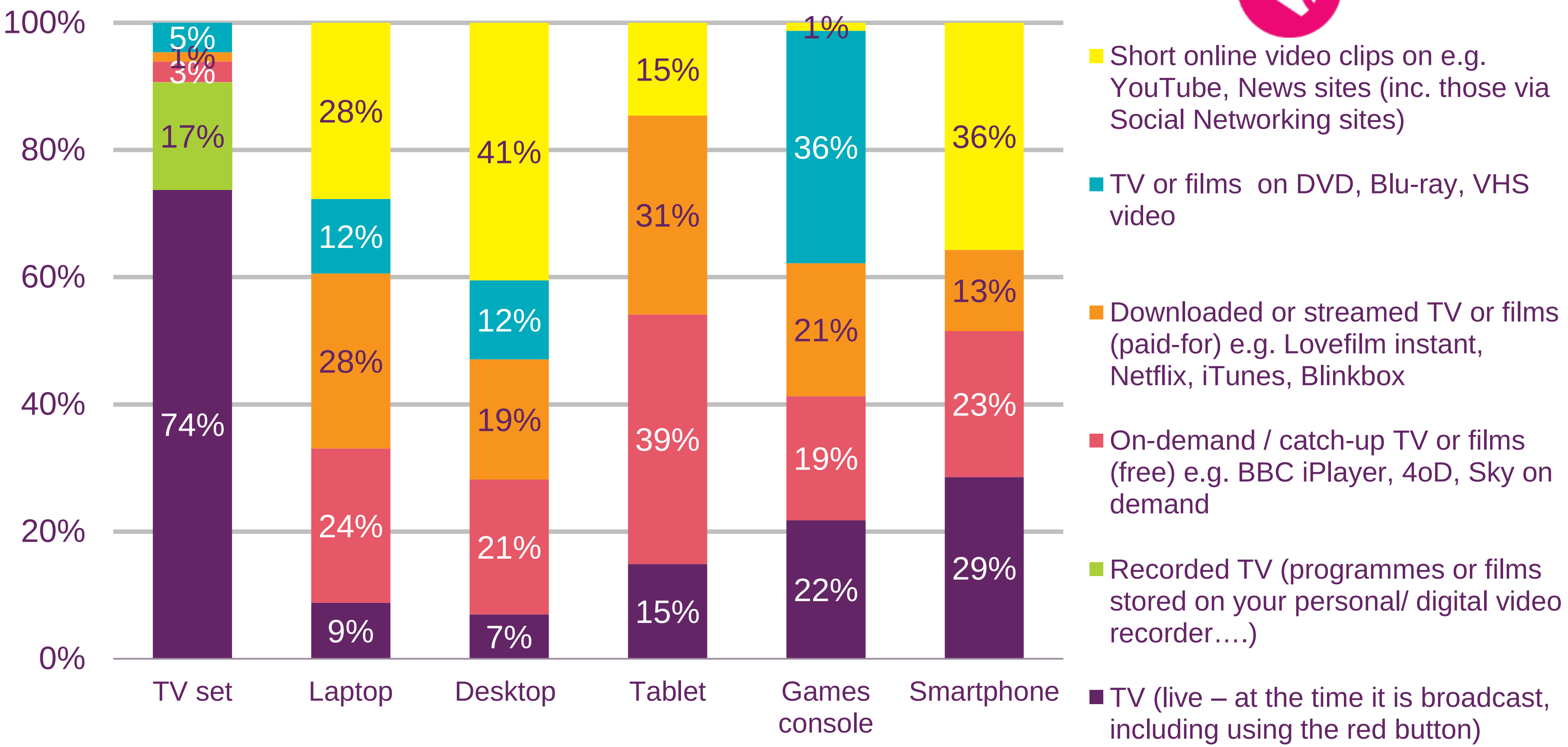
Proportion of time spent on activities, by device



Source: Digital Day 7 day diary
Base: All activity records for adults aged 16+ (108782), Watched (25272), Listened to (17290), Communicated (37827) , Played (4338), Read/browsed/used (24055)
**Average time spent is the total average daily time spent doing activity types, including simultaneous activity*
***Other device includes e-Reader, Games Console, Stereo system, and any other device*

Figure 1.61

Proportion of watching activities, by device

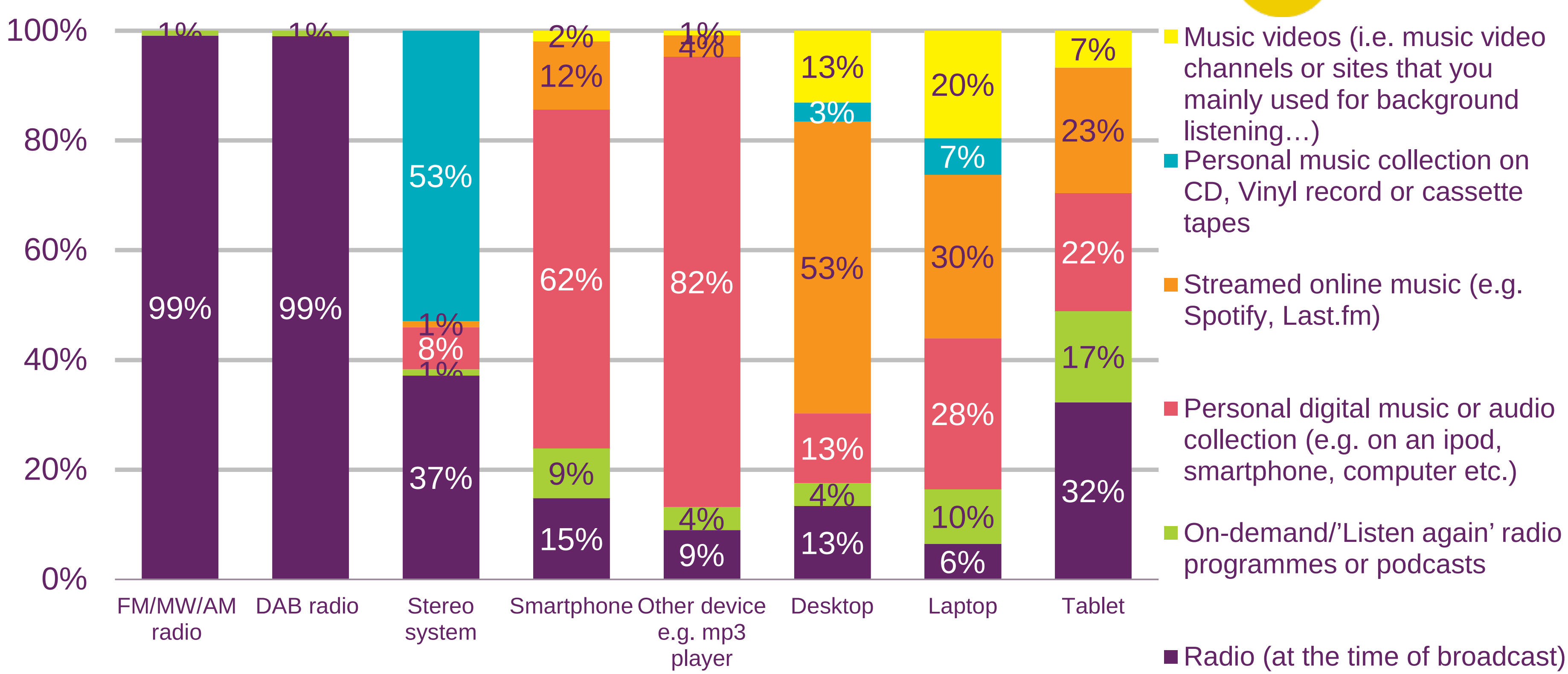


	TV set	Laptop	Desktop	Tablet	Games console	Smartphone
Weekly reach	97%	14%	13%	11%	7%	7%
Average time spent*	4:02	0:37	0:50	0:26	0:38	0:15

Source: Digital Day 7 day diary
Base: All watching activity records for adults 16+ (25272)
**Average time spent is the average time spent on each device per day for watching, amongst those who did it all over the week*
Weekly reach is for watching activities. Only devices with weekly reach for watching above 3% shown

Figure 1.62

Proportion of listening activities, by device

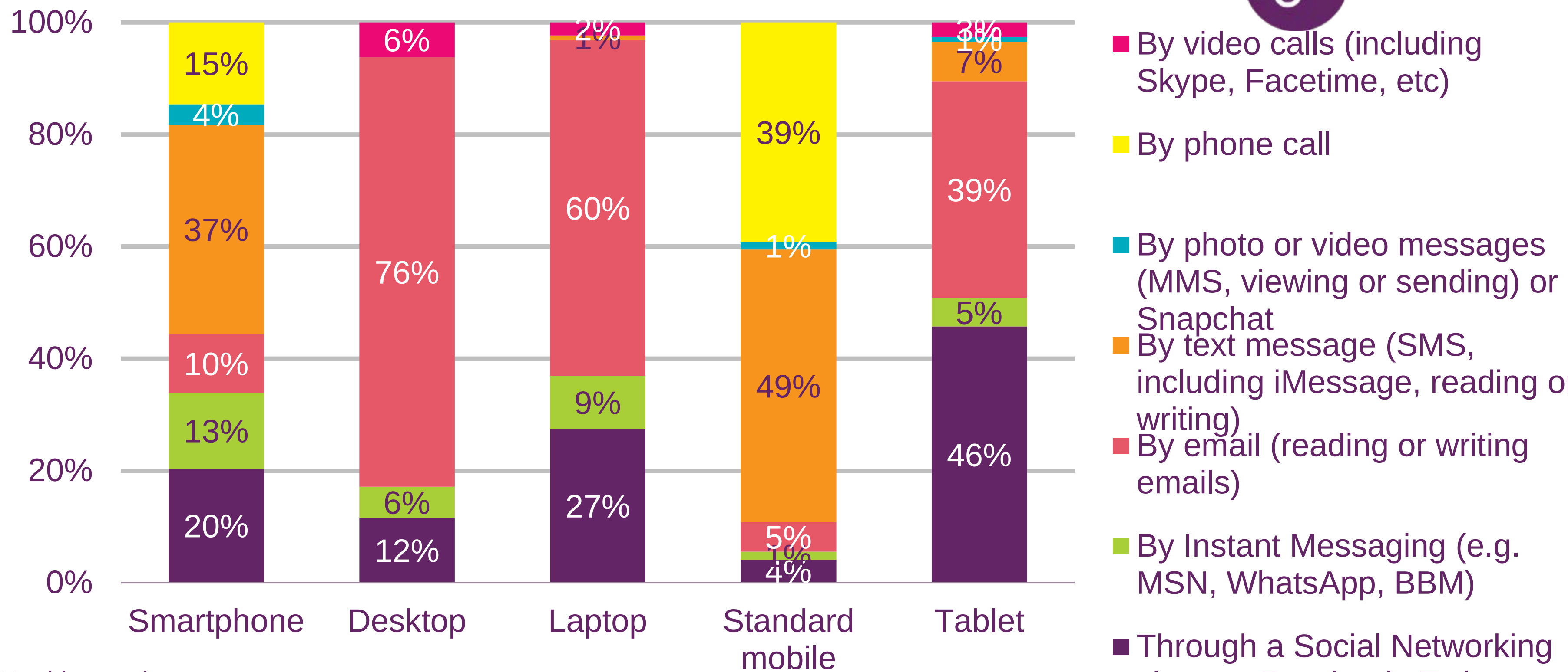


	FM/MW/AM radio	DAB radio	Stereo system	Smartphone	Other device e.g. mp3 player	Desktop	Laptop	Tablet
Weekly reach	52%	37%	34%	18%	16%	11%	10%	7%
Average time spent*	1:08	1:17	0:37	0:33	0:38	0:59	0:40	0:22

Source: Digital Day 7 day diary
Base: All listening activity records for adults 16+ (17290)
**Average time spent is the average time spent on each device per day for listening – amongst those who listened*
Weekly reach is for listening activities. Only devices with weekly reach for listening above 3% shown

Figure 1.63

Proportion of communication activities, by device

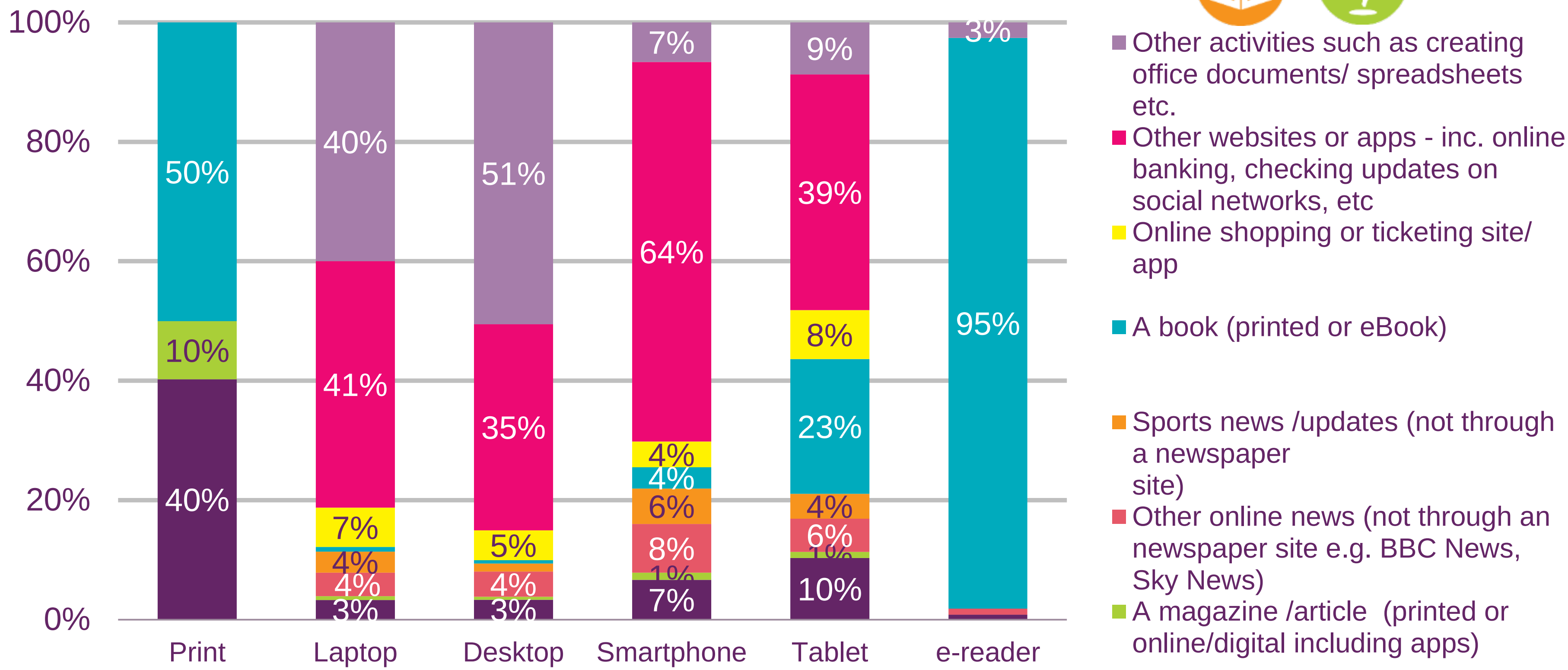


	Smartphone	Desktop	Laptop	Standard mobile	Tablet
Weekly reach	63%	45%	41%	31%	24%
Average time spent*	1:34	1:06	1:06	0:16	0:27

Source: Digital Day 7 day diary
Base: All communication activity records for adults 16+ (37827)
**Average time spent is the average time spent on each device per day for communicating – amongst those who did it all over the week*
Weekly reach is for communication activities. Only devices with weekly reach for communication above 3% shown

Figure 1.64

Proportion of reading/browsing/using activities, by device

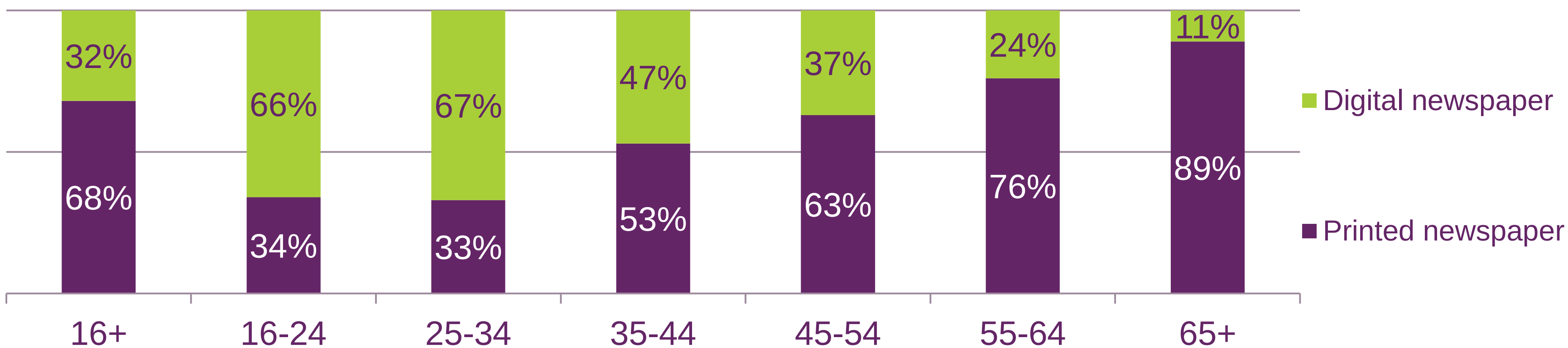


	Print	Laptop	Desktop	Smartphone	Tablet	e-reader
Weekly reach	60%	48%	43%	34%	29%	10%
Average time spent*	0:47	0:58	0:37	0:56	0:34	0:34

Source: Digital Day 7 day diary
Base: all reading/browsing/using activity records for adults 16+ (24055)
**Average time spent is the average time spent on each device per day for reading/browsing/using (including print) – amongst those who did it all over the week*
Weekly reach is for reading/browsing/using activities. Only devices with weekly reach for reading/browsing/using above 3% shown

Figure 1.65

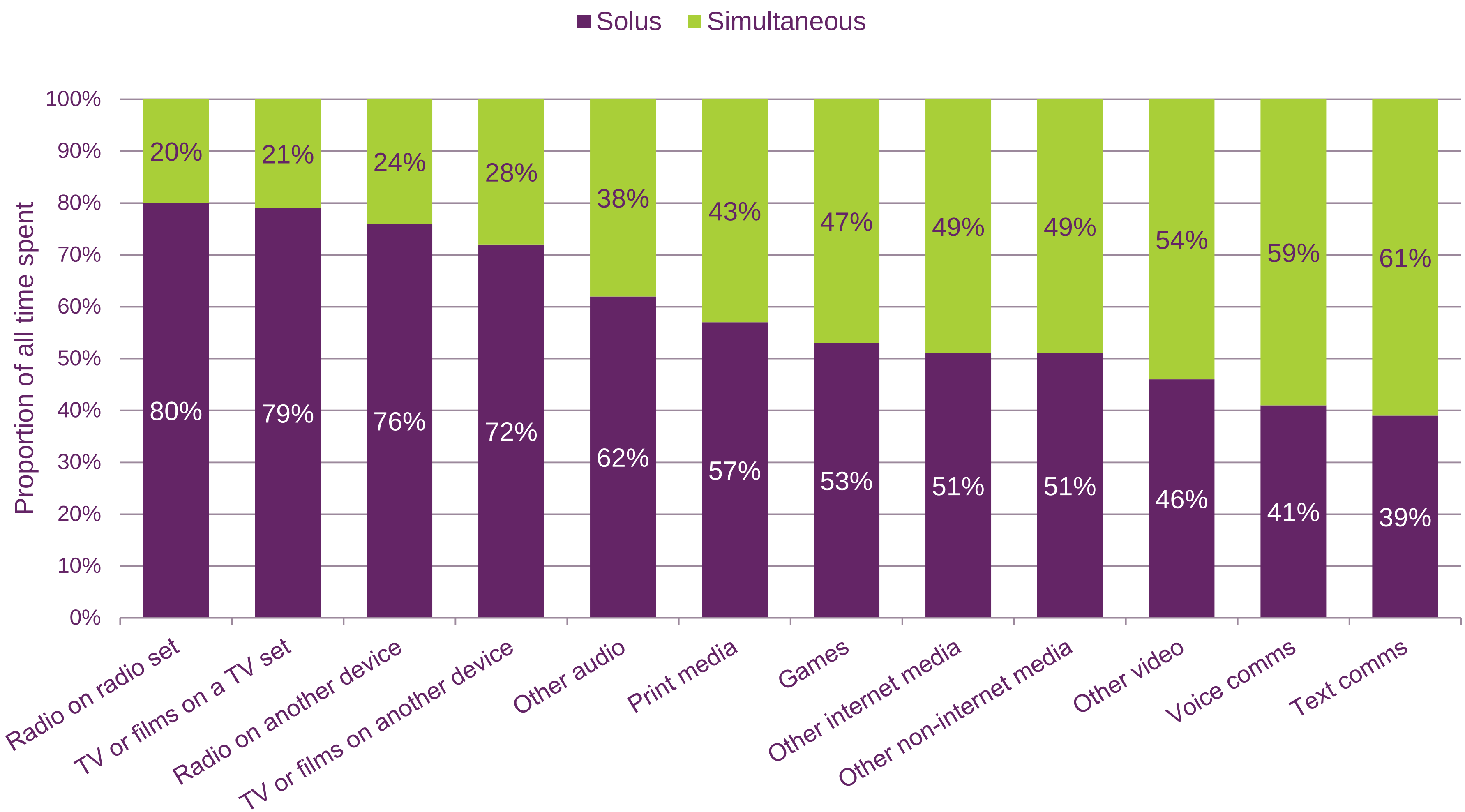
Proportions of book and newspaper reading: printed vs. digital



Source: Digital Day 7-day diary
Base: All book or newspaper reading records for adults 16+ (8156)

Figure 1.66

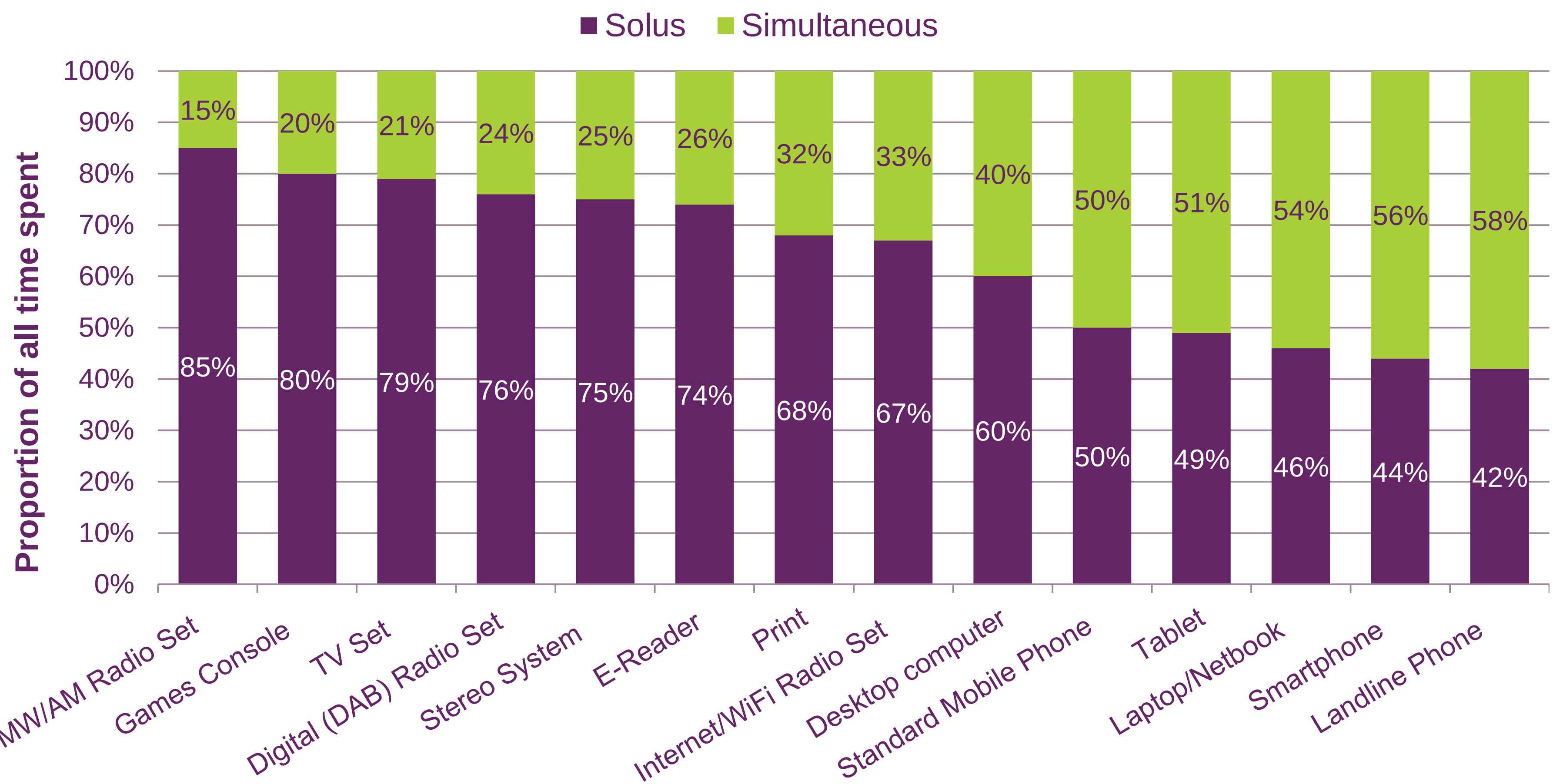
Proportion of solus and simultaneous minutes, by activity



Source: Digital Day 7 day diary
Base: All activity record minutes for adults aged 16+ (5930358)

Figure 1.67

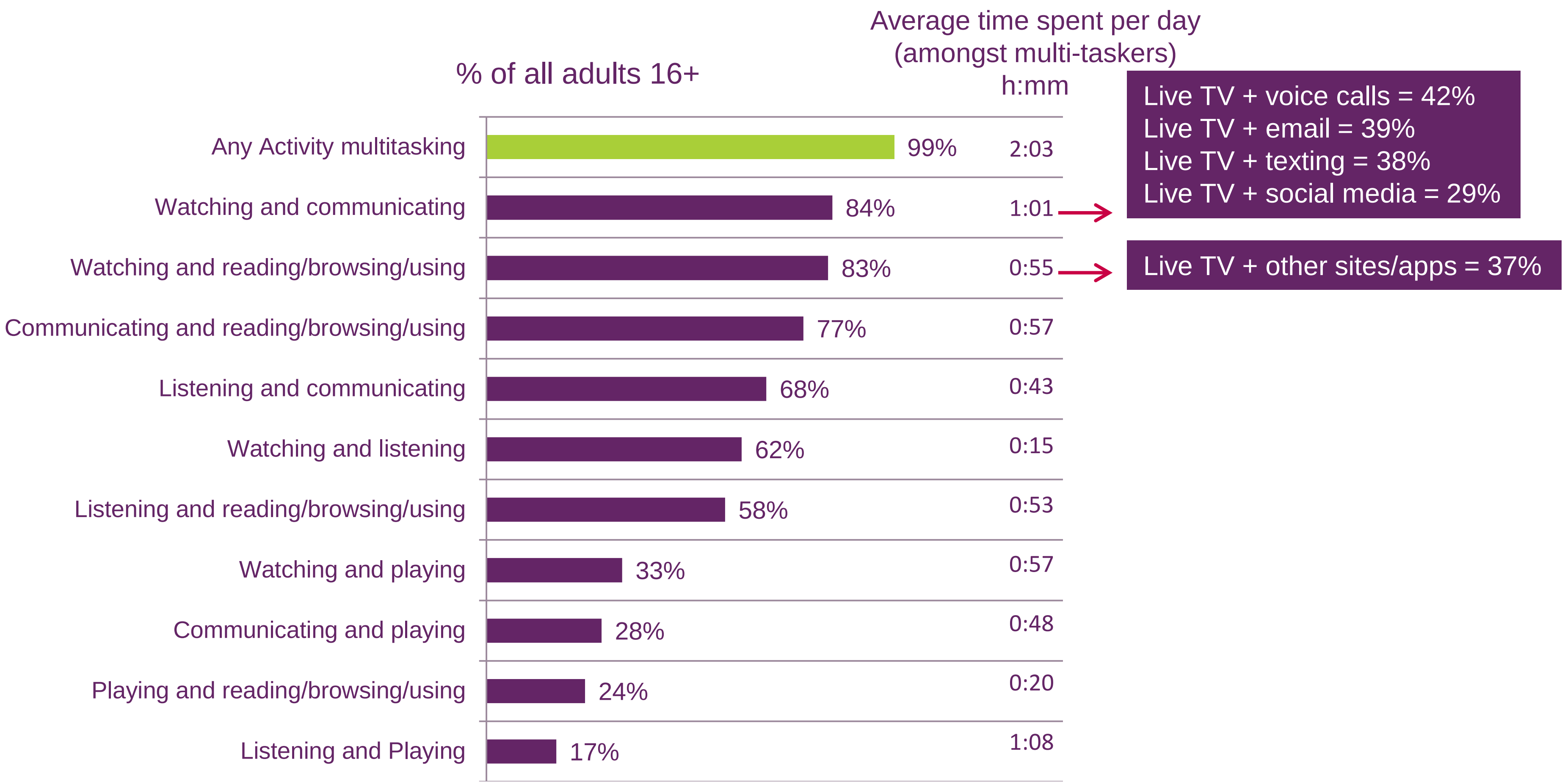
Proportion of solus and simultaneous minutes, by device



Source: Digital Day 7 day diary
Base: All activity record minutes for adults aged 16+ (5930358)
Note: For this analysis the calculations are made by generating mean times spent amongst all adults for each of the individual devices (including zeros). These mean times are then summed together to create total media and comms time, and time per device type (hence includes simultaneous activities).

Figure 1.68

Multitasking activity combinations: weekly reach



Source: Digital Day 7 day diary
Base: Weekly reach: All adults aged 16+ (1644), Average time spent: All activity record minutes (5930358)

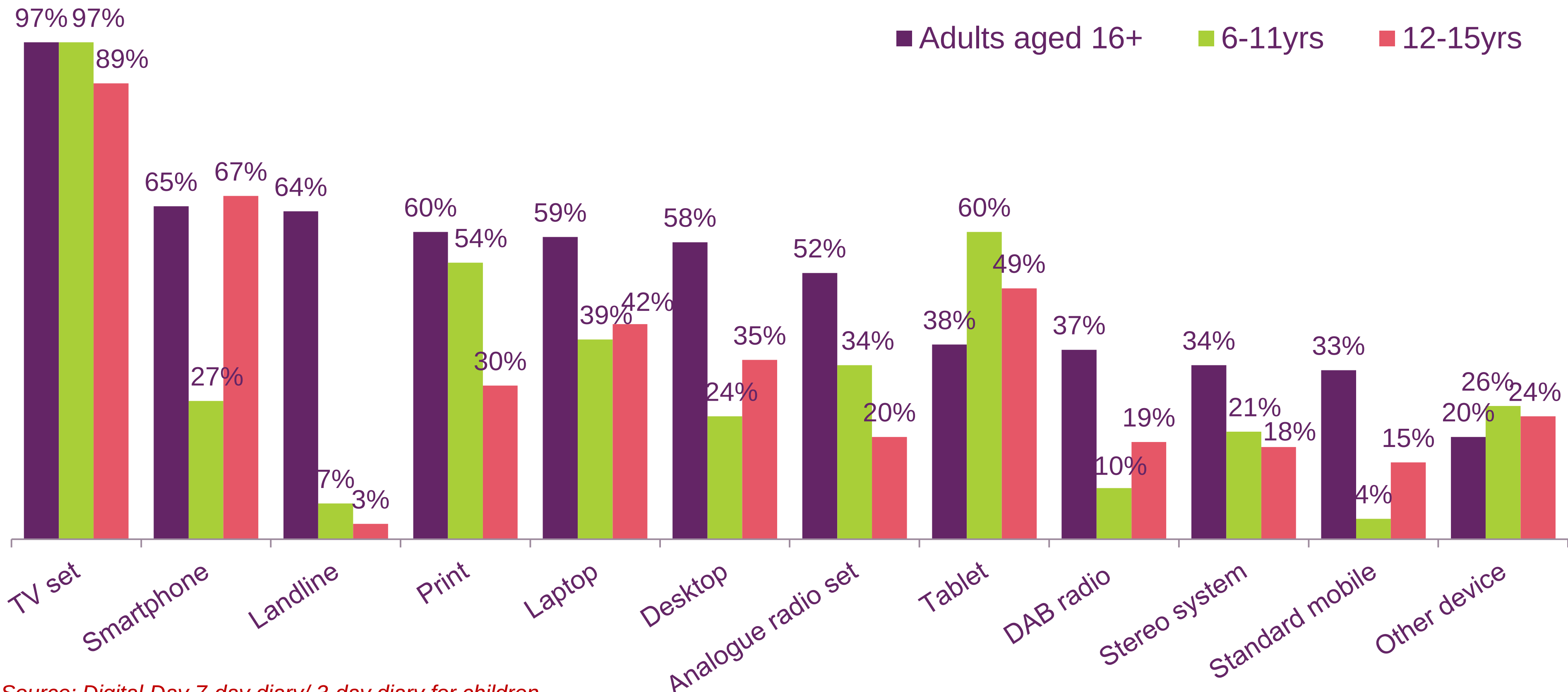
Figure 1.69

Proportion of solus and simultaneous minutes, by age group

Source: Digital Day 7-day diary
Base: All activity record minutes for adults aged 16+ (5930358)
Activity share of all simultaneous media and communications minutes

Figure 1.70

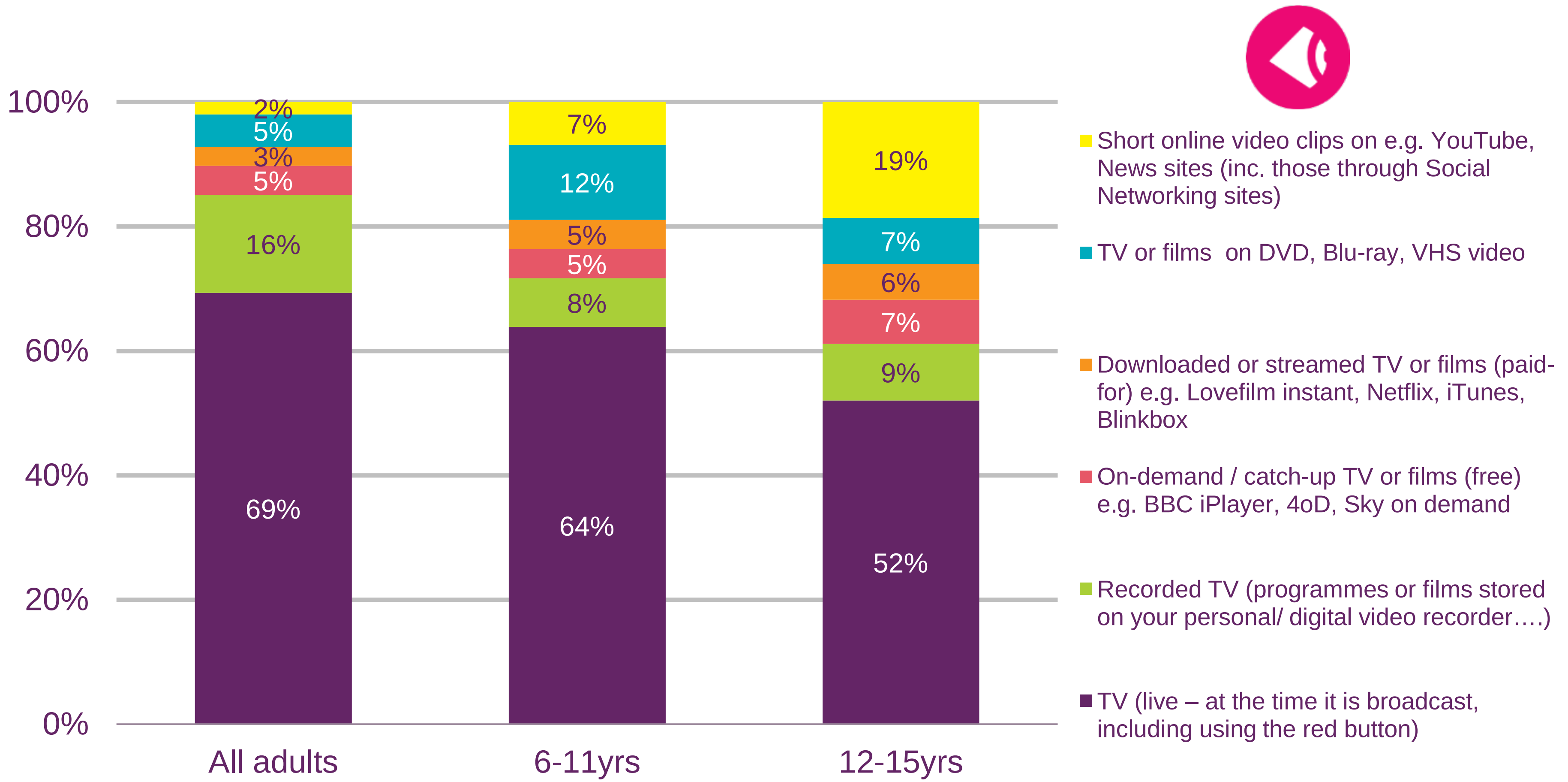
Weekly reach* of devices, all adults vs. children aged 6-11 and 12-15



Source: Digital Day 7-day diary/ 3-day diary for children
Base: All adults aged 16+ (1644), 6-11 (186), 12-15 (173)
*Ranked by % reach of all adults. *Note that reach for adults is across a full week, but reach for the children's sample is from a 3-day diary*
TV set includes set top box

Figure 1.71

Proportion of watching activities, all adults vs. children

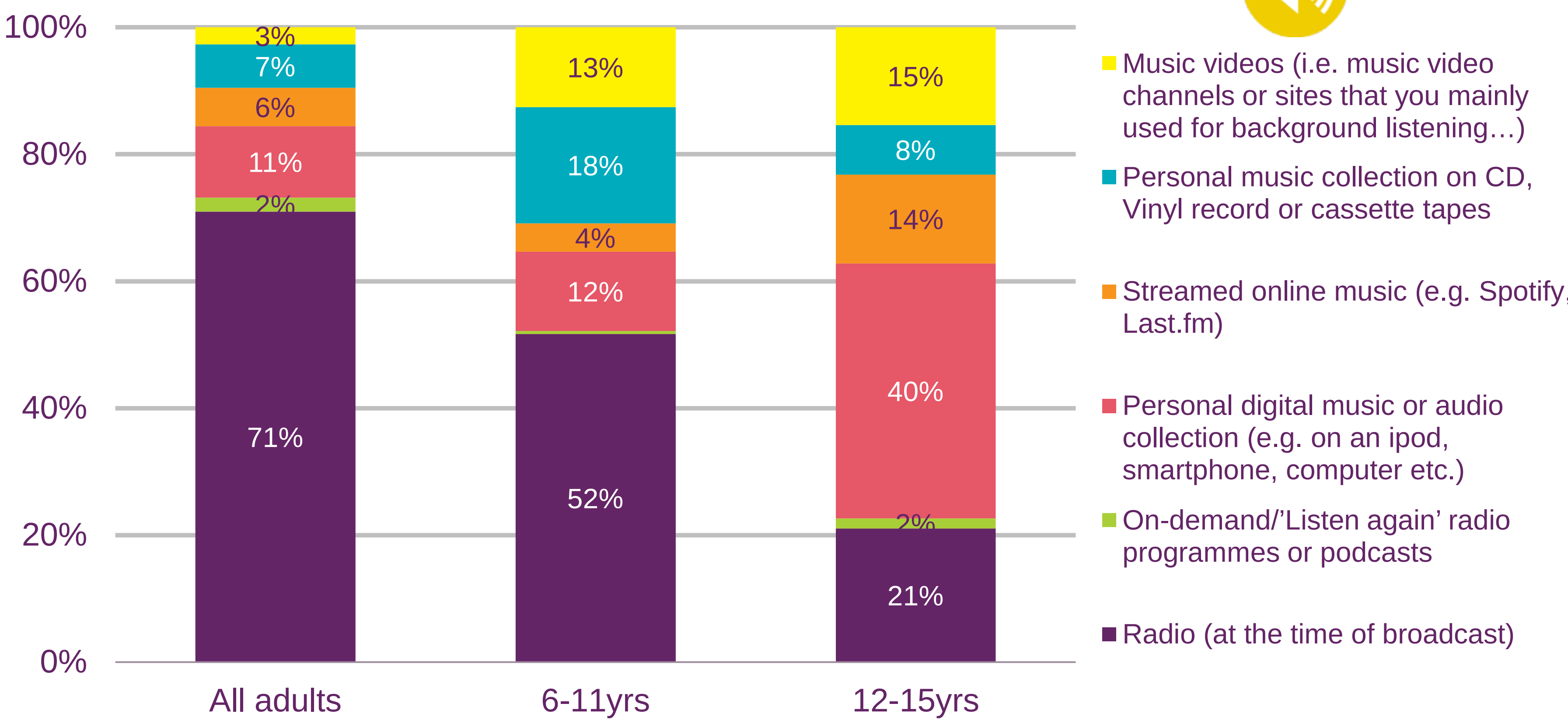


Source: Digital Day 7-day diary

Base: All watching activity records for adults 16+ (25272), primary school-aged 6-11 (1249), secondary school-aged 11-15 (1094)

Figure 1.72

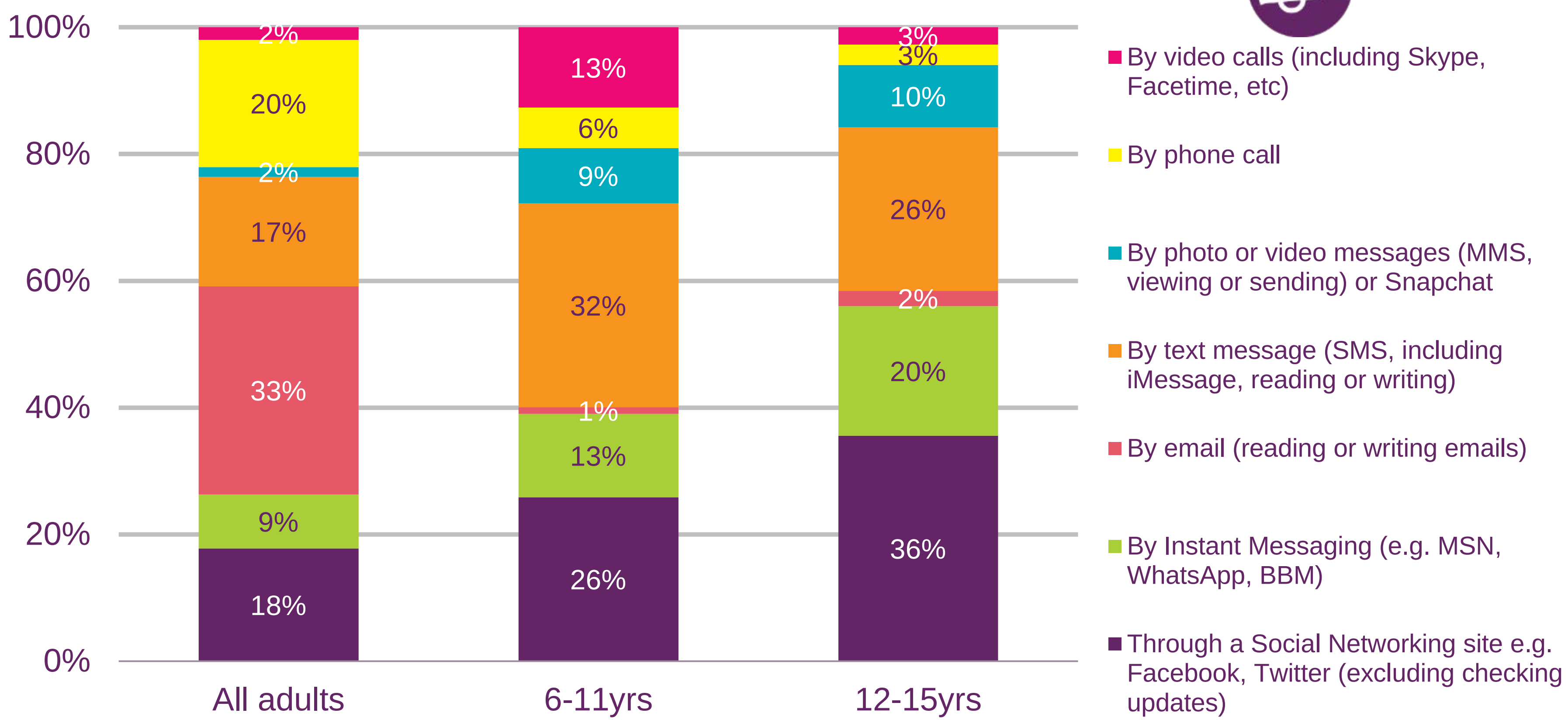
Proportion of listening activities, all adults vs. children



Source: Digital Day 7-day diary
Base: All listening activity records for adults 16+ (17290), primary school aged 6-11 (424), secondary school aged 11-15 (606)

Figure 1.73

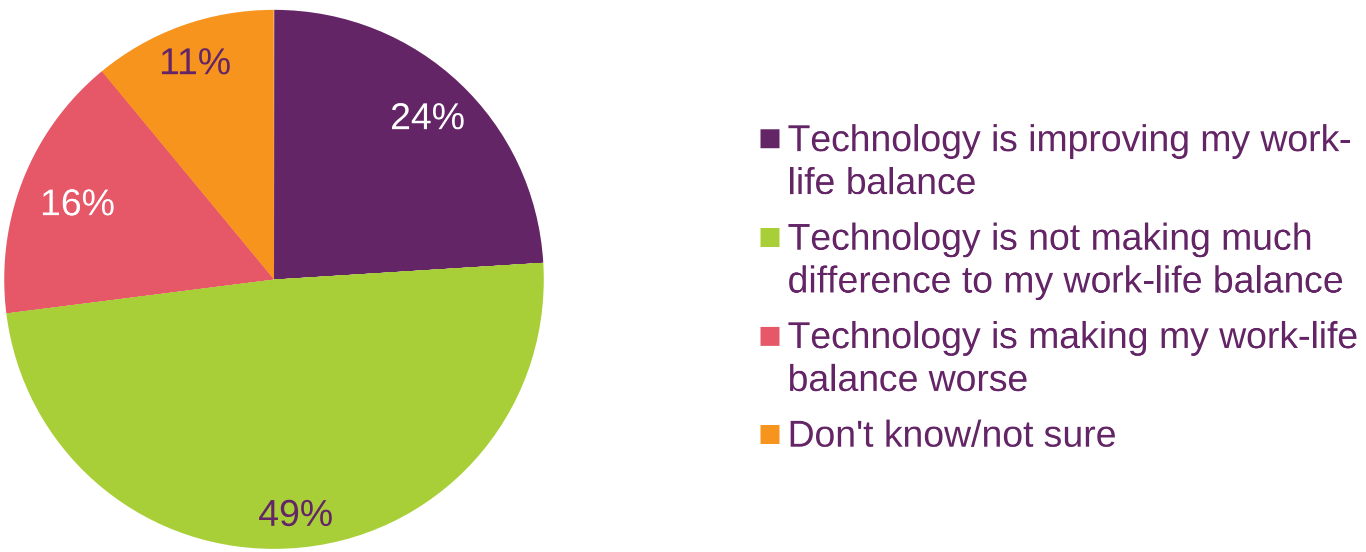
Proportion of communication activities, all adults vs. children



Source: Digital Day 7-day diary
Base: All communication activity records for adults 16+ (37827), primary school aged 6-11 (209), secondary school aged 11-15 (1063)

Figure 1.74

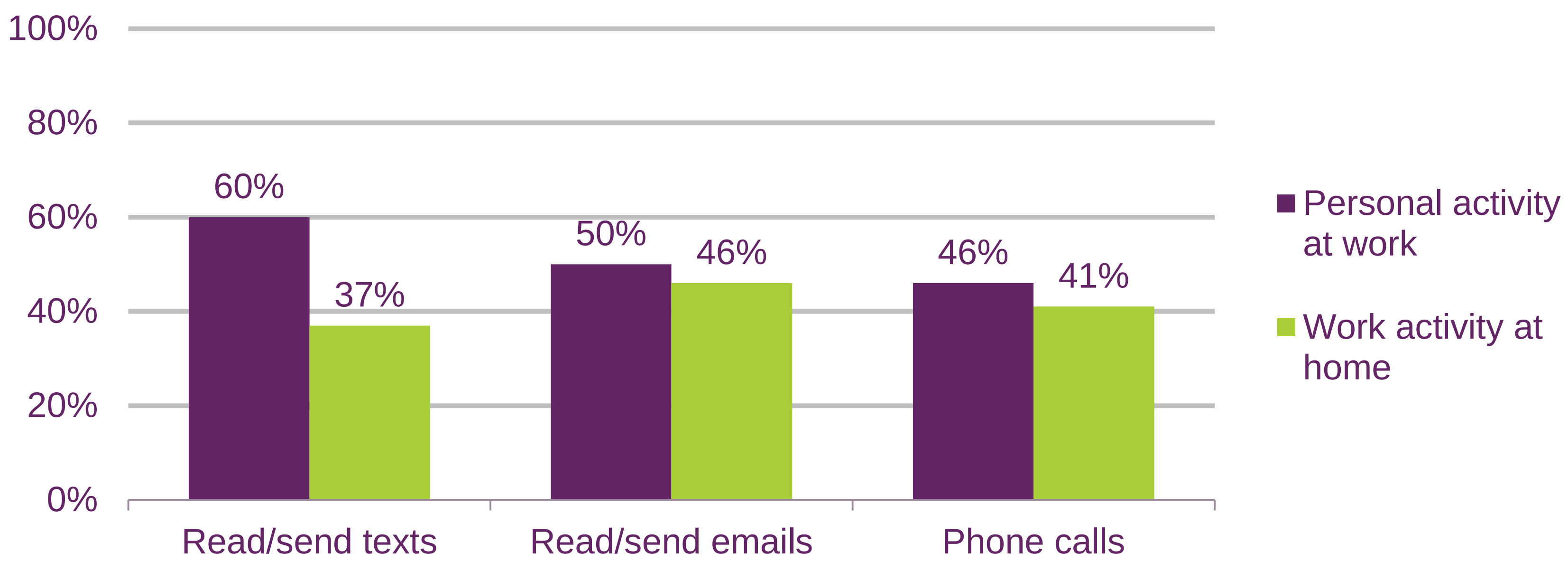
Overall attitude towards technology and work-life balance



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment
Q: “Thinking of the overall effect technology is having on your ‘work-life balance’ – both doing personal things at work and doing work in your personal time – which of the following statements best describes your attitude?”

Figure 1.75

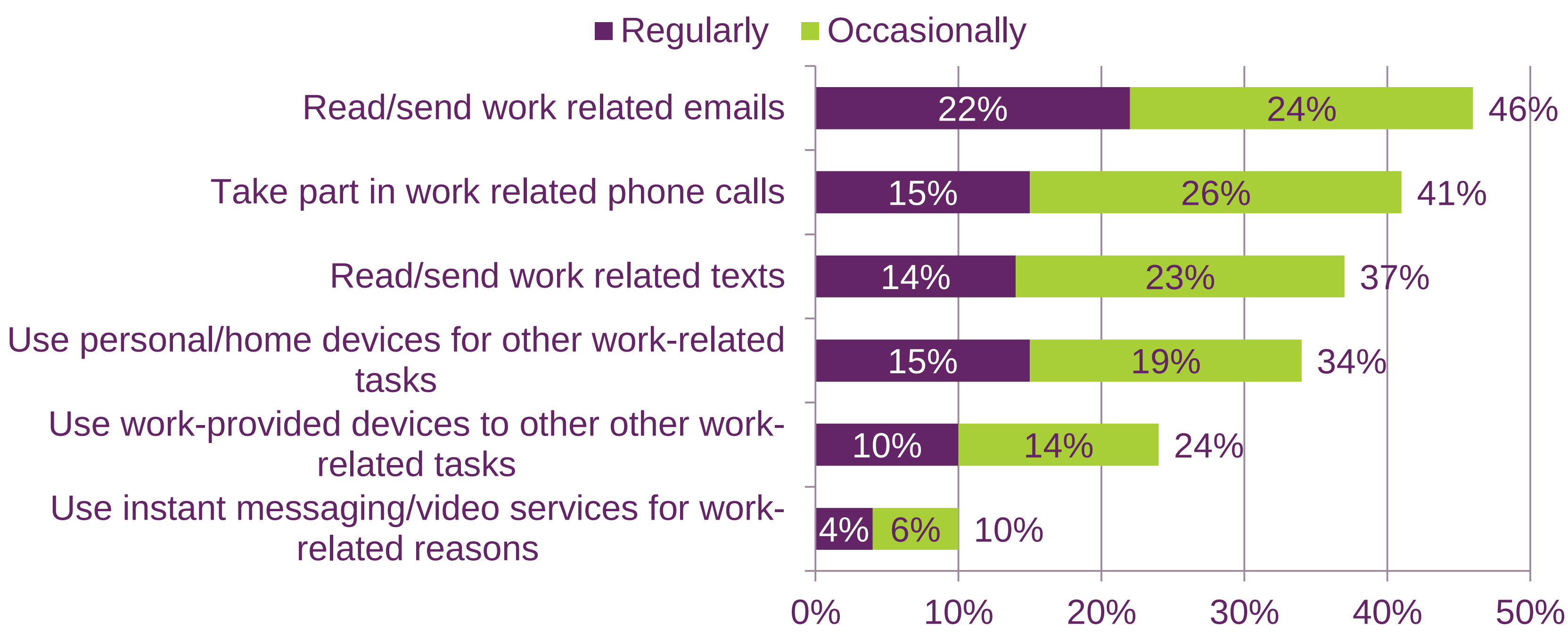
Personal communications at work versus work-related activity at home



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment
Analysis: the percentages of workers who regularly or occasionally participate in the three main personal communications activities (texting, emailing and telephone calls) while at work with the equivalent work-related communications activities outside work (at home, etc.)

Figure 1.76

Regular or occasional work-related activities outside working hours



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment
Q: "How frequently, if at all, do you do any of the following during your personal time outside of working hours (e.g. evenings or weekends, but not including holidays)?"

Figure 1.77

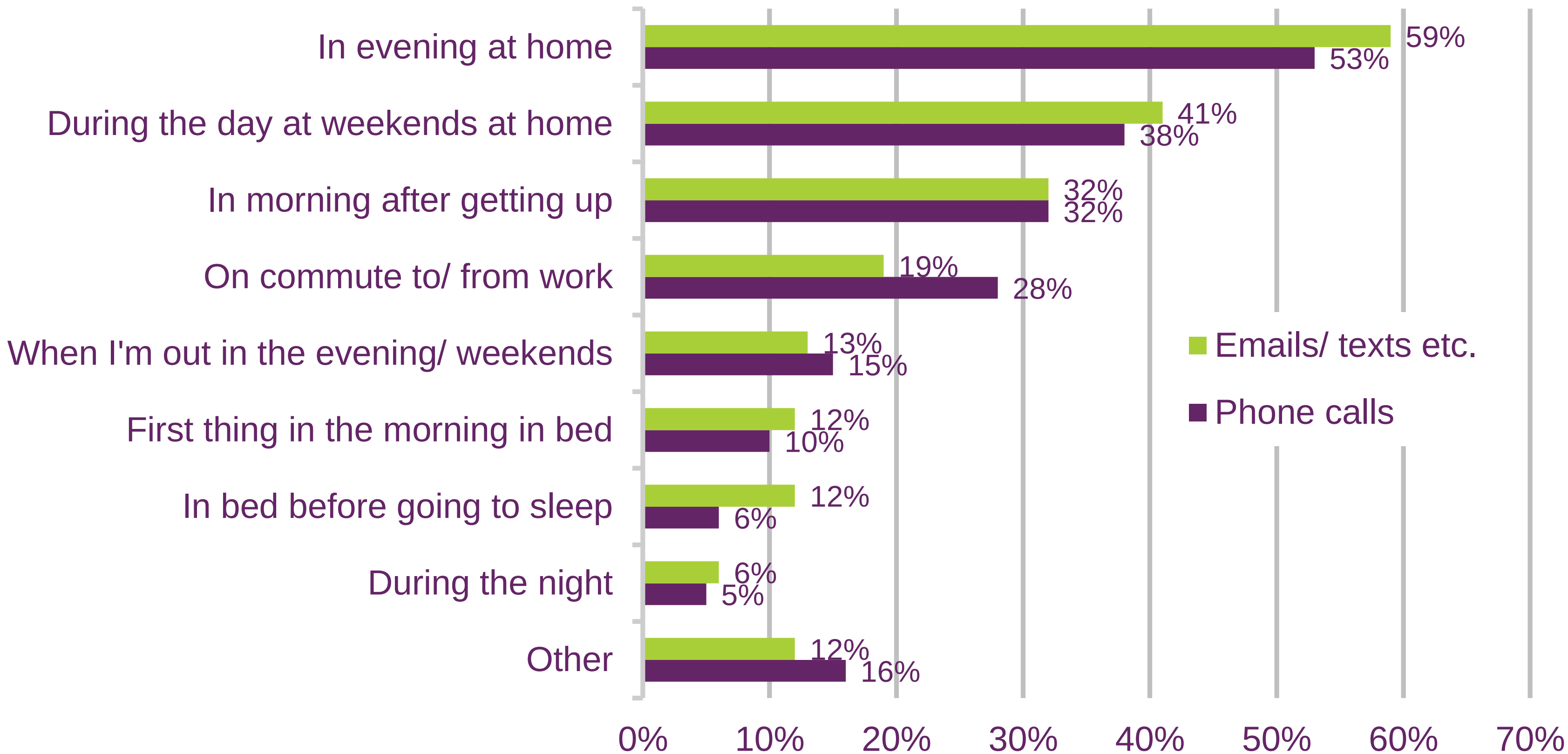
Regular work-related activities outside working hours: subgroups

	Work-related emails		Work-related telephone calls		Work-related texts	
	Regular	Regular/ occasional	Regular	Regular/ occasional	Regular	Regular/ occasional
ABC1	29%	57%	18%	46%	17%	41%
C2DE	13%	32%	12%	36%	10%	32%
Senior manager/exec	44%	72%	39%	70%	30%	61%
Middle manager	36%	72%	19%	57%	26%	55%
Junior manager	18%	49%	12%	43%	12%	40%
Non-management	9%	24%	5%	24%	4%	19%
Self-employed	42%	68%	33%	65%	25%	59%
Mainly office-based	20%	47%	14%	41%	14%	37%
16-24	14%	41%	12%	38%	10%	30%
25-39	25%	54%	25%	56%	17%	42%
40-54	19%	43%	13%	38%	13%	36%
55+	25%	45%	19%	45%	15%	38%

Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment, all base sizes above 100.
Q: "How frequently, if at all, do you do any of the following during your personal time outside of working hours (e.g. evenings or weekends, but not including holidays)?"

Figure 1.78

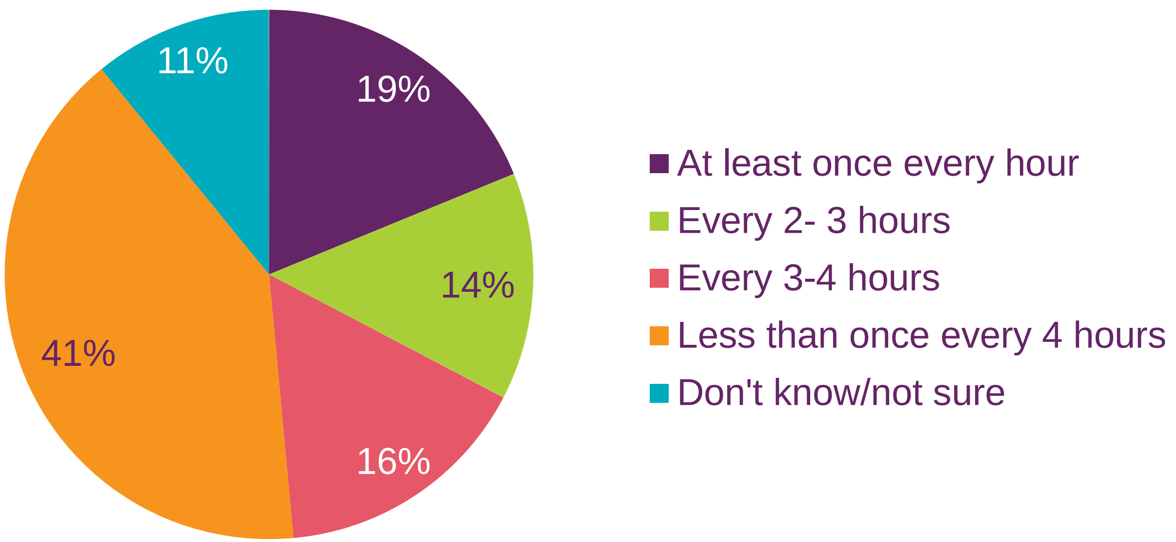
When people do work-related communications outside working hours



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 439 UK adults aged 16+ who take part in work-related phone calls outside working hours; 533 UK adults 16+ who take part in work-related emails, texts etc. outside working hours
Q: “Thinking of reading/sending work-related emails, texts or instant messaging, when do you typically do this? Please choose all that apply..”

Figure 1.79

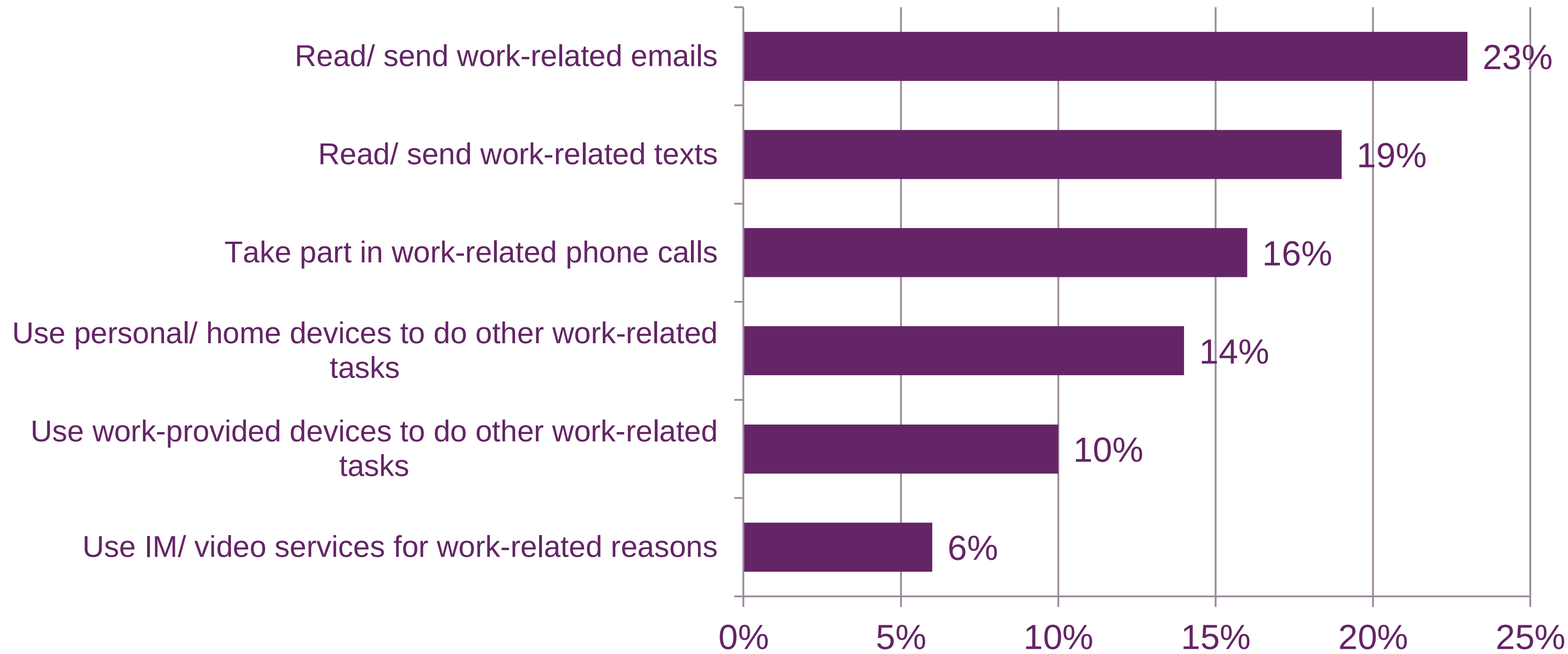
Frequency of checking work emails/texts outside working hours



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 528 UK adults aged 16+ in employment who check emails/text outside working hours
Q: “How often, on average, do you tend to check your work emails/texts during waking hours when you’re not at work?”

Figure 1.80

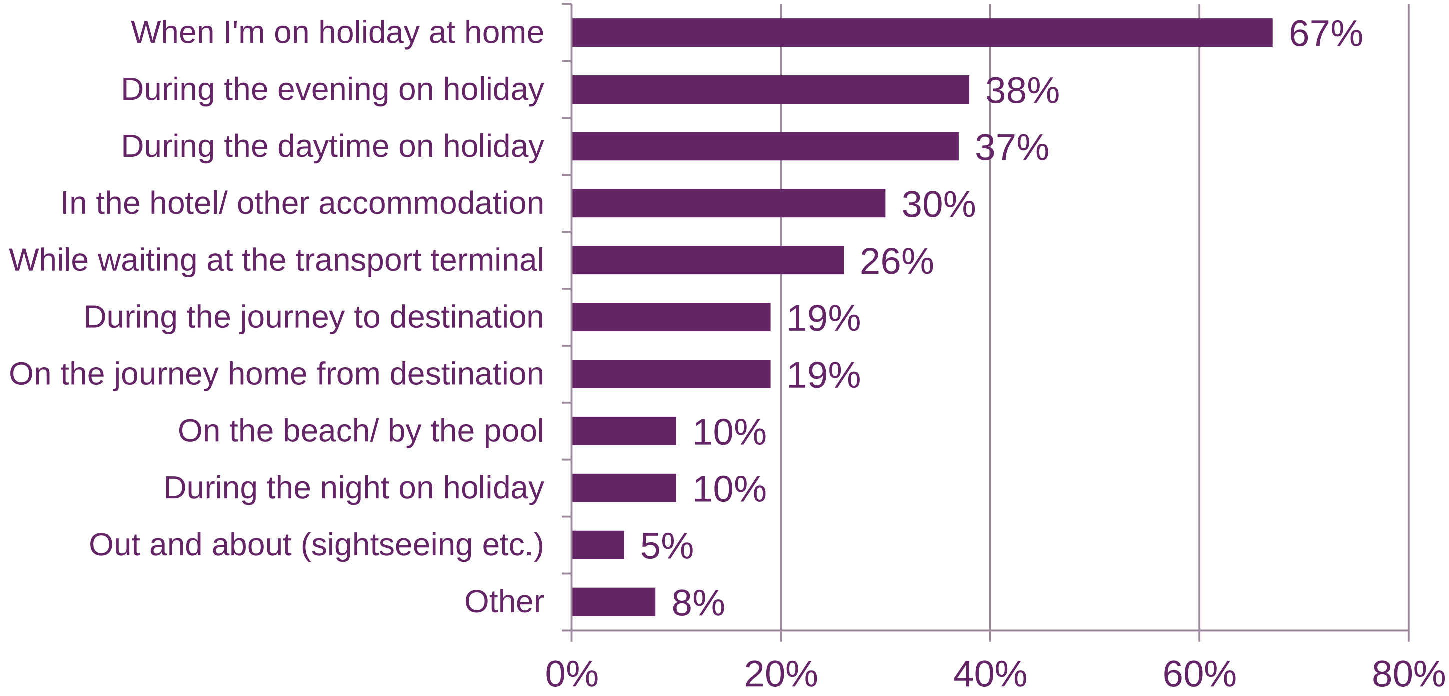
Regular or occasional participation in work-related activities while on holiday



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment
Q: “How frequently, if at all, do you do any of the following while on holiday from work?”

Figure 1.81

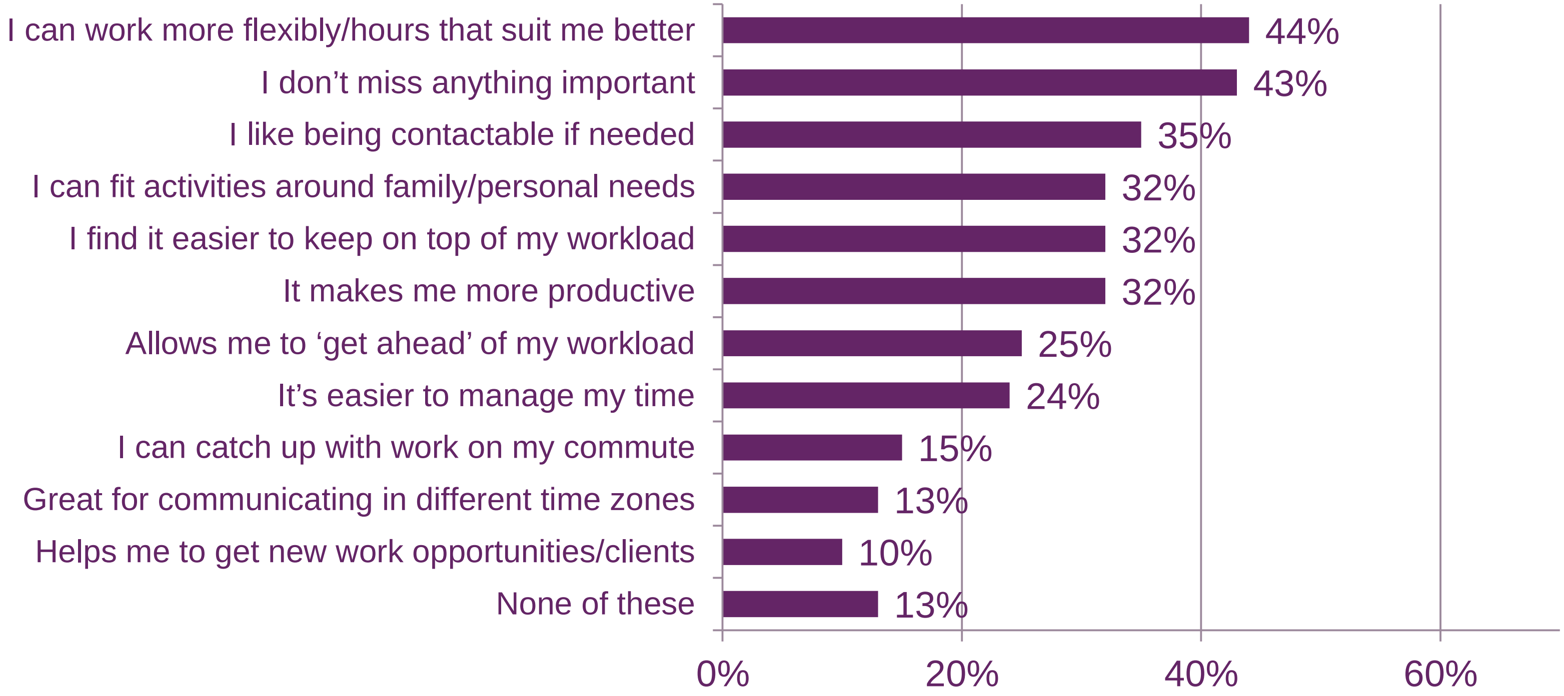
When and where people do work-related activities while on holiday



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 305 UK adults aged 16+ who participate in work activities on holiday
Q: “When do you typically do this/ these activities on holiday? Please choose all that apply.”

Figure 1.82

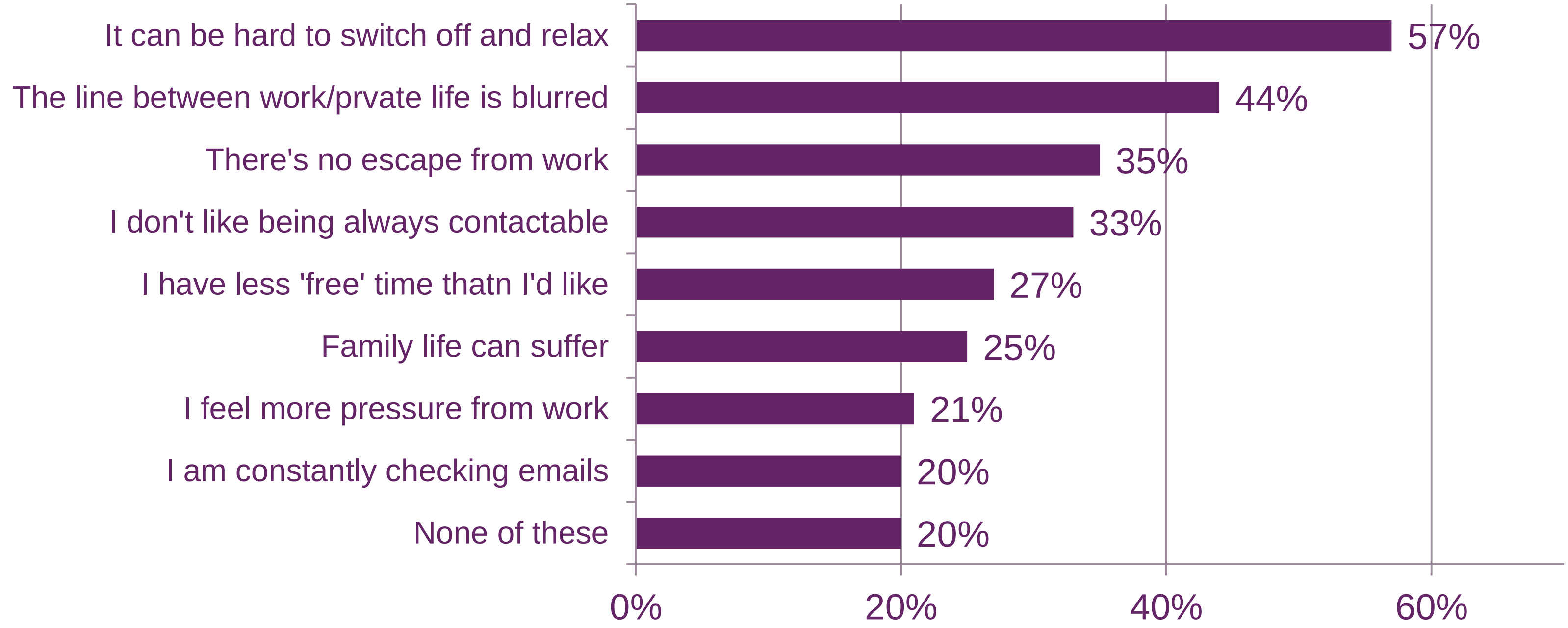
Advantages of using technology for work activities in personal time



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 601 UK adults aged 16+ in employment who use technology for work purposes outside working hours
Q: "Which, if any, of the following would you say are the advantages of using technology for work-related activities during personal time?"

Figure 1.83

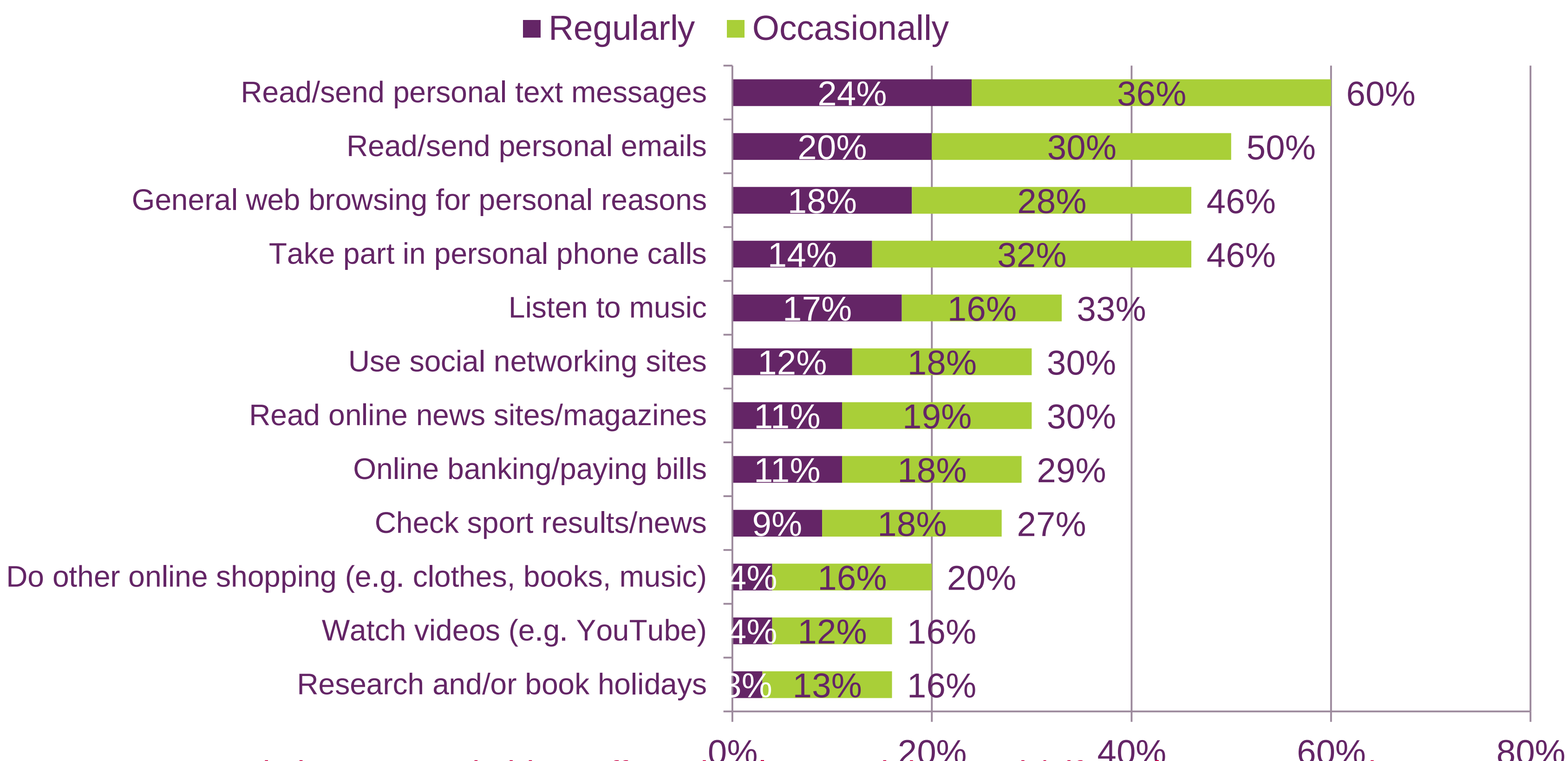
Disadvantages of using technology for work activities in personal time



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 601 UK adults aged 16+ in employment who use technology for work purposes outside working hours
Q: “And which, if any, of the following would you say are the disadvantages of using technology for work-related activities during personal time?”

Figure 1.84

Regular or occasional use of technology for personal reasons at work



Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment
Q: Q: "Now thinking of using technology at work for personal use, how frequently, if at all, do you do any of the following during working hours?" Mentions over 15% reported here.

Figure 1.85

Regular/occasional use of technology for personal activities at work: subgroups

	Personal text messages		Personal emails		Personal telephone calls		Web browsing	
	Regular	Regular/ occasional	Regular	Regular/ occasional	Regular	Regular/ occasional	Regular	Regular/ occasional
ABC1	26%	64%	23%	56%	14%	48%	20%	50%
C2DE	22%	56%	17%	43%	14%	43%	15%	41%
Senior manager/exec	31%	71%	31%	62%	26%	64%	22%	52%
Middle manager	28%	67%	20%	59%	16%	50%	16%	45%
Junior manager	27%	63%	19%	48%	10%	46%	19%	51%
Non-management	19%	53%	15%	42%	8%	35%	14%	42%
Self-employed	29%	71%	31%	63%	25%	66%	24%	51%
Mainly office-based	29%	66%	23%	57%	12%	45%	22%	55%
16-24	27%	65%	24%	58%	13%	31%	22%	57%
25-39	32%	73%	24%	60%	13%	50%	15%	52%
40-54	24%	59%	18%	46%	12%	43%	17%	43%
55+	19%	54%	19%	46%	16%	49%	14%	43%

Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 1,050 UK adults aged 16+ in employment, all base sizes above 100.
Q: "Now thinking of using technology at work for personal use, how frequently, if at all, do you do any of the following during working hours?"

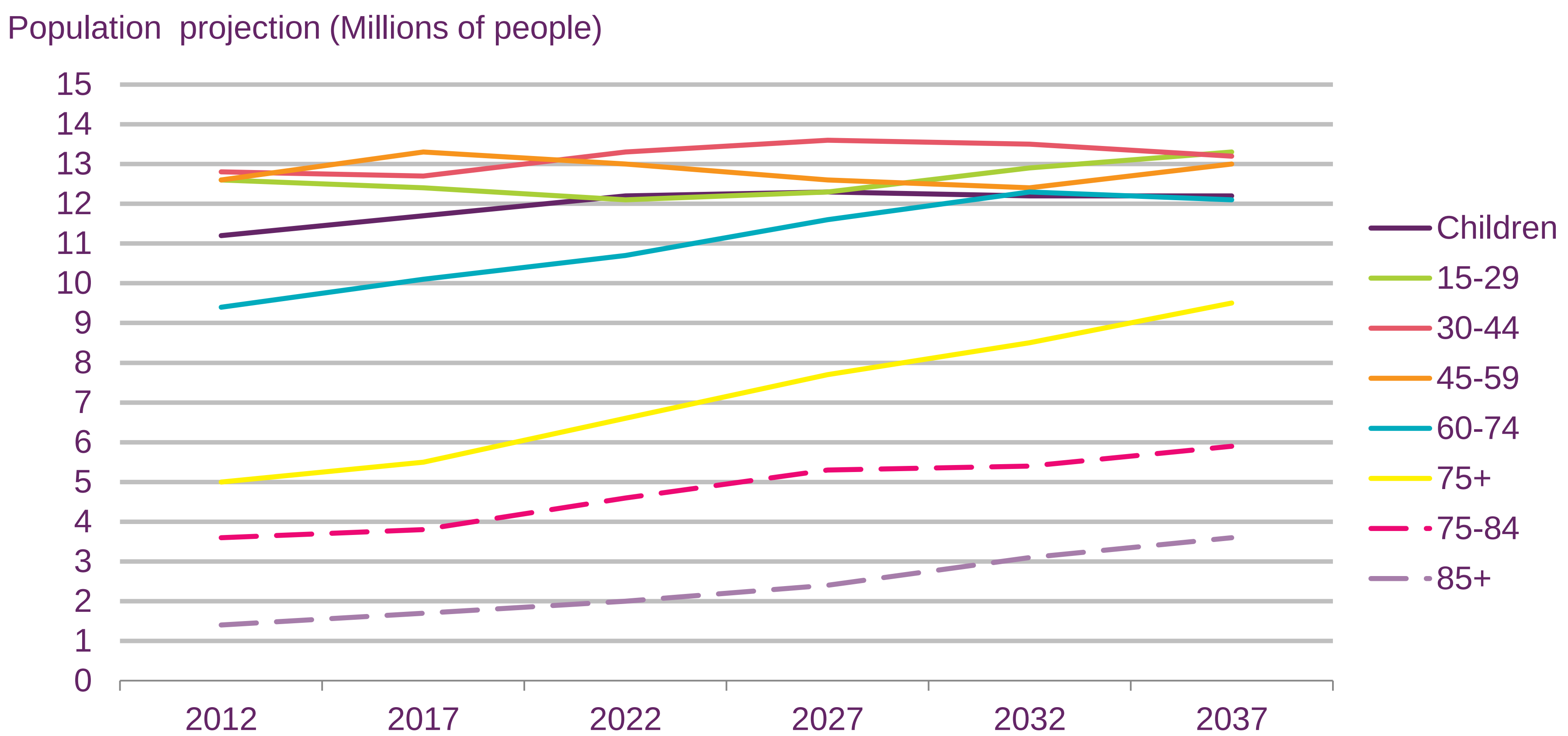
Figure 1.86

Attitudes towards using technology at work for personal reasons

Source: YouGov SixthSense Switching Off: Technology and the Work/Life Balance Survey (27-31 Mar 2014).
Base: 601 UK adults aged 16+ in employment who use technology for work purposes outside working hours
Q: "Thinking of using technology (e.g. smart phones, computers etc.) at work for personal reasons, to what extent would you agree with the following statements?". Strongly agree and agree reported here.

Figure 1.87

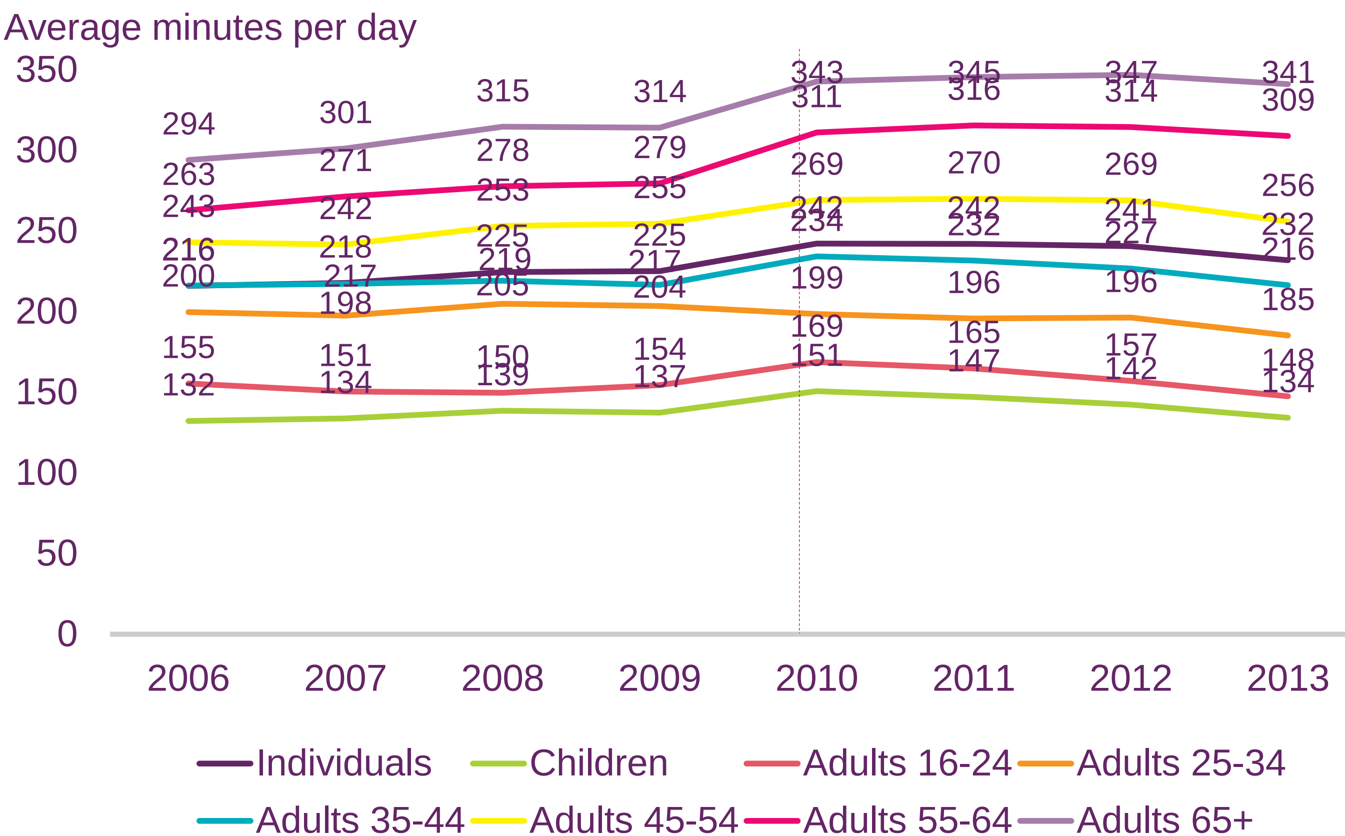
UK population projections to 2037



Source: ONS National Population Projections – 2012 Published 6 November 2013

Figure 1.88

Average minutes per day of TV viewing, by age: 2006-2013

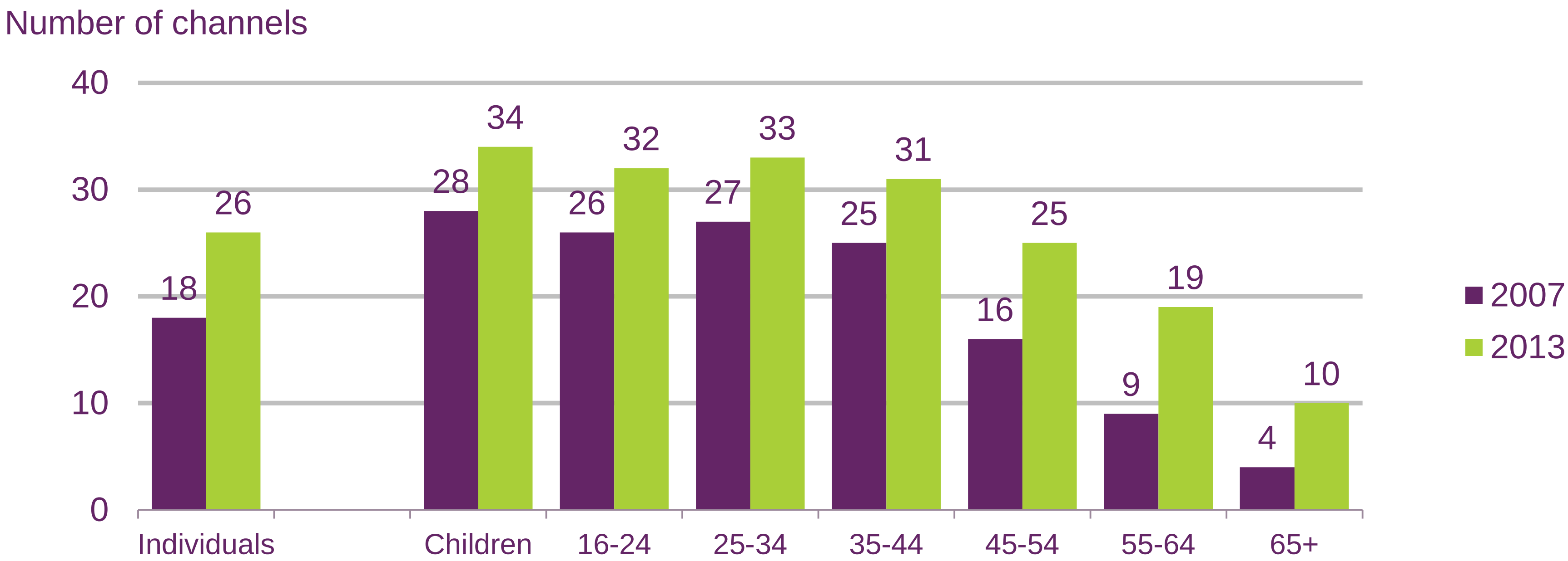


	% change: 2013-2010
All Individuals	-4.4% (10min)
Children	**-12.2% (-16min)**
16-24	**-14.3% (-21min)**
25-34	**-7.2% (-13min)**
35-44	**-8.3% (-18min)**
45-54	**-5.1% (-13min)**
55-64	-0.7% (-2min)
65+	-0.5% (-2min)

Source: BARB, Network
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Figure 1.89

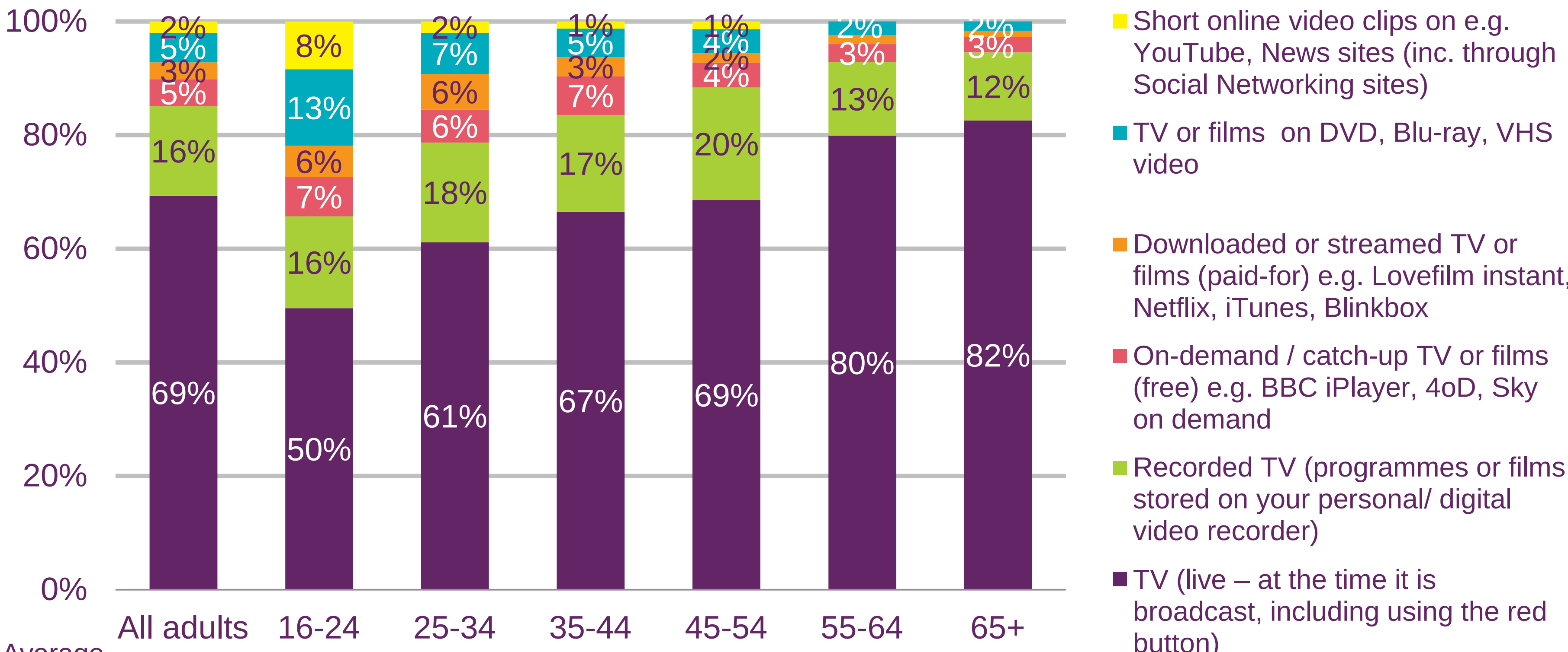
Number of channels representing 75% of viewing by age group, 2007 and 2013



Source: BARB, All Individuals, Network. Individuals= 4+, Children= 4-15 years.
-Based on the number of channels representing 75% of each demographics viewing (channels ranked by channel share).

Figure 1.90

Total time spent watching audiovisual content, by age group

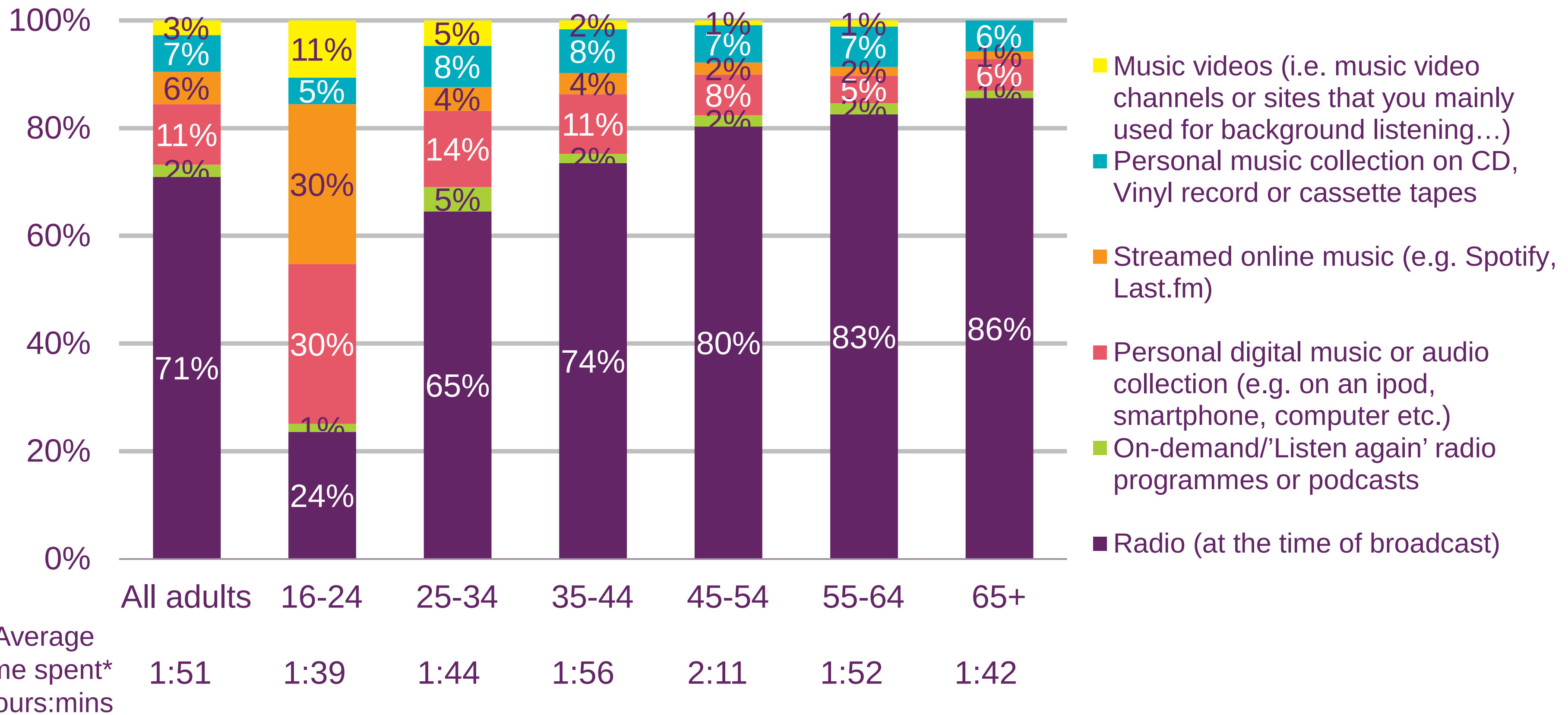


Average time spent* Hours:mins	All adults	16-24	25-34	35-44	45-54	55-64	65+
	4:17	4:14	3:51	3:50	4:31	4:37	4:35

Source: Digital Day 7 day diary
Base: All watching activity records for adults 16+ (25272), 16-24 (1583), 25-34 (3390), 35-44 (5362), 45-54 (6012), 55-64 (4905), 65+ (4020)
*Average time spent is the total average daily time spent watching media, including simultaneous activity

Figure 1.91

Percentage of total time spent listening to any audio, by age

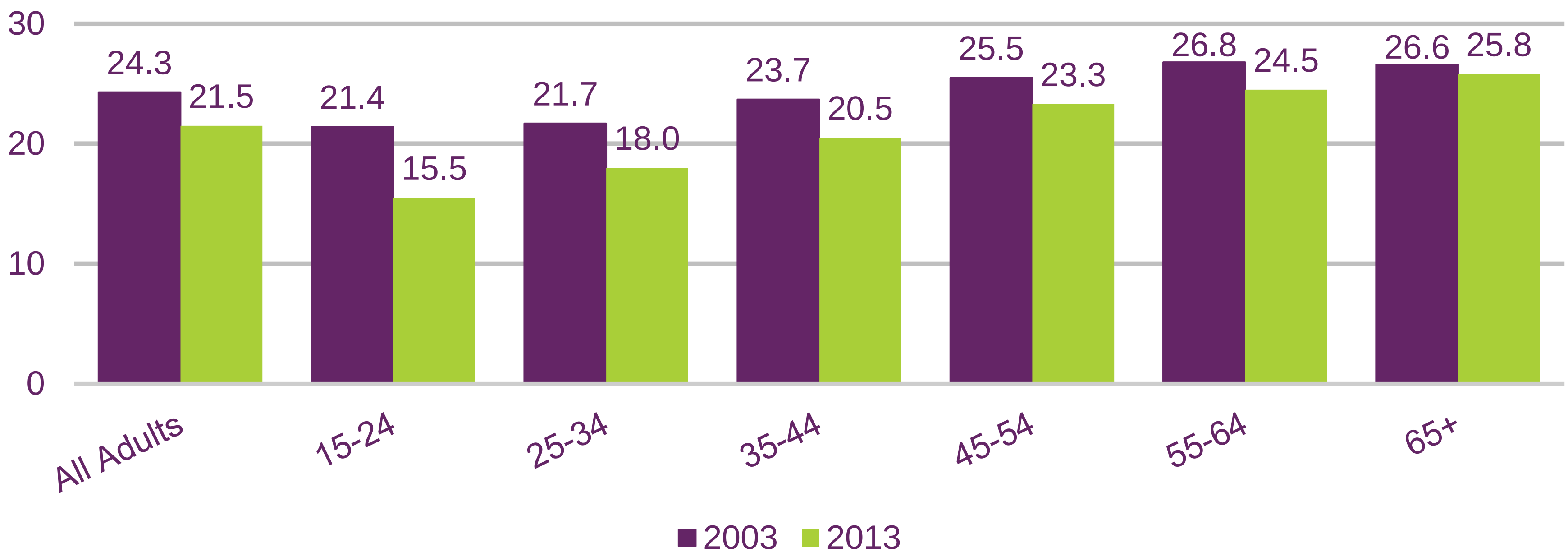


Source: Digital Day 7 day diary
Base: All listening activity records for adults 16+ (17290), 16-24 (999), 25-34 (2342), 35-44 (4113), 45-54 (4334), 55-64 (3284), 65+ (2218)
*Average time spent is the total average daily time spent listening to media, including simultaneous activity

Figure 1.92

Average hours listening per week: 2003-2013

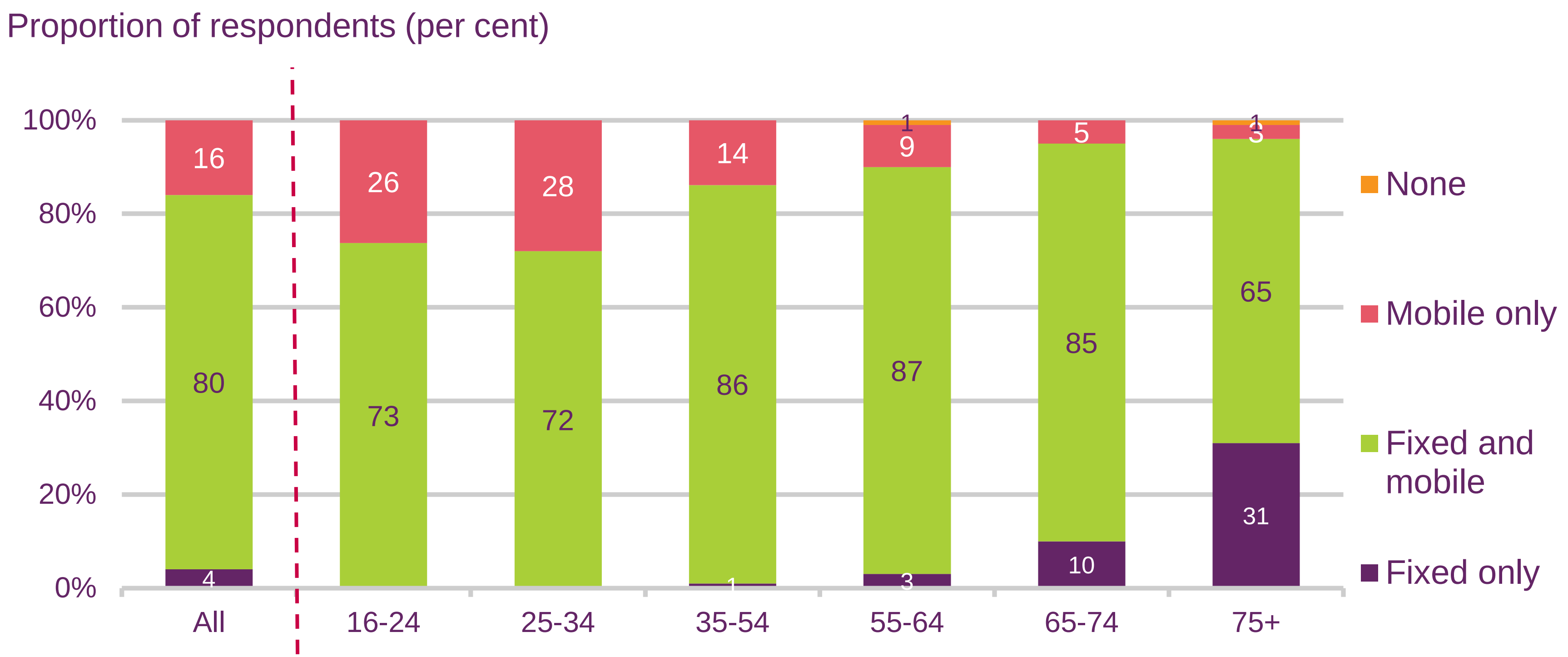
Average hours per listener



Source: RAJAR, all adults (15+)

Figure 1.93

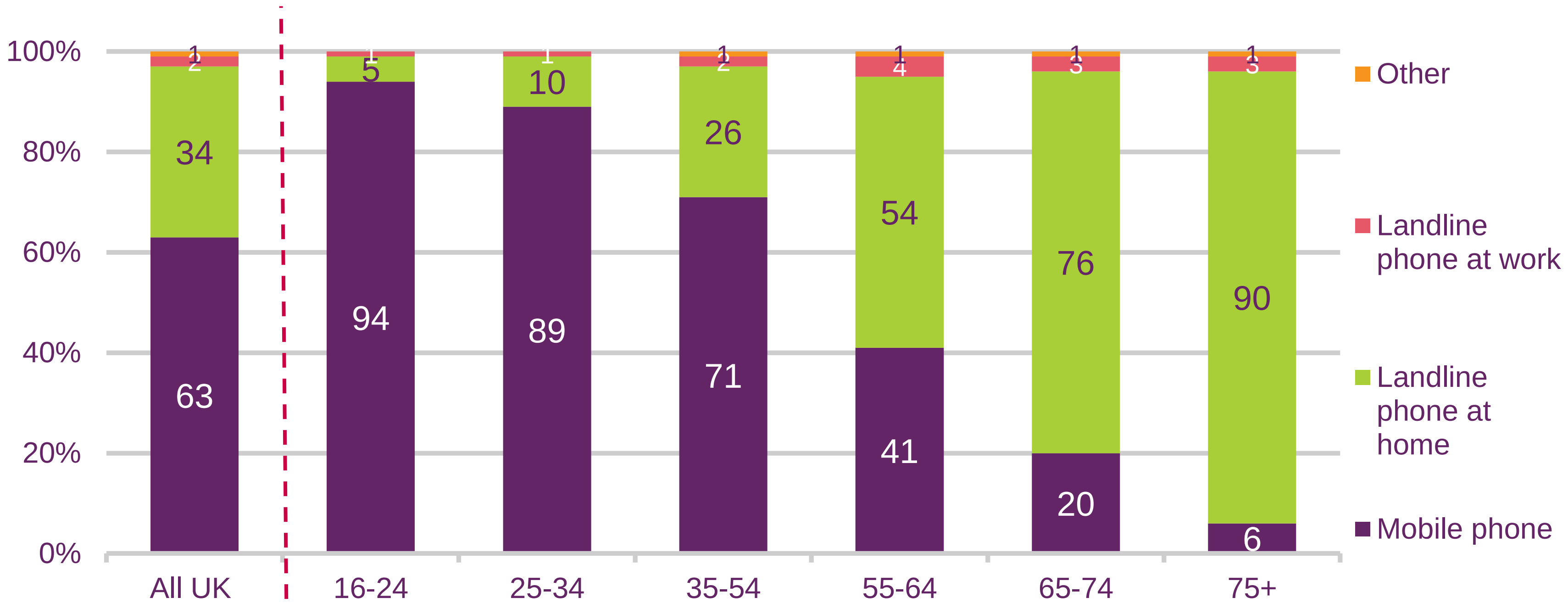
Household penetration of fixed and mobile telephony, by age



Source: Ofcom technology tracker, Q1 2014
QC1: Is there a landline phone in your home that can be used to make and receive calls?

Figure 1.94

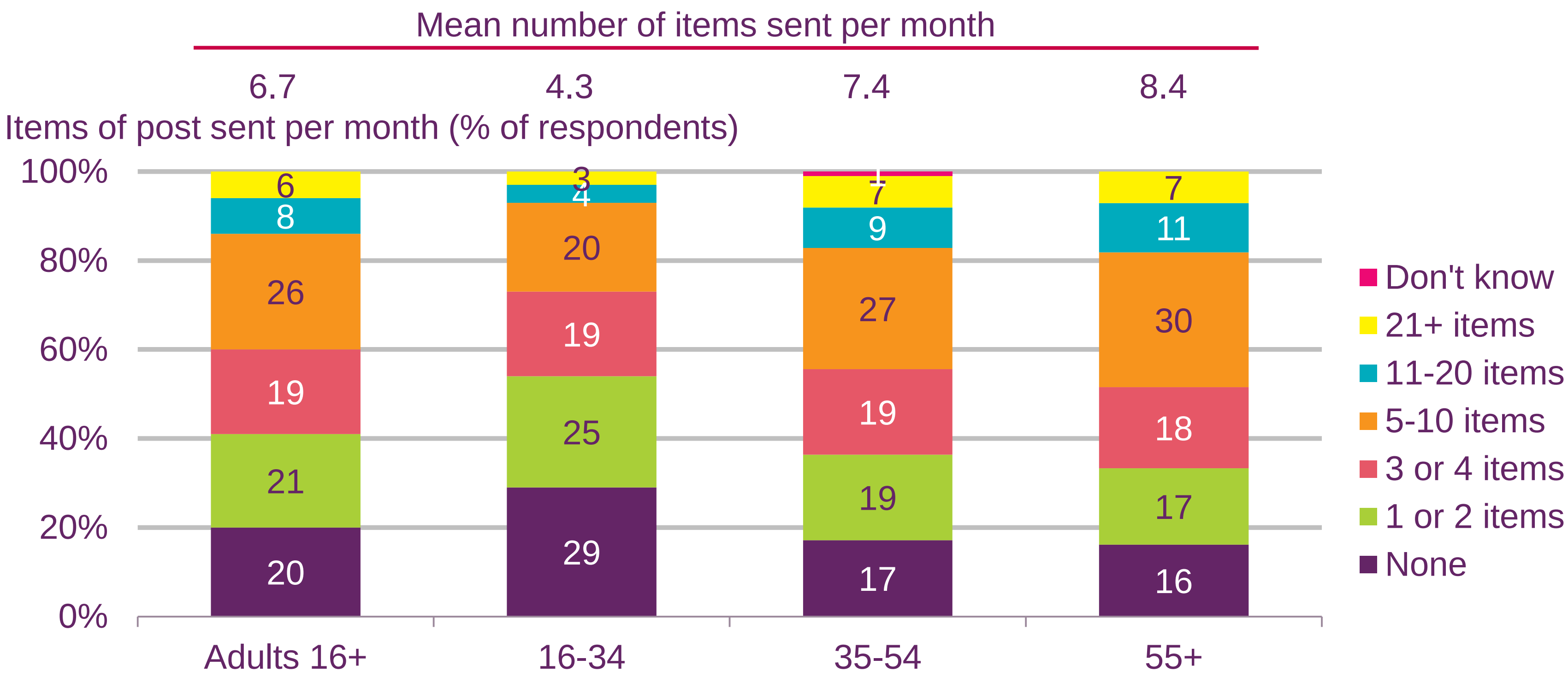
Main method of making/receiving telephone calls, by age



Source: Ofcom technology tracker, Q1 2014
QC4: Which of these do you consider to be your MAIN method of making and receiving telephone calls?

Figure 1.95

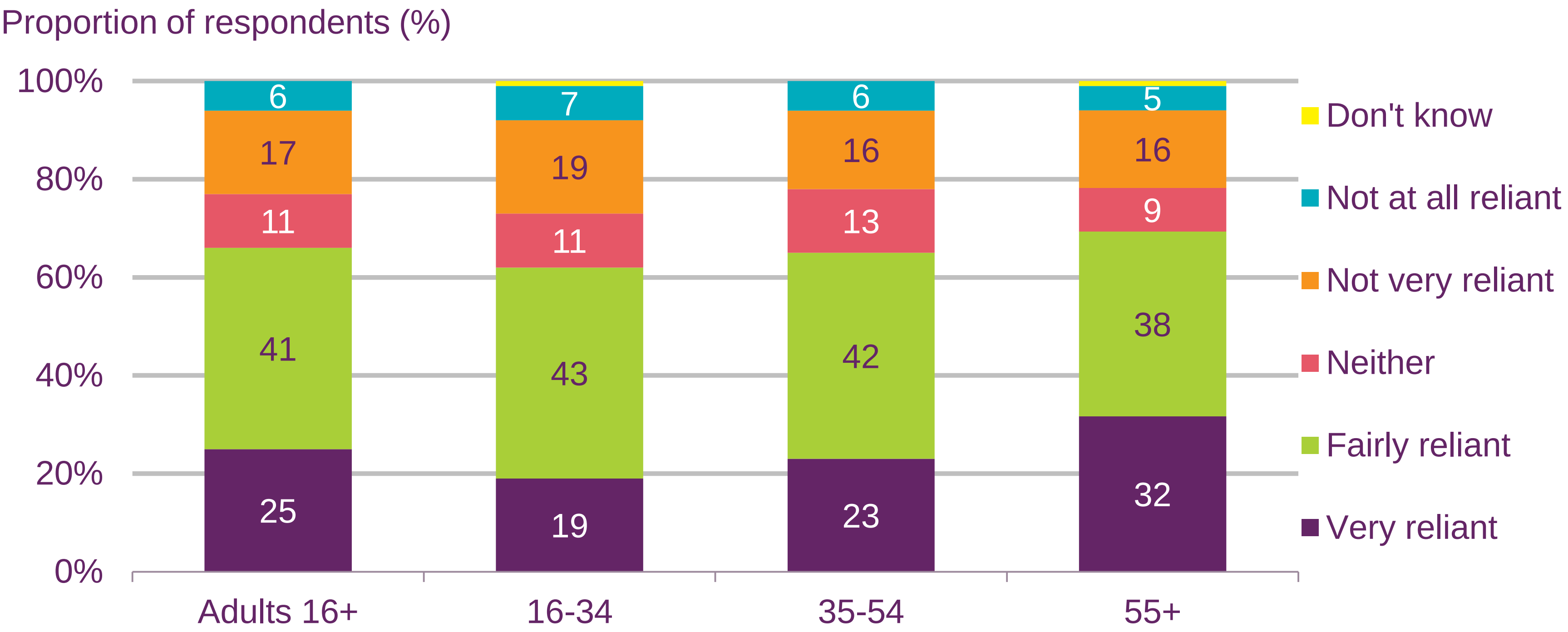
Number of items sent per month



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?

Figure 1.96

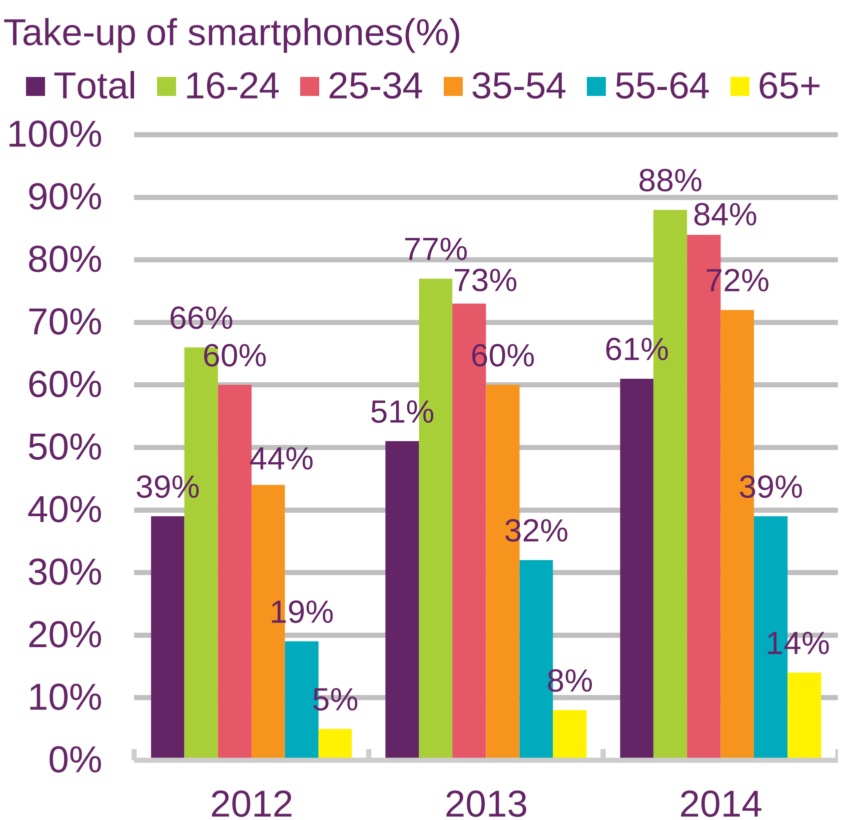
Reliance on post as a way of communicating

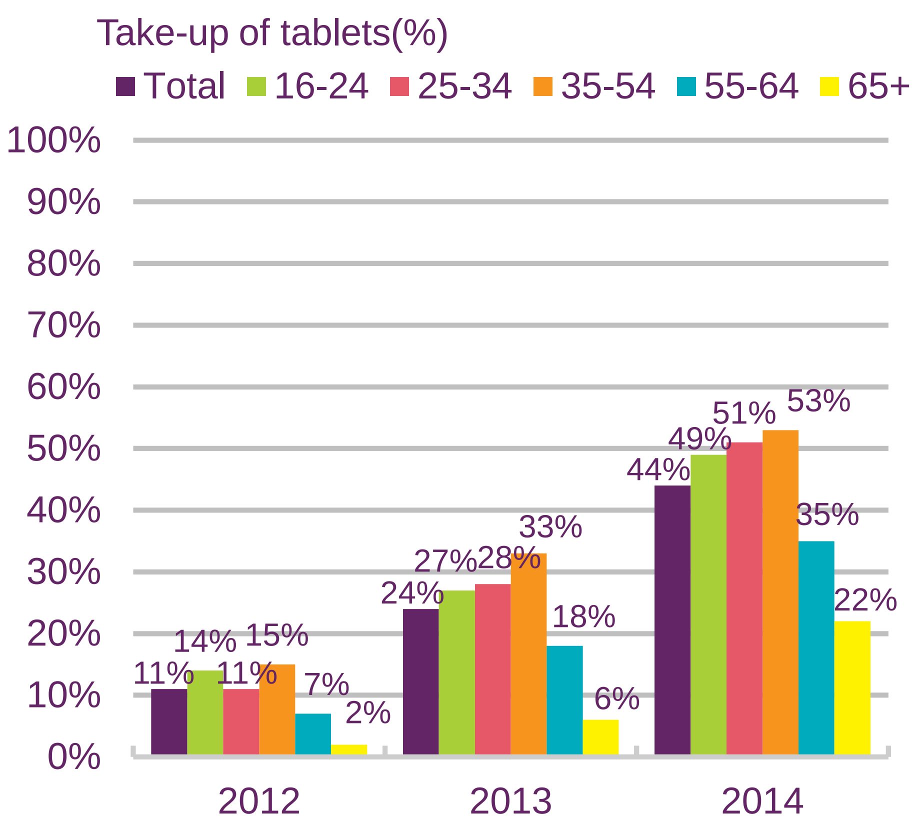


Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QE1. How reliant would you say you are on post as a way of communicating? (SINGLE CODE)

Figure 1.97

Ownership of Smartphones and Tablets





Source: Ofcom technology tracker, Q1

QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Figure 1.98

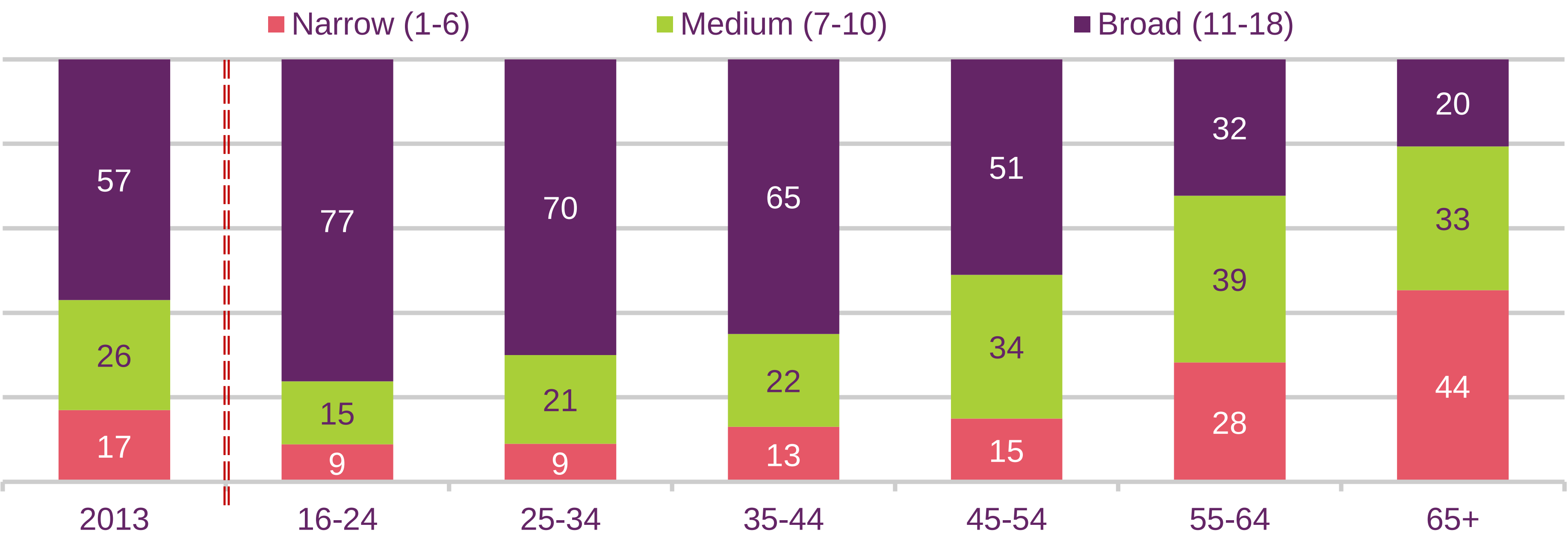
Types of mobile phone use, by age-group

Mobile phone users (%)	All mobile phone users	16-24s	65+
Send/receive photo messages by phone	67	92	20
Send/receive email by phone	55	81	9
Instant messaging by phone	38	72	5

Source: Ofcom Media Literacy Tracker, 2013

Figure 1.99

Breadth of internet use, by age



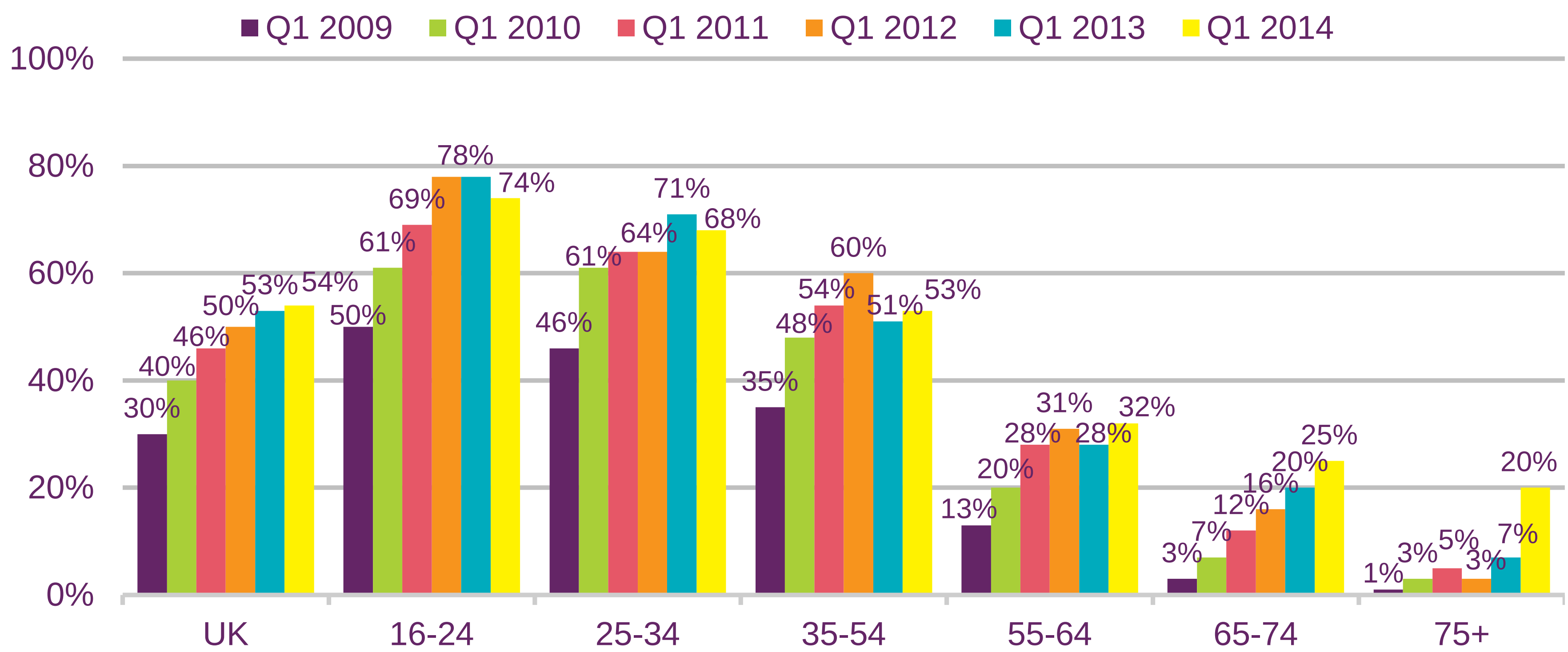
IN17/18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1282 in 2009, 1369 in 2011, 1381 in 2012, 1272 in 2013, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+) . Significance testing shows any change between 2012 and 2013, and between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 1.100

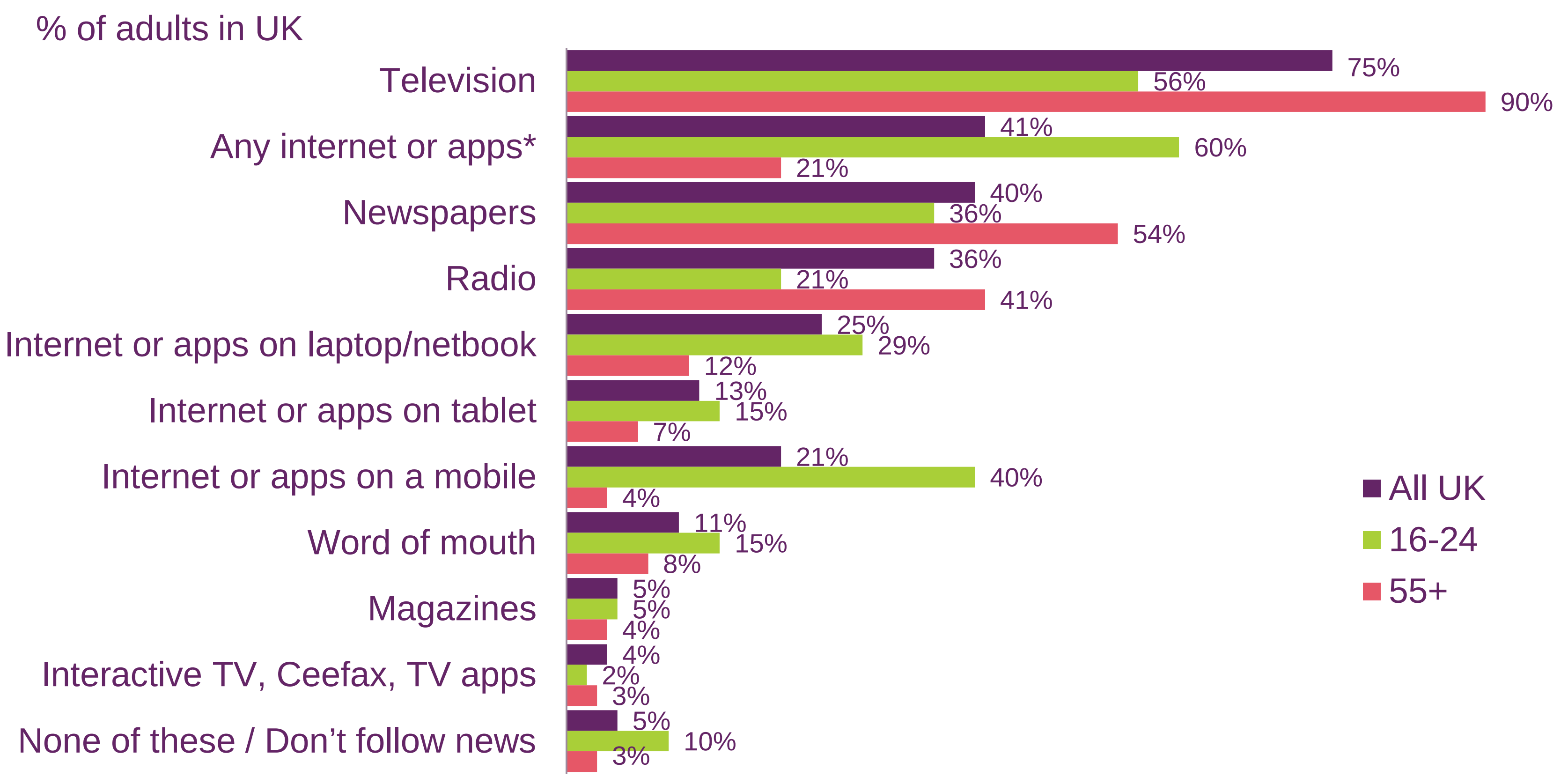
Proportion of adults who access social networking sites on the internet at home



QE21A: Which, if any, of these do you use the internet for?
Base: Those who use the internet at home or elsewhere
Source: Ofcom technology tracker, Q1 2014, Q1 2013, Q1 2012, Q1 2011, Q1 2010 & Q1 2009

Figure 1.101

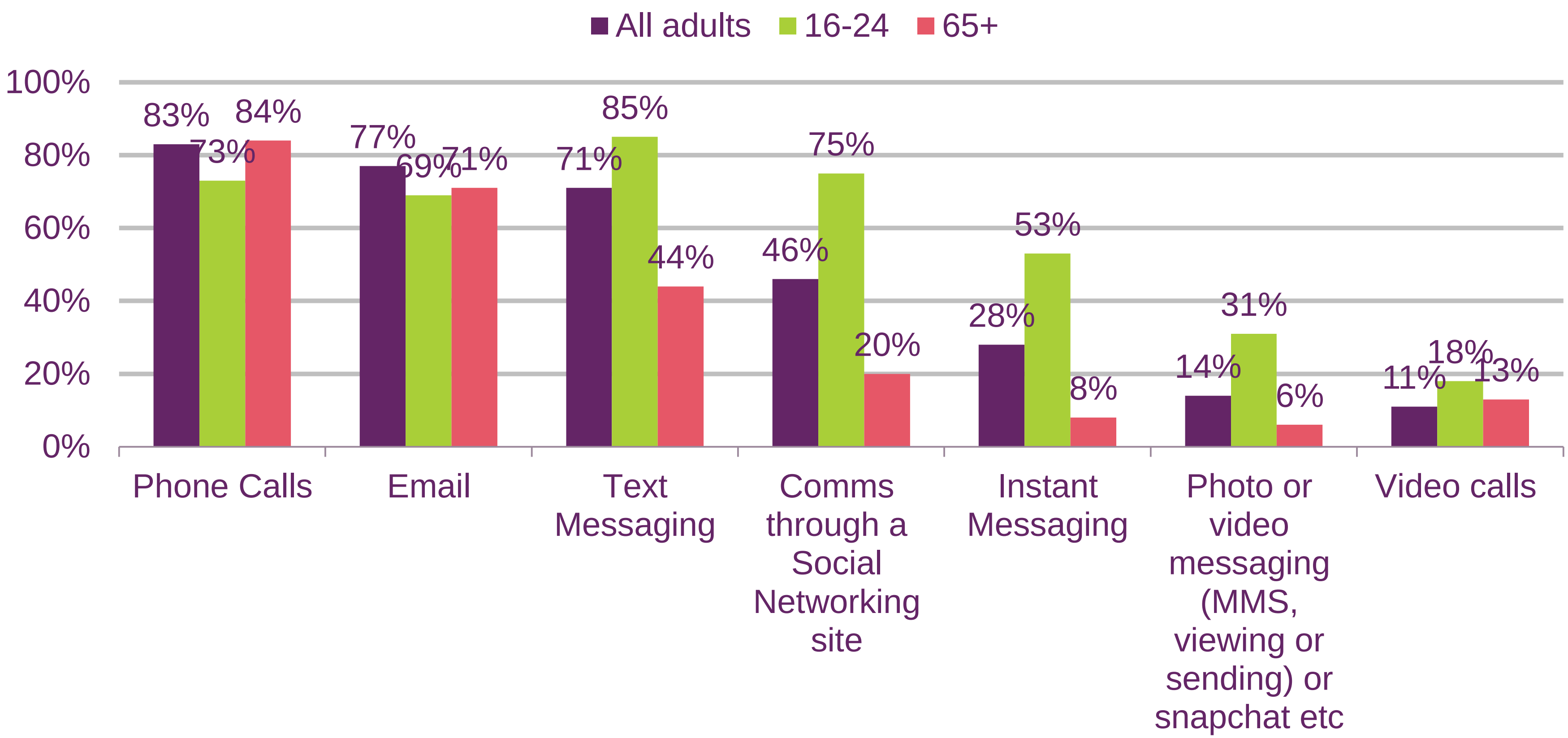
News consumption, by platform: 2014



Q3a) Which of the following do you use for news nowadays?
Base: All adults 16+ (2731).
*Any internet or apps; aggregate of all internet devices.

Figure 1.102

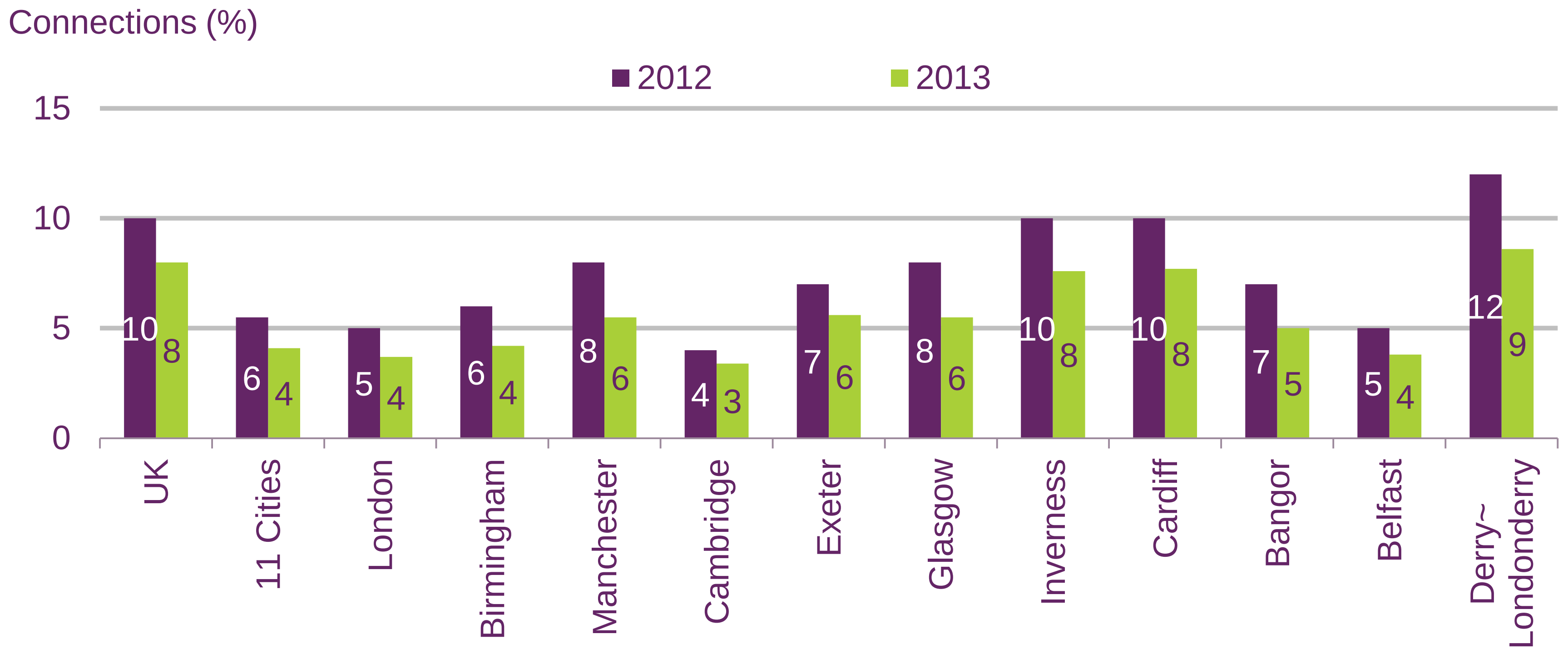
Weekly reach of communications, by age group



Source: Digital Day 7 day diary
Base: All adults aged 16+ (1644)

Figure 1.103

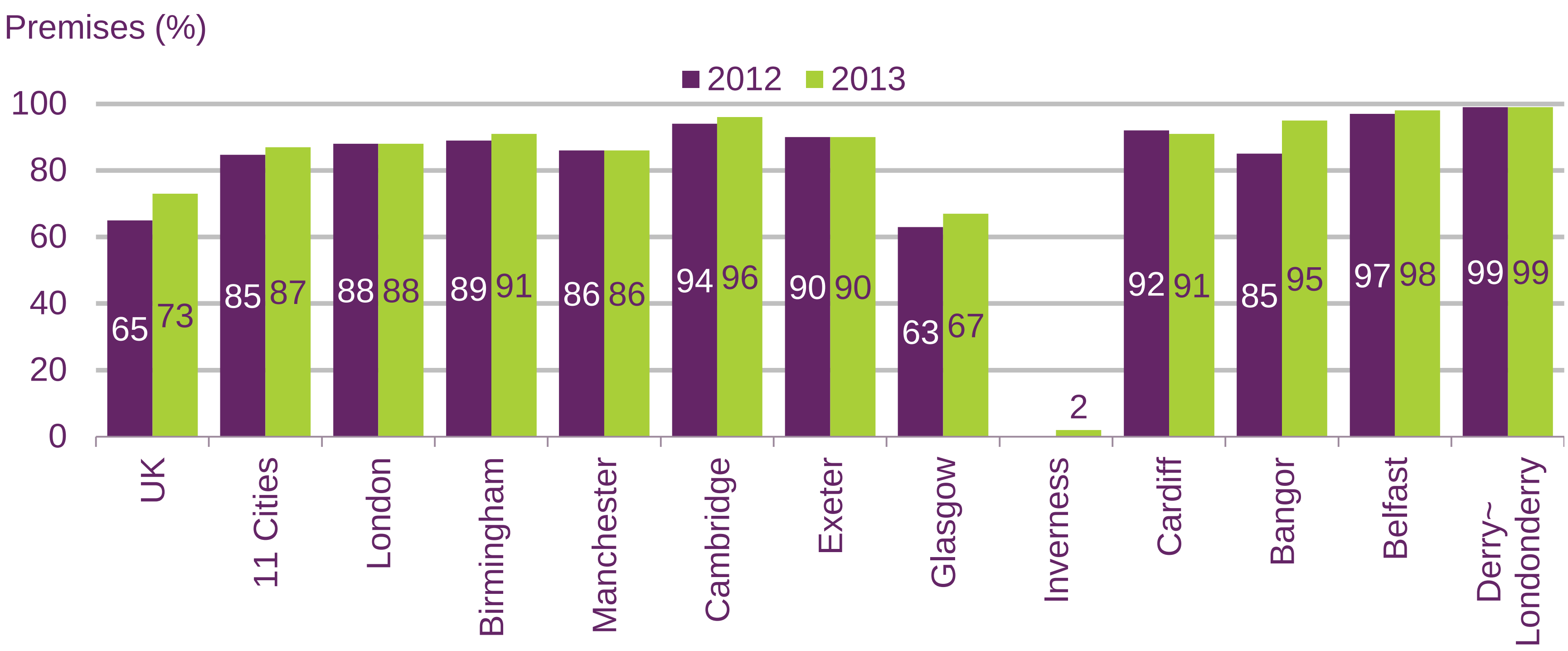
Proportion of connections with speeds less than 2Mbit/s



Source: Analysys Mason, Ofcom Infrastructure Report 2012 and 2013

Figure 1.104

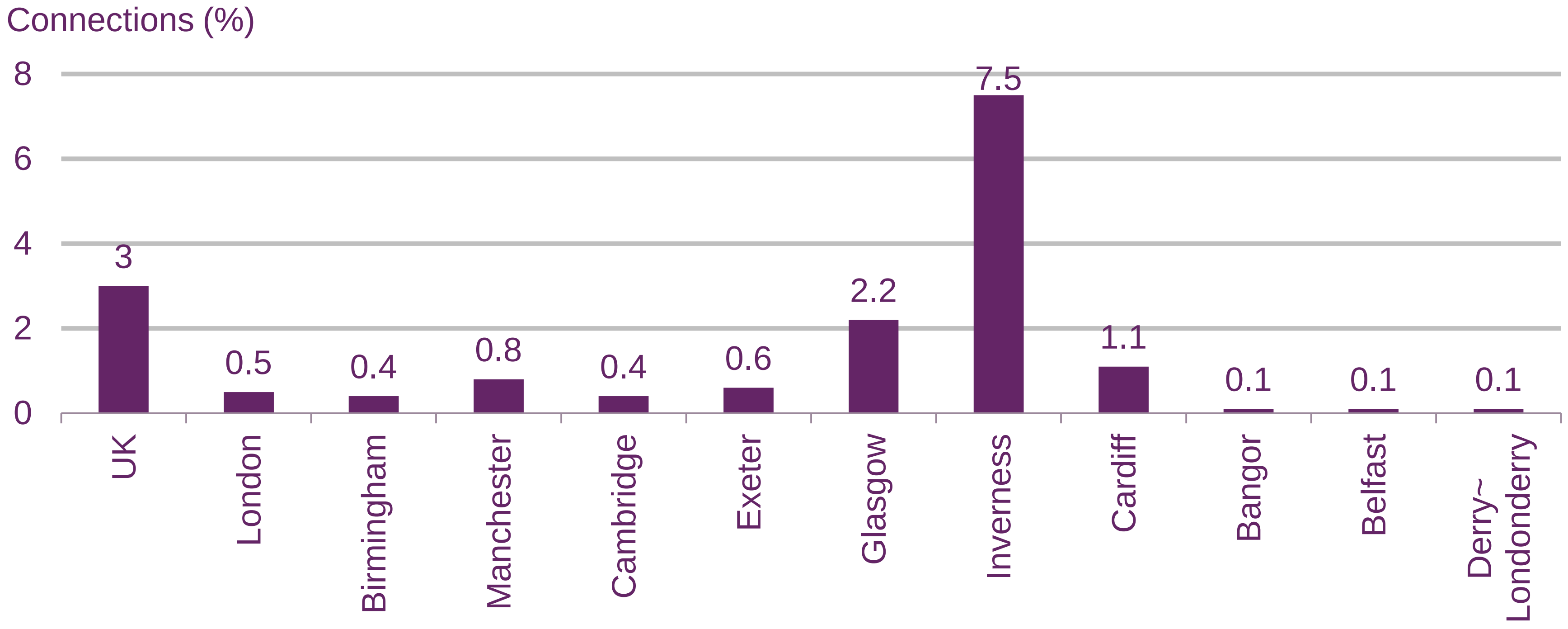
Estimated current availability of NGA infrastructure from BT Openreach and/or Virgin Media



Source: Analysys Mason, Ofcom Infrastructure Report 2013

Figure 1.105

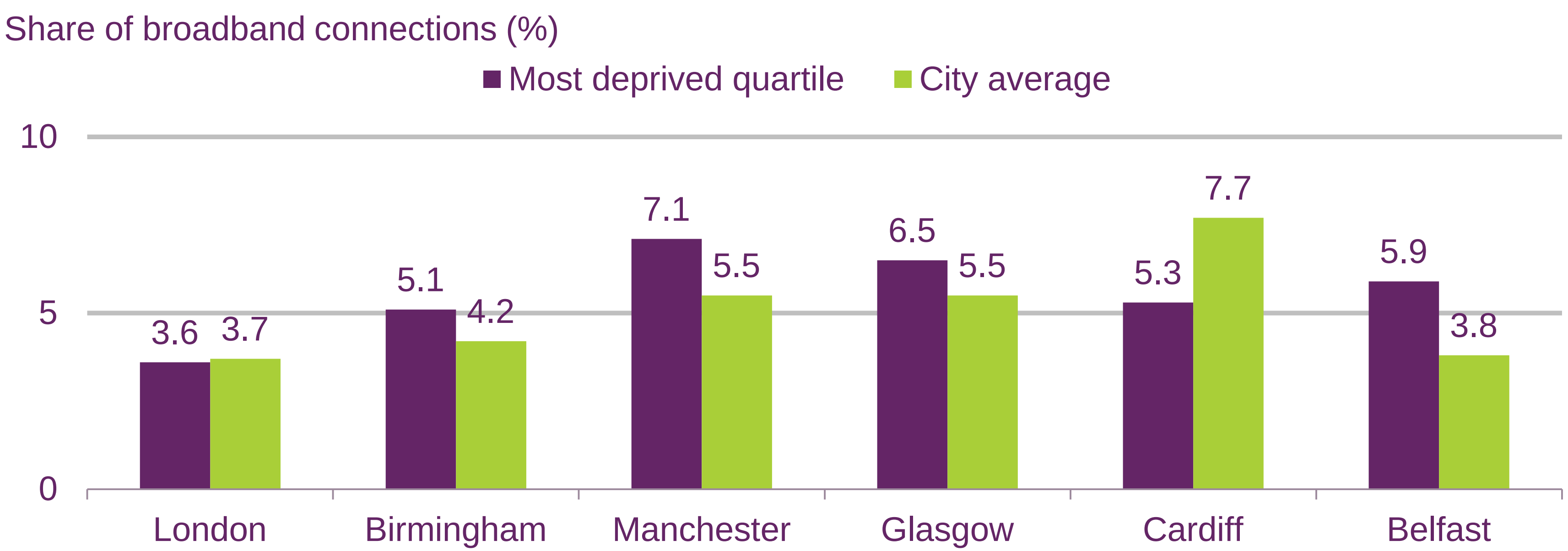
Proportion of connections in postcodes where NGA is not available with speeds of less than 2Mbit/s



Source: Analysys Mason, Ofcom Infrastructure Report 2013

Figure 1.106

Proportion of ‘<2Mbit/s’ connections, by city average and most income-deprived quartile

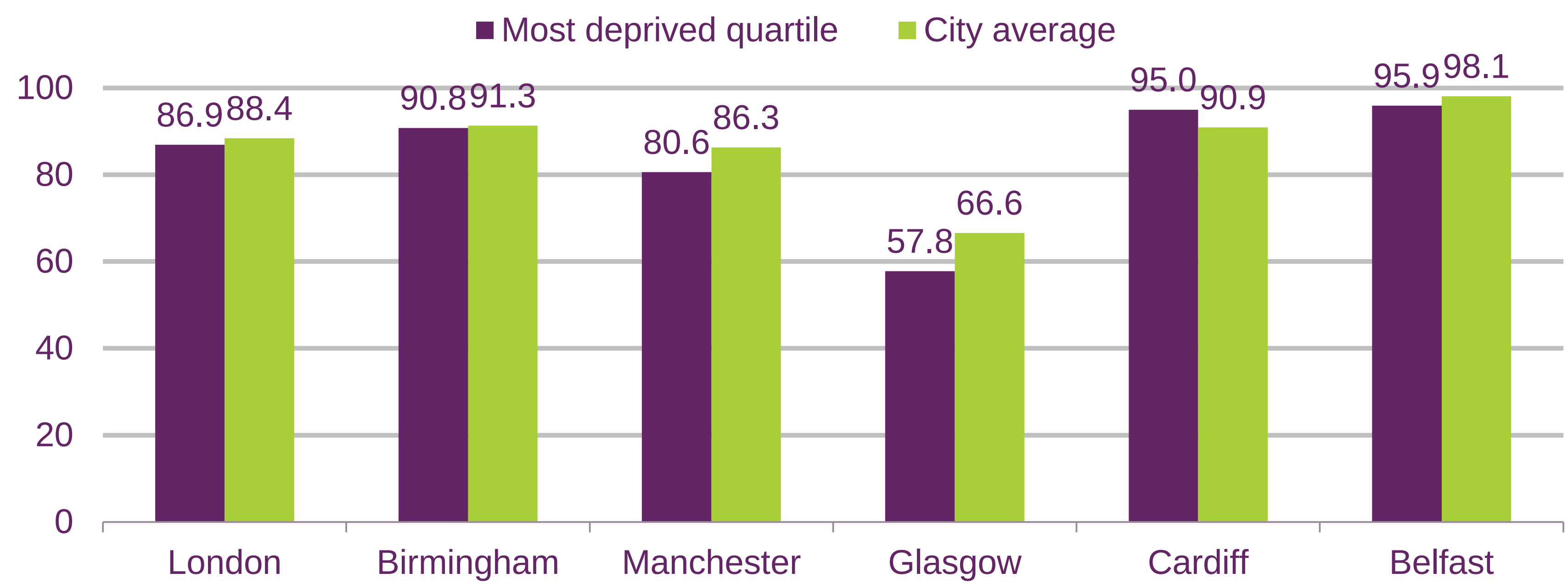


Source: Analysys Mason, IMD, Ofcom January 2014
Notes: Equal premises count method

Figure 1.107

NGA availability, by city average and most income-deprived quartile

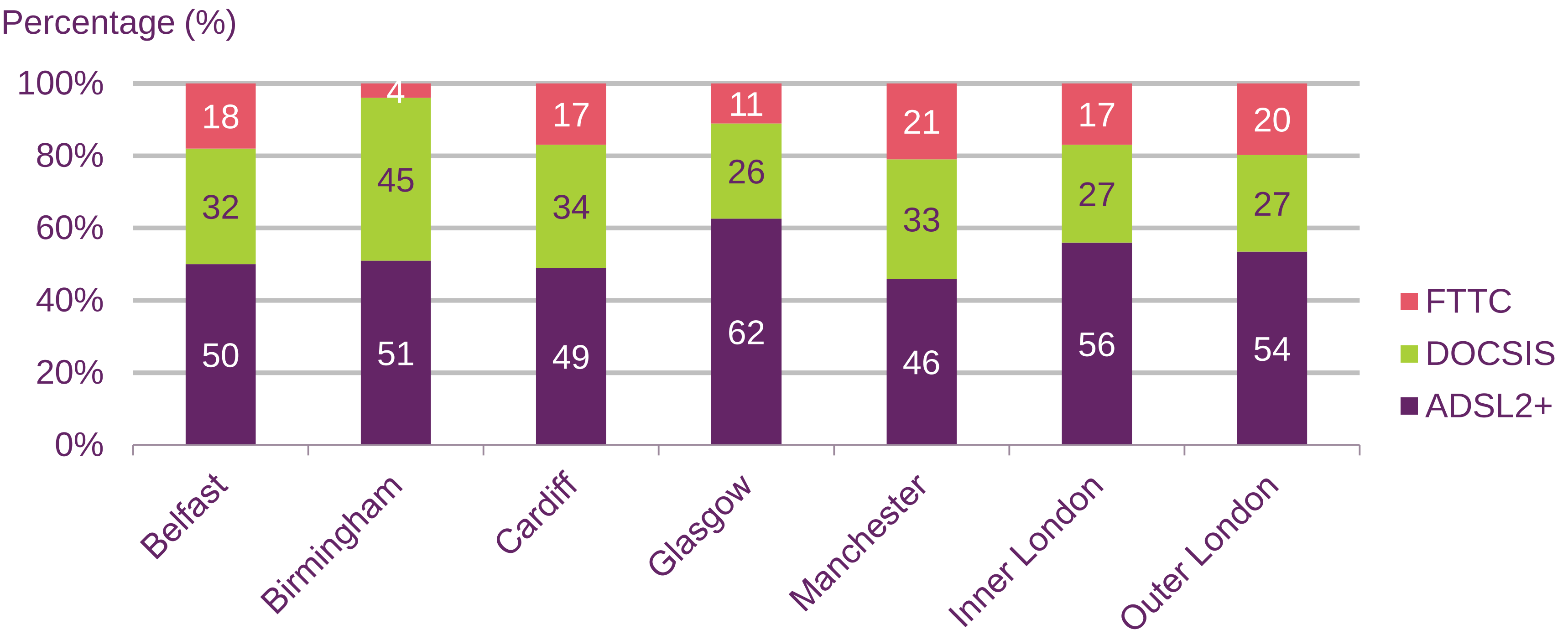
Premises (%)



Source: Analysys Mason, IMD, Ofcom January 2014
Notes: Equal premises count method

Figure 1.108

Broadband connections in the six cities, by type

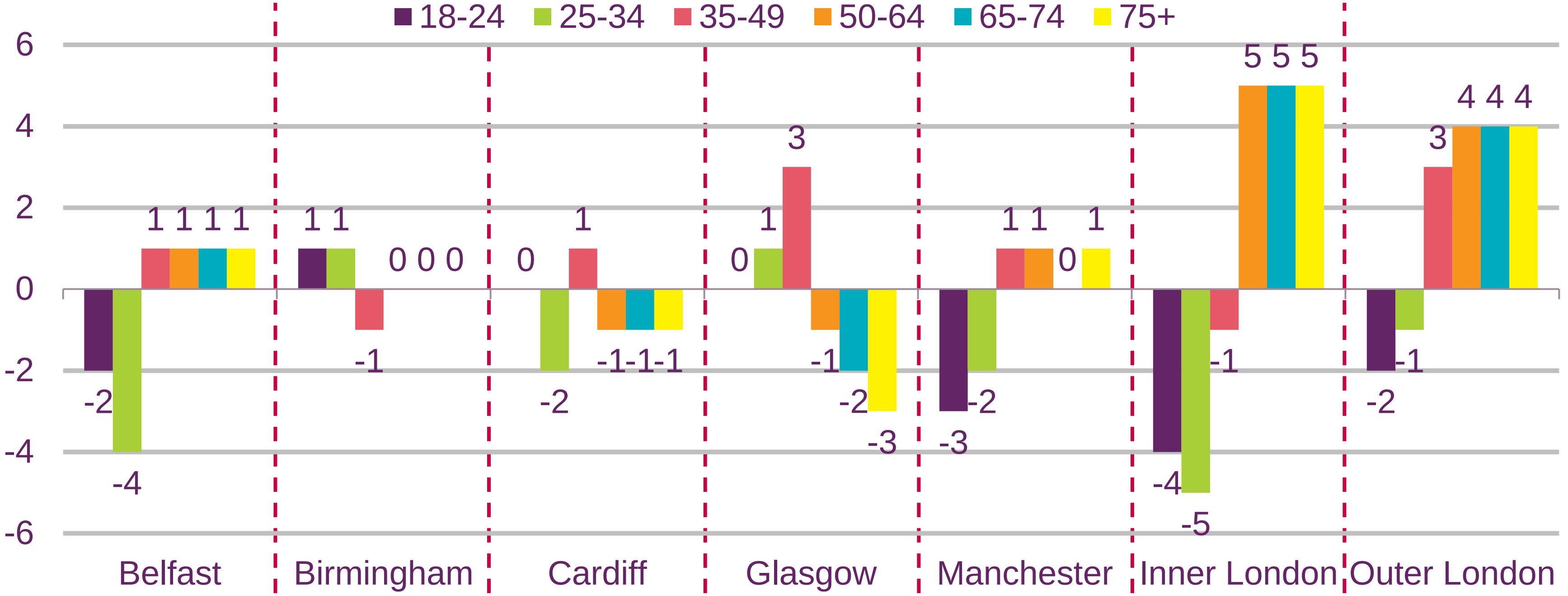


Source: Ofcom Infrastructure Report 2013
Base: ADSL2+, FTTC and DOCSIS connections. Fibre-to-the-premises (FTTP) and ADSL1 connections are excluded from the analysis.

Figure 1.109

NGA connections in the six cities, by age group

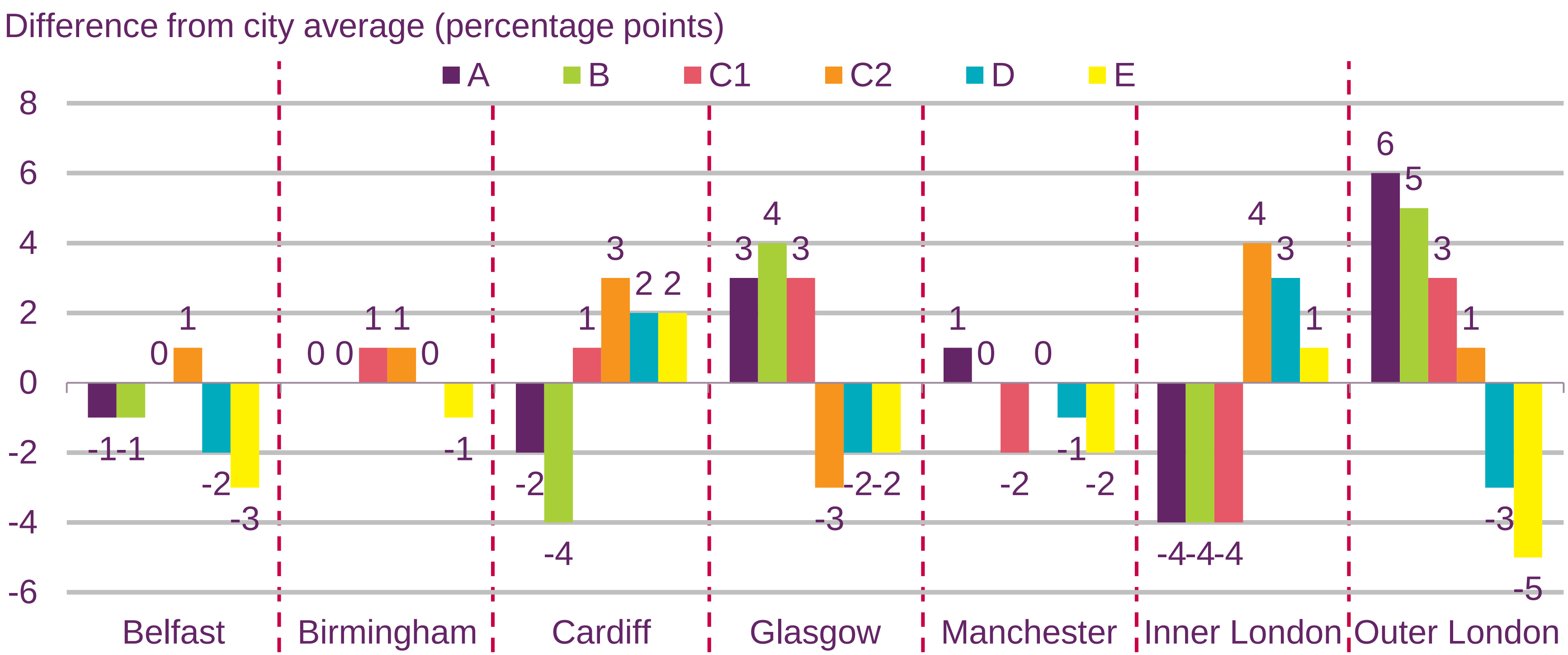
Difference from city average (percentage points)



Source: CACI, ACORN Knowledge File, Ofcom Infrastructure Report 2013

Figure 1.110

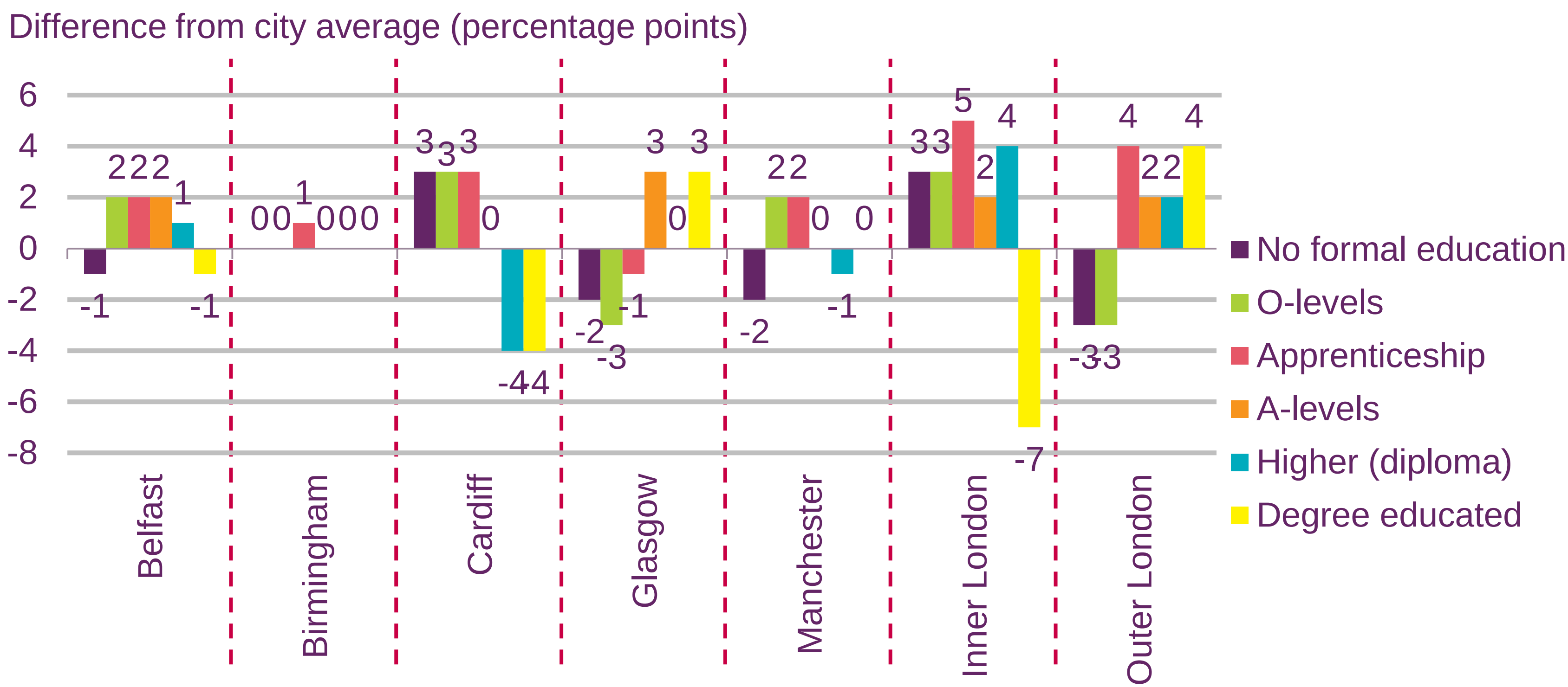
NGA connections in the six cities, by socio-economic group



Source: CACI, ACORN Knowledge File, Ofcom Infrastructure Report 2013

Figure 1.111

NGA connections in the six cities, by education level



Source: CACI, ACORN Knowledge File, Ofcom Infrastructure Report 2013

2 Television and Audio Visual

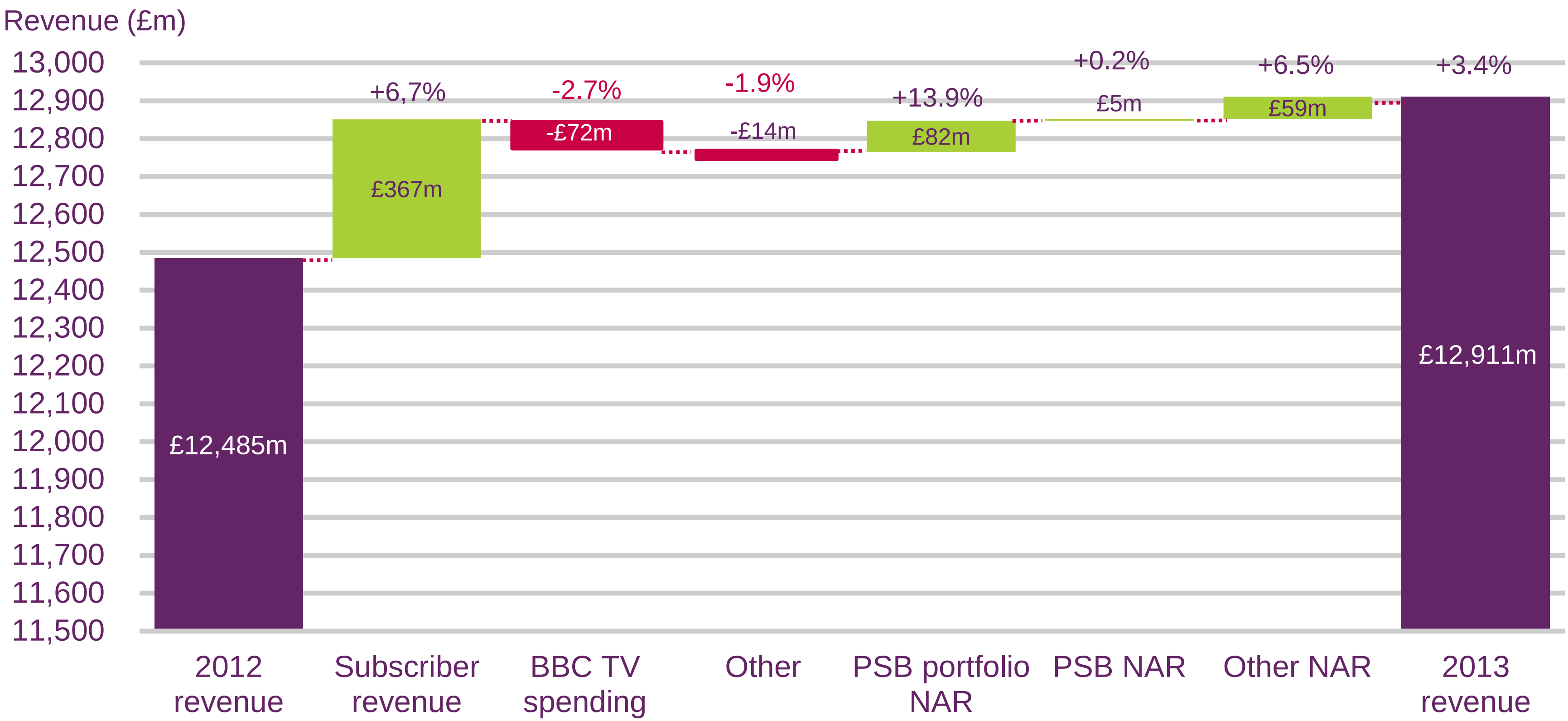
Figure 2.1
Industry metrics

UK television industry	2008	2009	2010	2011	2012	2013
Total TV industry revenue (£bn)	11.2	11	11.8	12.3	12.4	12.9
Proportion of revenue generated by public funds	23%	23%	22%	21%	21%	20%
Proportion of revenue generated by advertising	31%	28%	30%	29%	28%	29%
Proportion of revenue generated by subscriptions	39%	42%	43%	44%	44%	46%
TV as a proportion of total advertising spend	27%	28%	29%	29%	30%	26%
Spend on originated output by 5 main networks (£bn)	2.6	2.4	2.5	2.5	2.6	2.5
Digital TV take-up (% all households)	84%	88%	92%	94%	96%	95%
Proportion of DTV homes paying for TV	53%	54%	52%	51%	51%	53%
Viewing per head, per day (hours) in all homes	3.74	3.75	4.04	4.03	4.01	3.9
Share of the five main channels in all homes	61%	58%	56%	54%	52%	51%
Number of channels broadcasting in the UK	495	490	510	515	529	527

Source: Ofcom/broadcasters/Advertising Association/Warc/BARB. Note: Expressed in nominal terms. 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 (expenditurereport.warc.com/). The AA/Warc data is net of discounts, and includes agency commission, but excludes production costs. Spend on originations includes spend on nations and regions programming (not Welsh or Gaelic language programmes but some Irish language).

Figure 2.2

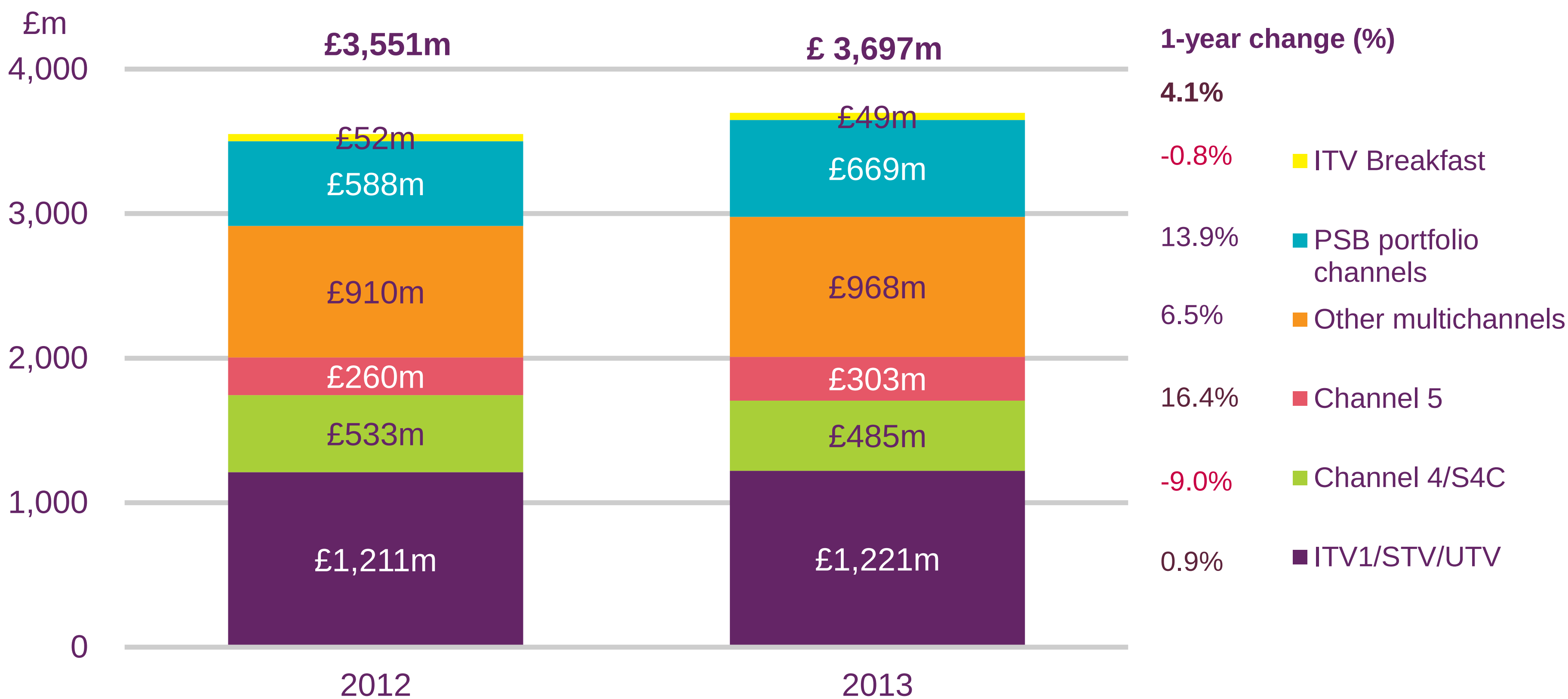
Total TV industry revenue, by source: 2013



Source: Ofcom/broadcasters. Note: Figures expressed in nominal terms. PSB NAR comprises Channel 3 licensees (including ITV Breakfast, ITV plc, Channel Television, STV and UTV), Channel 4, Channel 5 and S4C. PSB portfolio NAR includes commercial channels owned by the PSBs (ITV2, ITV3, ITV4, E4, More 4, Film 4, 5* and 5USA. 'Other NAR' comprises the rest of the multichannel market. Platform operator revenues do not include installation costs, equipment sales or subsidies. BBC TV spending represents the amount of BBC revenue that is allocated to TV, which is estimated by Ofcom based on Note B3 in the BBC's annual report and accounts 2013/14.

Figure 2.3

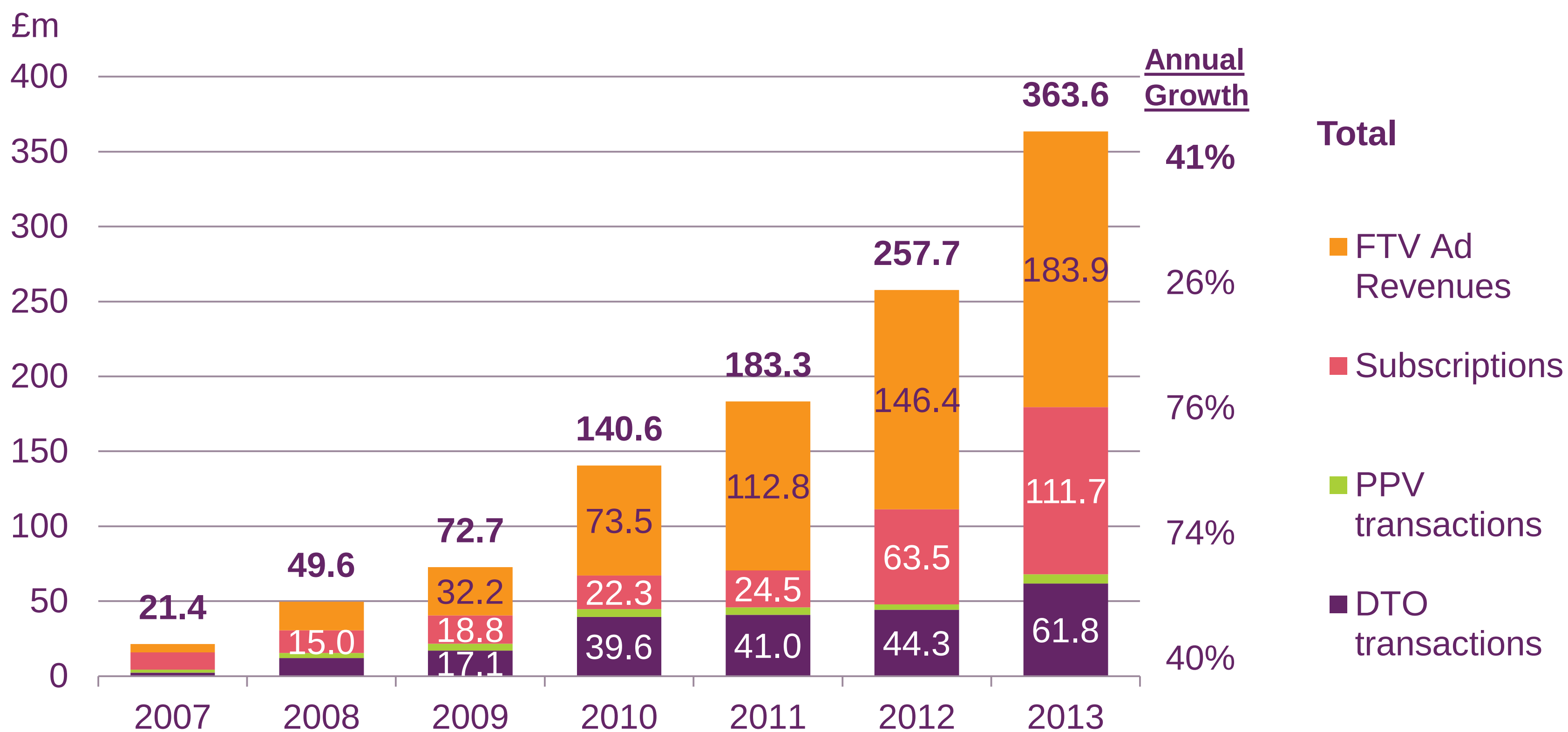
Advertising revenue, by share: 2012 - 2013



Source: Ofcom/broadcasters. Note: TV advertising includes revenues that broadcasters receive from the sale of advertisements on screen (net of agency fees) and excludes video on demand. Totals may not equal the sum of the components due to rounding. ITV1/Channel 3 includes ITV Plc, STV, UTV and Channel Television.

Figure 2.4

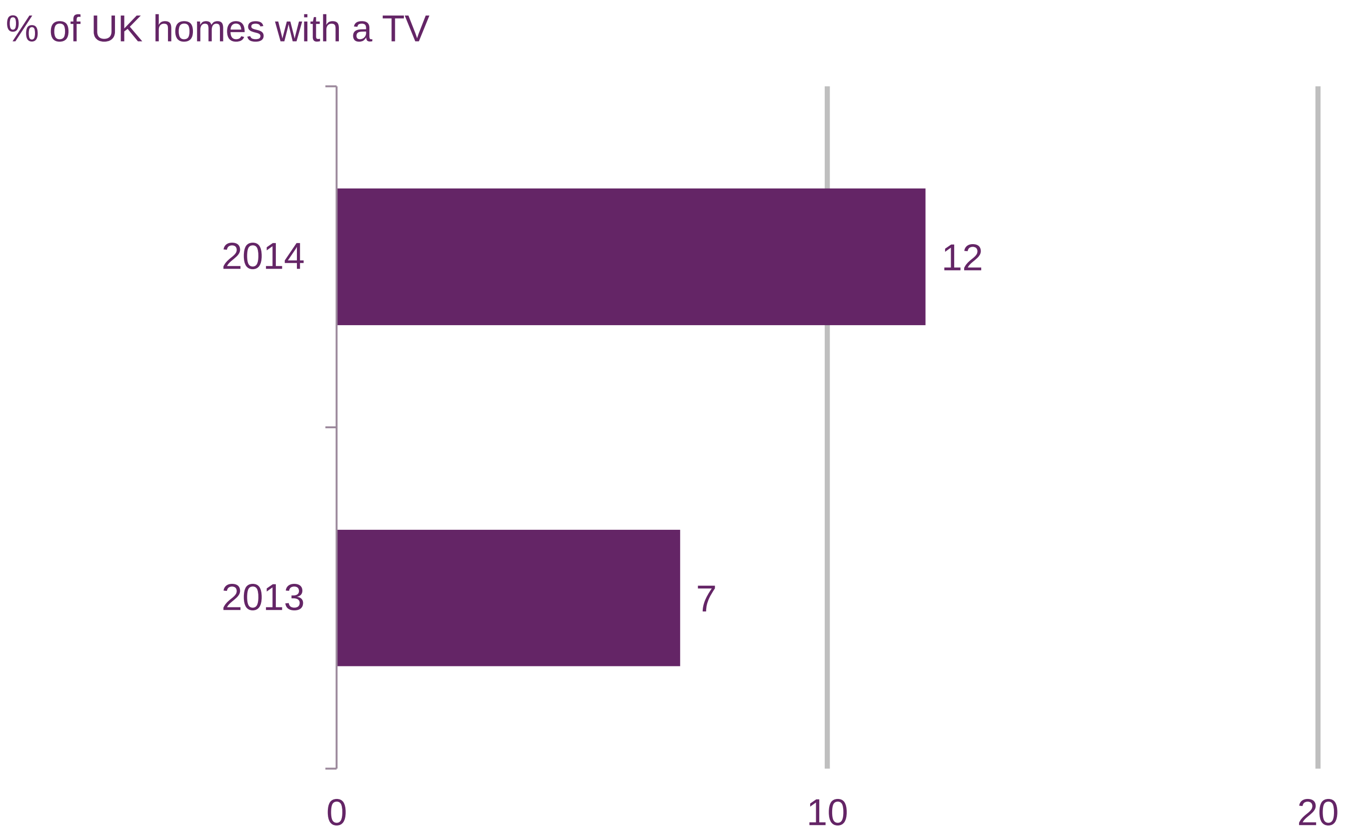
Online TV revenues



Source: IHS. Note: FTV (free to view) refers to services delivering online video free to the consumer. Number of FTV streams includes both ad-supported services and services funded through other means (such as BBC iPlayer). FTV revenues include advertising revenues only. PPV (pay per view) refers to a method of renting digital content whereby customers commonly choose content on 'a la carte' basis and pay to watch it for a limited period. The category includes all content consumed on an on-demand basis, including traditional PPV (such as live sports) and VoD. DTO (download to own) refers to a method of obtaining content that gives the customer ownership over the files they have downloaded, allowing them to use the content as many times as they like.

Figure 2.5

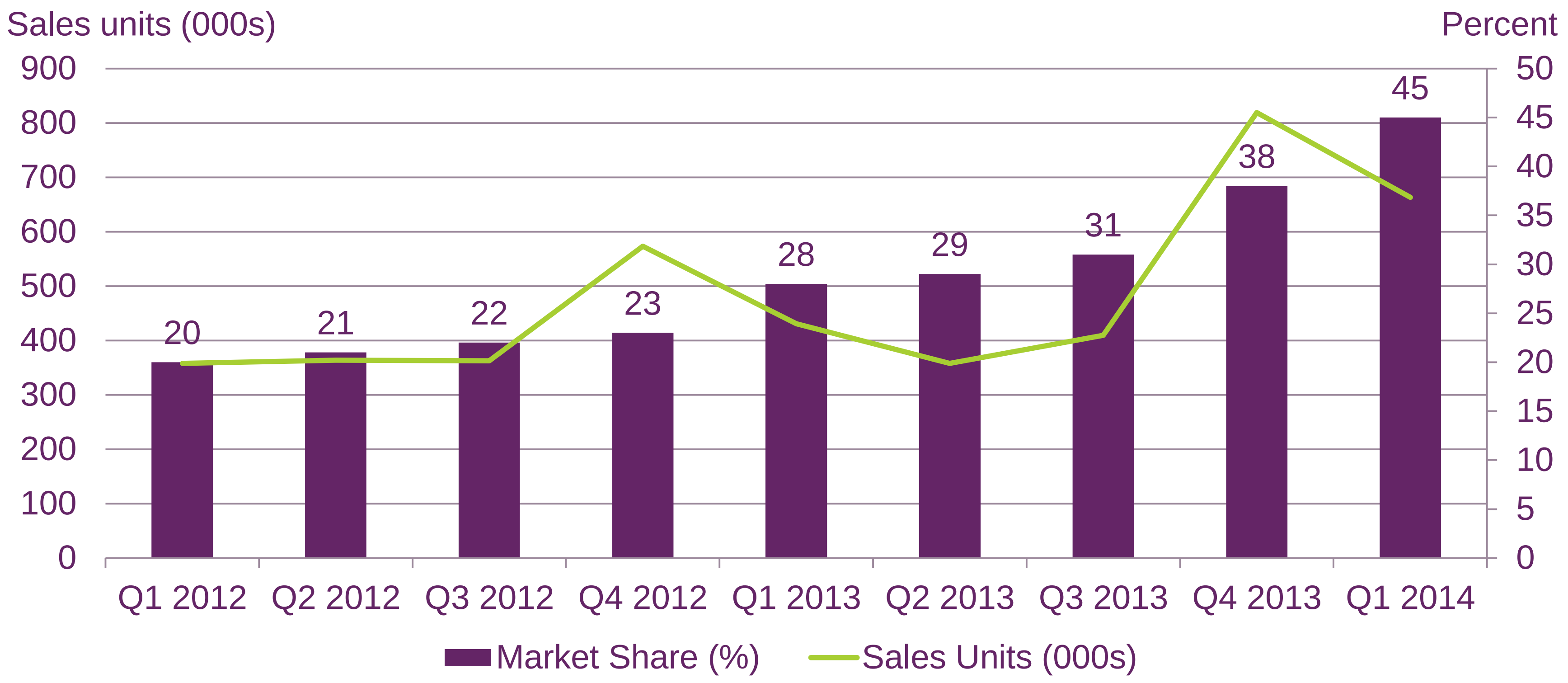
Take up of smart TVs among UK TV households



Source: Ofcom technology tracker. Data from Q1 of each year
Base: All adults aged 16+ with a TV in the household: 2014 (3635) 2013 (3661).

Figure 2.6

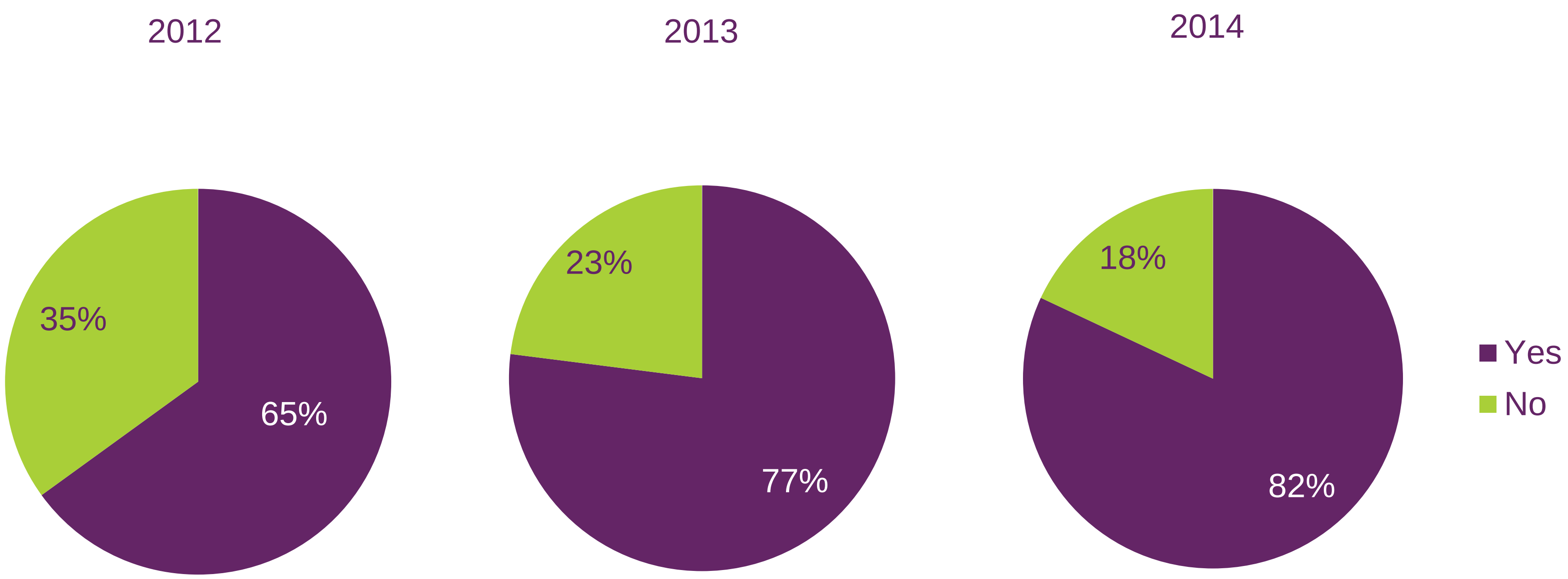
Smart TV sales and market share



Source: GfK

Figure 2.7

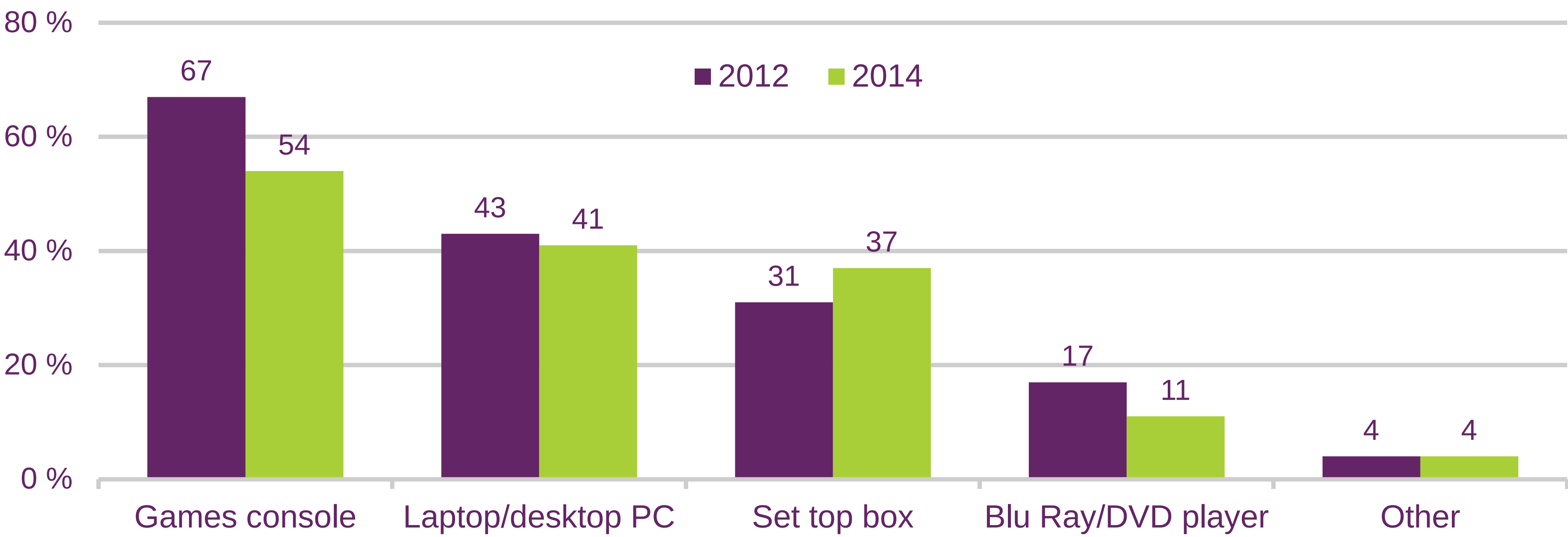
Consumers' use of internet connection on smart TVs



Source: Ofcom research, March 2014
Q.D7 Have you ever used the internet connection on your smart TV set?
Base: All respondents who own a smart TV 2014 (512), 2013 (670), 2012 (252)

Figure 2.8

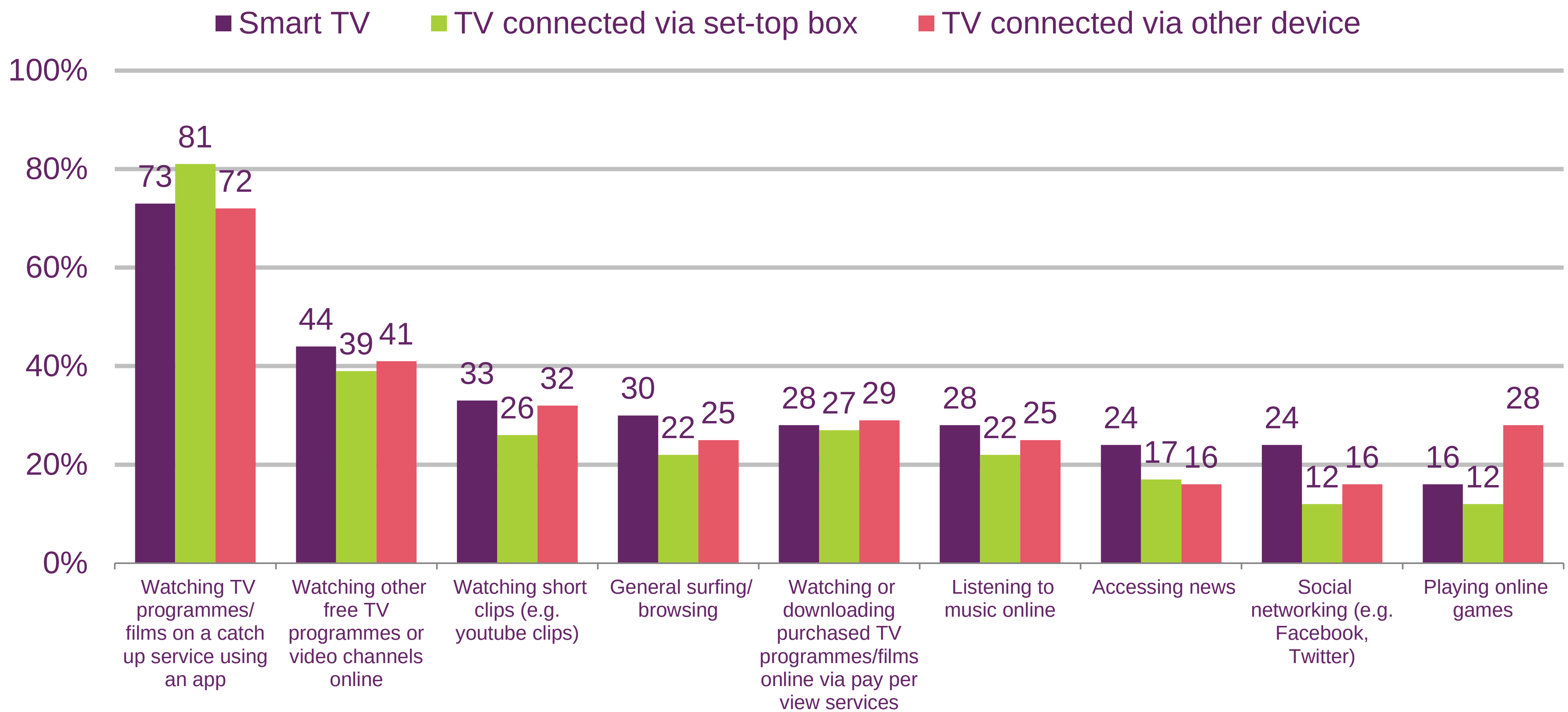
Use of different devices to connect to the internet



Source: Ofcom research, March 2014
Q.S4. What type of device do you use your TV with, to view content from the internet?
Base: All respondents who don't own a smart TV but do connect their TV to the internet: 2012 (338), 2014 (510).

Figure 2.9

Activities done using smart TV / internet connected TV



Source: Ofcom research, March 2014

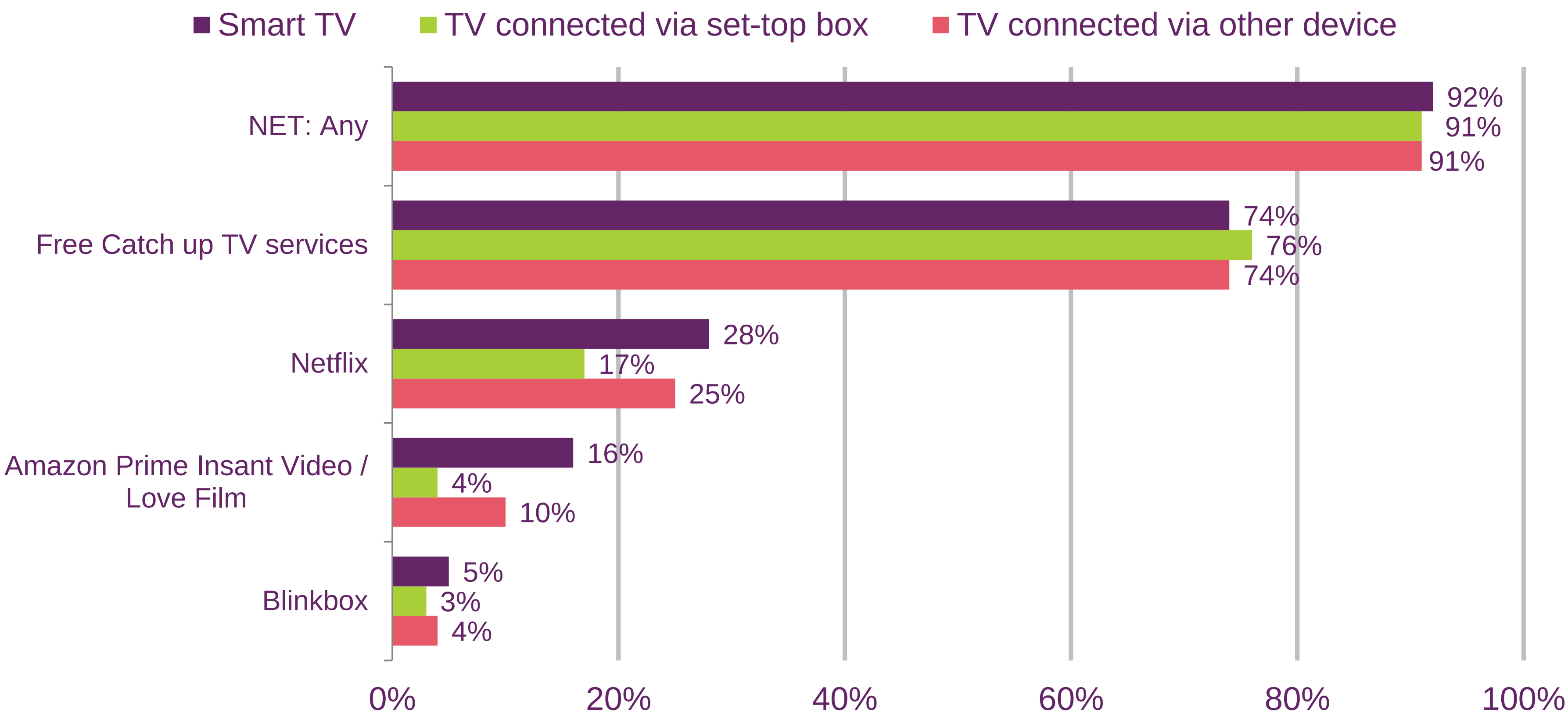
Q.D8 What do you use the internet functionality on your TV for?

Q.E2 When you connect your TV to the internet, what do you tend to do online?

Base: All respondents with an internet connected TV: 2014 (513) smart TV (420)

Figure 2.10

Audio-visual services used in the past month



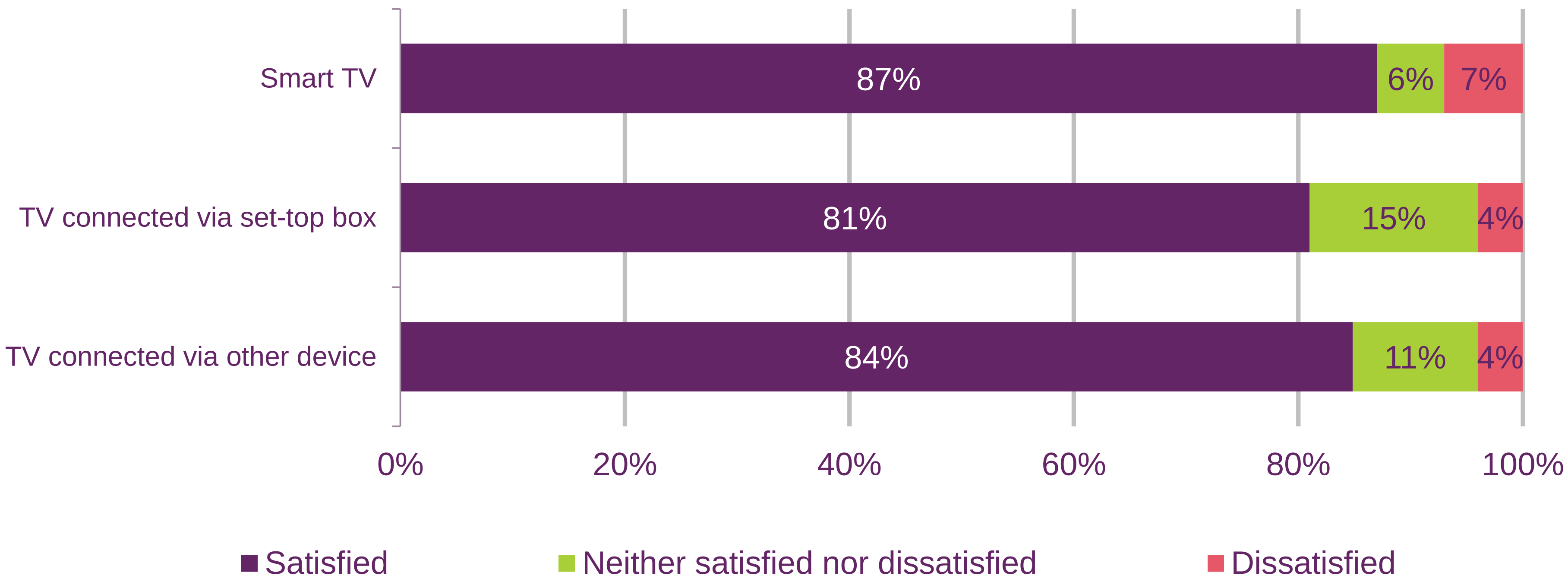
Source: Ofcom research, March 2014

QD10/ Q.E8a Which of the following internet services, if any, have you used in the past month on your TV/ smart TV?

Base: All respondents who watch content from the internet with an internet-connected TV: 2014 (442) / smart TV (344)

Figure 2.11

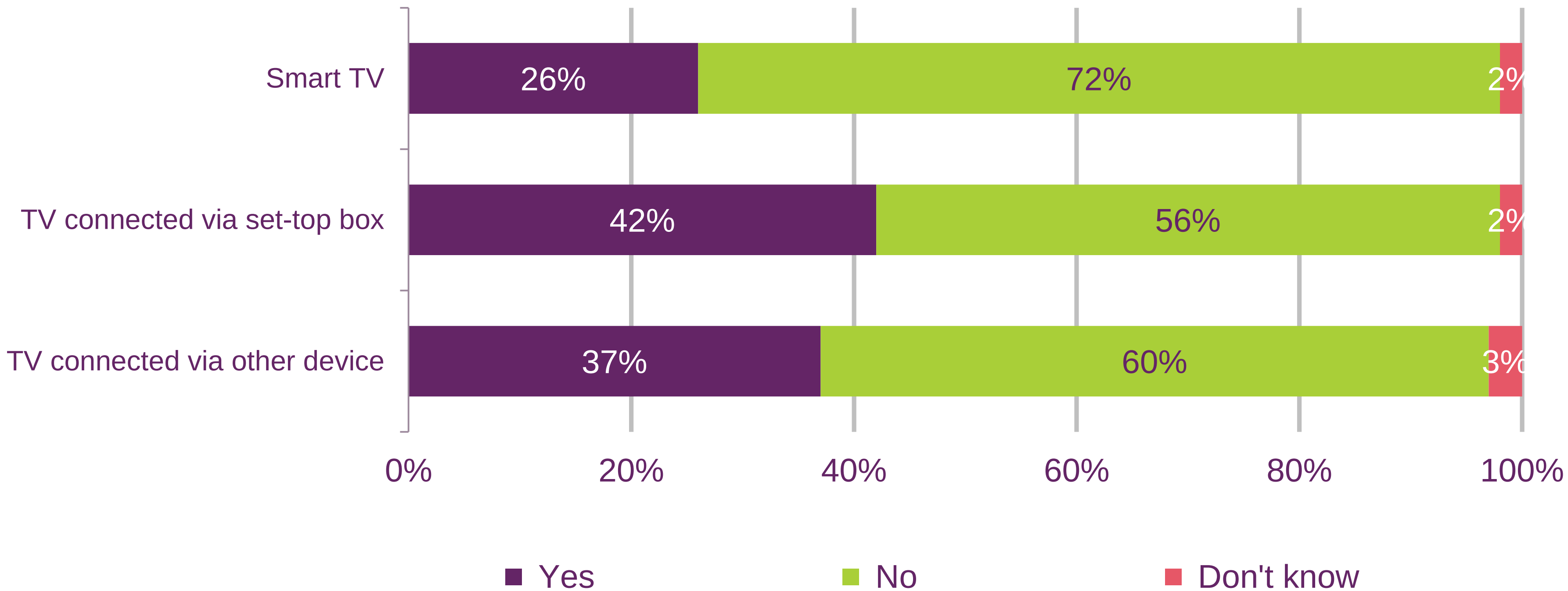
Levels of satisfaction with smart TV/ internet connected TV



Source: Ofcom research, March 2014
Q.D2/ Q.E3 Taking all things into account, how satisfied or dissatisfied are you with the experience of connecting your TV to the internet? Q.D2. Taking all things into account, how satisfied or dissatisfied are you with your smart TV?
Base: All respondents with an internet-connected TV: 2014 (513), smart TV (512)

Figure 2.12

Problems experienced while watching content using smart TV/ internet connected TV

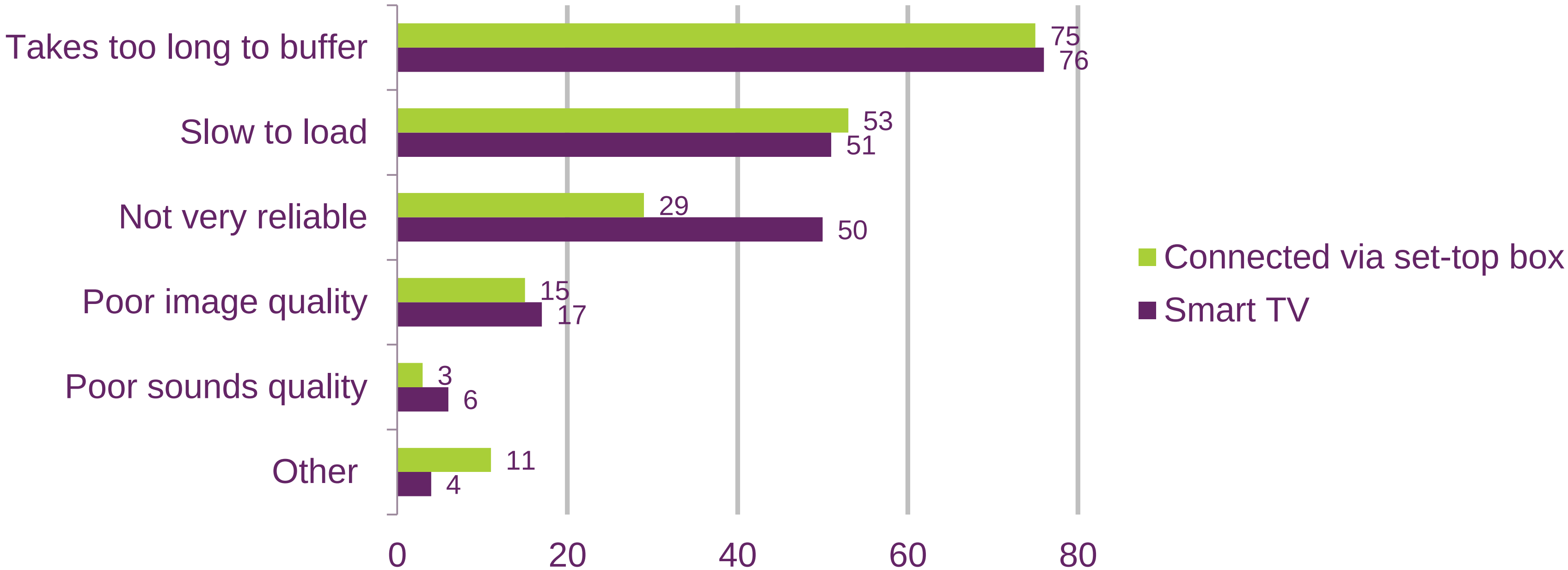


Source: Ofcom research, March 2014
Q.D9a Have you ever had any problems while trying to watch TV programmes or films from the internet on your smart TV?/ Q.E8b Have you ever had any problems while trying to watch TV programmes or films from the internet using your internet-connected TV?
Base: All respondents with an internet connected TV who watch content online (442) smart TV (344)

Figure 2.13

Problems experienced whilst watching content using smart TV / TV connected through set-top box

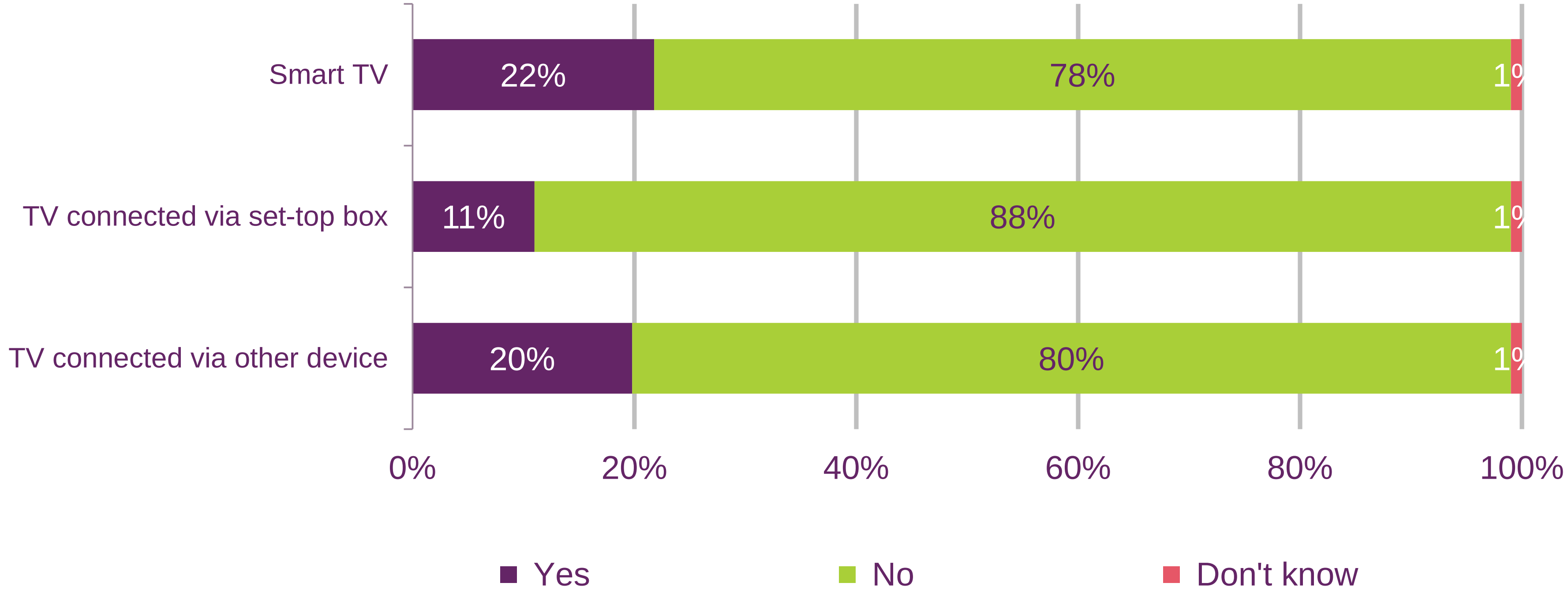
Percentage (%)



Source: Ofcom research, March 2014
Q.E8b Have you ever had any problems while trying to watch TV programmes or films from the internet using your internet connected TV? Which, if any, of the following problems have you experienced?
Base: All respondents with a set-top box who have experienced problems (72)
Q.D9a Have you ever had any problems while trying to watch TV programmes or films from the internet on your smart TV?
Q.D9b Which, if any, of the following problems have you experienced?
Base: All respondents who watch content from the internet on their smart TV (344), who have had problems (90)

Figure 2.14

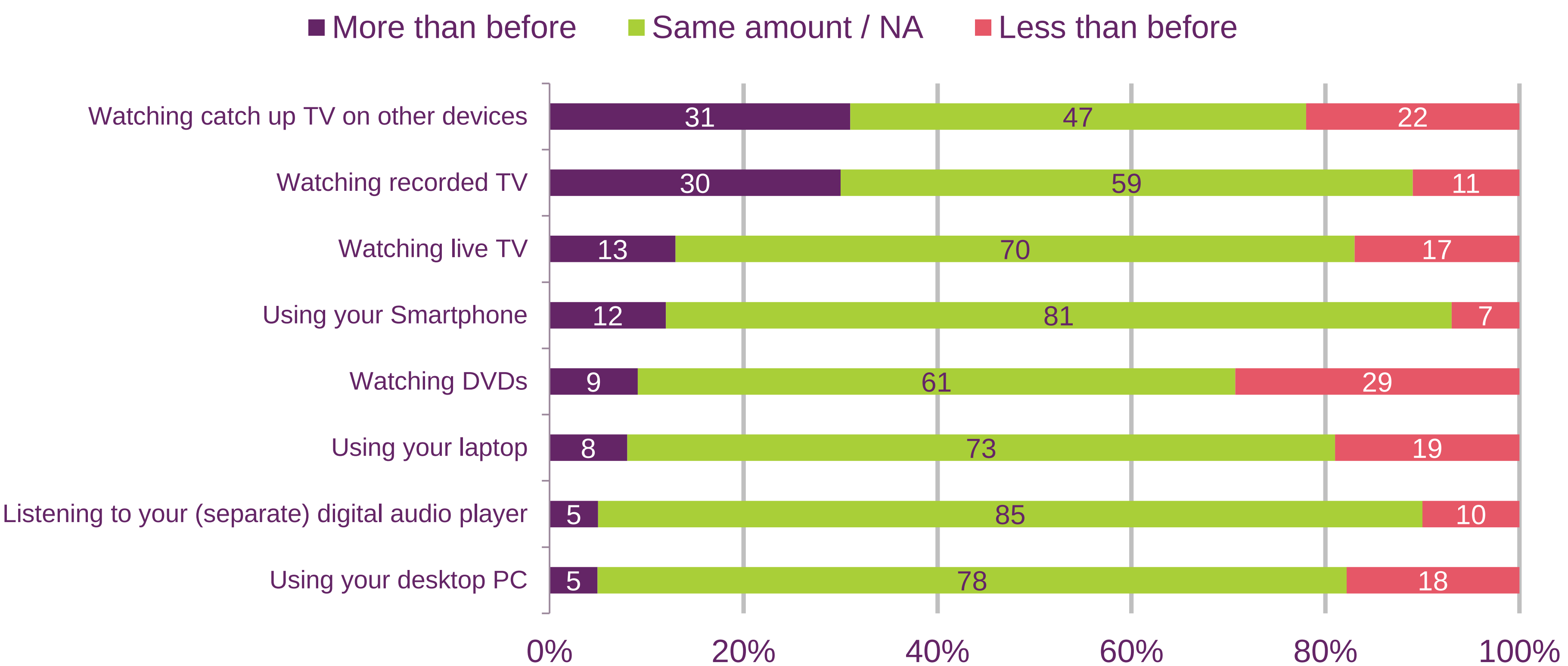
Changed broadband package since purchasing smart TV/ internet connected TV



Source: Ofcom research, March 2014
D15a/ Q.E12a Have you changed your broadband package since connecting your TV to the internet?
Base: All respondents with an internet connected TV: 2014 (513), smart TV (512)

Figure 2.15

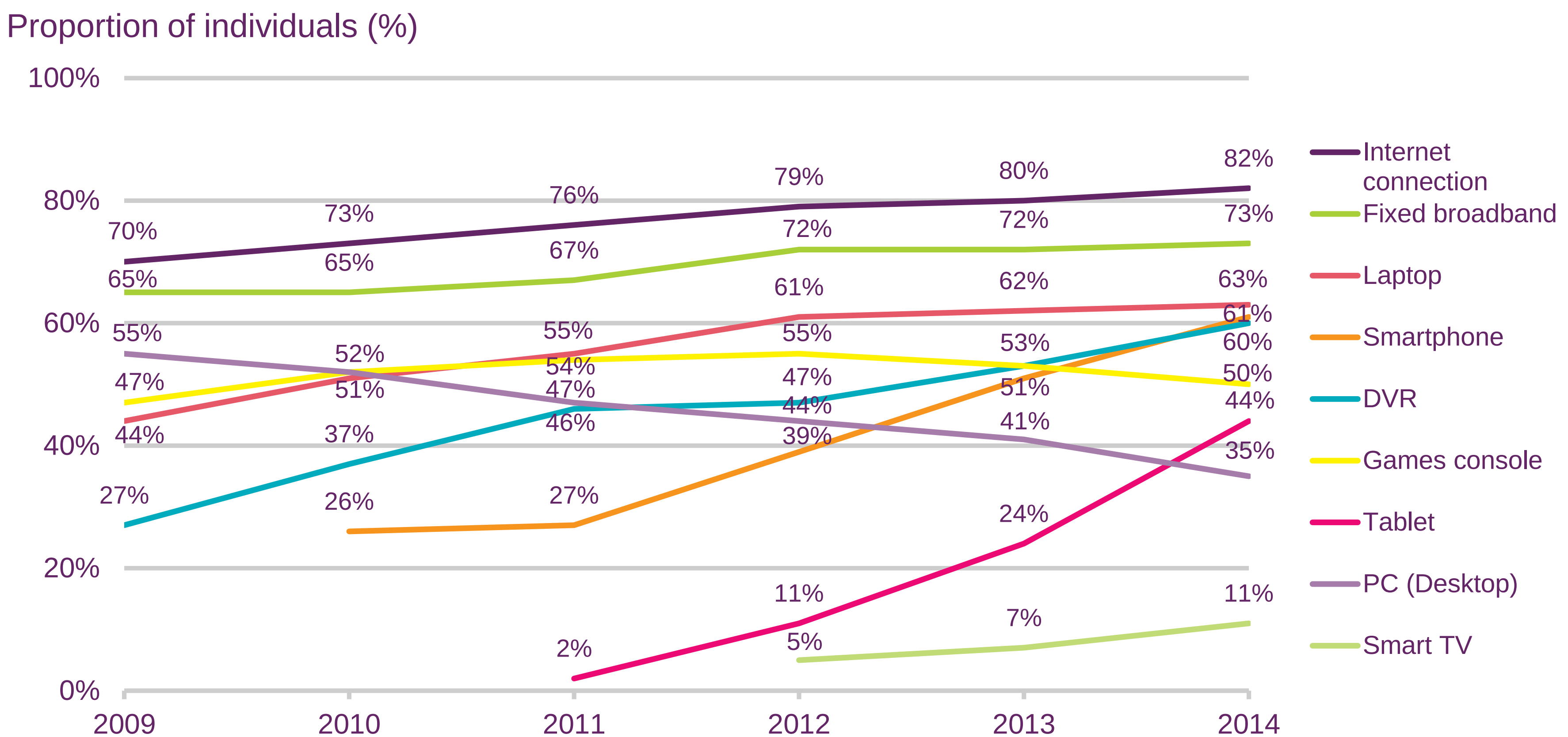
Change in frequency of activities since owning a smart TV



Source: Ofcom research, March 2014
Q.D13 Since owning your smart TV have you done each of the following more or less than before?
Base: All respondents who own a smart TV: 2013 (670), 2014 (512)

Figure 2.16

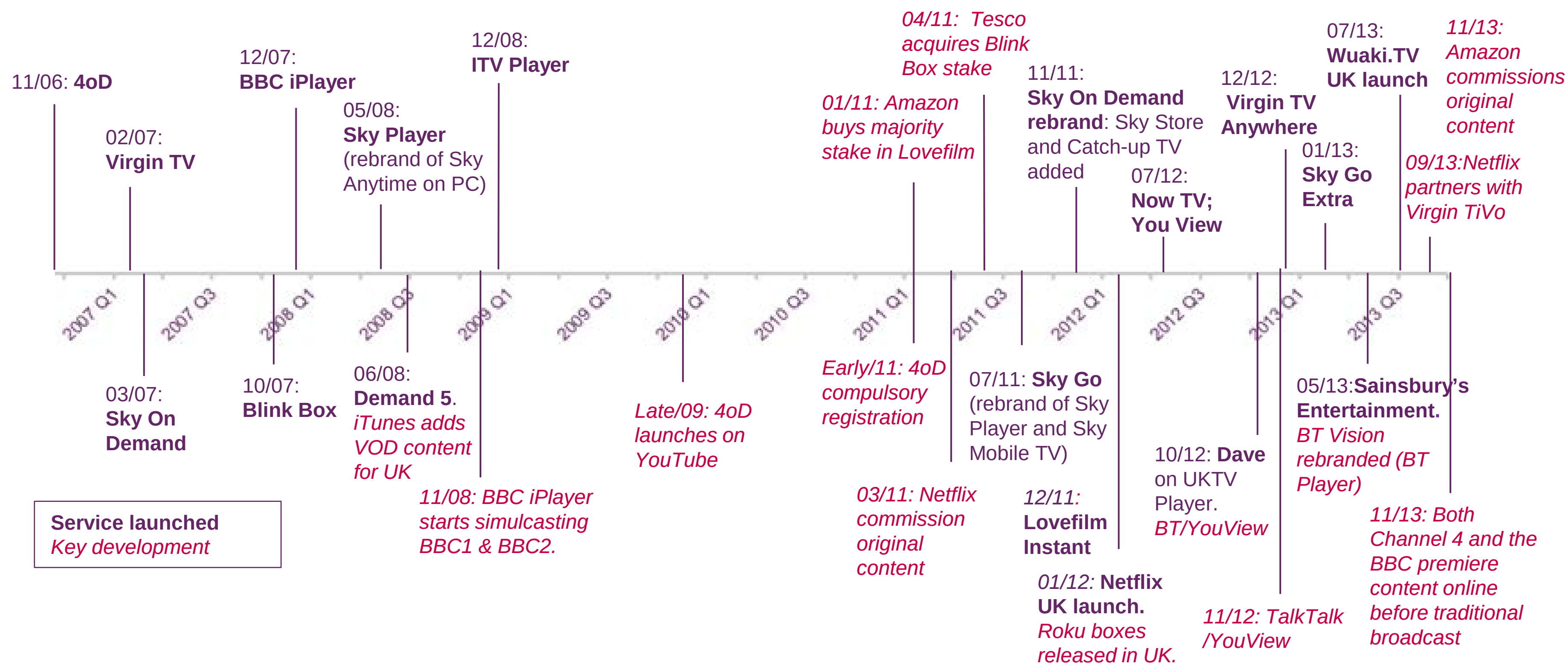
Take-up of VOD-related devices and technologies



Source: Ofcom technology tracker. Data from Q1 of each year.
Base: All adults aged 16+ (2014 n=3740).
Notes: Fixed broadband = ADSL through a phone line or cable service – perhaps using a Wi-Fi router. Includes superfast broadband services. Home internet access = connection to the internet through ordinary phone line; fixed broadband; mobile broadband such as USB stick, dongle or built in connectivity through a SIM card; internet access through mobile phone or smartphone (Wi-Fi or mobile network); tethering or MiFi mobile broadband wireless router (taps into a 3G or 4G mobile network within range of the signal

Figure 2.17

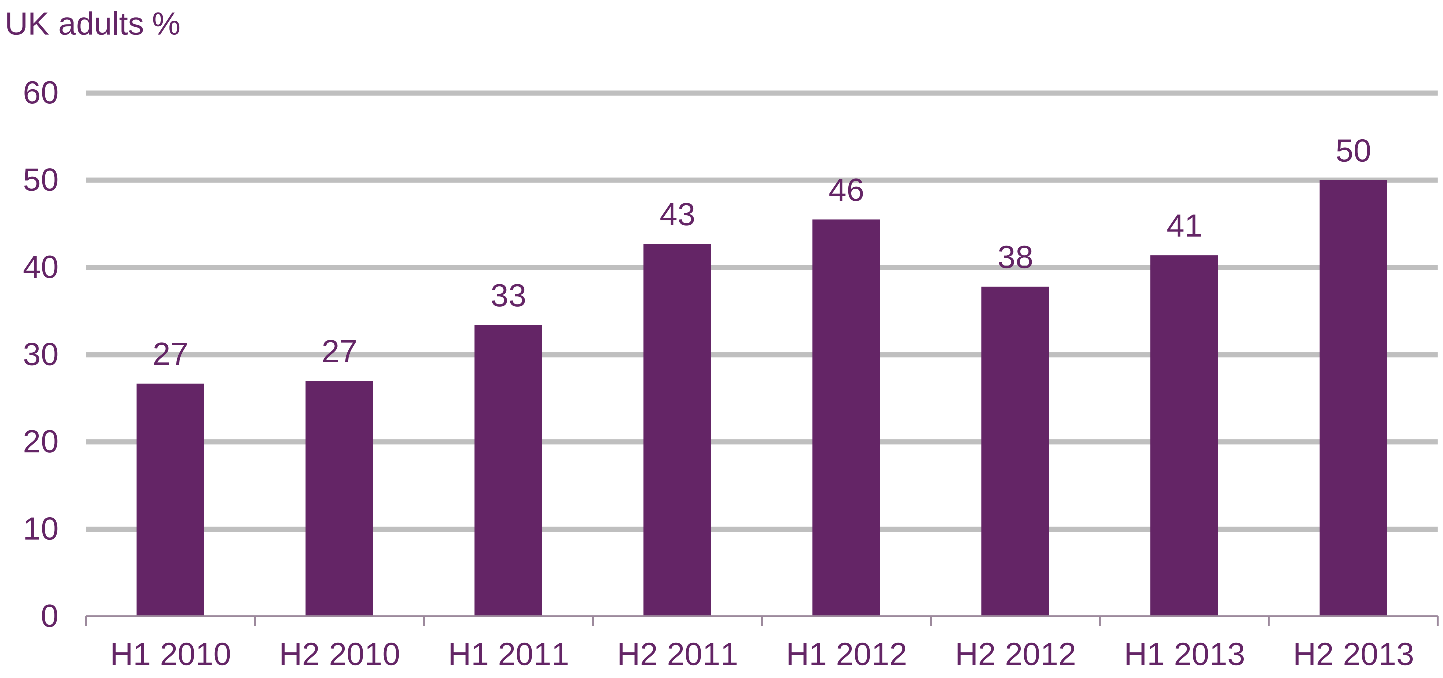
Selected video-on-demand service developments



Source: Ofcom desk research

Figure 2.18

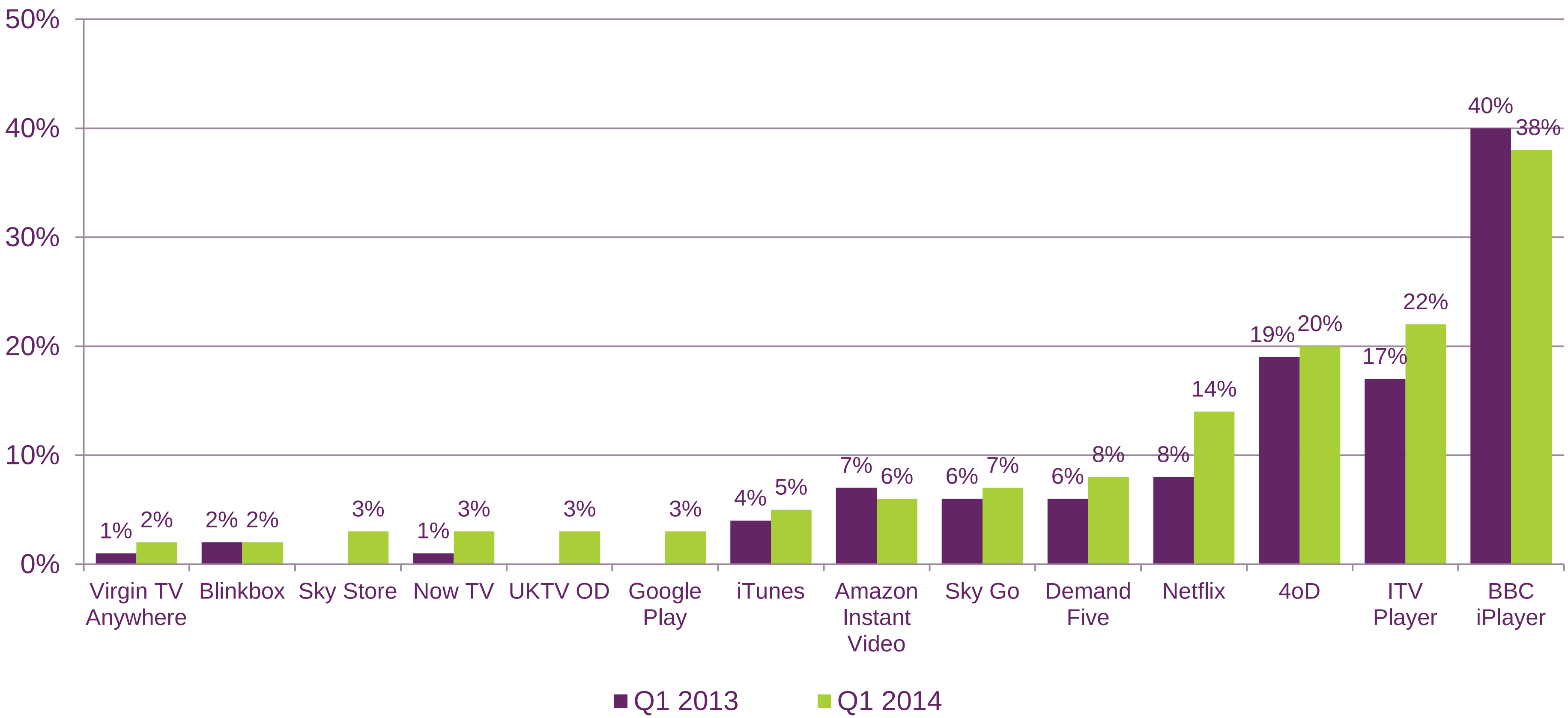
Use of VOD services in the past 12 months



Source: Target Group Index (TGI), Kantar Media UK 2014.
Base: UK adults 15+. H1 2010 n=12226, H2 2010 n=11794, H1 2011 n=12602, H2 2011 n=12915, H1 2012 n=11098, H2 2012 n=12495, H1 2013 n=11853, H2 2013 n=12570

Figure 2.19

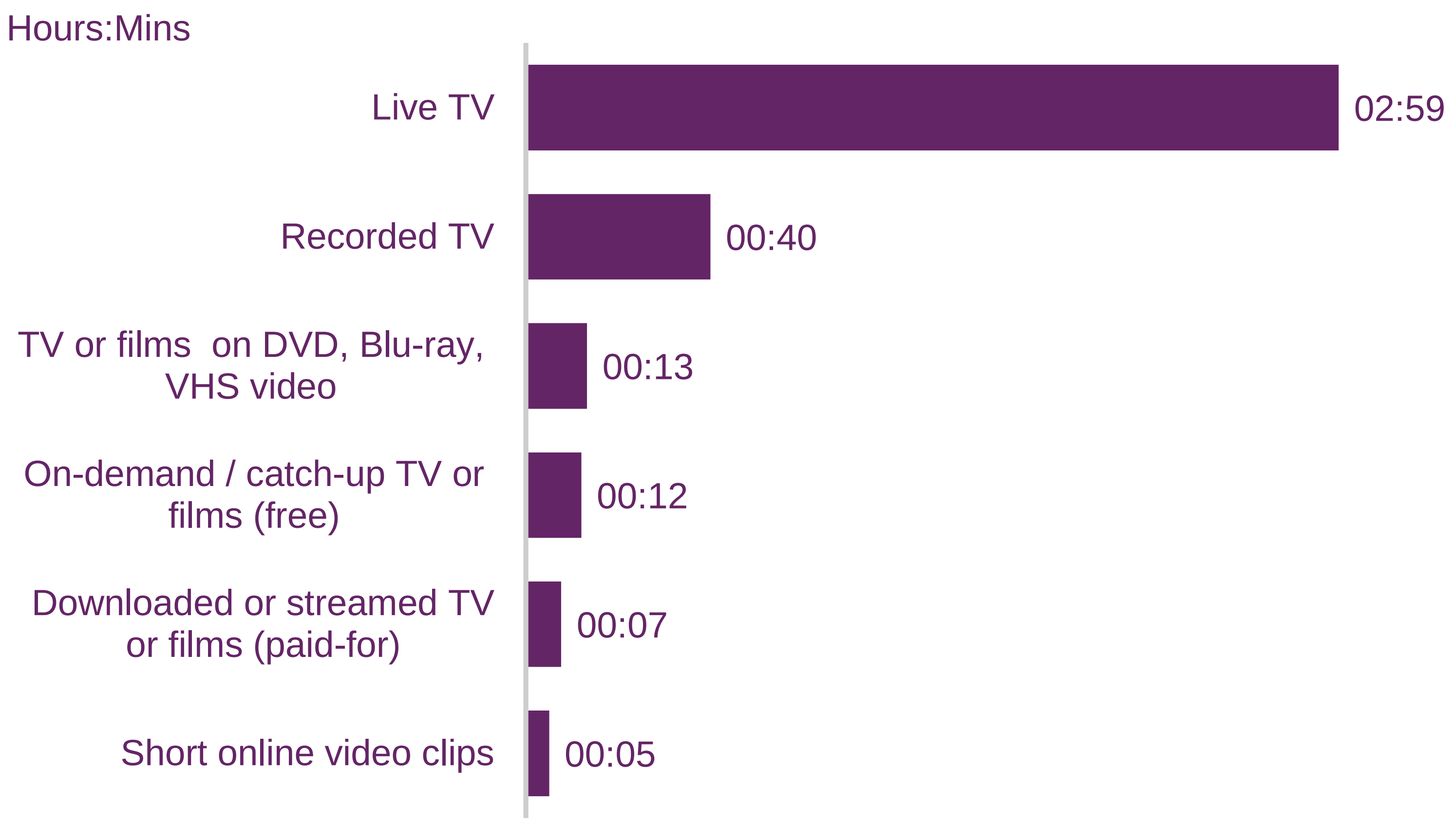
Claimed usage of selected online VOD services



Source: Decipher mediabug - Wave 4 report. Base: UK online population 16+. March 2014 (n=3017).
Note: UKTV OD includes Dave, Really and Yesterday on demand. LoveFilm Instant was rebranded to Amazon Instant Video in February 2014.

Figure 2.20

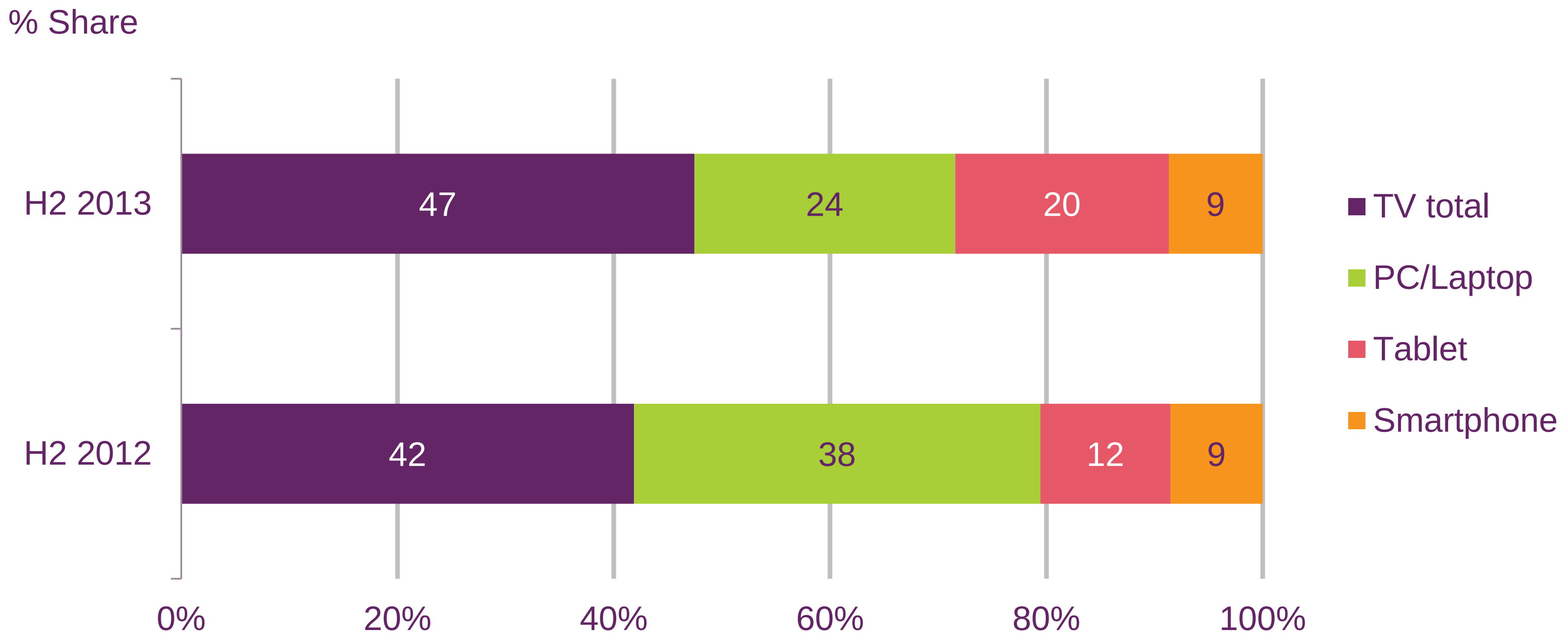
Average time spent on watched activities per day



Source: Digital Day 7-day diary, April 2014. Base: All adults aged 16+ (1644)
Note: Average time is calculated as all time recorded doing an activity divided by all participants in the survey

Figure 2.21

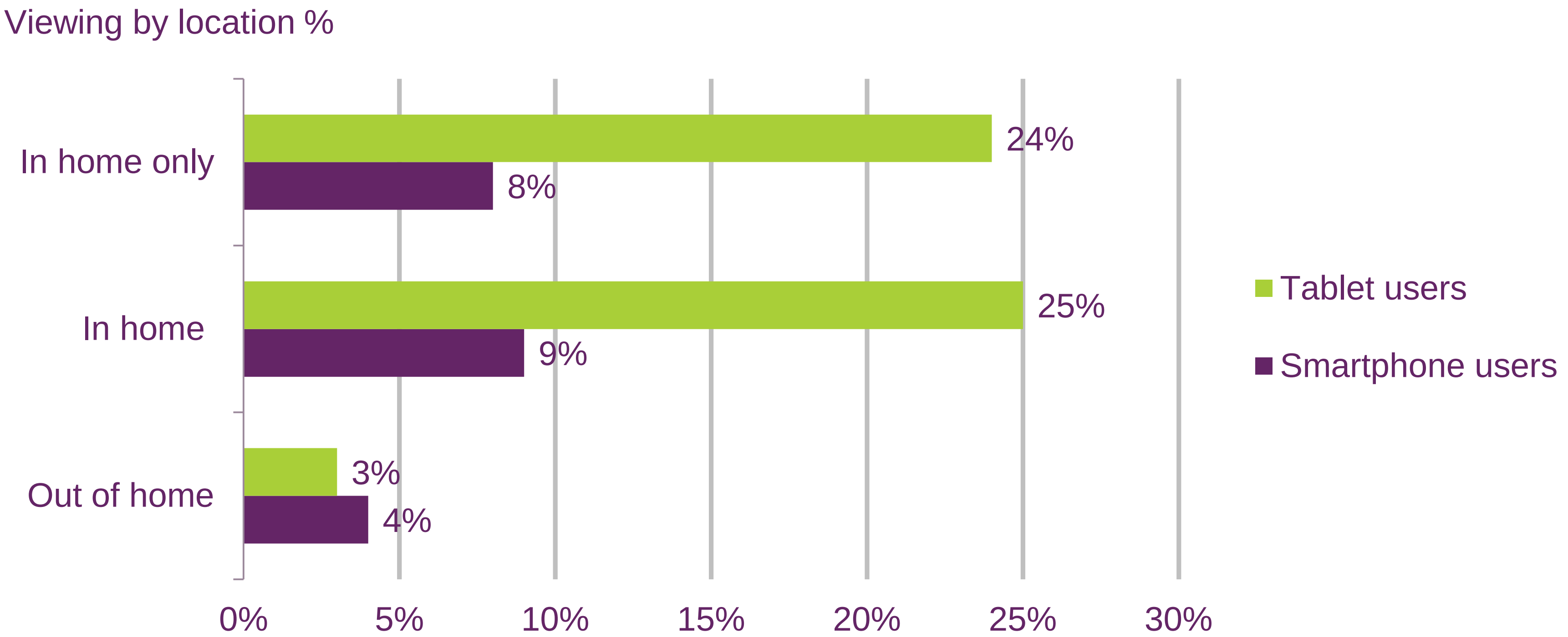
Estimated share of the UK long-form 'pull' VOD market, by device (programmes/films, not short clips or videos)



Source: 3Reasons LLP. Estimates are based on the number of initiated long-form content streams delivered lawfully, from a range of sources including press disclosures and published company results. Note: Pull VOD is a form of video on-demand distribution where content is delivered online at a user's request. Total TV includes VOD via set-top box, internet-enabled sets and TVs connected by games consoles.

Figure 2.22

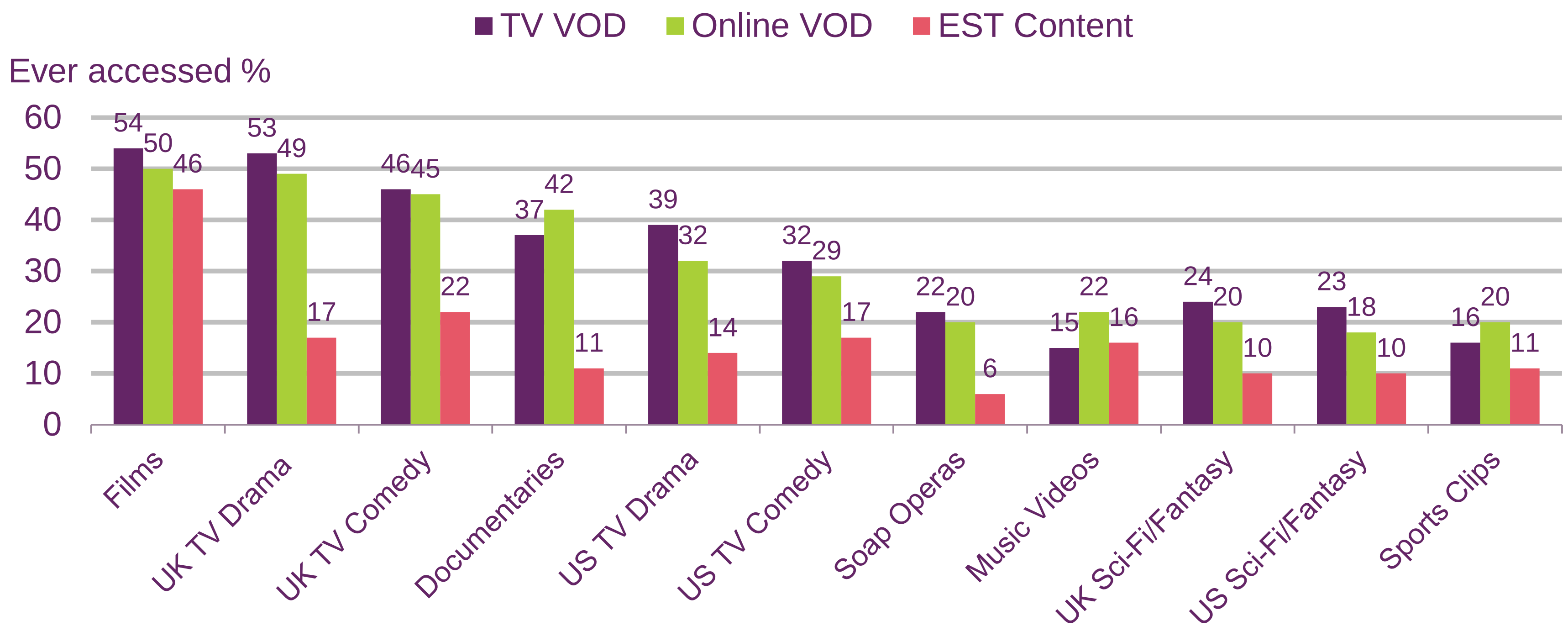
Claimed consumption of AV content in the past week, by location



Source: Digital Day 7 day diary
Base: Tablet users (647) Smartphone users (1060) aged 16+. Q1 2014

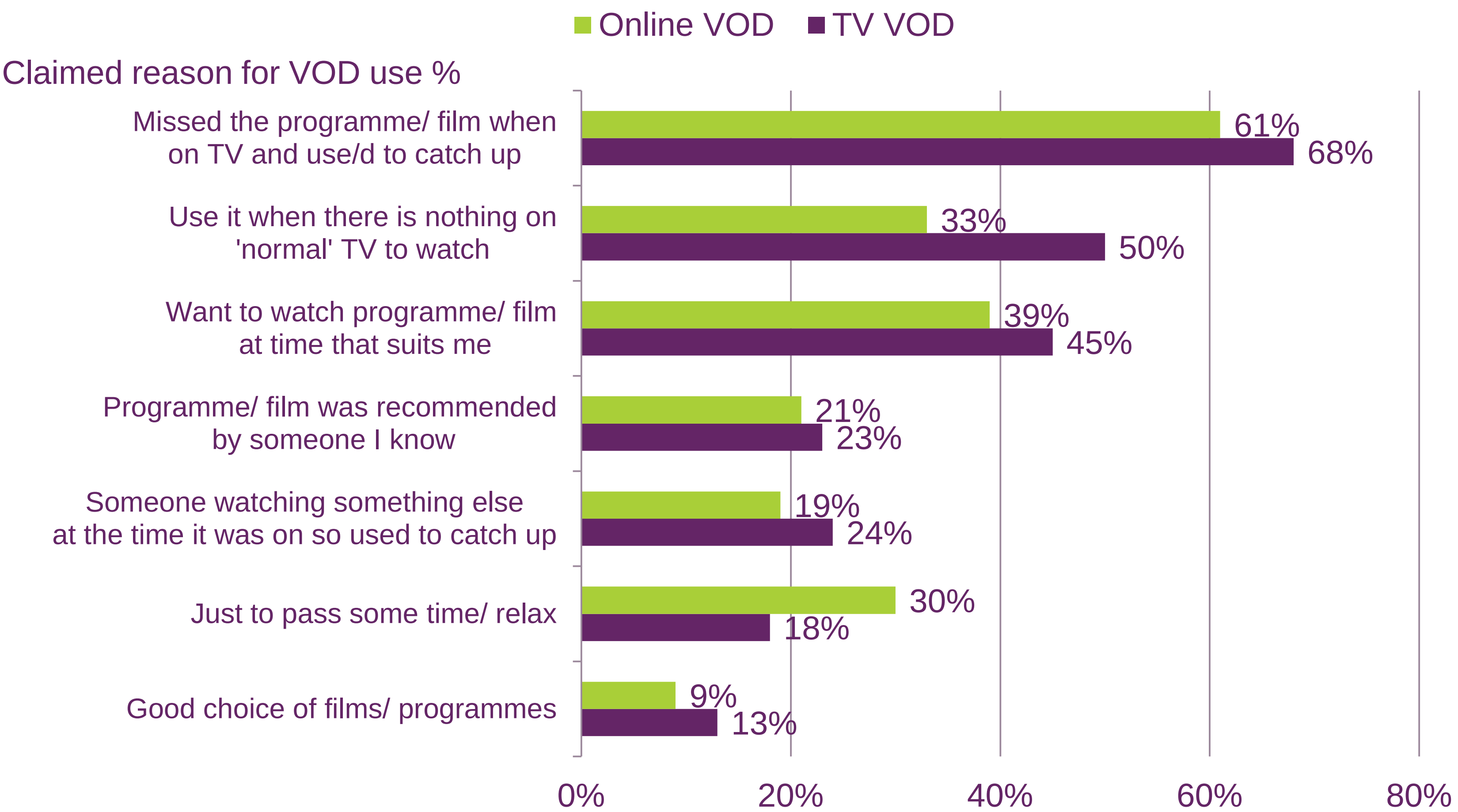
Figure 2.23

TV and and online VOD, and videos purchased online (EST*): claimed use, by genre



Source: Mediabug Tracker, Decipher, March 2014. UK online population 16+. *EST (Electronic Sell Through) is content that is purchased and a copy permanently kept not rented. TV VOD Base: Ever used TV VOD (1122), Online VOD Base: Ever used any Online VOD services (2148) EST BASE: Ever Used any EST services (914)

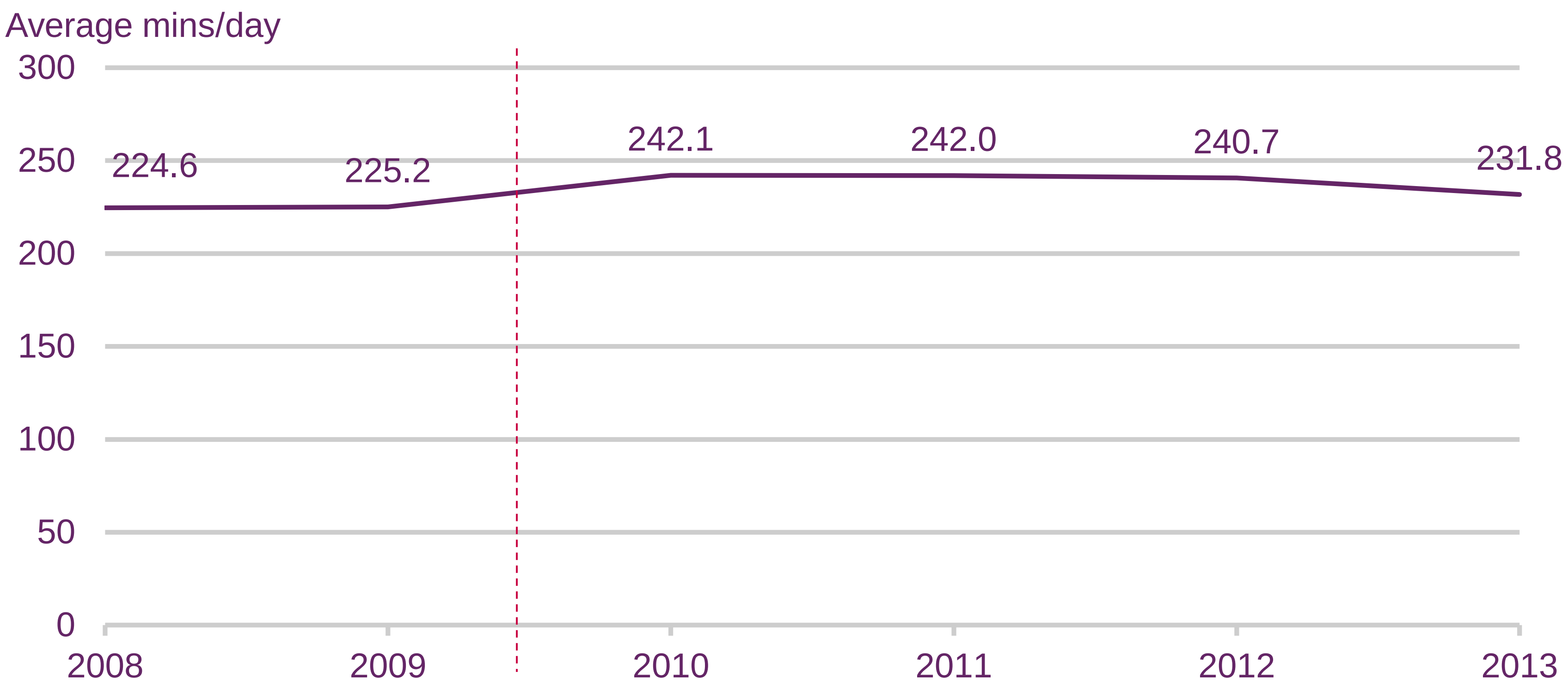
Figure 2.24
Reason for video-on-demand use: TV vs. online



Source: Ofcom Media tracker 2013. Base: UK adults aged 16+. All who use online 'video on demand' (829), all who use TV 'video on demand' (652). All responses unprompted.

Figure 2.25

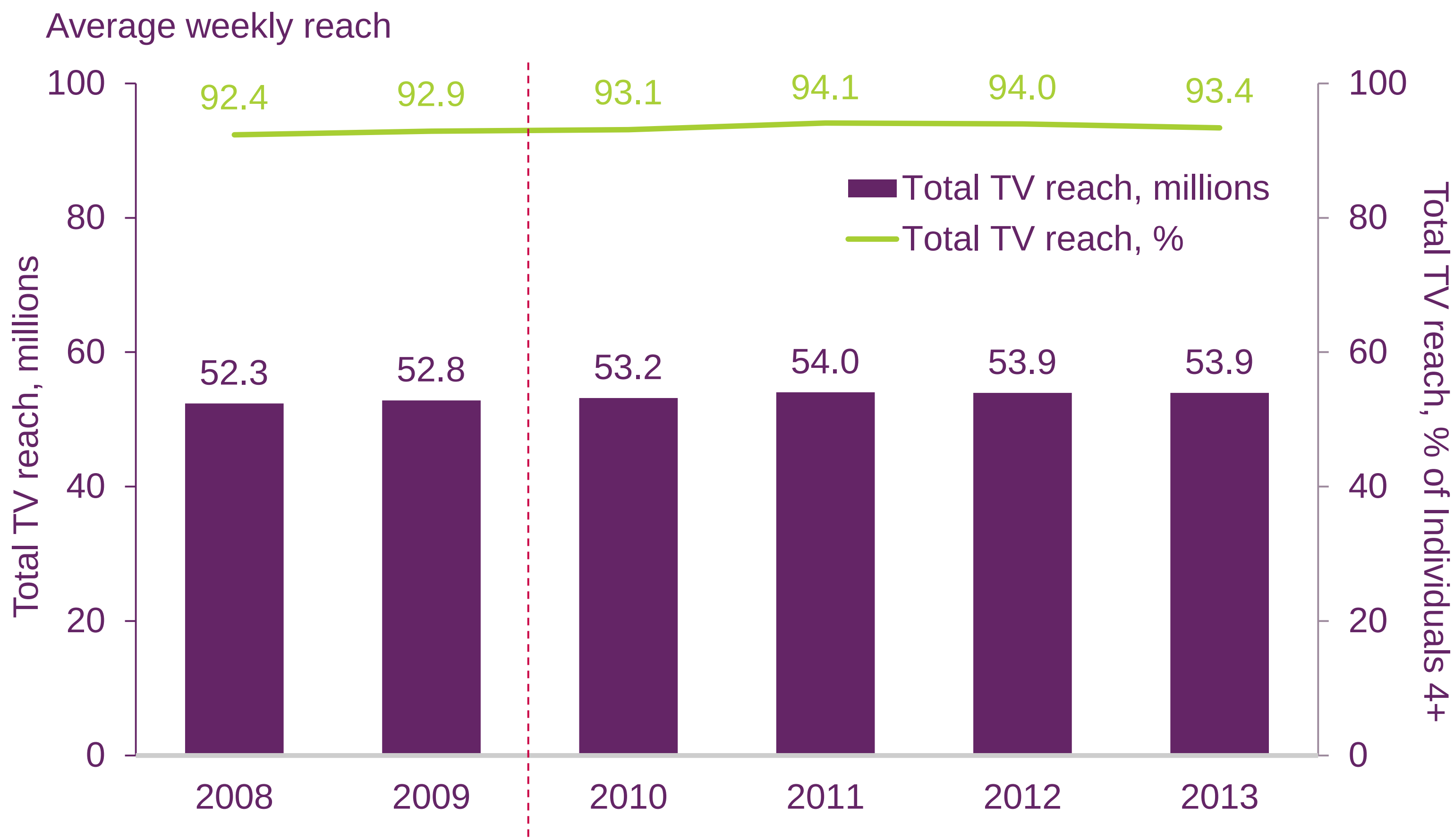
Average minutes of viewing per person per day: Total TV, Individuals 4+



Source: BARB, Network
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Figure 2.26

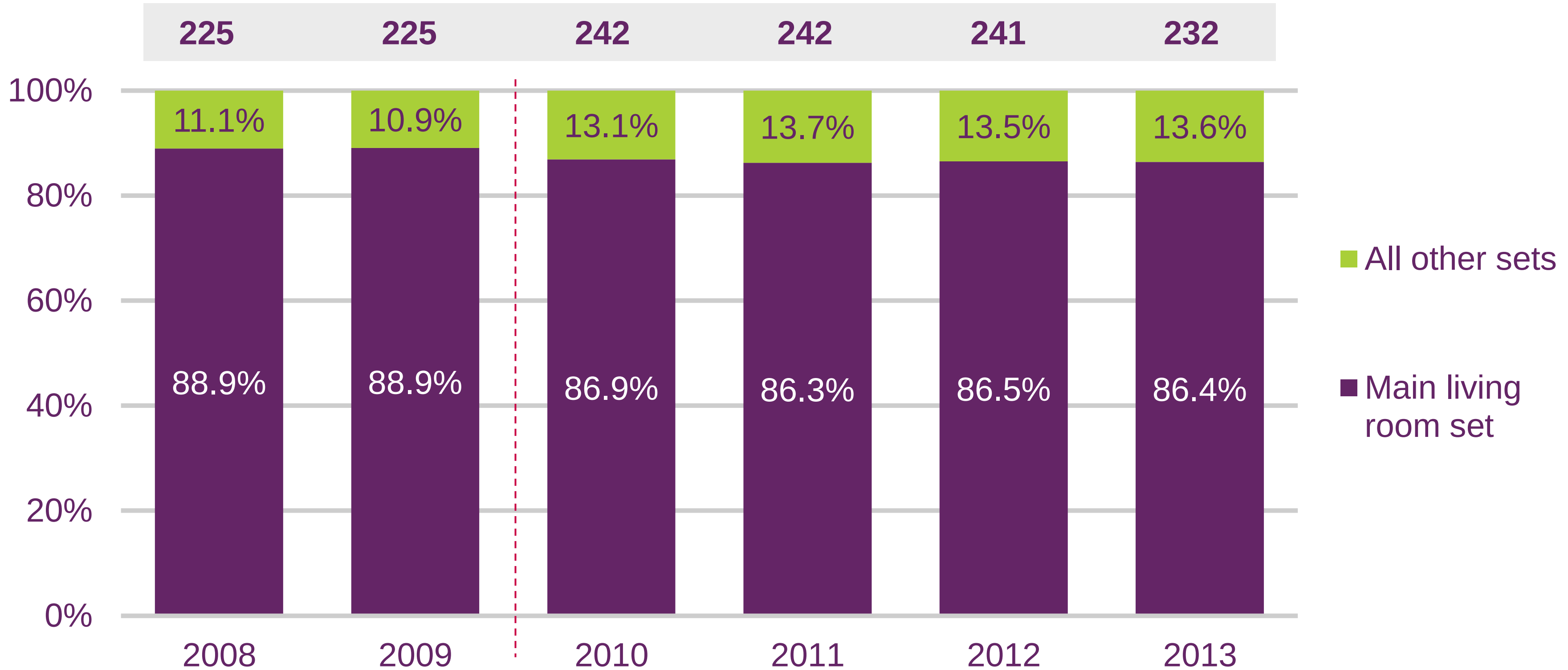
Average weekly reach : Total TV, 15 min+, Individuals 4+



Source: BARB, Network, Individuals 4+
Reach criteria = 15 consecutive minutes of viewing at least once in the average week. Full weeks used.
New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line)

Figure 2.27

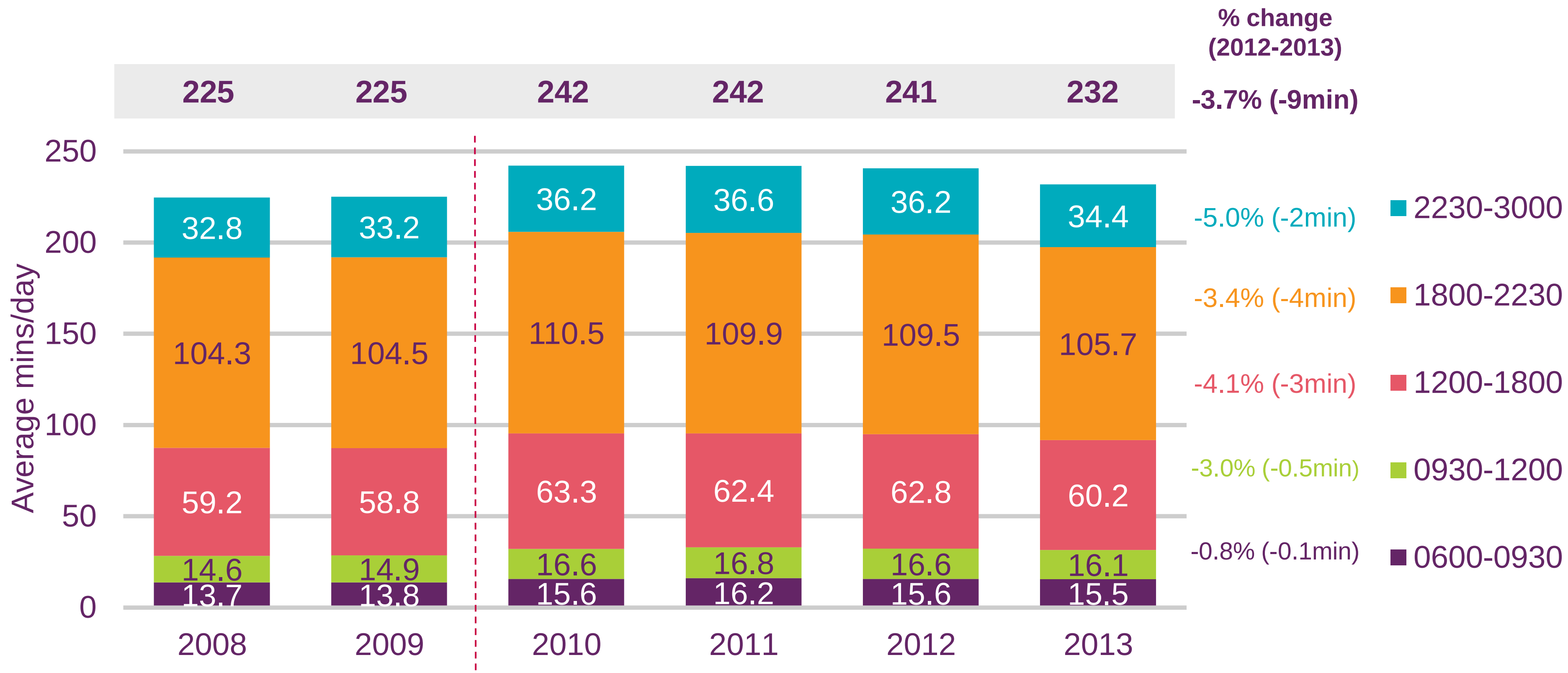
Proportion of viewing per day, by TV set: Total TV, Individuals 4+



Source: BARB, Network – Some variation in figures due to rounding
-New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Figure 2.28

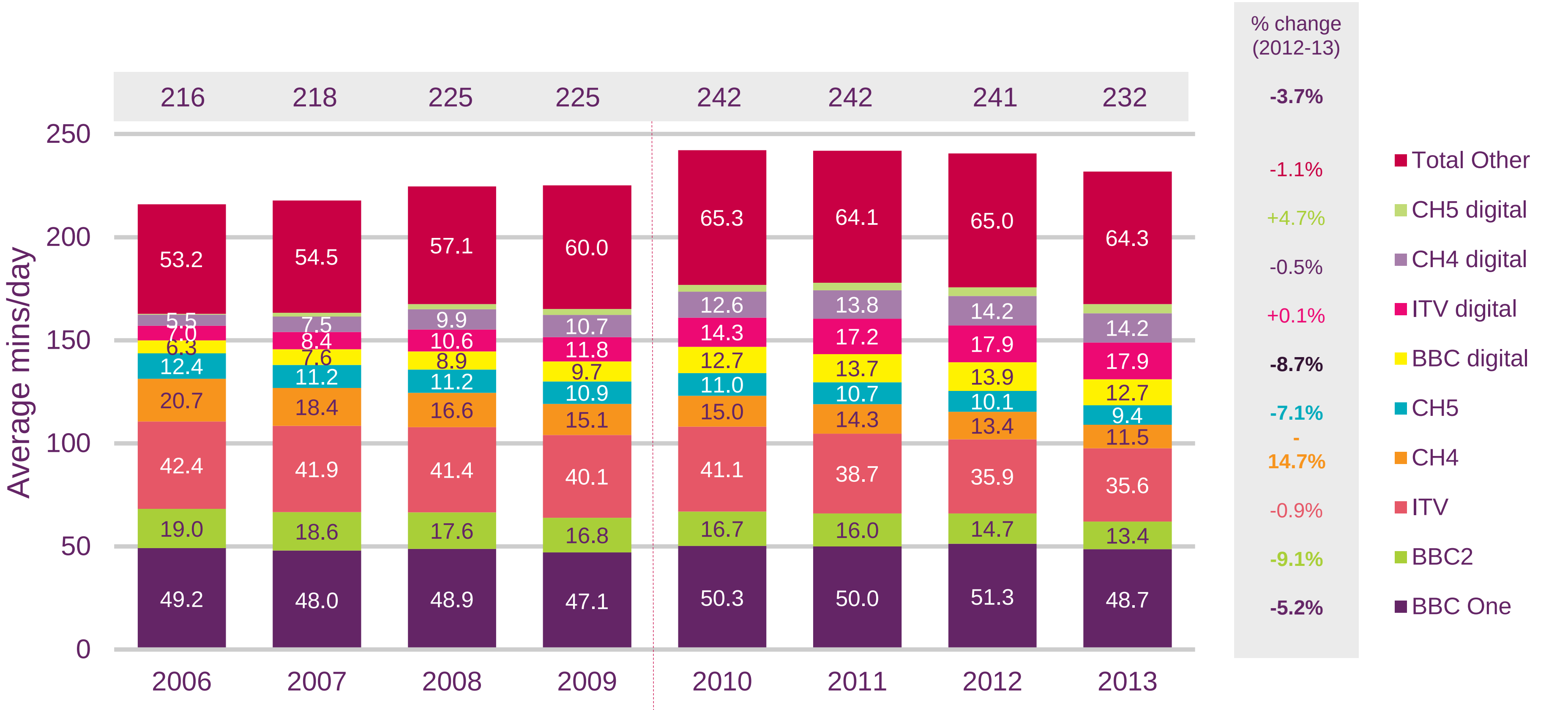
Average minutes of viewing/day by daypart: Total TV, Individuals 4+



Source: BARB, Network
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Figure 2.29

Average minutes of viewing/day by channel group: Total TV, Individuals 4+



Source: BARB, Network

- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

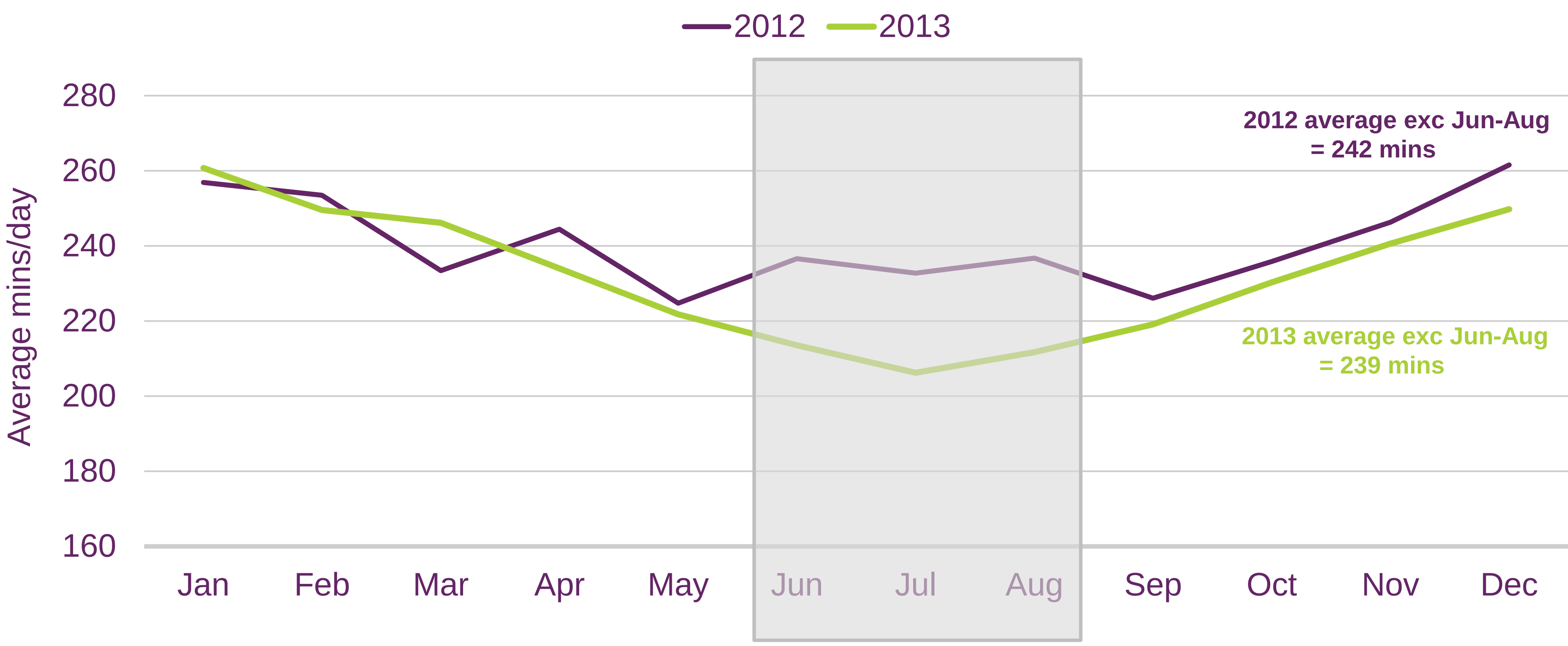
Figure 2.30

Average minutes of viewing per day by activity: Total TV, Individuals 4+

Source: BARB, Network – Some variation in figures due top rounding
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line).

Figure 2.31

Average daily minutes of viewing by month: Total TV, Individuals 4+, 2012 and 2013



Source: BARB, Network
- New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution.

Figure 2.32

Top 10 programmes by average audience: 2012 and 2013

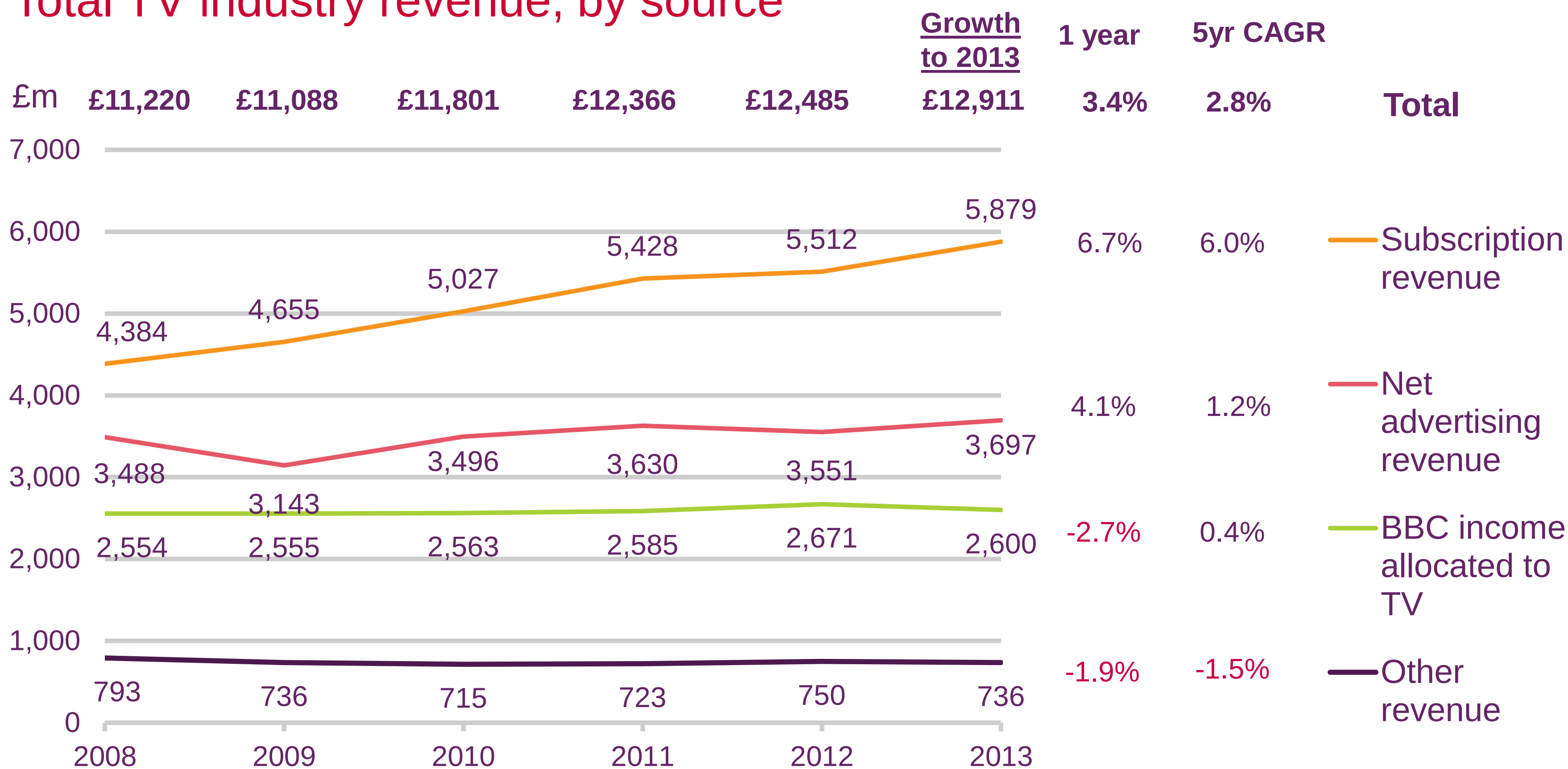
Title	Channel	Date	Start	End	Average Audience, 000s
OLYMPICS 2012: CLOSING CEREMONY	BBC1	12/08/2012	21:00	00:17	24,465
OLYMPICS 2012: OPENING CEREMONY	BBC1	27/07/2012	21:00	00:51	24,245
EURO 2012: ENG V ITA	BBC1	24/06/2012	19:44	22:24	20,342
OLYMPICS 2012: MEN'S 100M FINAL	BBC1	05/08/2012	21:42	22:15	17,333
UEFA EURO 2012 MATCH ENG V UKR	ITV	19/06/2012	19:44	21:38	16,217
THE DIAMOND JUBILEE CONCERT	BBC1	04/06/2012	19:29	22:49	15,321
EURO 2012: SWE V ENG	BBC1	15/06/2012	20:01	21:52	14,252
OLYMPICS 2012	BBC1	05/08/2012	18:52	21:42	13,647
STRICTLY COME DANCING	BBC1	22/12/2012	18:30	19:55	13,368
STRICTLY COME DANCING: THE RESULTS	BBC1	22/12/2012	20:52	22:02	13,354

Title	Channel	Date	Start	End	Average Audience, 000s
NEW YEAR'S EVE FIREWORKS	BBC1	31/12/2013	23:57	00:12	13,525
I'M A CELEBRITY GET ME OUT OF HERE!	ITV	17/11/2013	21:02	22:34	13,048
DOCTOR WHO	BBC1	23/11/2013	19:50	21:06	12,804
STRICTLY COME DANCING: THE RESULTS	BBC1	21/12/2013	20:41	21:50	12,788
STRICTLY COME DANCING	BBC1	21/12/2013	18:30	19:55	12,421
WIMBLEDON 2013: MEN'S FINAL	BBC1	07/07/2013	13:53	17:59	12,278
STILL OPEN ALL HOURS	BBC1	26/12/2013	19:46	20:16	12,233
BRITAIN'S GOT TALENT	ITV	08/06/2013	19:29	22:00	12,230
DOWNTON ABBEY	ITV	10/11/2013	21:03	22:31	11,696
MRS BROWN'S BOYS	BBC1	25/12/2013	21:31	22:05	11,521

Source: BARB, Network, all individuals 4+. Top programmes are based on the best-performing episode of a programme in the year. .

Figure 2.35

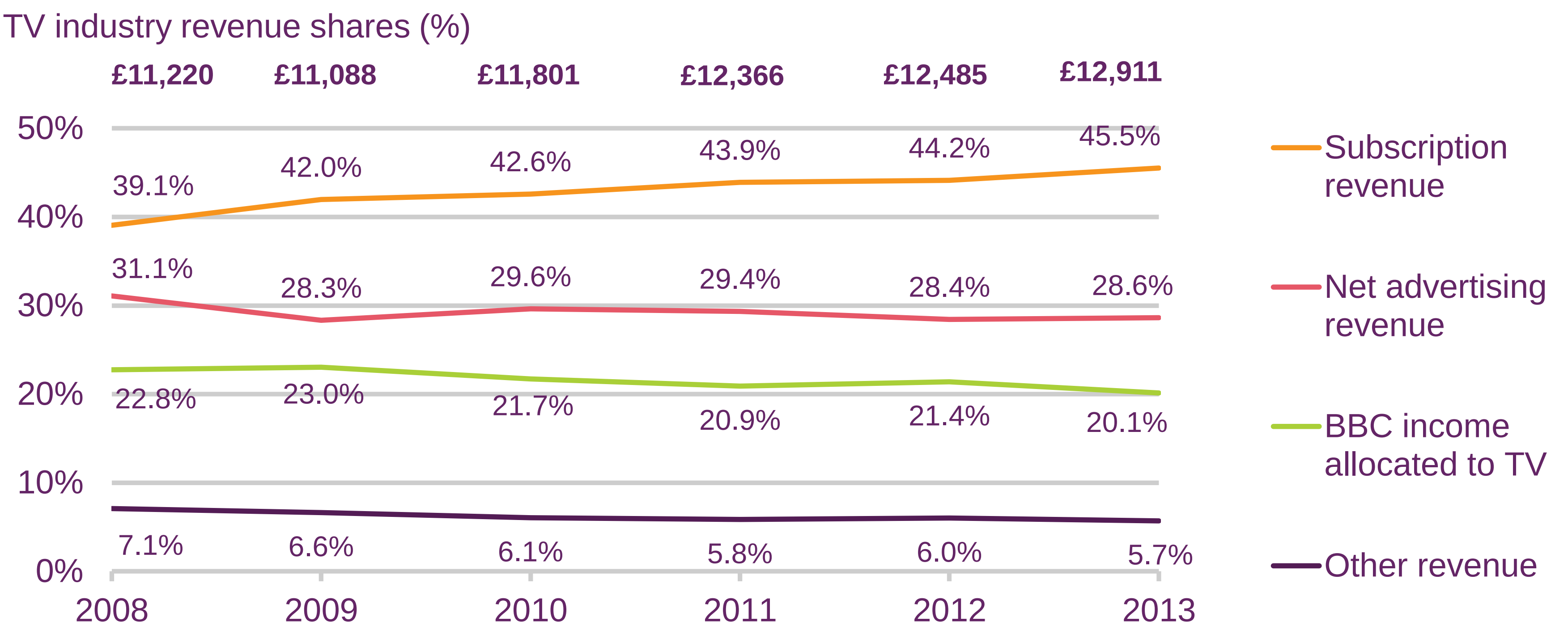
Total TV industry revenue, by source



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, sponsorship, interactive (including premium-rate telephony services), programme sales and S4C's grant from the DCMS. The BBC re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.36

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 re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

Figure 2.37

Total TV industry revenue by sector: 2008 - 2013

Source: Ofcom/broadcasters. Note: Figures are nominal. Main commercial PSB channels comprise ITV/ITV Breakfast, STV, UTV, Channel Television, Channel 4, Channel 5 and S4C. Commercial multichannels comprise all multichannels including those owned by ITV1, Channel 4 and Channel 5. 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 re-stated licence fee revenue in 2008. Totals may not equal the sum of the components due to rounding.

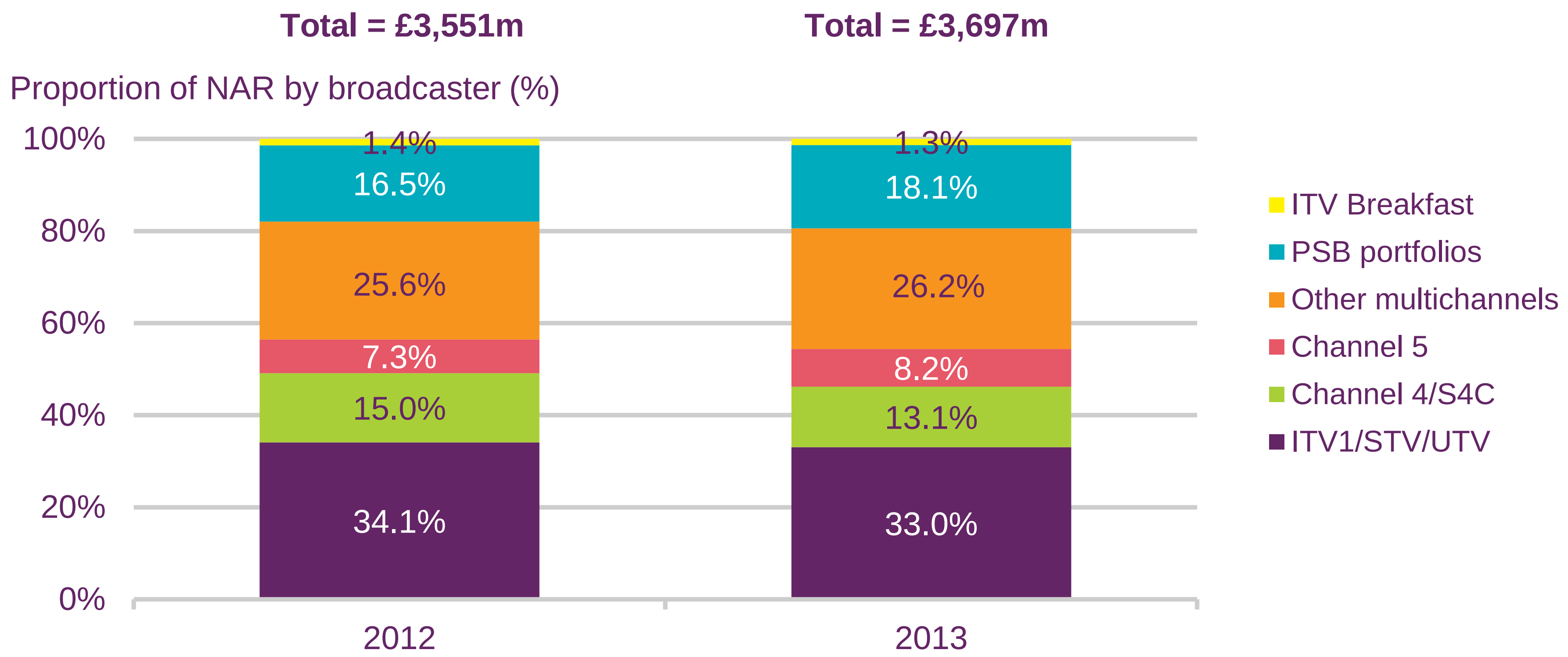
Figure 2.38

TV net advertising revenues, by source: 2008 - 2013

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, ITV Breakfast, Channel 4, Channel 5 and S4C; Commercial PSB portfolio channels include, where relevant, ITV2, 3, 4, CiTV, E4, More 4, Film 4, Five USA and 5* (and their '+1' channels). For previous years, closed channels have also been included. Sponsorship revenue not included. Totals may not equal the sum of the components due to rounding

Figure 2.39

TV net advertising revenue market shares: 2012 - 2013

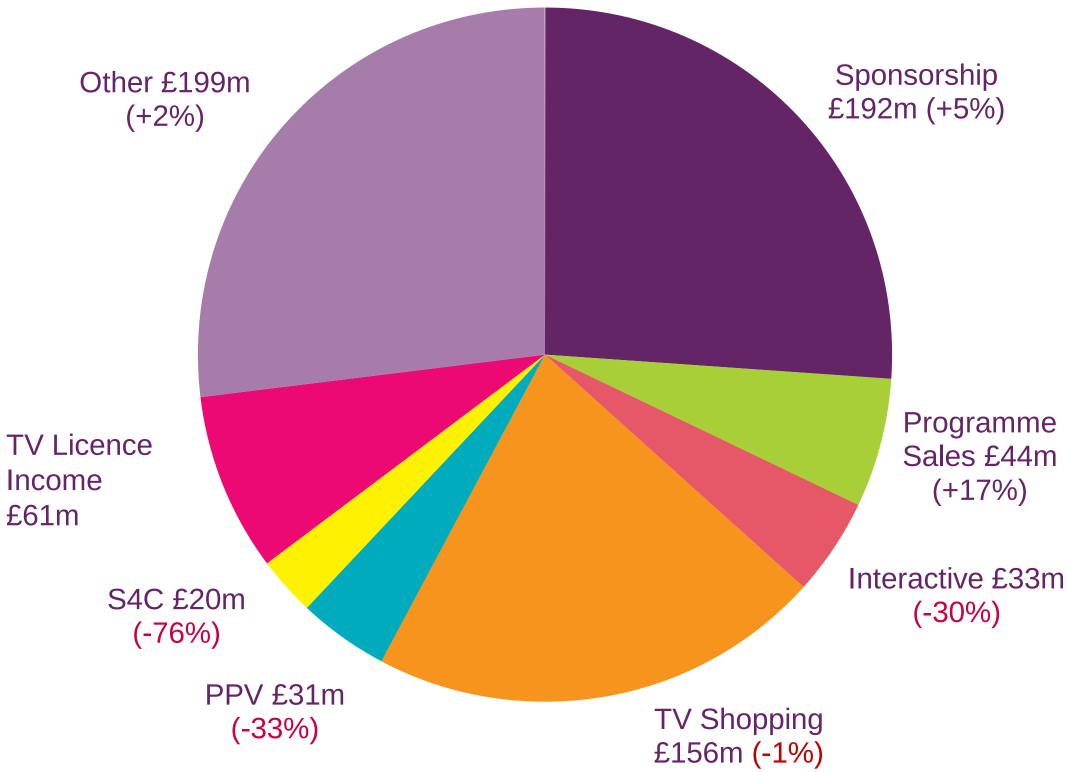


Source: Ofcom/broadcasters. Note: Expressed in nominal terms. ITV1/Channel 3 includes ITV1, STV, UTV and Channel Television.

Figure 2.40

Breakdown of other / non-broadcast revenue: 2013 versus 2012

Total non-broadcast revenue = £736m (-2%)

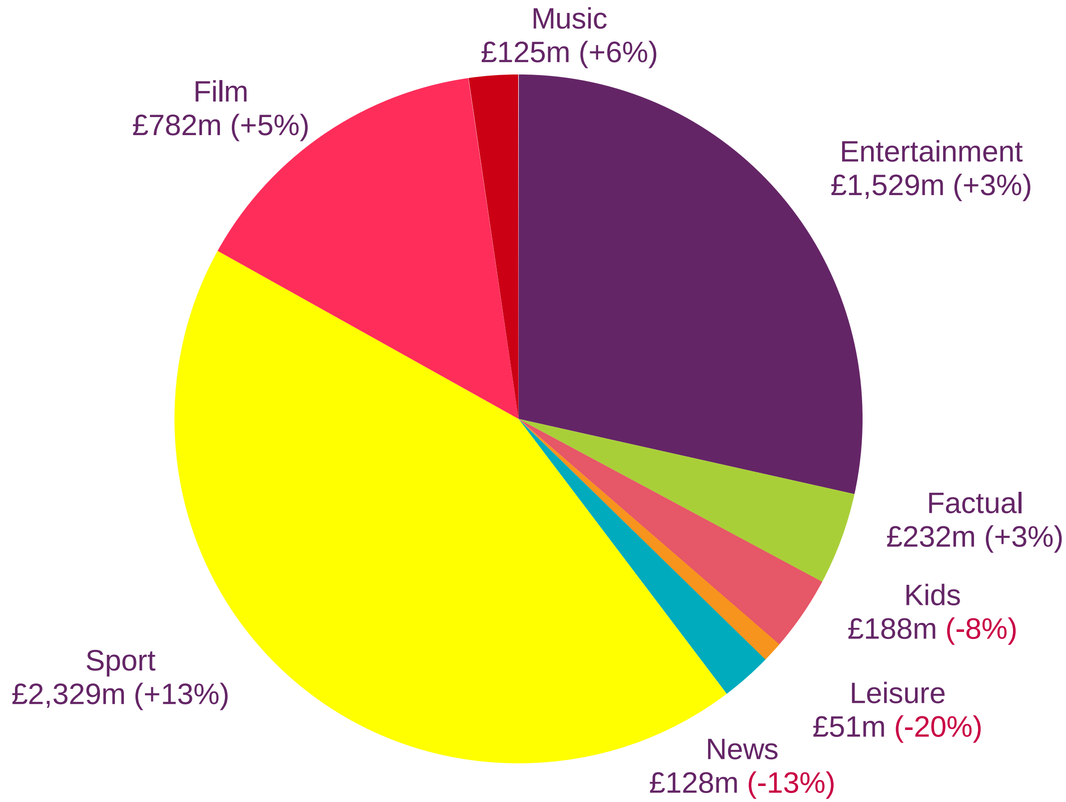


Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total non-broadcast revenue versus 2012. TV shopping represents aggregate operating margin of products sold via television. A funding agreement reached in April 2013 meant that the majority of S4C funding now comes out of the BBC's licence fee income. Totals may not equal the sum of the components due to rounding. Owing to the nature of these revenue components, annual changes may be a function of a higher number of broadcaster returns being received by the time of writing, rather than material changes in the contributions that these revenue components are making to total industry income

Figure 2.41

Revenue generated by multichannel broadcasters, by genre: 2013 versus 2012

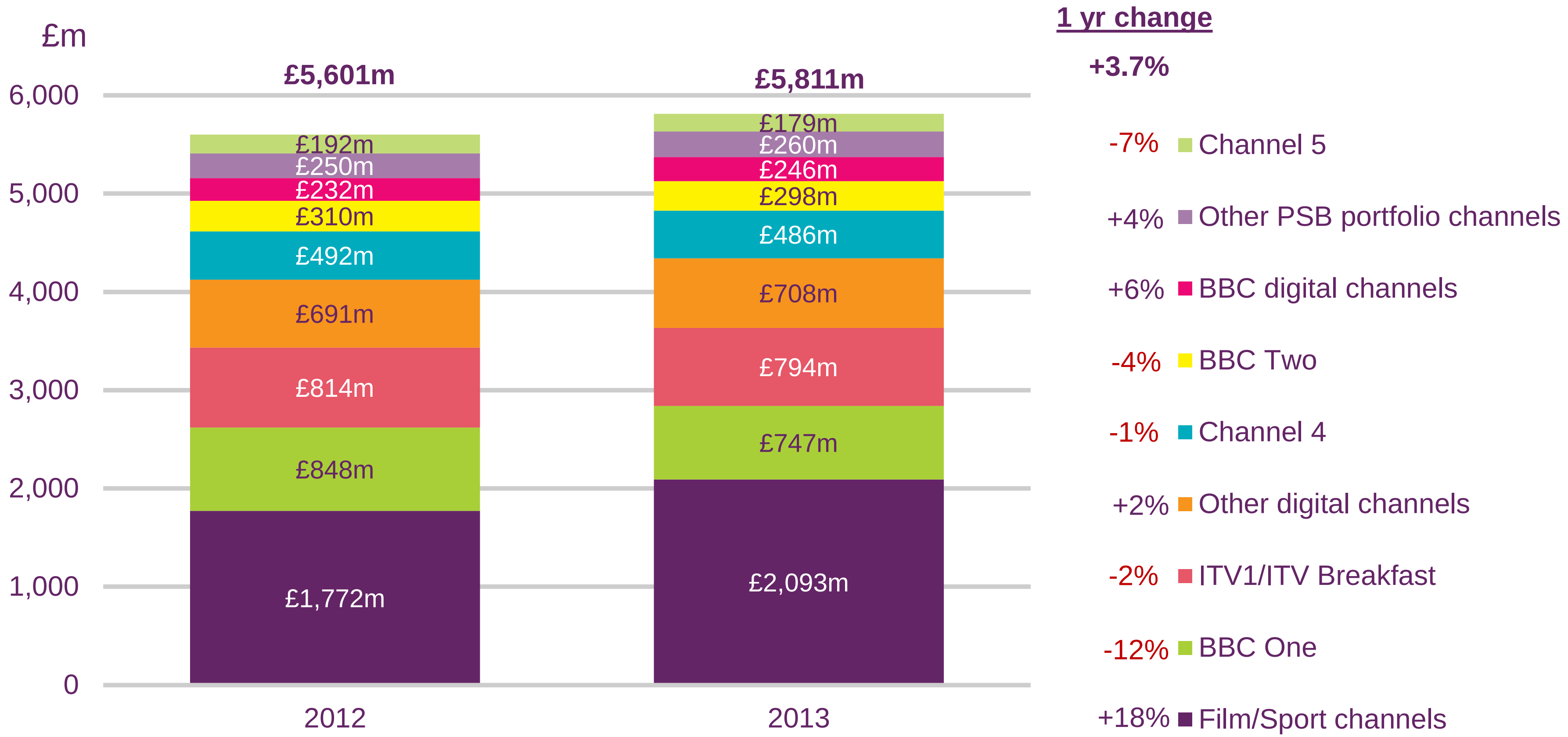
Total revenue = £5,364m across the eight included genres (+6%)



Source: Ofcom/broadcasters. Note: Percentage figures in brackets represent year-on-year change for total revenue compared to 2012. 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 2.35 plus wholesale subscriber payments from platform operators

Figure 2.42

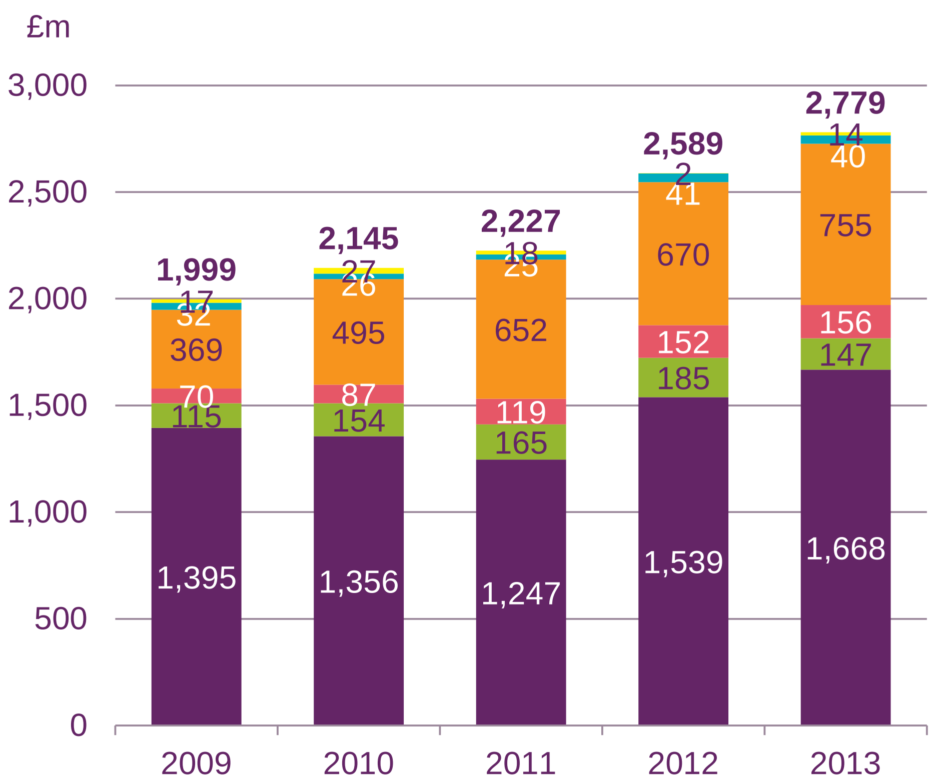
Spend on network TV programmes: 2012 - 2013



Source: Ofcom/broadcasters. Note: Figures expressed in nominal prices. 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 first-run acquired programmes, spend on rights and on repeats (originations or acquisitions).

Figure 2.43

Independent producer TV-related revenues



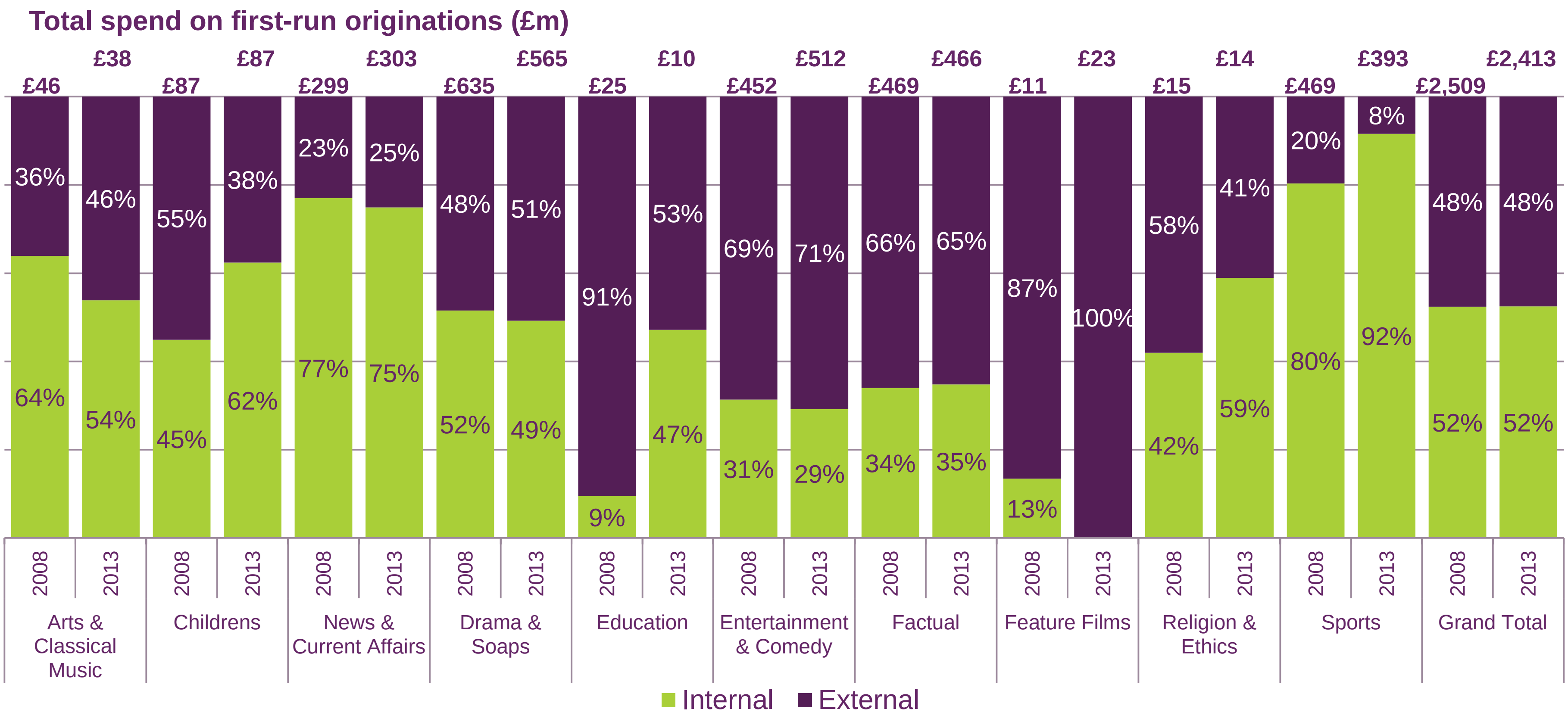
Growth

	1 year	3yr CAGR
Total	**7.3%**	**9.0%**
Other UK	600%	-19.7%
Pre-production	-2.4%	15.4%
Other international income	12.7%	15.1%
International sales of UK finished programmes	2.6%	21.5%
UK rights income	-20.5%	-1.5%
Primary UK commissions	8.4%	7.2%

Source: PACT Independent Production Sector Financial Census and Survey 2013. Note: ‘Other international income’ refers to revenue from companies overseas operations and any primary commissions received from non-UK broadcasters; ‘International sales of UK finished programmes’ – sales of first-run UK programming sold as finished product abroad ; ‘UK rights income’ – UK secondary sales, publishing, formats, DVD sales etc.

Figure 2.44

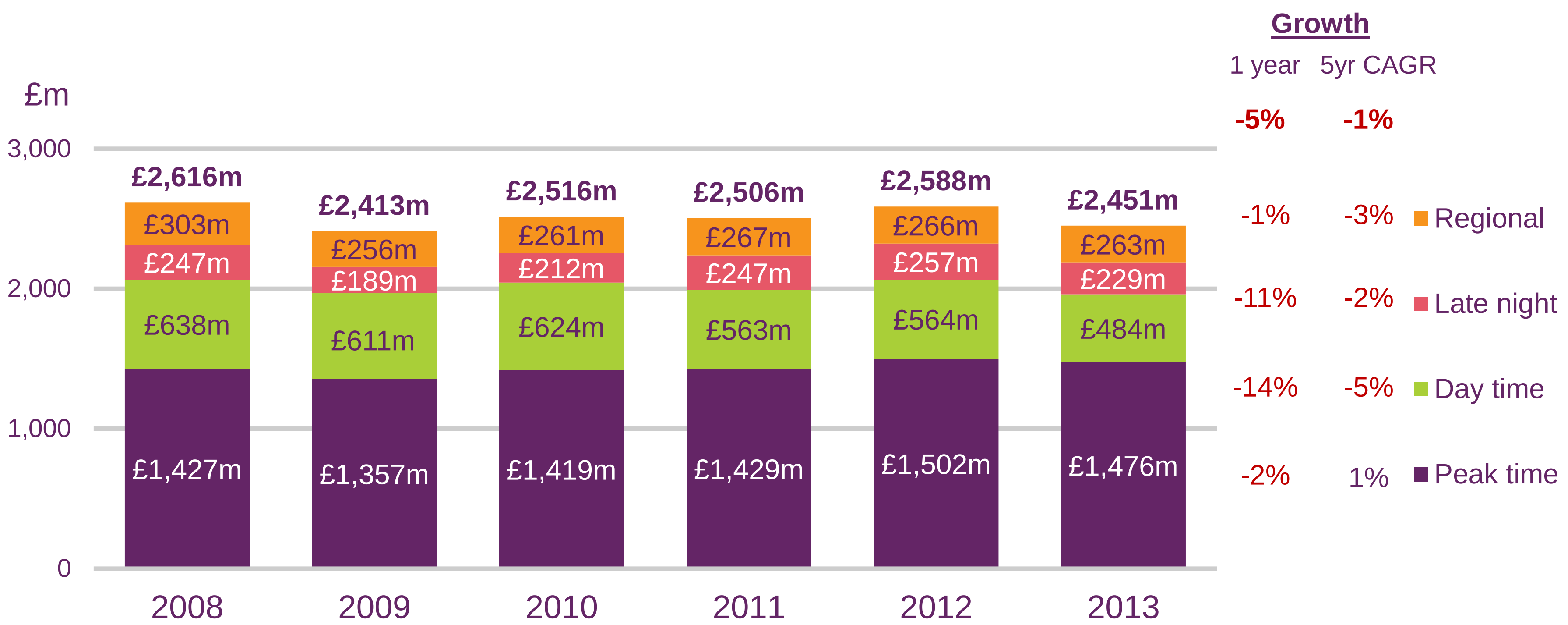
Relative share of spend on first-run originated content by genre: in-house vs. independent producers: 2008 and 2013



Source: Ofcom/broadcasters. Note: Includes spend by the five main PSBs and BBC portfolio channels on first-run originated content broadcast all day, and excludes regional output.

Figure 2.45

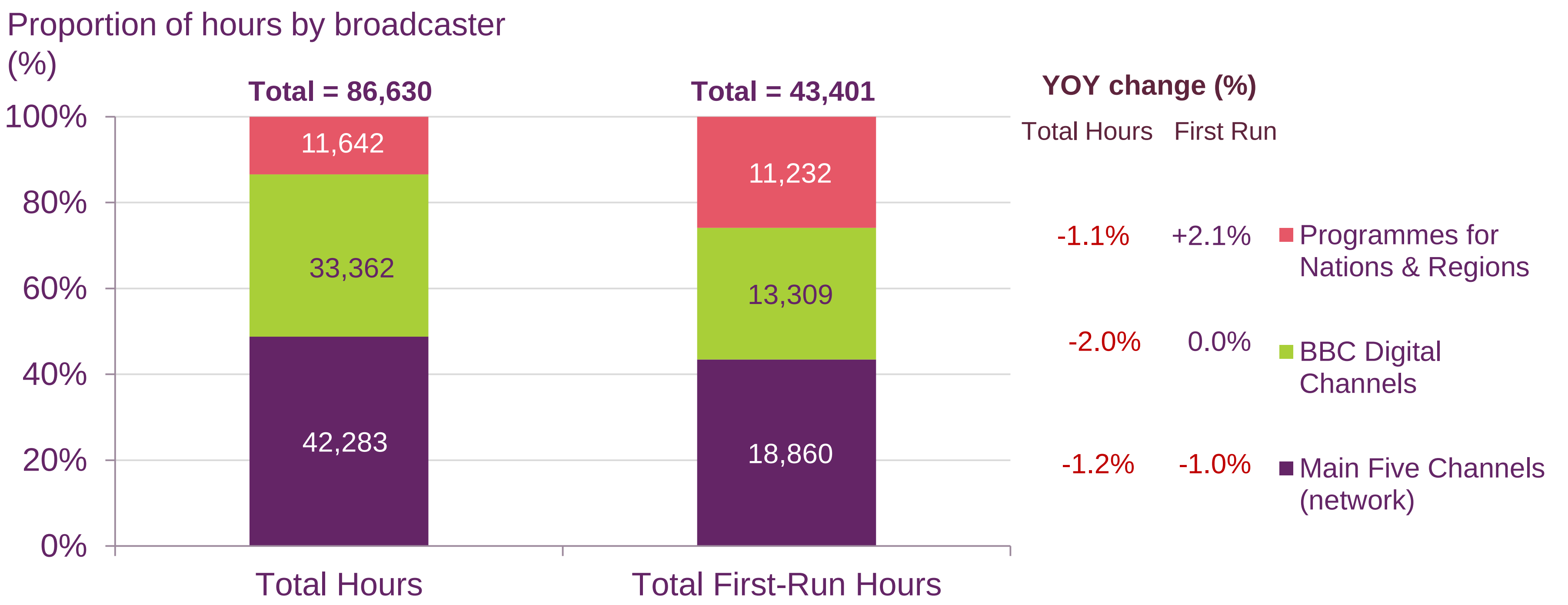
Spend on first-run originated output on the five main networks



Source: Ofcom/broadcasters. Note: Figures are expressed in nominal terms. They include ITV Breakfast, 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 2.46

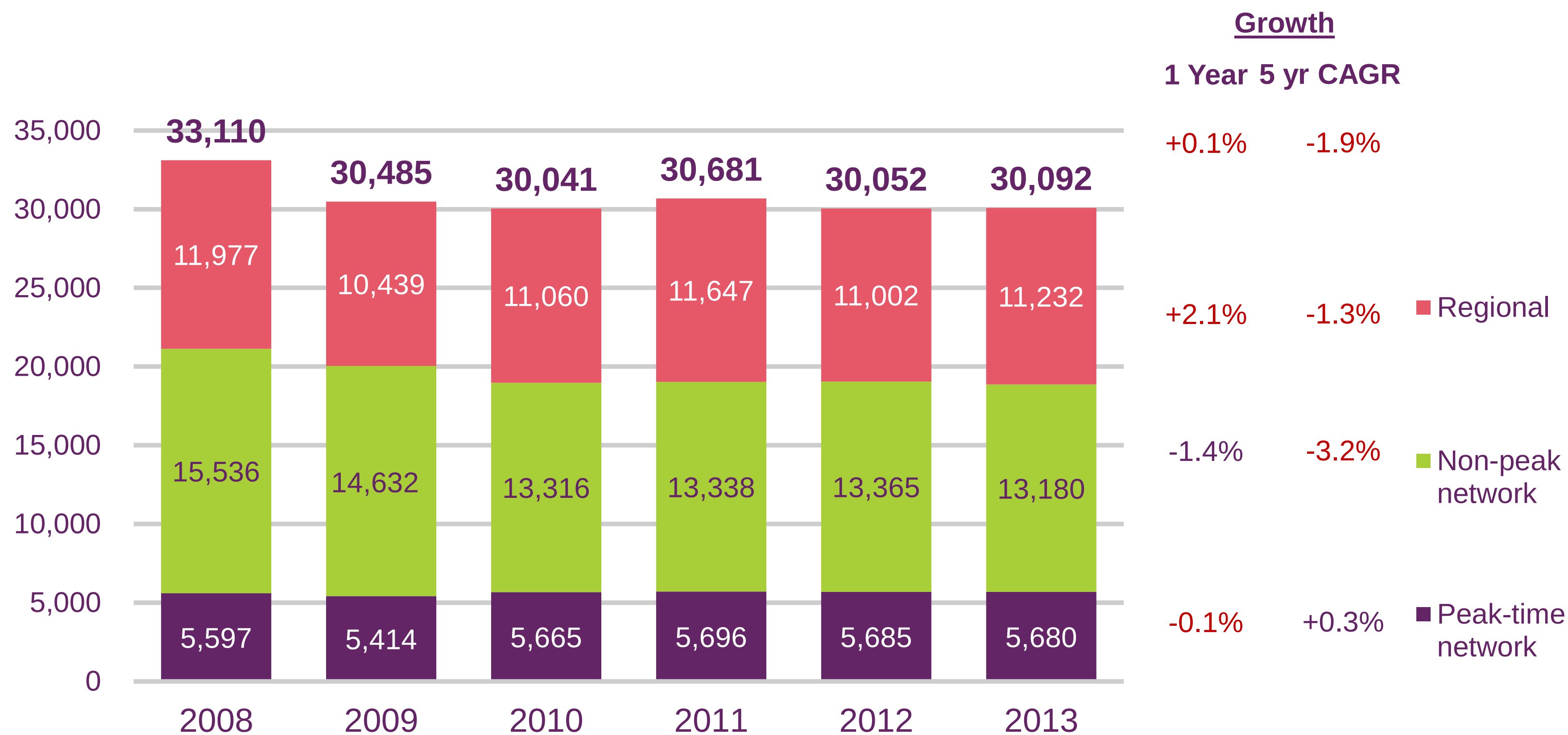
PSBs' total hours and first-run originated hours of output, all day: 2013



Source: Ofcom/broadcasters. Note: The first-run figures include in-house productions and external commissions, not first-run acquisitions. ITV Breakfast is included within the figures for the five main channels. Regional hours exclude Welsh and Gaelic-language programming but include a small proportion of Irish-language and Ulster Scots programmes on BBC NI and UTV.

Figure 2.47

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

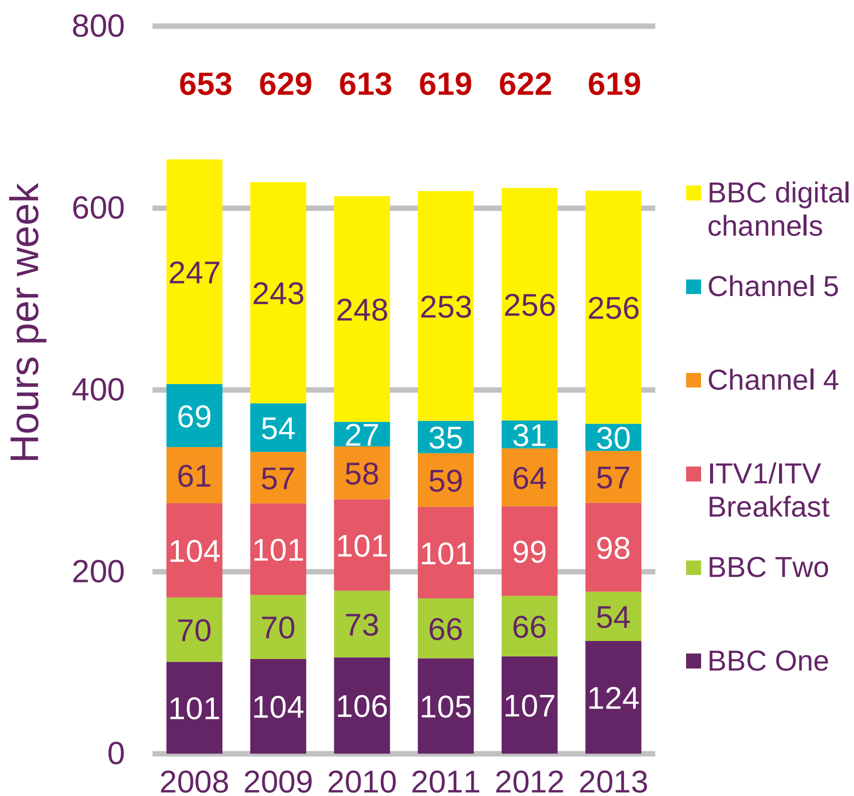


Source: Ofcom/broadcasters. Note: Figures include ITV Breakfast but do not include the BBC’s digital channels. Regional hours exclude Welsh and Gaelic-language programming but do include a small proportion of Irish-language programmes.

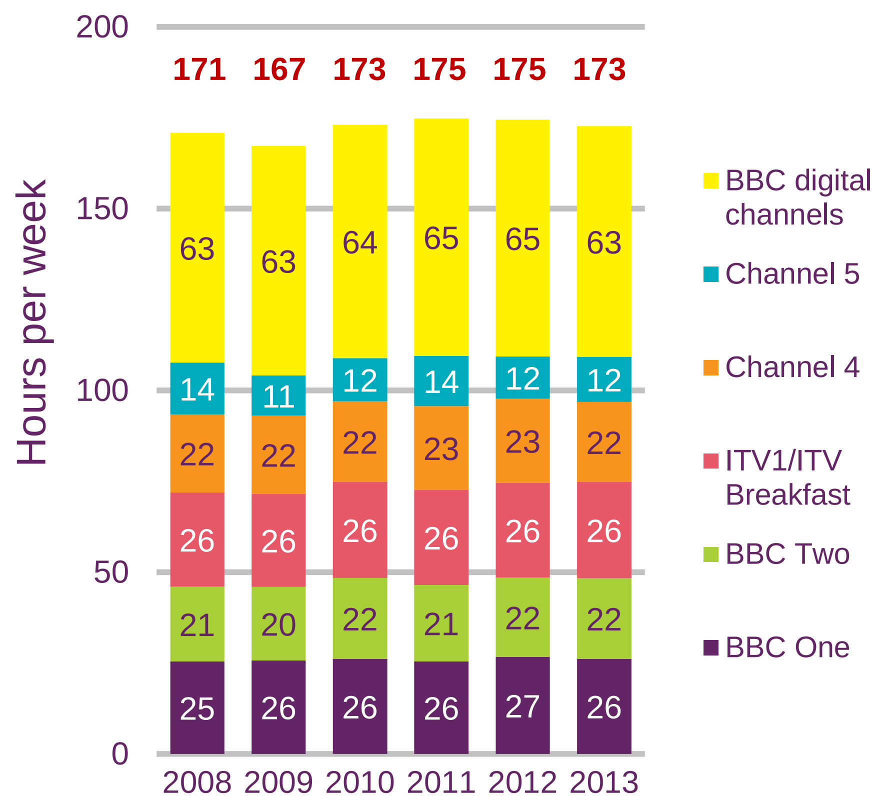
Figure 2.48

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

All Day



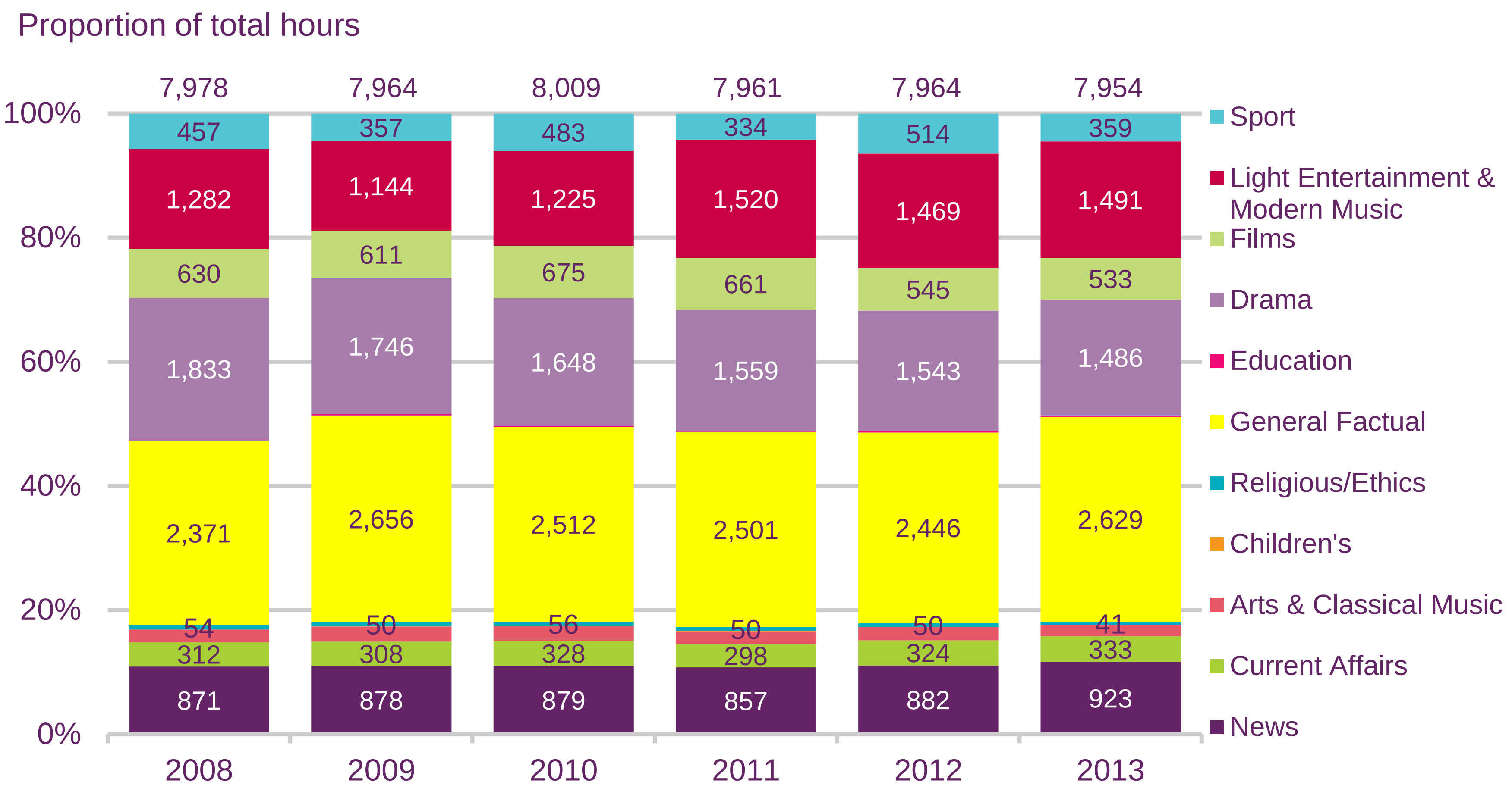
Peak-Time



Source: Ofcom/broadcasters.
Note: Figures do not include spend on nations and regions output.

Figure 2.49

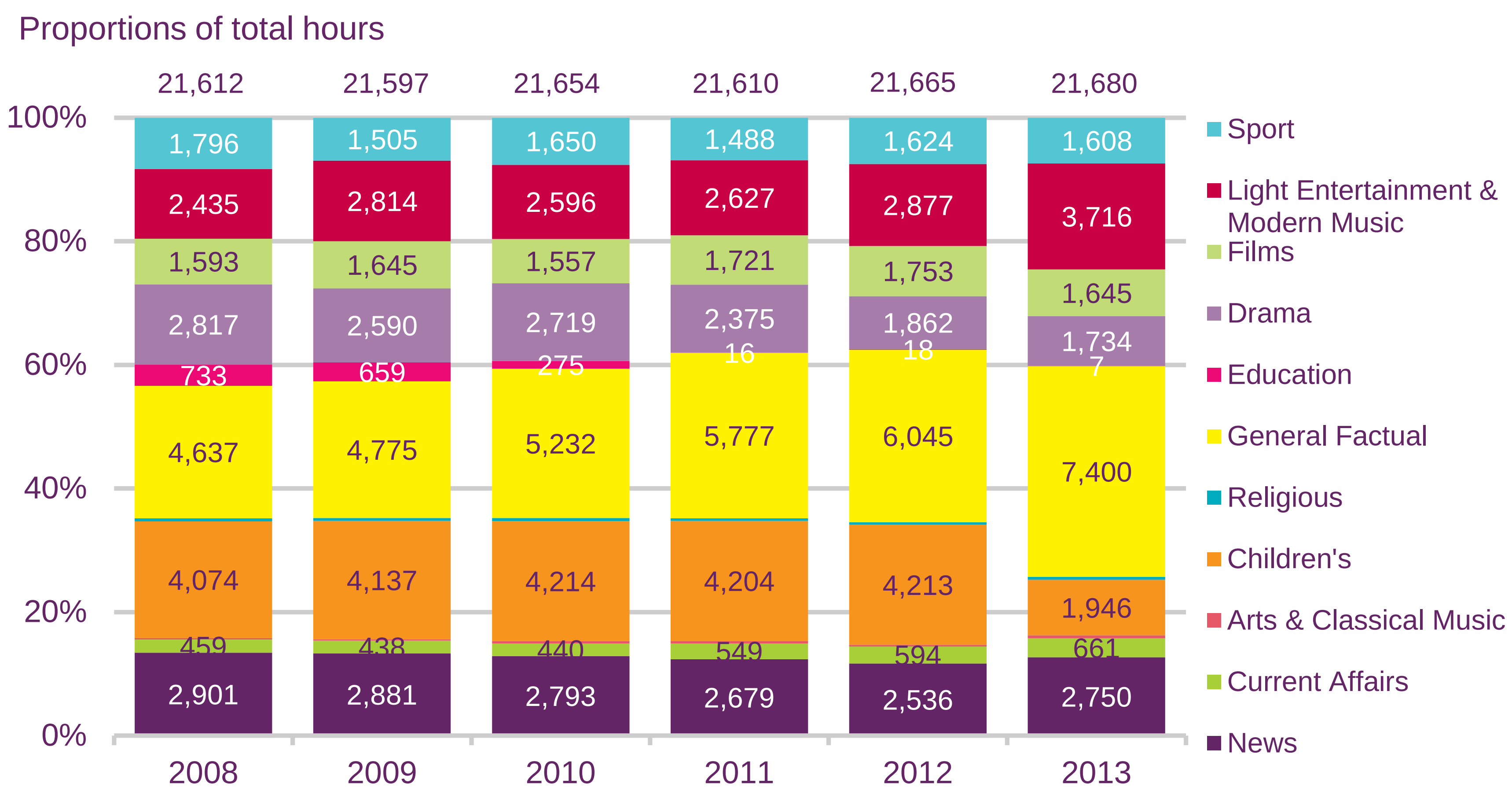
Genre mix on the five main PSB channels in peak time, by hours



Source: Ofcom/broadcasters. Note: Includes five main channels including ITV Breakfast, figures do not include hours of nations and regions output.

Figure 2.50

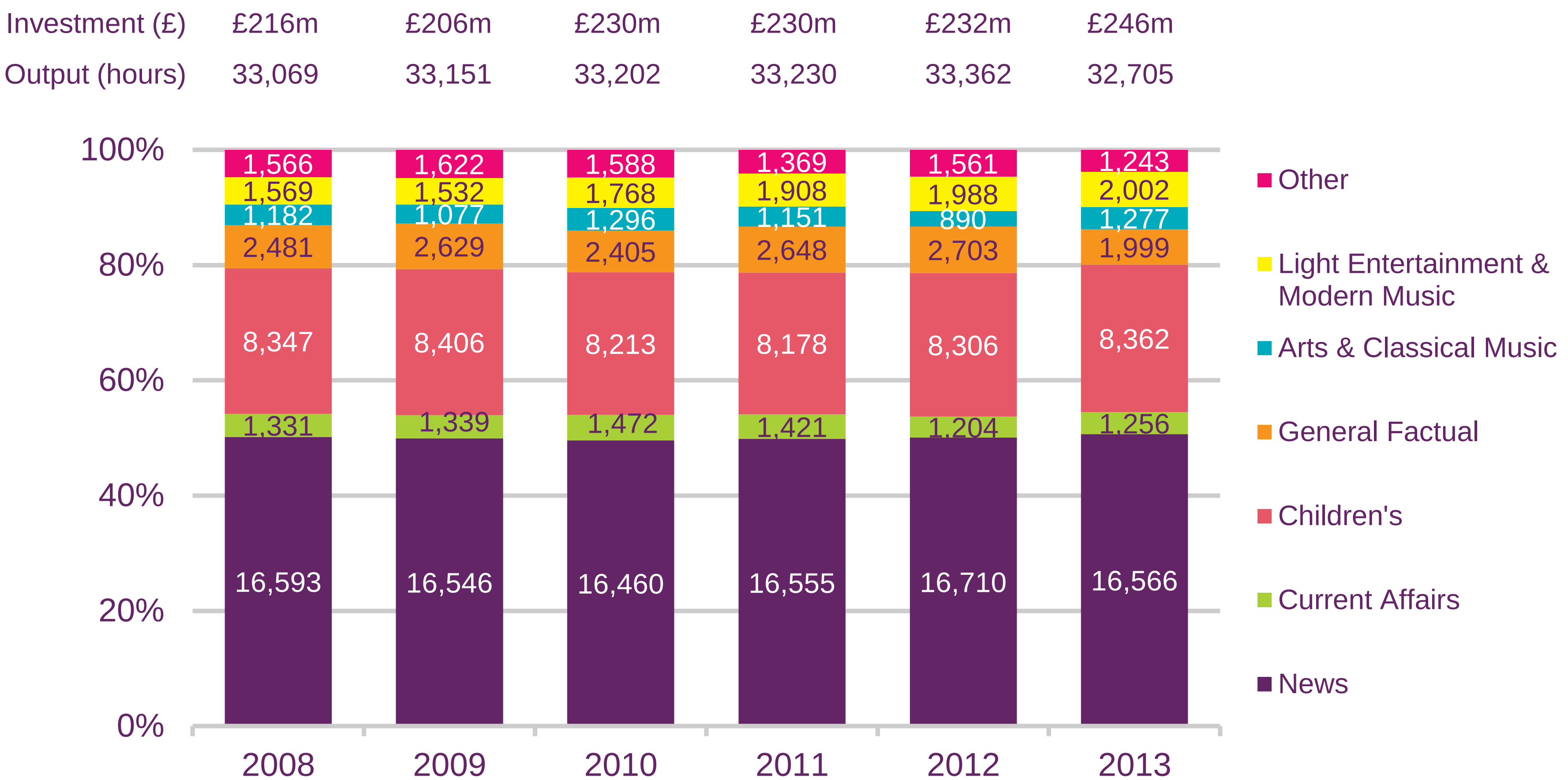
Genre mix on five main PSB channels: daytime



Source: Ofcom/broadcasters. Note: Includes five main channels plus ITV Breakfast. Figures do not include hours of nations and regions output.

Figure 2.51

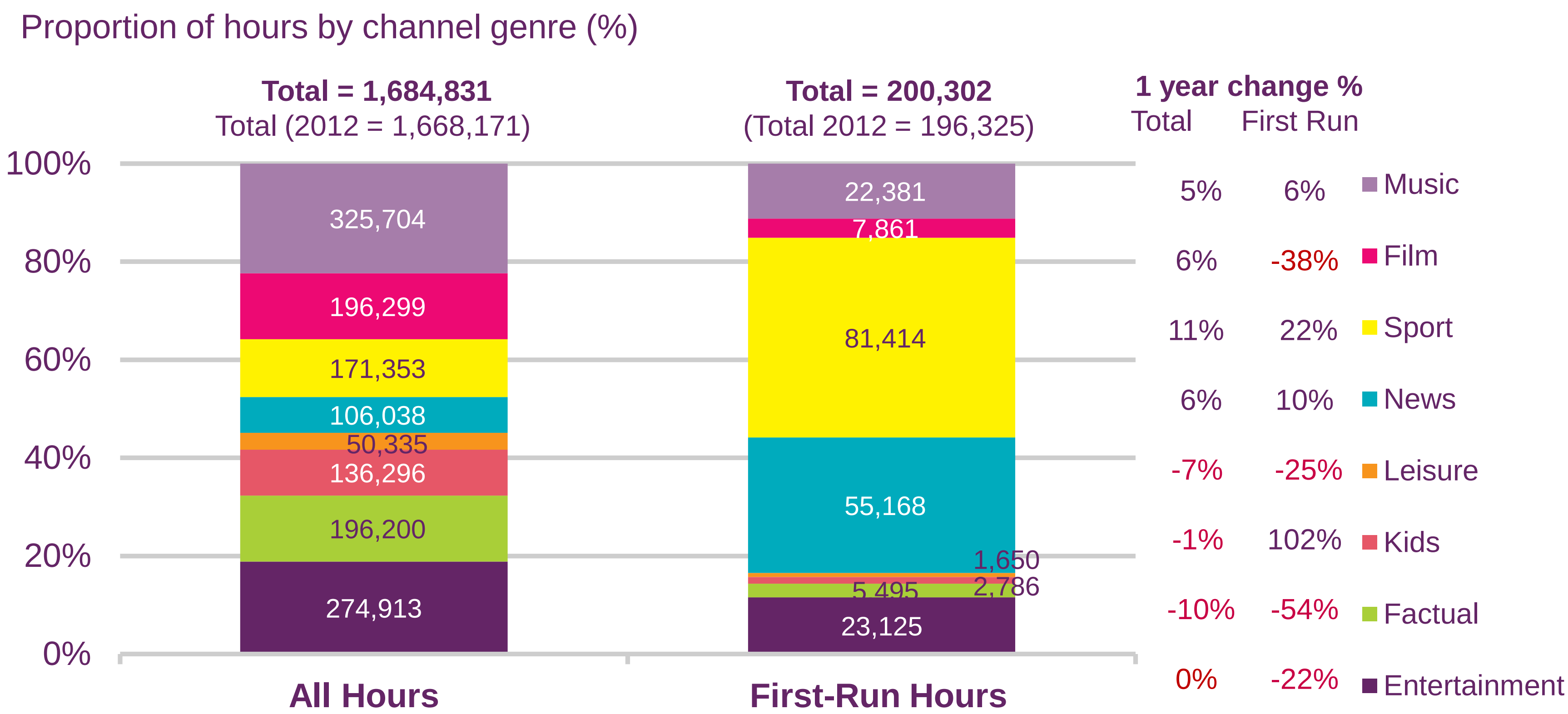
The BBC's digital channels genre mix by hours: all day



Source: Ofcom/broadcasters. Note: BBC digital channels include BBC Three, BBC Four, BBC News 24, BBC Parliament, CBBC, and CBeebies. 'Other' includes: education, drama, film, religion and sports

Figure 2.52

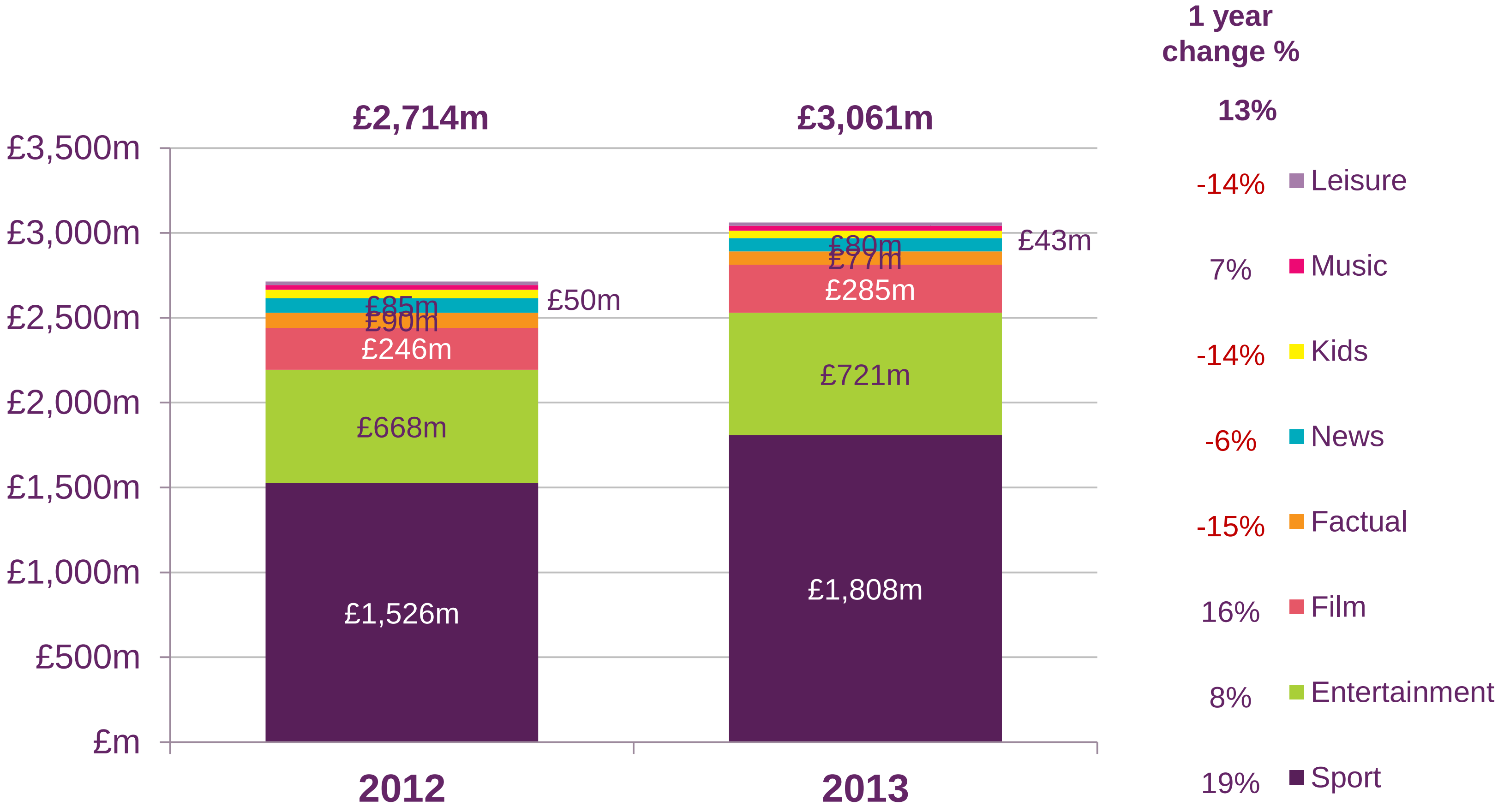
Total multichannel hours and first-run originations/acquisitions: 2013



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

Figure 2.53

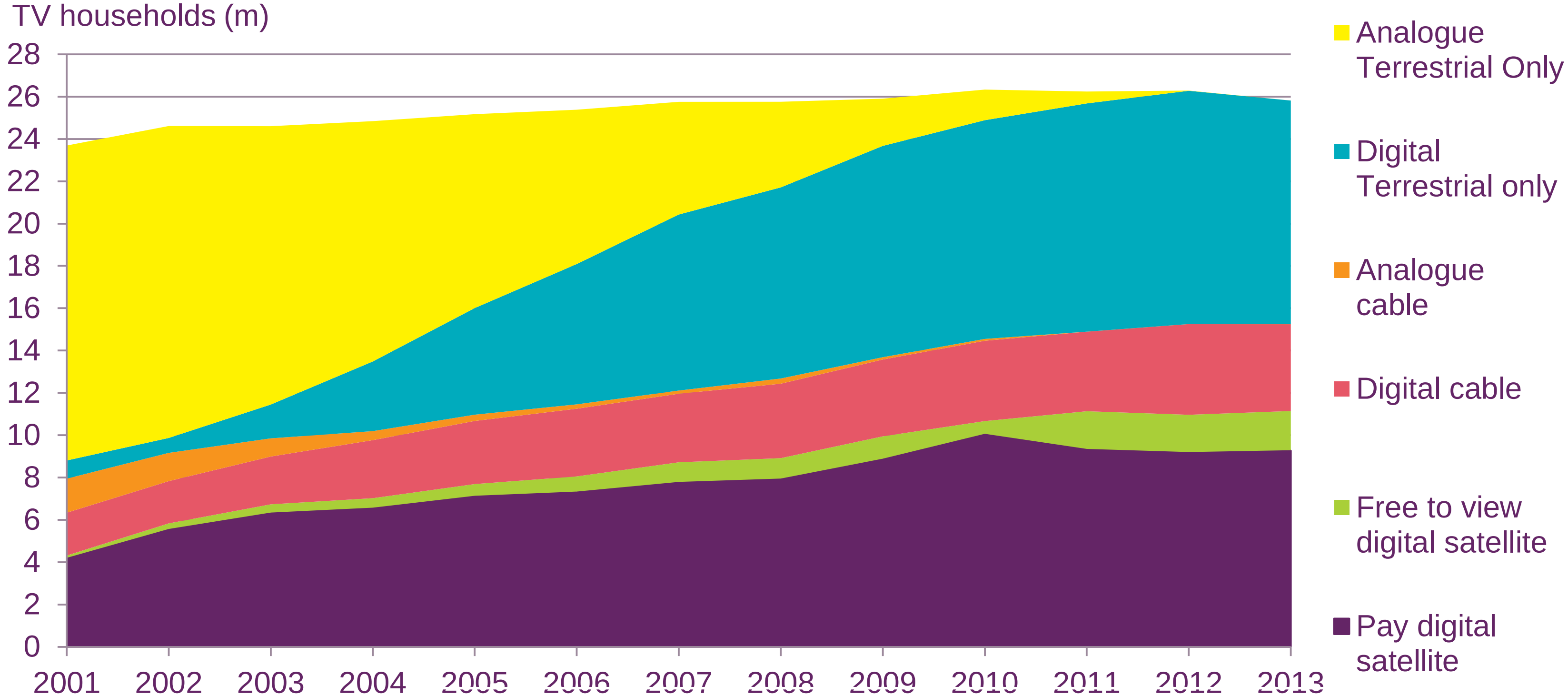
Content spend by commercial multichannels in key genres: 2012 - 2013



Source: Ofcom/broadcasters. Note: Spend expressed in nominal terms. Excludes BBC digital channels.

Figure 2.54

Platform take-up: 2001 – 2013

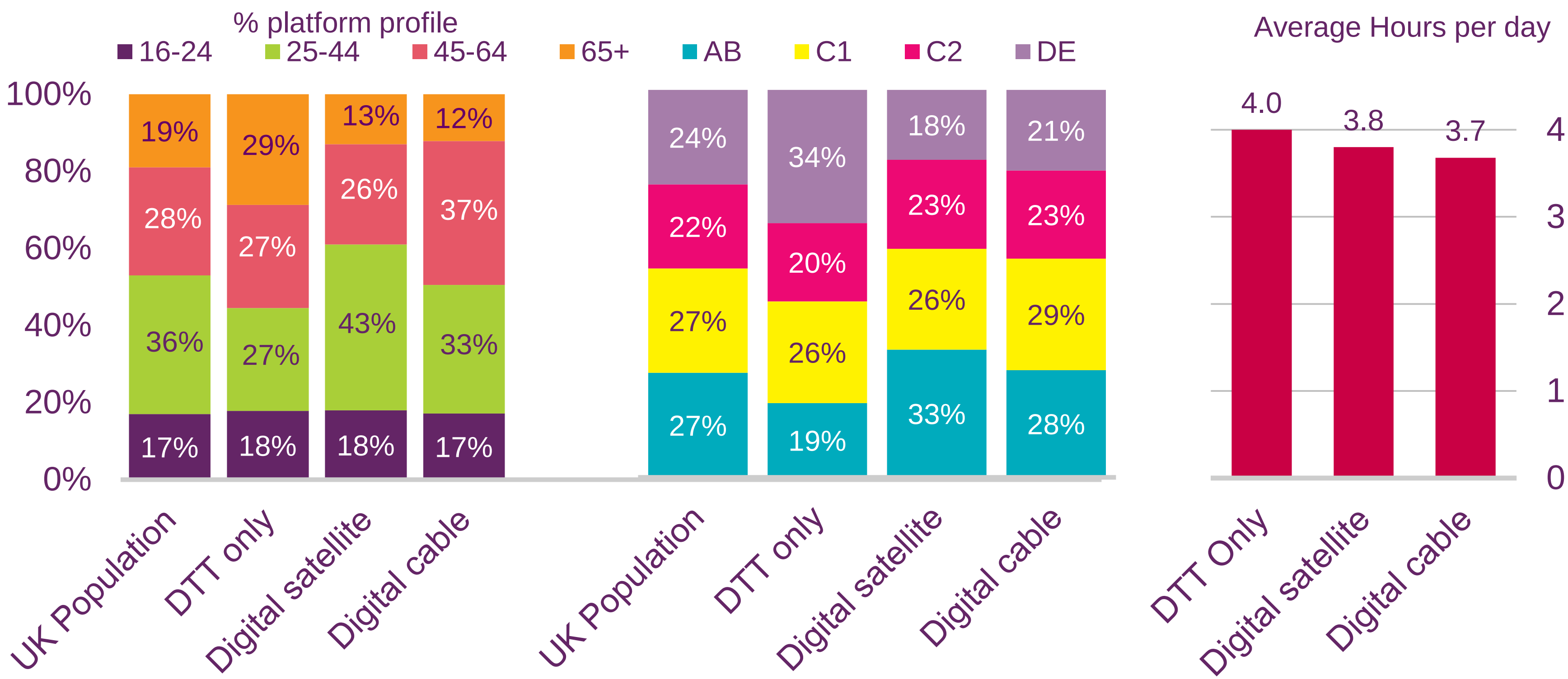


	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Multichannel take-up (% all households)	38.5%	39.4%	45.3%	52.9%	61.8%	69.4%	77.3%	84.3%	88.2%	91.5%	94.4%	95.5%	94.7%

Source: BARB Establishment Survey. Note: Data points are based on Q4 data for each year.

Figure 2.55

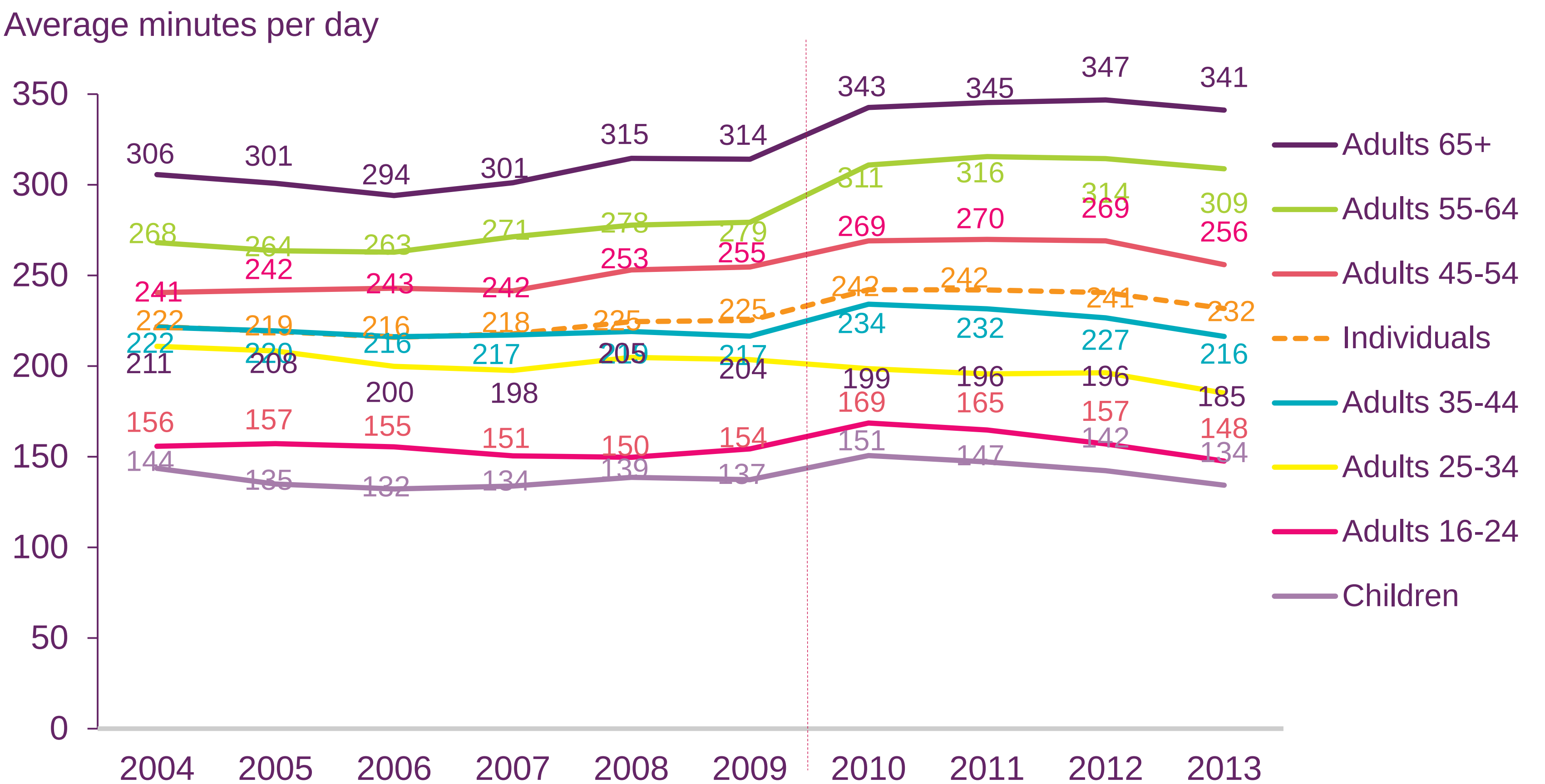
Platform demographics by age, socio-economic group and viewing hours



Source: Ofcom 2013 data and BARB 2013 data

Figure 2.56

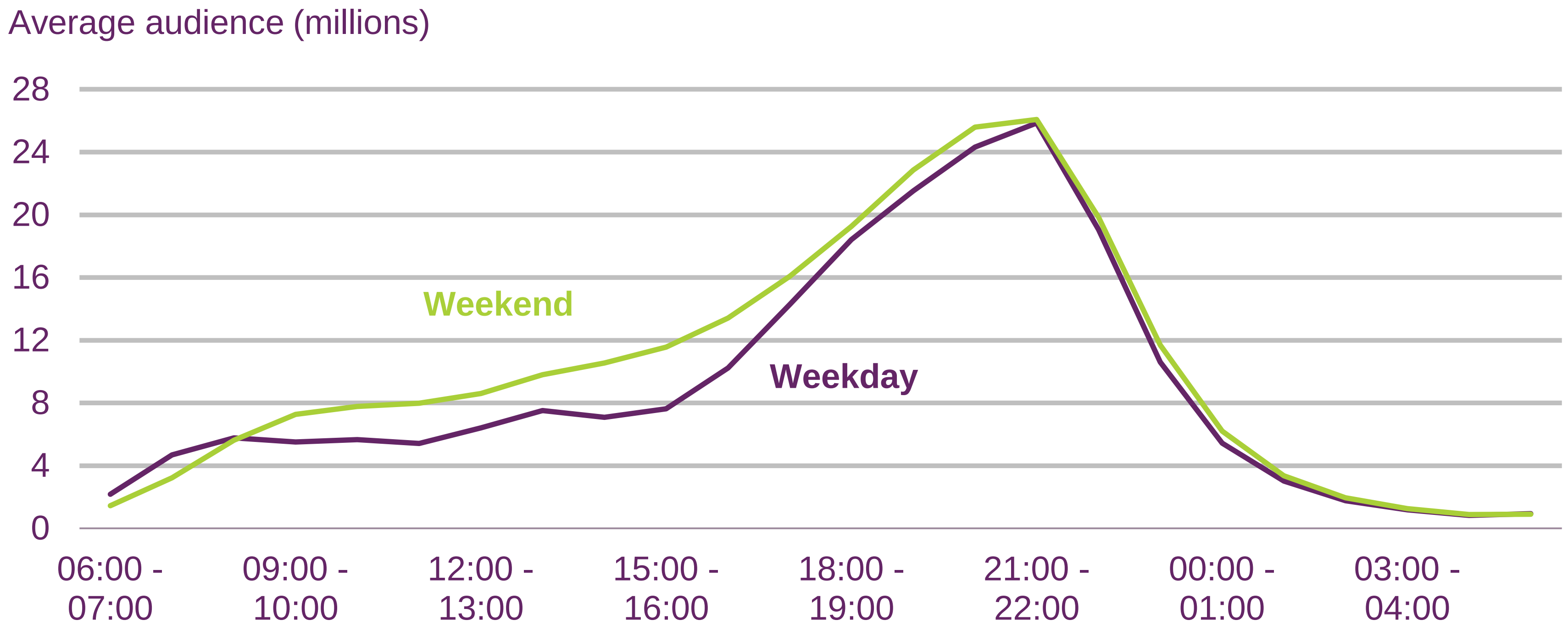
Average minutes of television viewing per day, by age, all homes



Source: BARB, Network. Note: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution

Figure 2.57

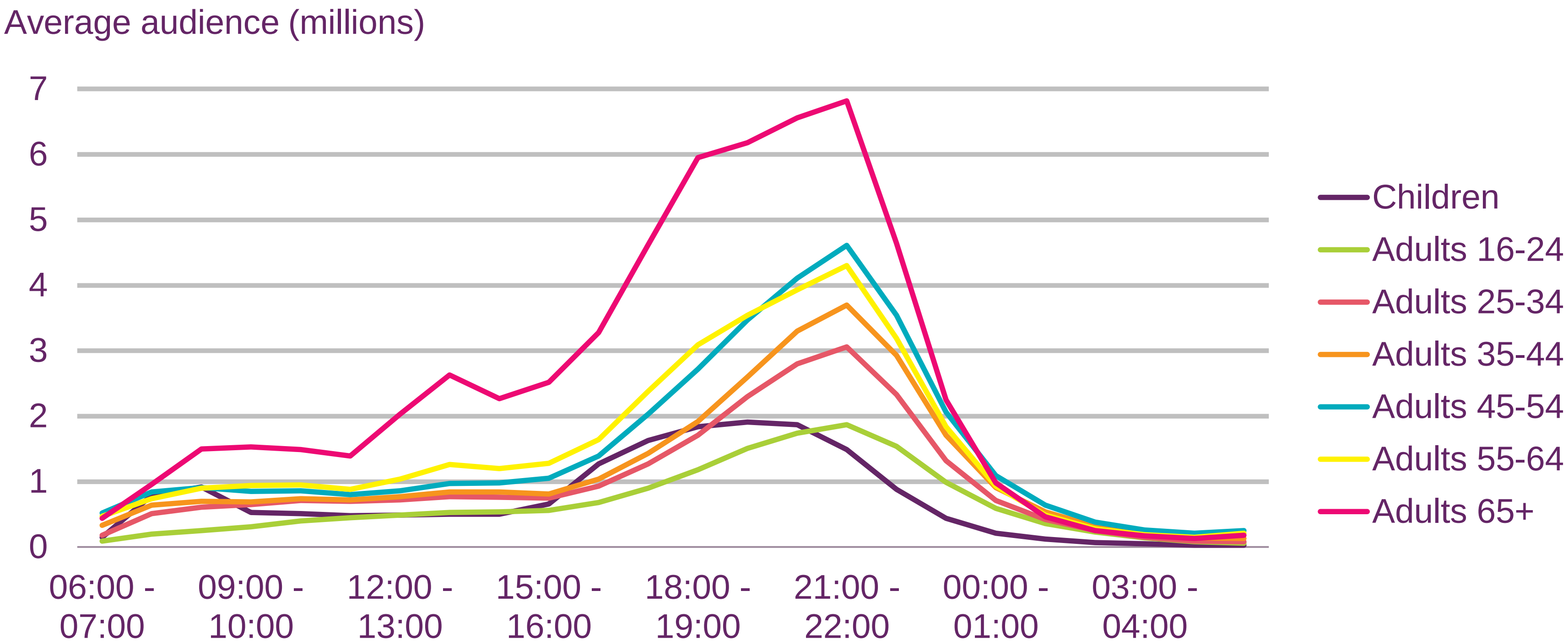
Average 2013 audiences, weekdays/weekends: by day part, all homes



Source: BARB, all Individuals 4+

Figure 2.58

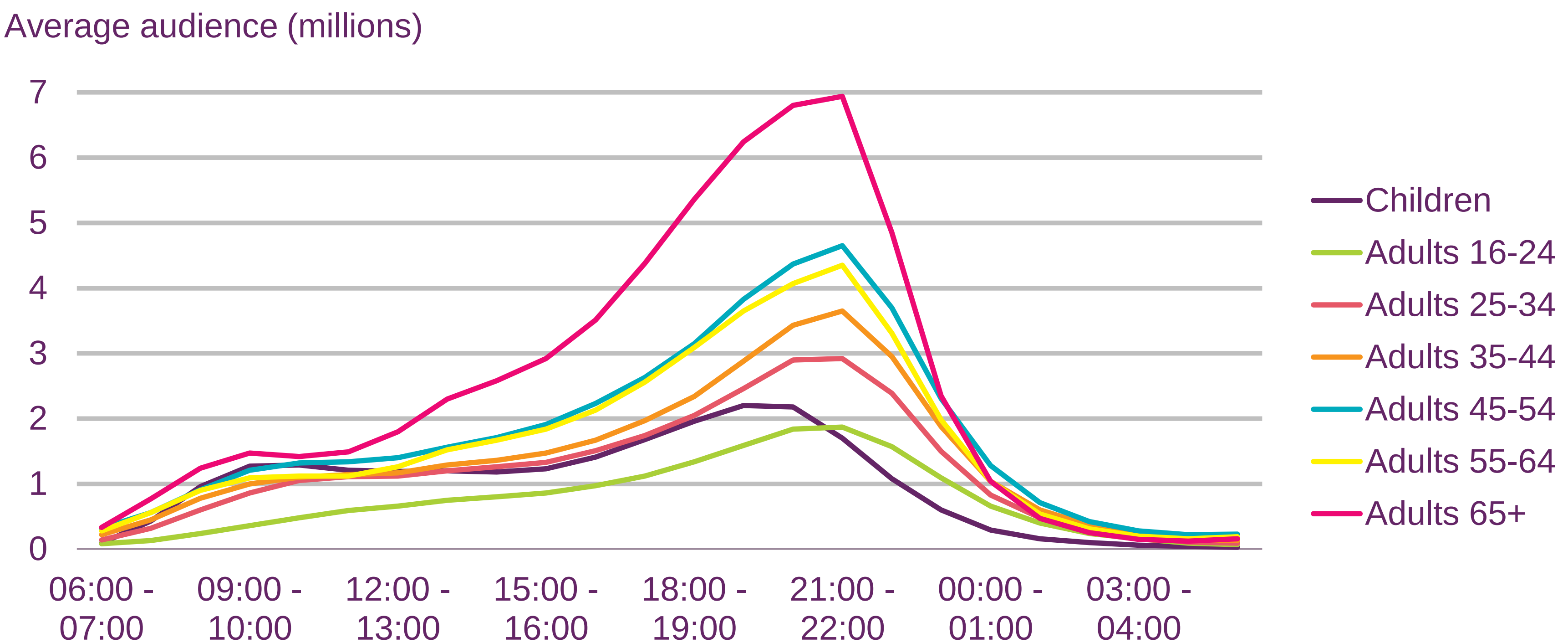
Average 2013 weekday audiences, by day part and age, all homes



Source: BARB

Figure 2.59

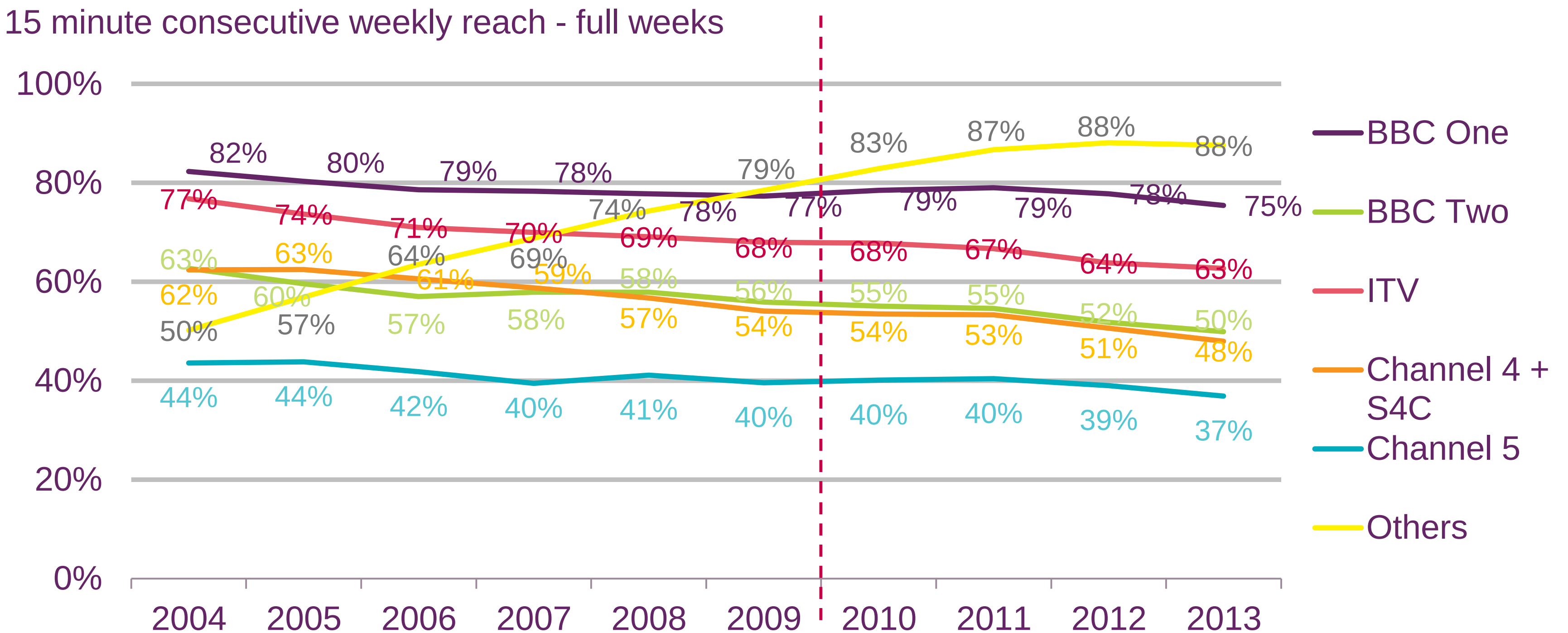
Average 2013 weekend audiences, by day part and age, all homes



Source: BARB

Figure 2.60

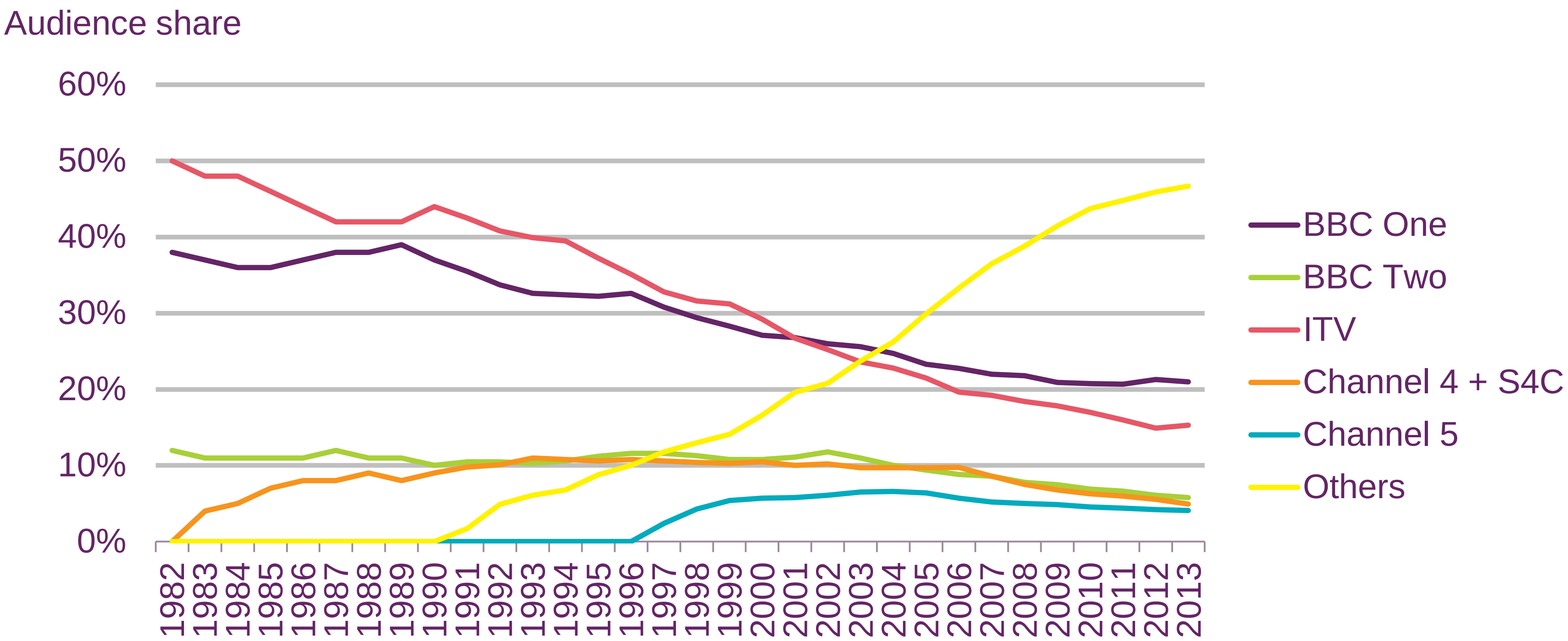
Average weekly TV reach in all homes, by channel



Source: BARB Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 ceased to carry S4C programming following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. S4C weekly reach in 2013 was 0.5% (all homes). The five main PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.61

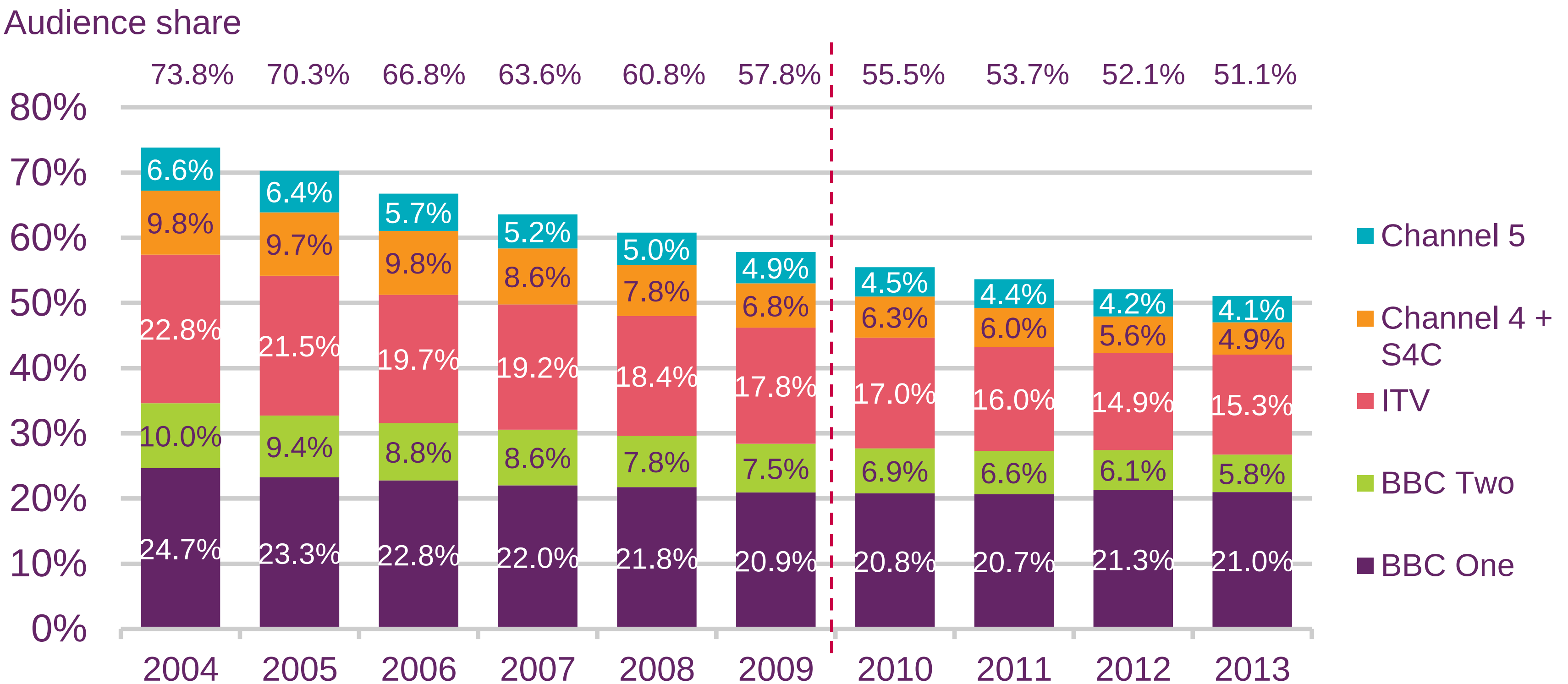
Channel shares in all homes: 1982 to 2013



Source: BARB, TAM JICTAR and Ofcom estimates. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 ceased to carry S4C programming following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.S4C 2013 channel share in all homes = 0.1%. The main five PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure 2.62

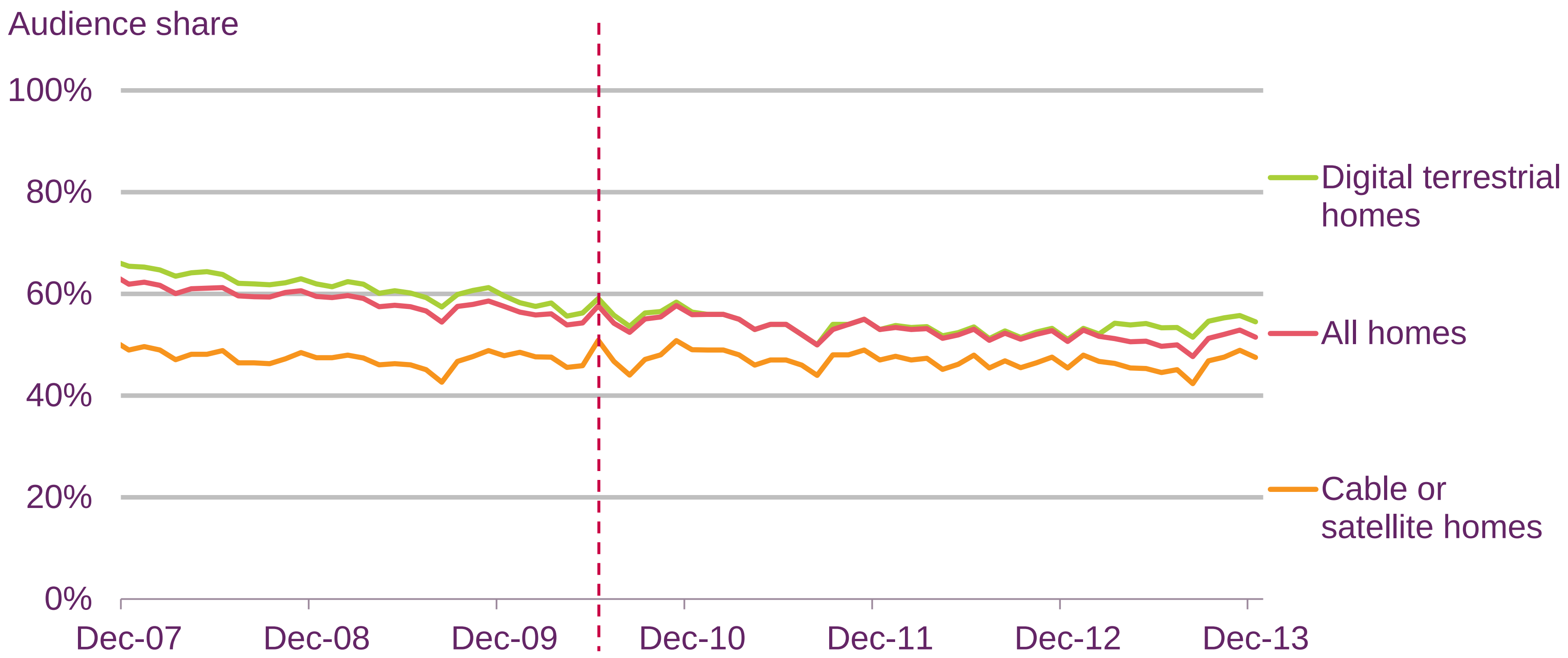
Five main PSB channels' audience share, all homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts.S4C 2013 channel share = 0.1%. HD and SD viewing included

Figure 2.63

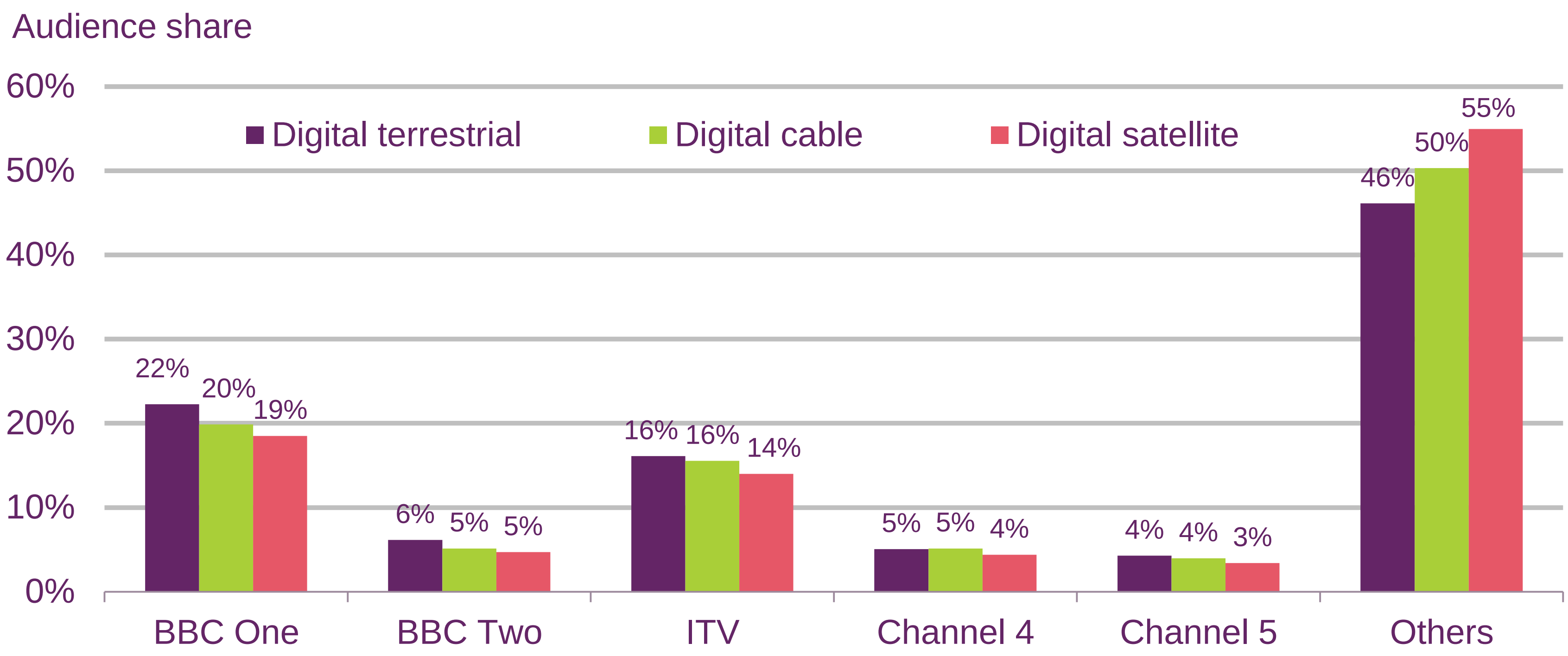
Five main PSB channels’ audience share, by platform



Source: BARB, Individuals in platform homes, based on Share %. HD and SD viewing included. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain grouped together in relevant charts.S4C 2013 channel share (all homes)= 0.1%.

Figure 2.64

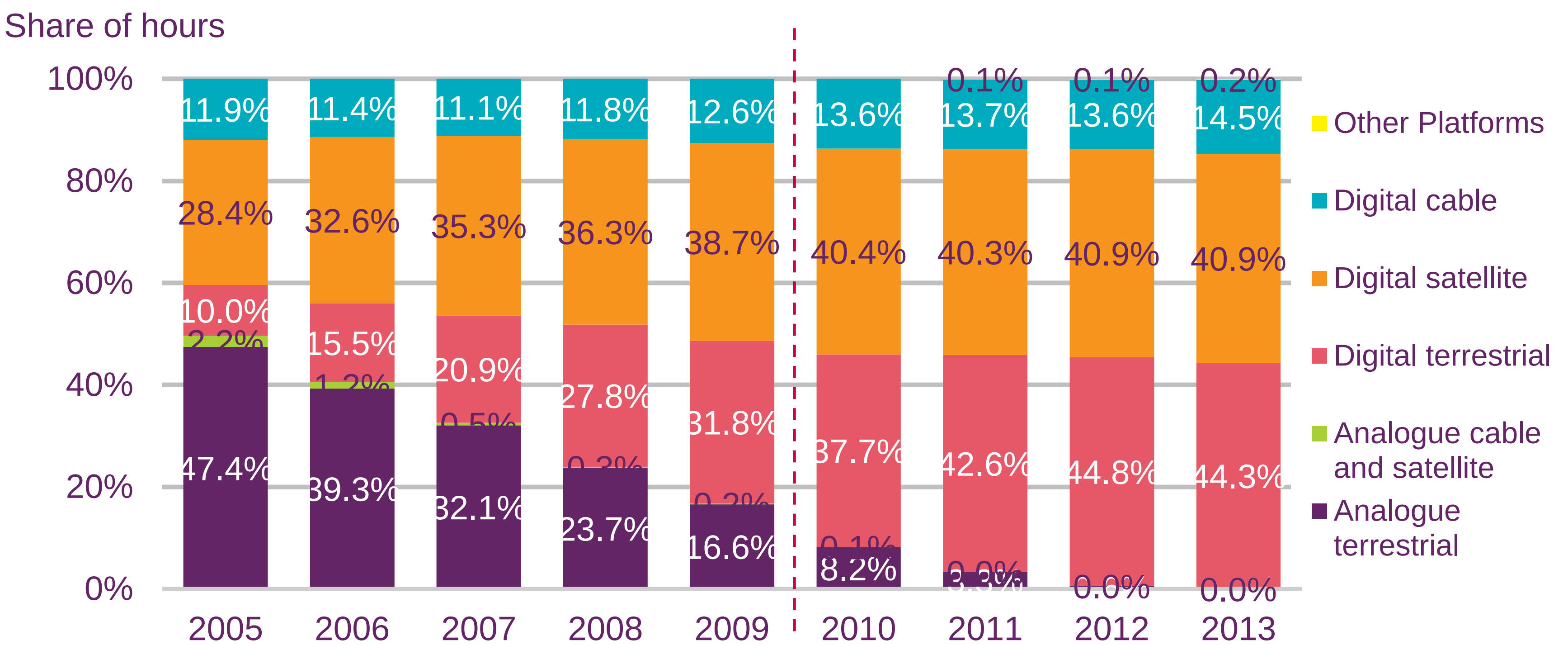
Channel share, by platform: 2013



Source: BARB. Individuals in platform homes, based on share%. HD and SD viewing included for the main PSB channels but not +1 channel variants.

Figure 2.65

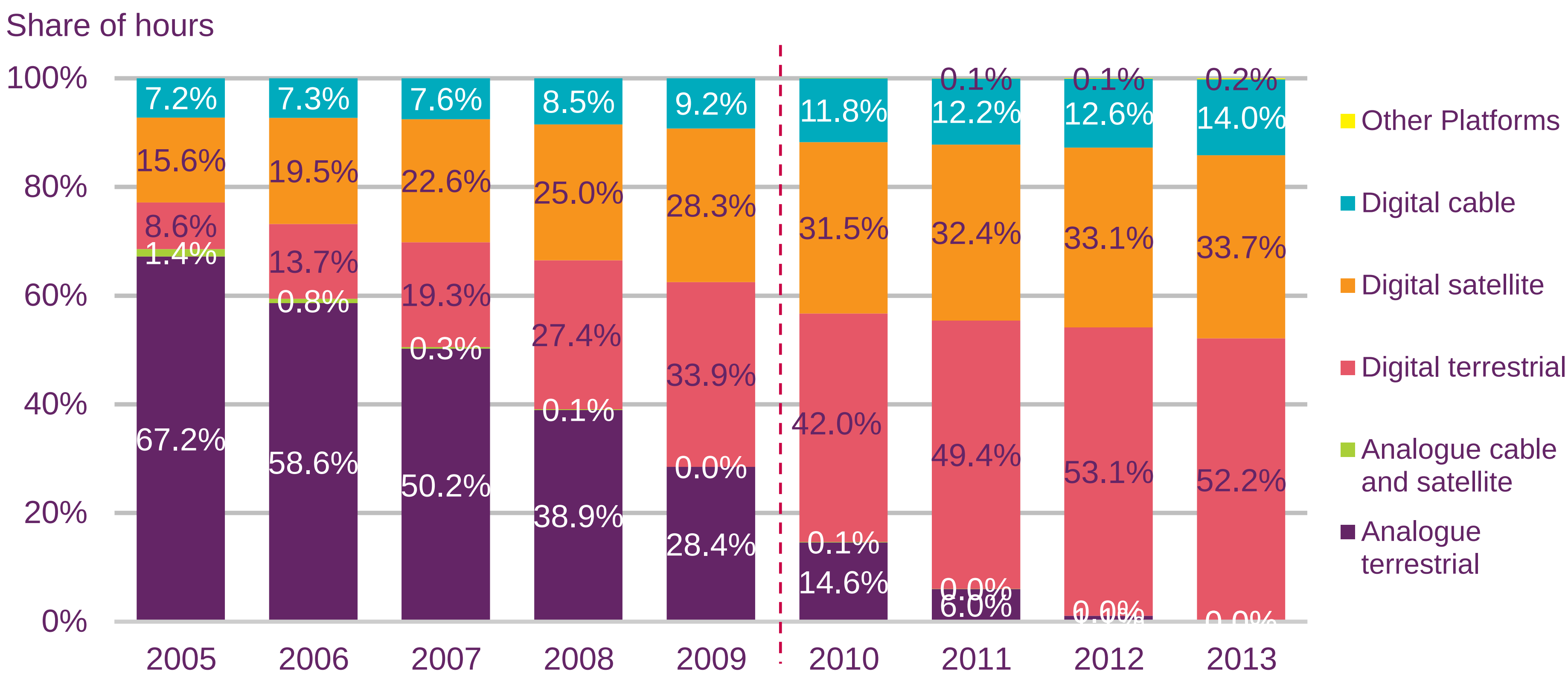
Share of total TV hours by platform signal



Source: BARB, Individuals 4+, all homes, total hours. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.66

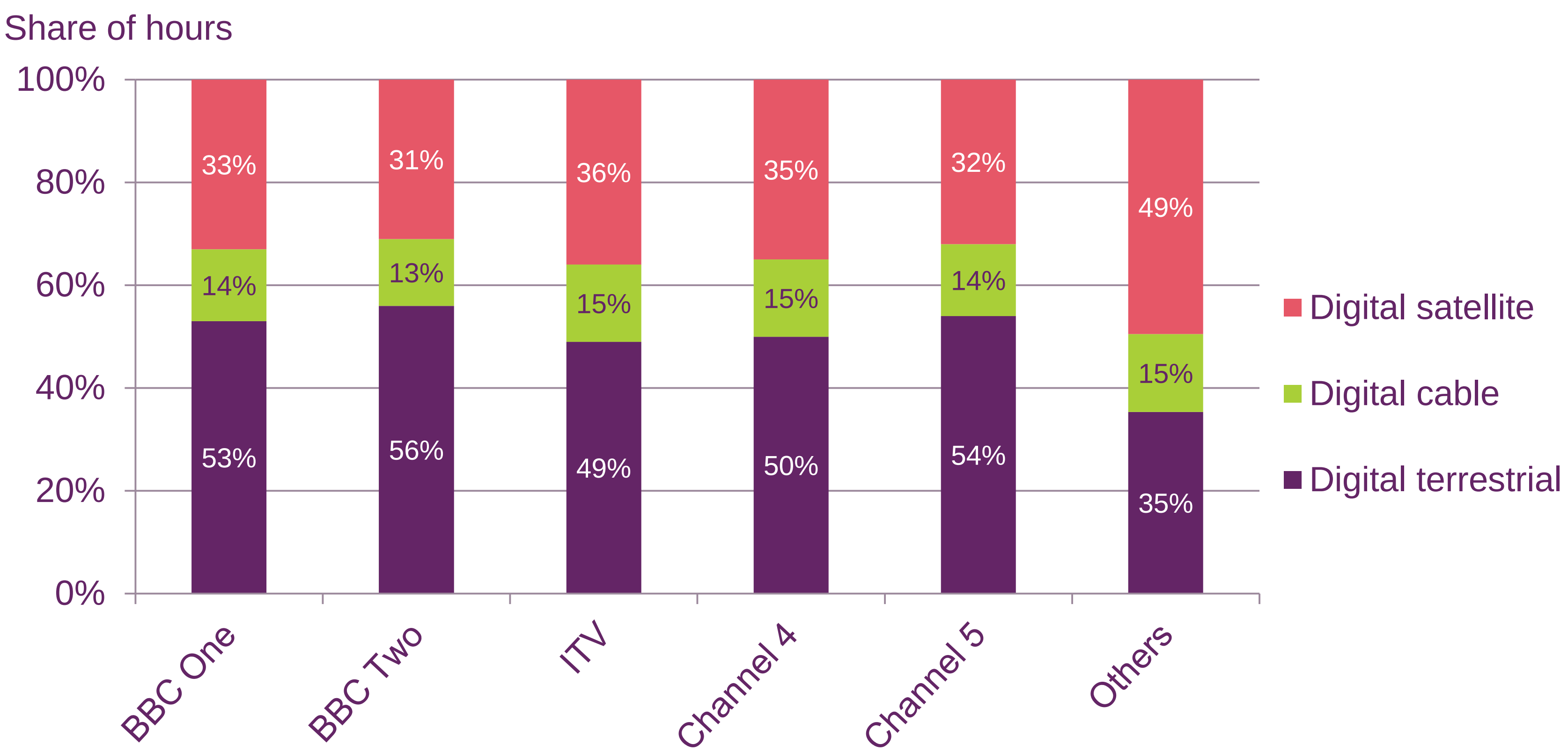
Five main PSB channels’ share of total hours by platform signal



Source: BARB, all Individuals, total hours. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included but not +1 channel variants

Figure 2.67

Share of viewing hours for main PSB channels and other channels, by platform signal: 2013



Source: BARB. All individuals, total hours. HD and SD viewing included for the five main PSBs but not +1 channel variants

Figure 2.68

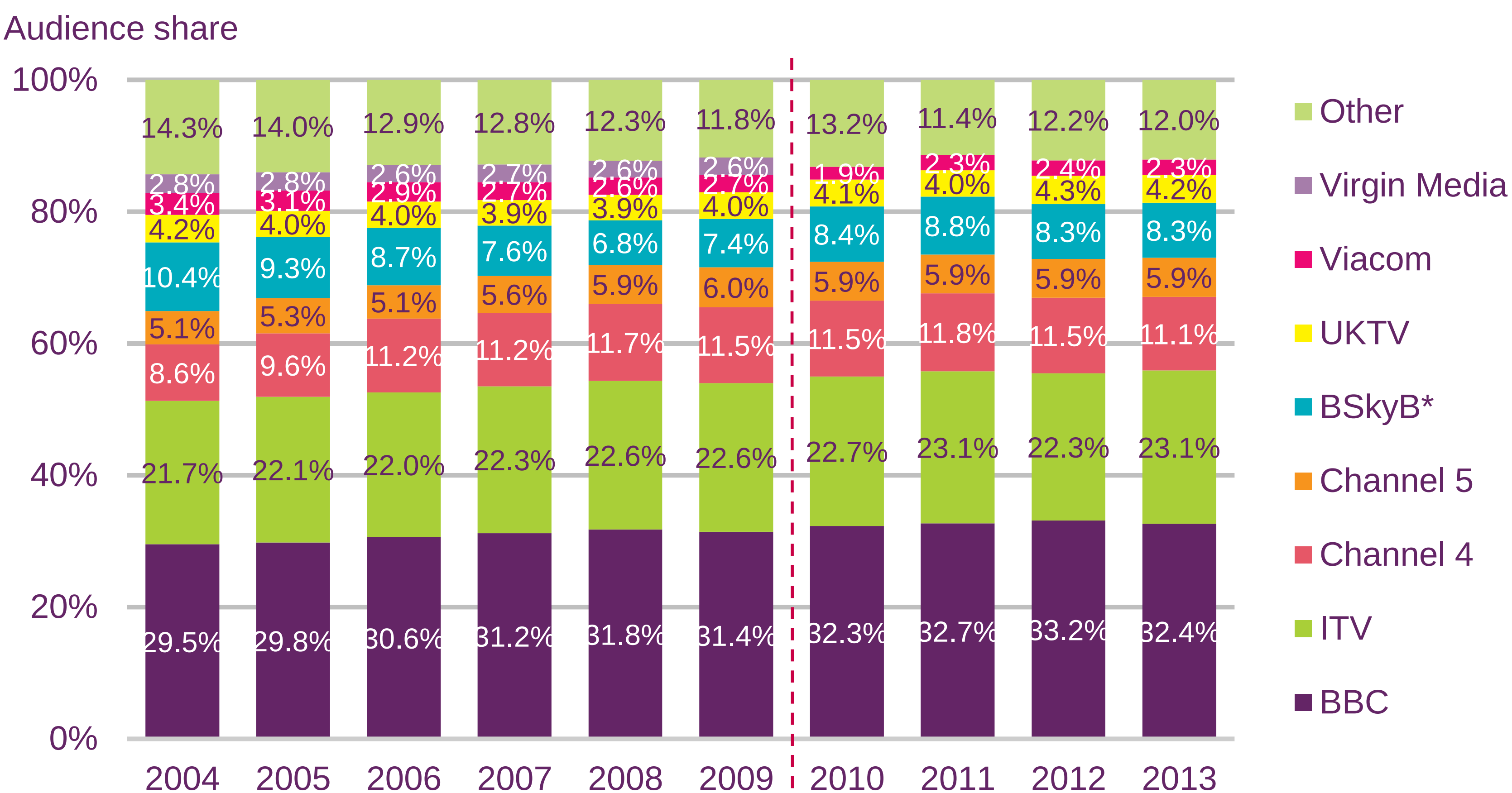
PSB, PSB portfolio channels and other channels' shares in multichannel homes

Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. The five main PSB channels include viewing to their HD channel variants but exclude viewing to their +1 channels.

Figure xxxx

Figure 2.69

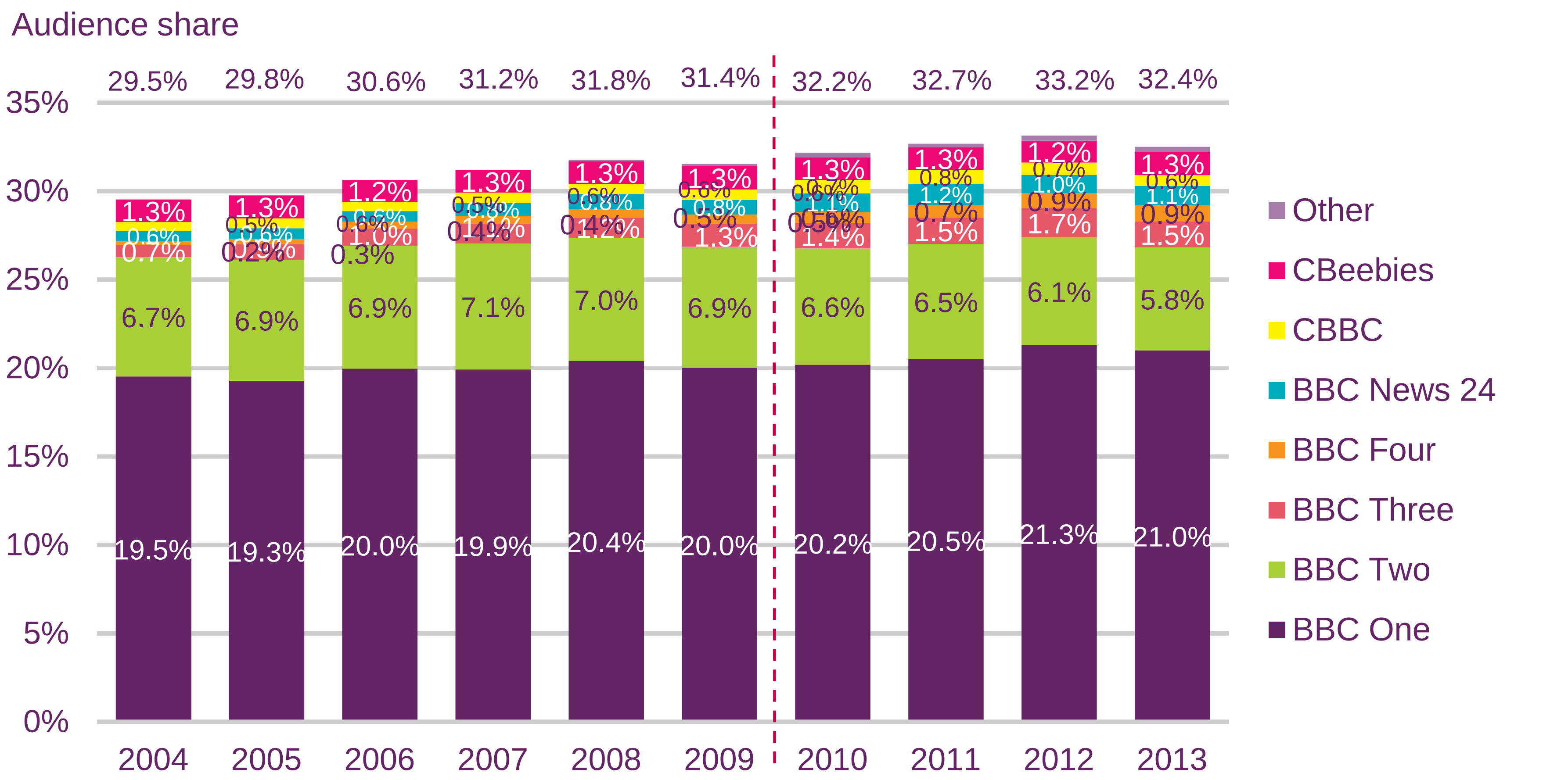
Broadcaster portfolio shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010. ITV includes all ITV network channels, not just those owned by ITV plc.

Figure 2.70

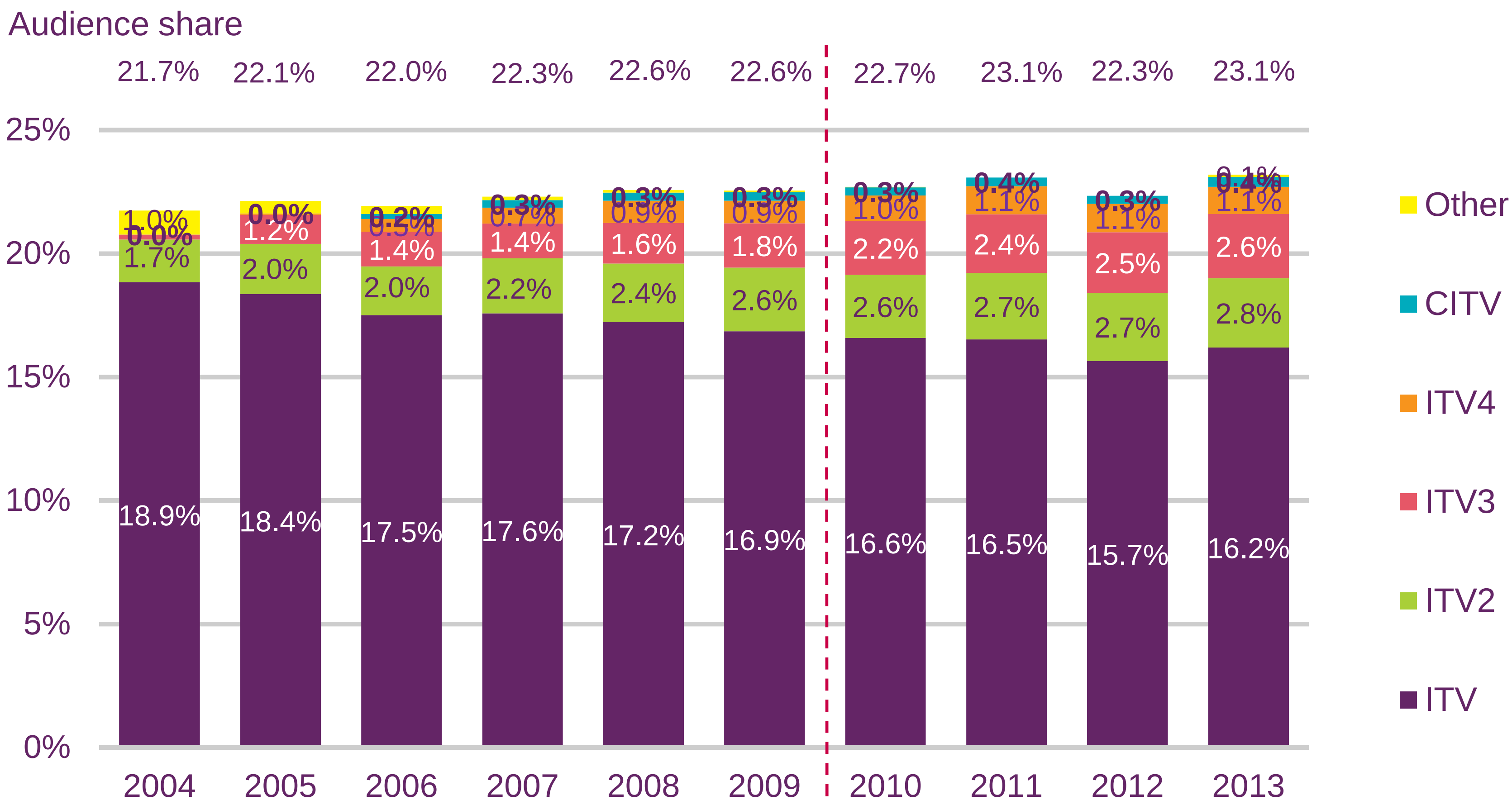
BBC portfolio shares in multichannel homes



Source: BARB Note: ‘Other’ includes BBC Parliament, BBC Choice, BBC HD and BBC Knowledge. The 24 BBC Olympics channels have been excluded from 2012 share and accounted for 0.21% share. A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD and SD viewing included

Figure 2.71

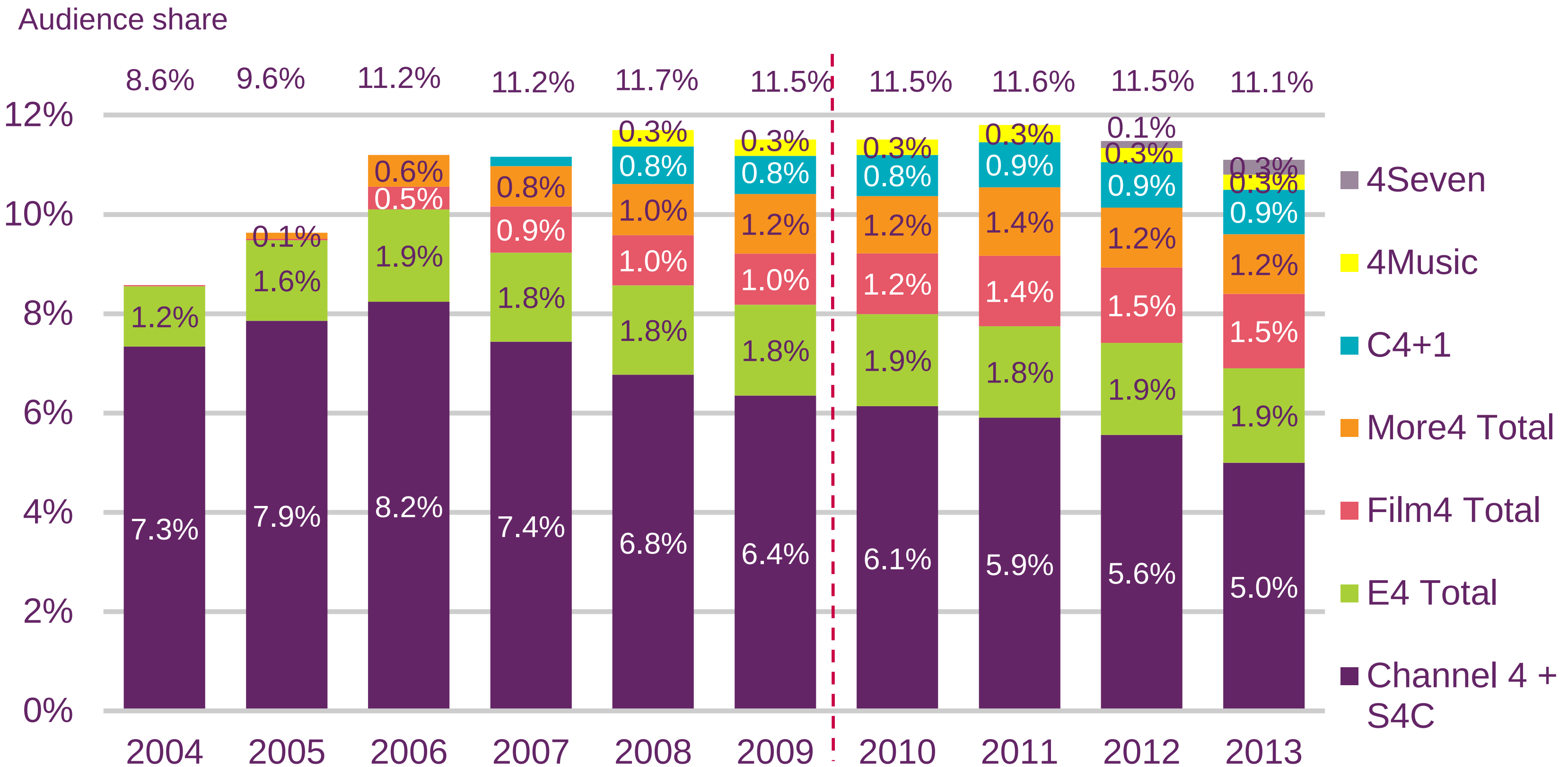
ITV portfolio shares in multichannel homes



Source: BARB. Note: ‘Other’ includes (when relevant) ITV Play, Men & Motors, GMTV2, Granada Breeze, Plus, ITV News. ITV, ITV2, ITV3 and ITV4 and include +1 services’ shares. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.72

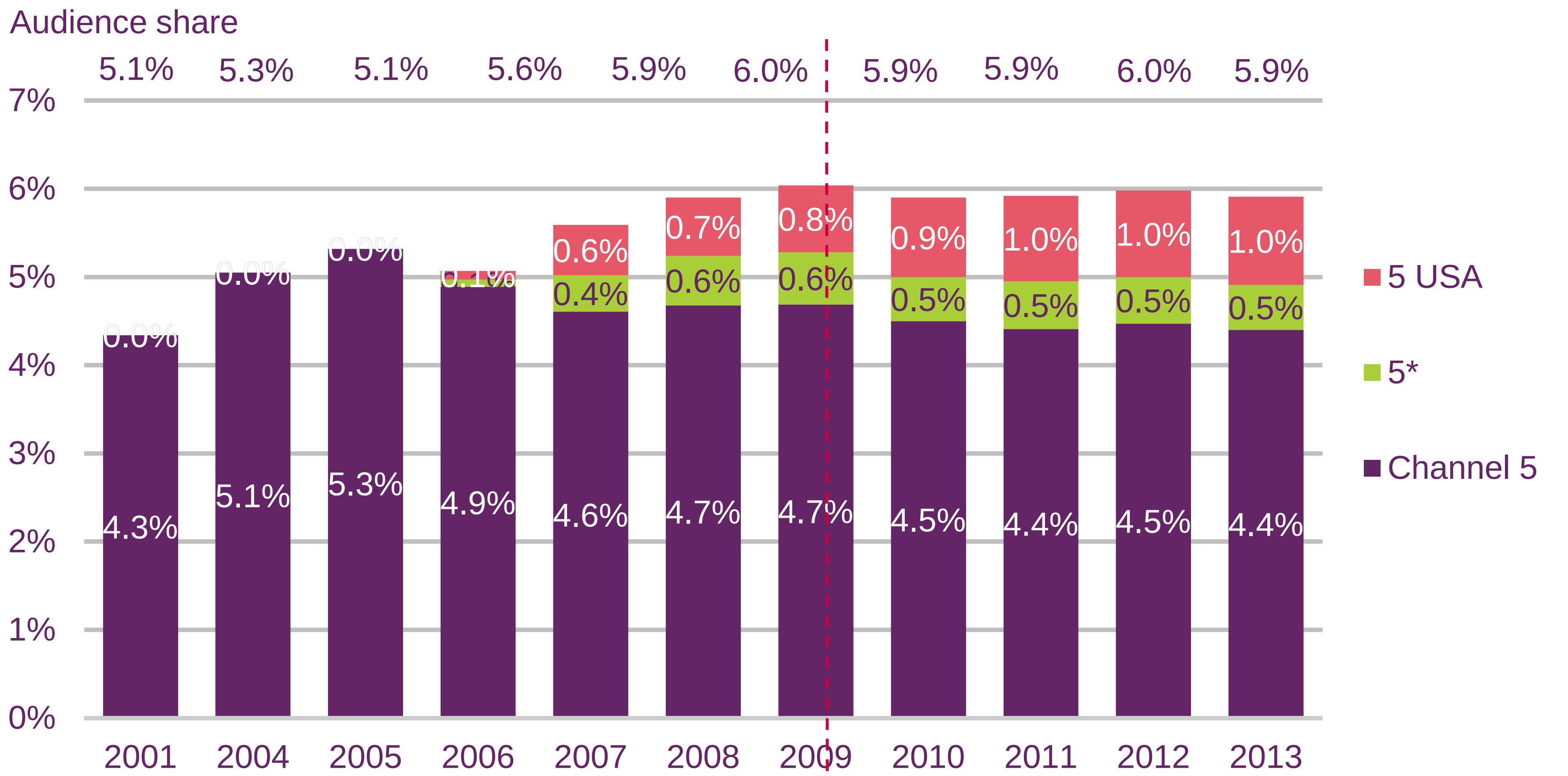
Channel 4 portfolio shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. E4, More4 and Film 4 respective +1 channel shares are included. 4Seven launched 4th July 2012. Note: In 2010 C4 and S4C became two separate channels following digital switchover in Wales. For the purposes of this report the two channels remain labelled together in relevant charts. HD and SD viewing included.

Figure 2.73

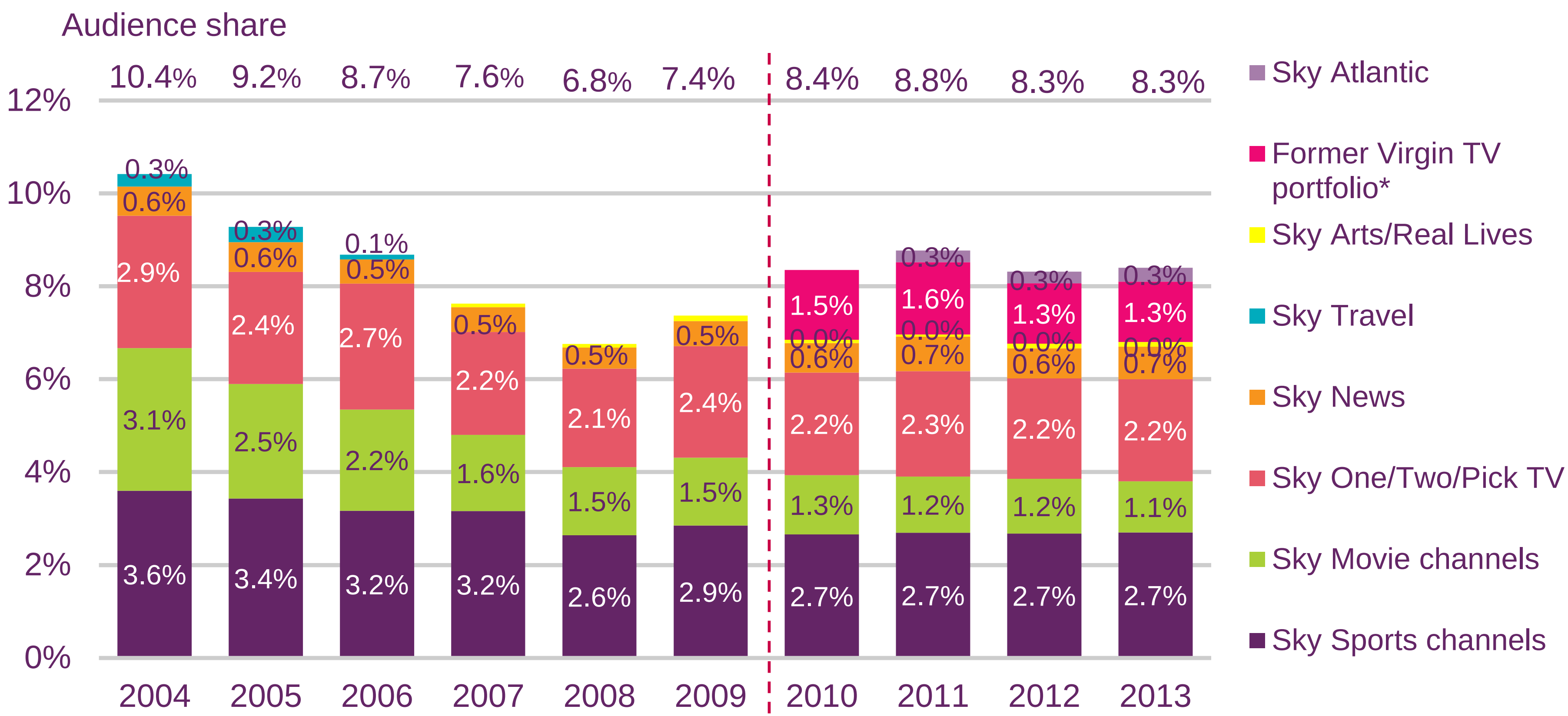
Channel 5 portfolio shares in multichannel homes



Source: BARB. Note: Channels include their +1 service. HD and SD viewing included. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution.

Figure 2.74

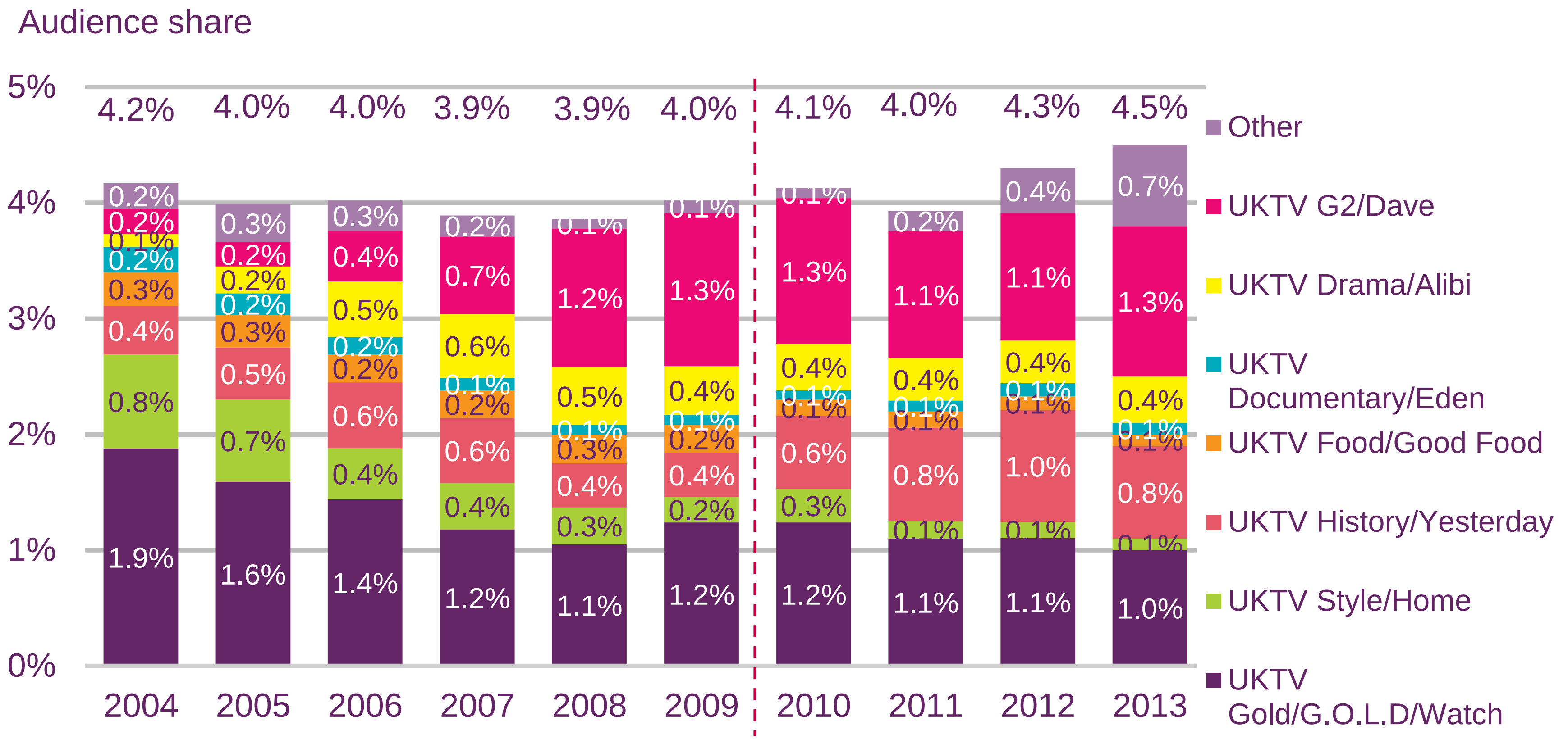
BSkyB portfolio shares in multichannel homes



Source: BARB. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. *BSkyB took ownership of VMTV in June 2010, Virgin Media TV portfolio shares are included in the BSkyB figure for the whole of 2010 onwards. HD and SD viewing included.

Figure 2.75

UKTV portfolio shares in multichannel homes



Source: BARB. Note: In 2008 figures, new channel names and shares have been matched to old channels. Dave went live in Oct 2007. Drama launched in July 2013 and is included in 'Other'. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. HD, SD and +1 viewing are included

Figure 2.76

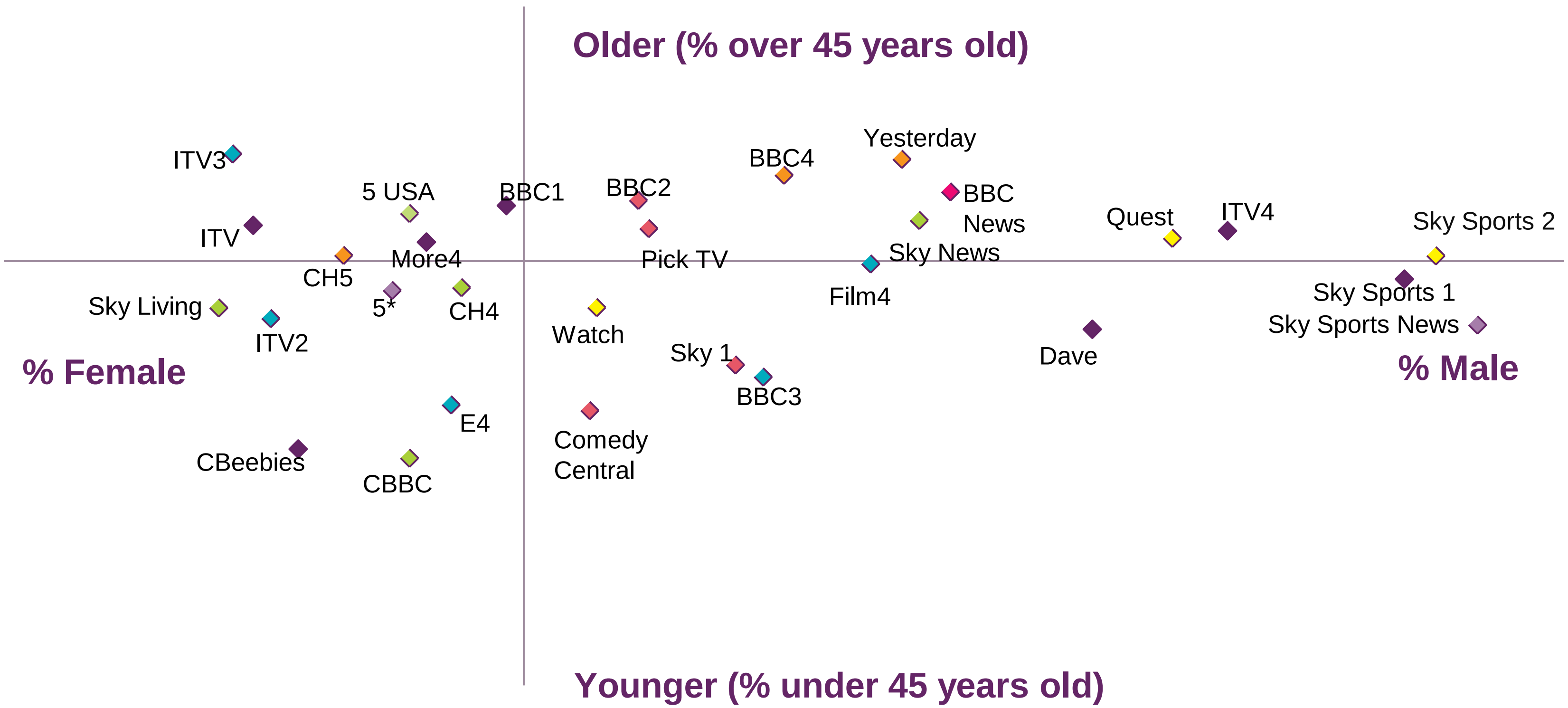
The top channels by share in multichannel homes: 2012 to 2013

	Share	Rank			Share	Rank	
Channel	2013	2013	2012	Channel	2013	2013	2012
BBC One	21.0%	1	1	Dave	1.3%	11	15
ITV	16.2%	2	2	Cbeebies	1.3%	12	11
Channel 4	5.8%	3	3	More4	1.2%	13	12
BBC Two	5.8%	4	4	ITV4	1.1%	14	14
Channel 5	4.4%	5	5	Sky Sports 1	1.1%	15	13
ITV2	2.8%	6	6	BBC News	1.1%	16	16
ITV3	2.6%	7	7	5 USA	1.0%	17	17
E4	1.9%	8	8	Pick TV	1.0%	18	18
Film4	1.5%	9	10	Sky One	1.0%	19	20
BBC Three	1.5%	10	9	BBC Four	0.9%	20	n/a

Source: BARB. Individuals 4+
Note: Includes channels' +1 services and HD and SD viewing

Figure 2.77

Age and gender profile of the 30 most-viewed channels in multichannel homes, 2013



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

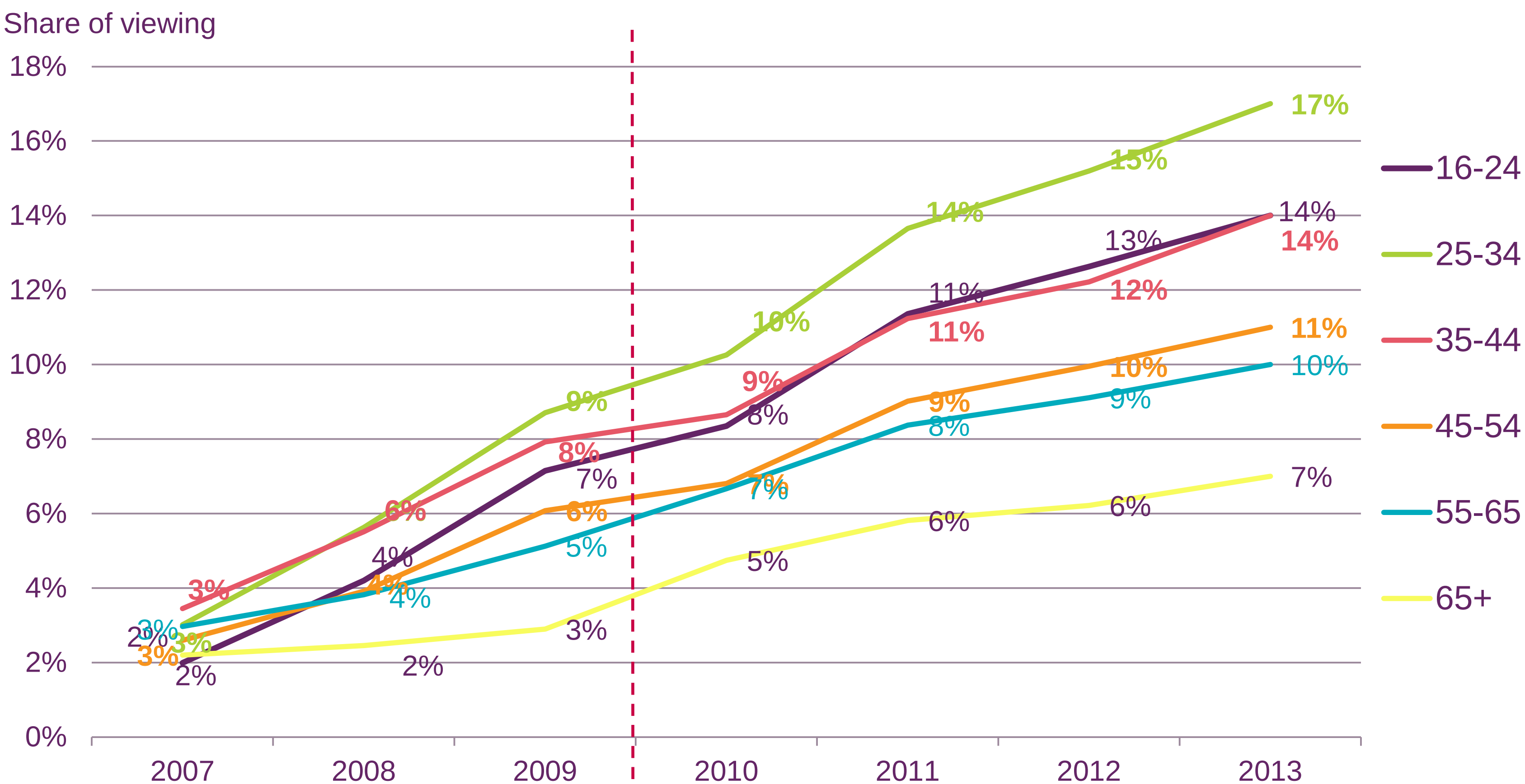
Figure 2.78

Live versus time-shifted viewing, all Individuals

Source: BARB, all individuals, based on total minutes. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing is defined as total minutes of viewing on same day as live plus viewing 2-7 days after broadcast. All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This includes viewing to programmes stored on recording devices and content viewed via TV player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.79

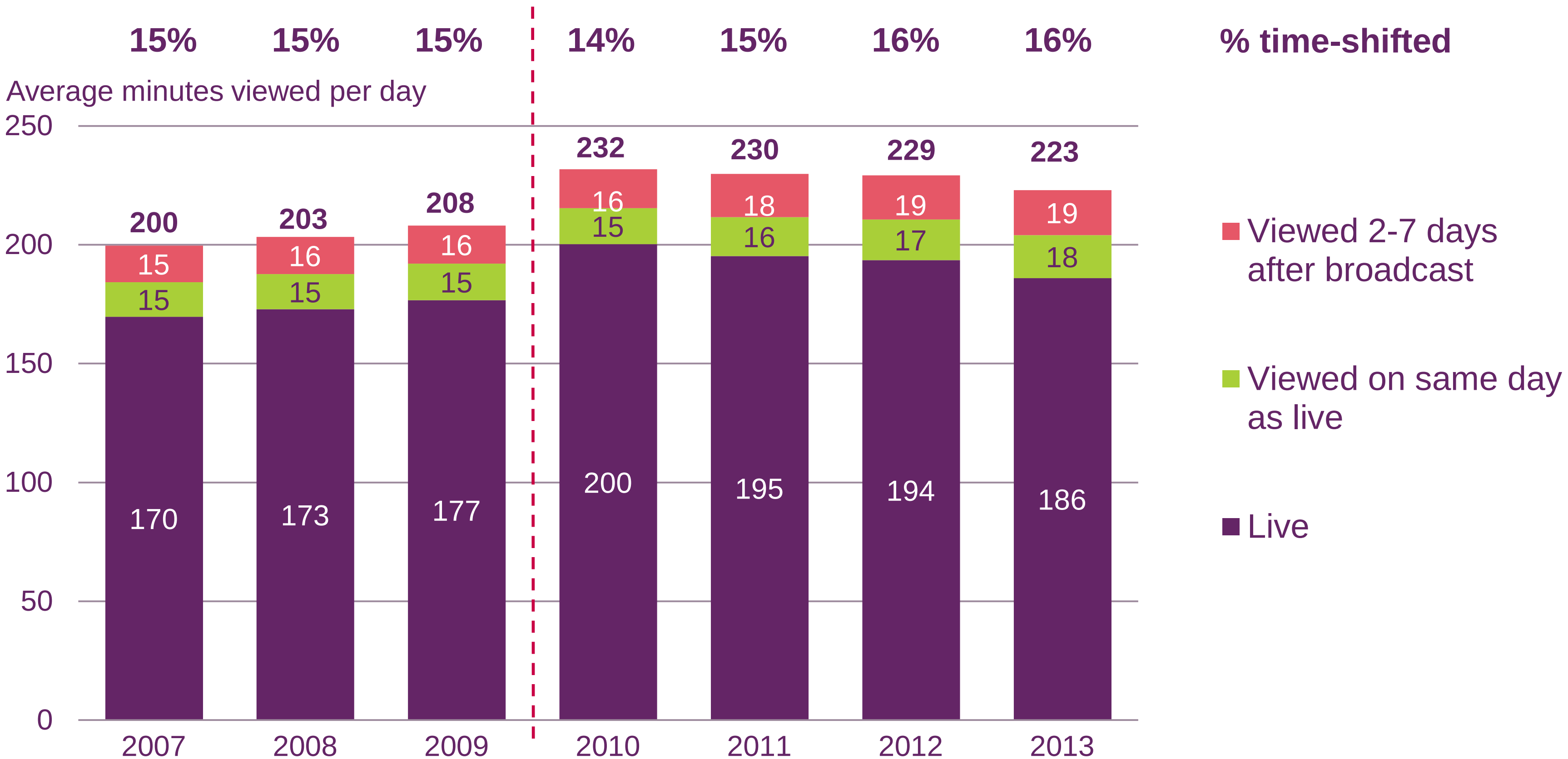
Proportion of time shifted viewing, by age, all Adults



Source: BARB, all Individuals, based on total minutes. Note: New BARB panel introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing is defined as total minutes of viewing on same day as live plus viewing 2-7 days after broadcast. All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This includes viewing to programmes stored on recording devices and content viewed via TV player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.80

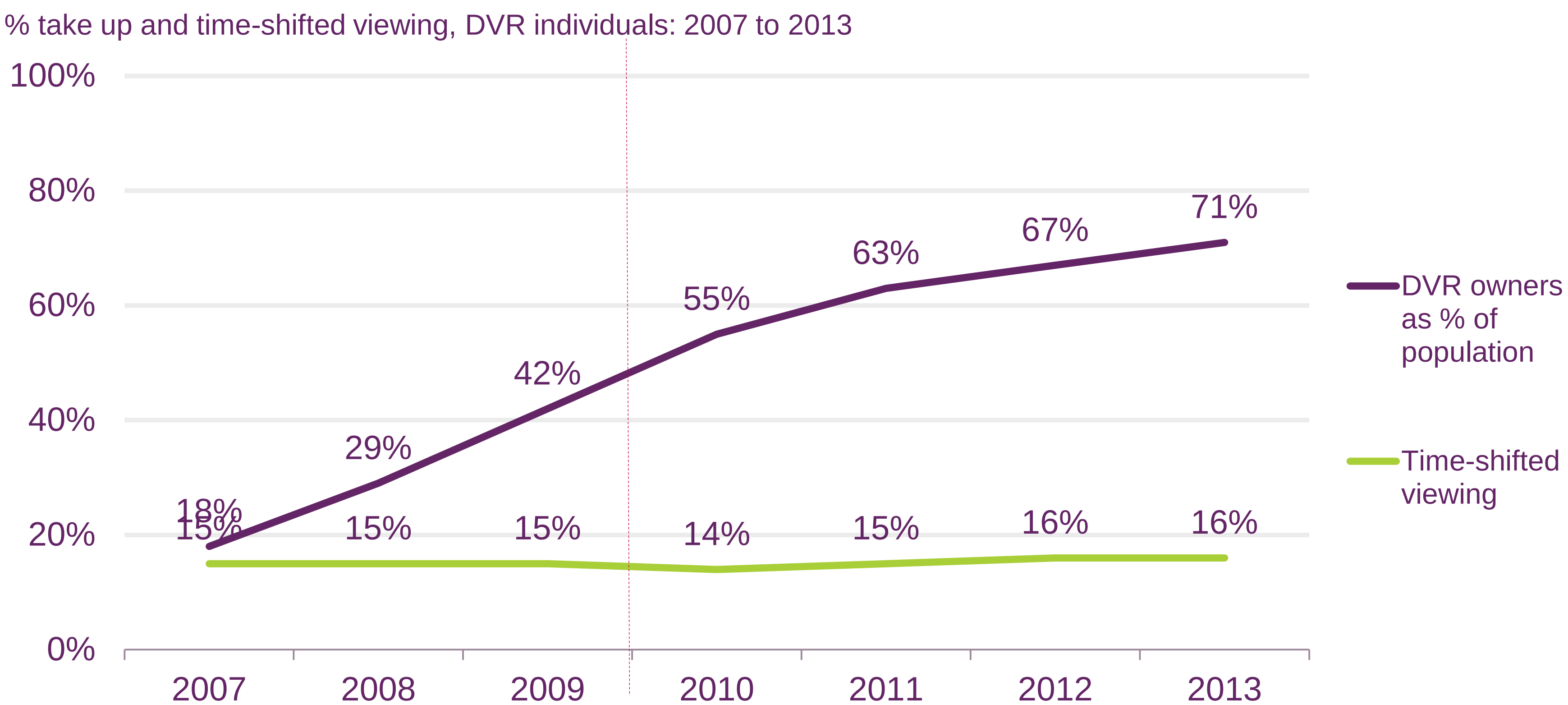
Live versus time-shifted viewing, individuals in DVR homes



Source: BARB, DVR owners, all homes, based on total minutes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing is defined as total minutes of viewing on same day as live plus viewing 2-7 days after broadcast. All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This includes viewing to programmes stored on recording devices and content viewed via TV player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.81

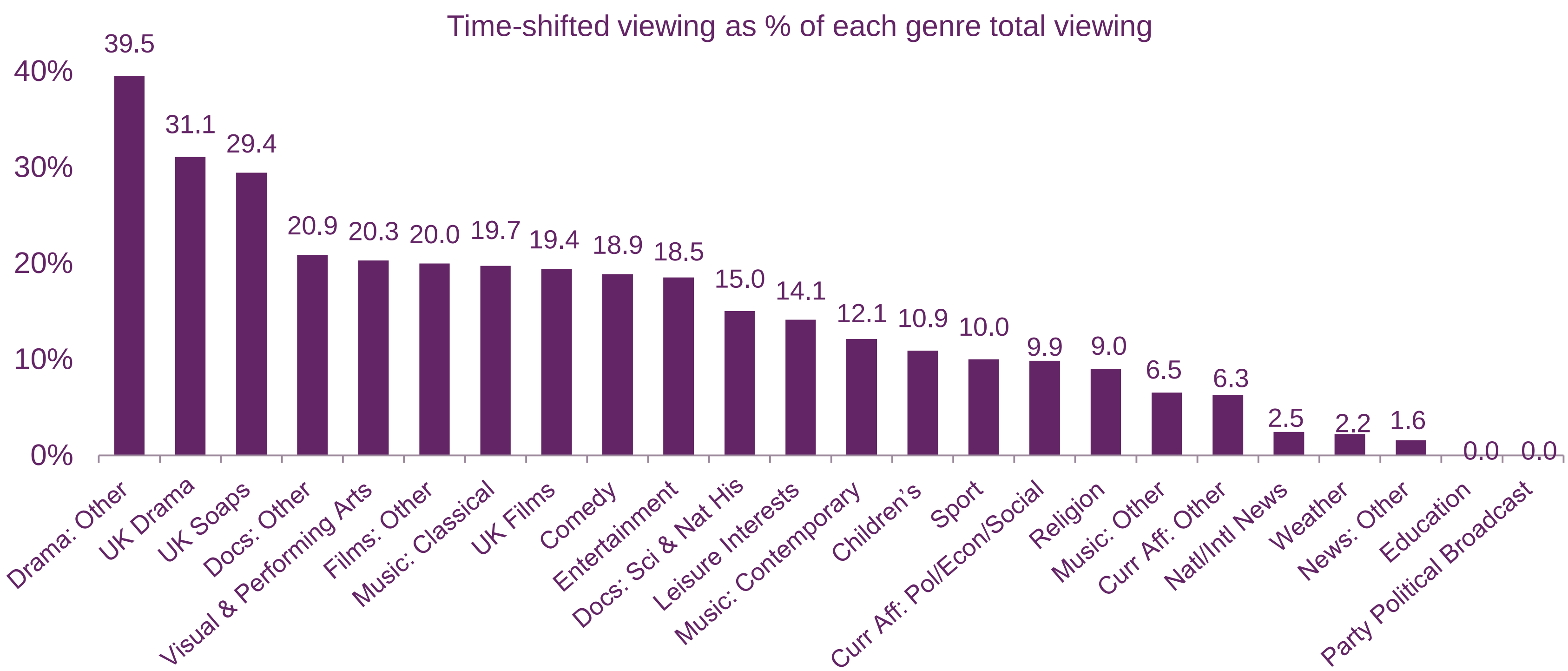
DVR take-up and time-shifted viewing, Individuals in DVR homes



Source: BARB, Network , DVR Individuals. Note: New BARB panel introduced 1st Jan 2010. As a result pre and post panel change data must be treated with caution (see dotted line). Time-shifted viewing is defined as total minutes of viewing on same day as live plus viewing 2-7 days after broadcast. All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This includes viewing to programmes stored on recording devices and content viewed via TV player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.82

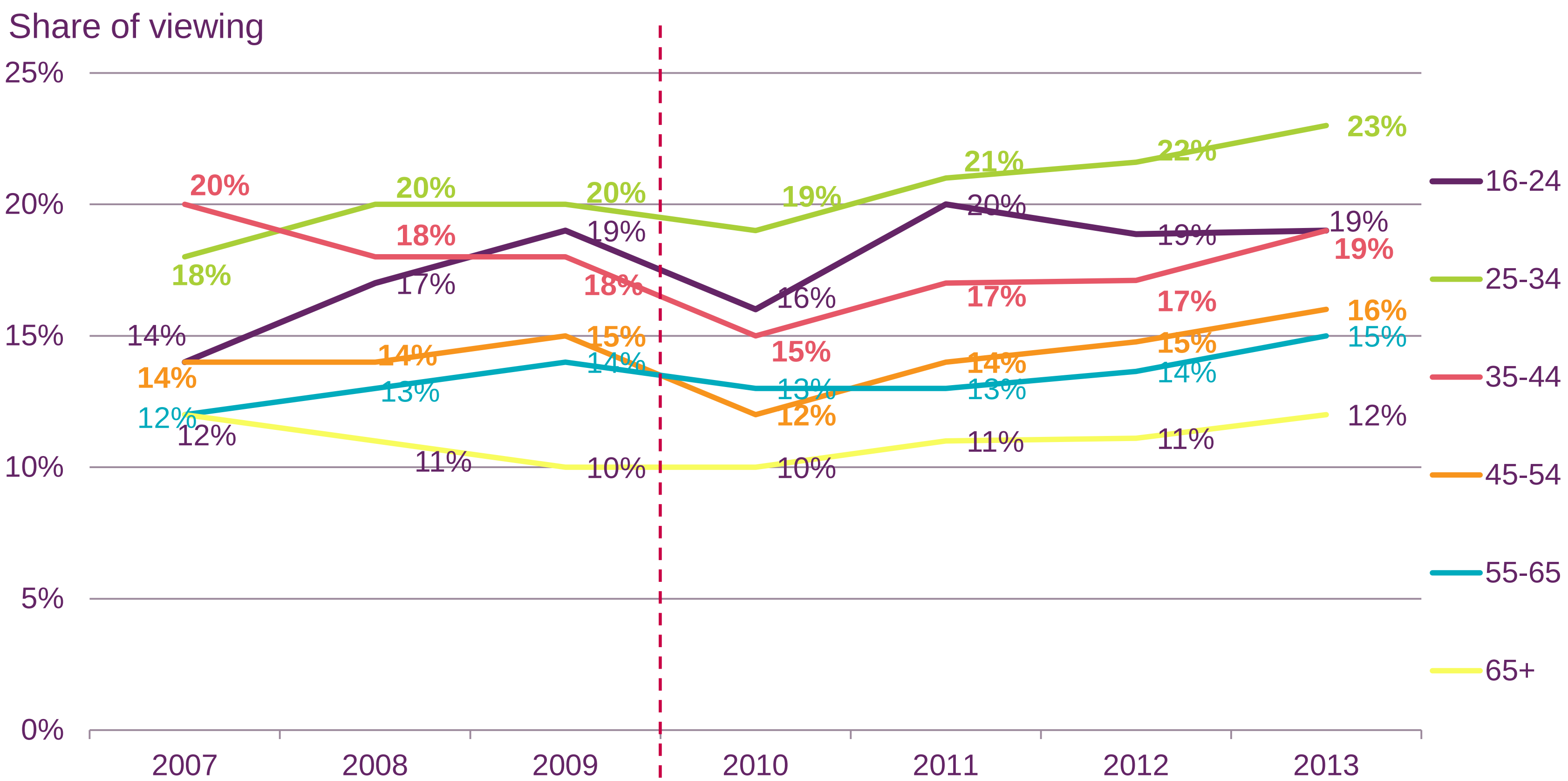
Proportion of total time-shifted TV viewing by genre, DVR individuals: 2013



Source: BARB, DVR Individuals 4+. Based on total minutes of viewing to genres. Time-shifted viewing is defined as total minutes of viewing on same day as live plus viewing 2-7 days after broadcast. All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This includes viewing to programmes stored on recording devices and content viewed via TV player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.83

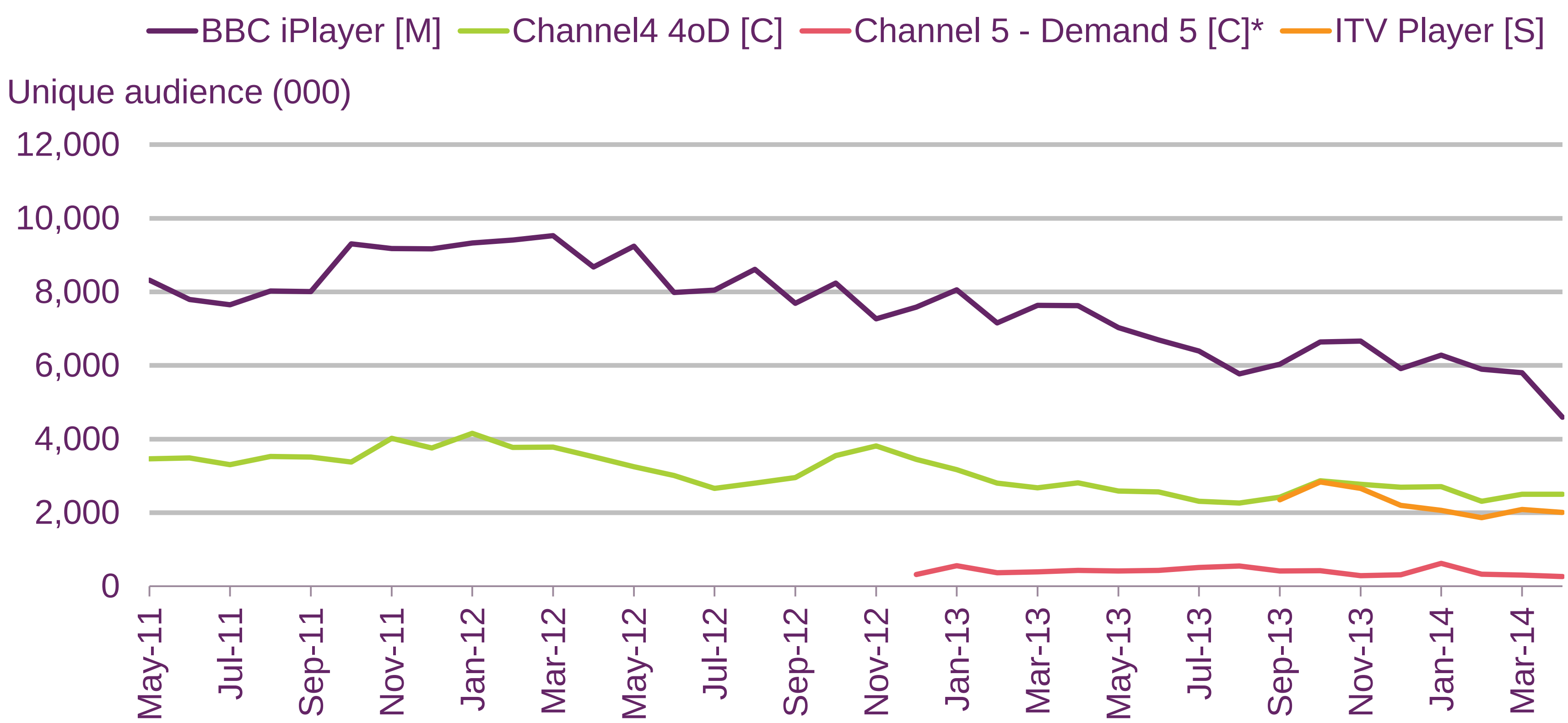
Proportion of time shifted viewing, by age, DVR Adults



Source: BARB, DVR owners, all homes, Based on total minutes. Note: A new BARB panel was introduced in 2010. As a result, pre- and post-panel change data must be compared with caution. Time-shifted viewing is defined as total minutes of viewing on same day as live plus viewing 2-7 days after broadcast. All viewing (via a TV set) of broadcast content viewed within 7 days after broadcast is reported by BARB. This includes viewing to programmes stored on recording devices and content viewed via TV player services such as BBC iPlayer, ITV Player, 4OD etc

Figure 2.84

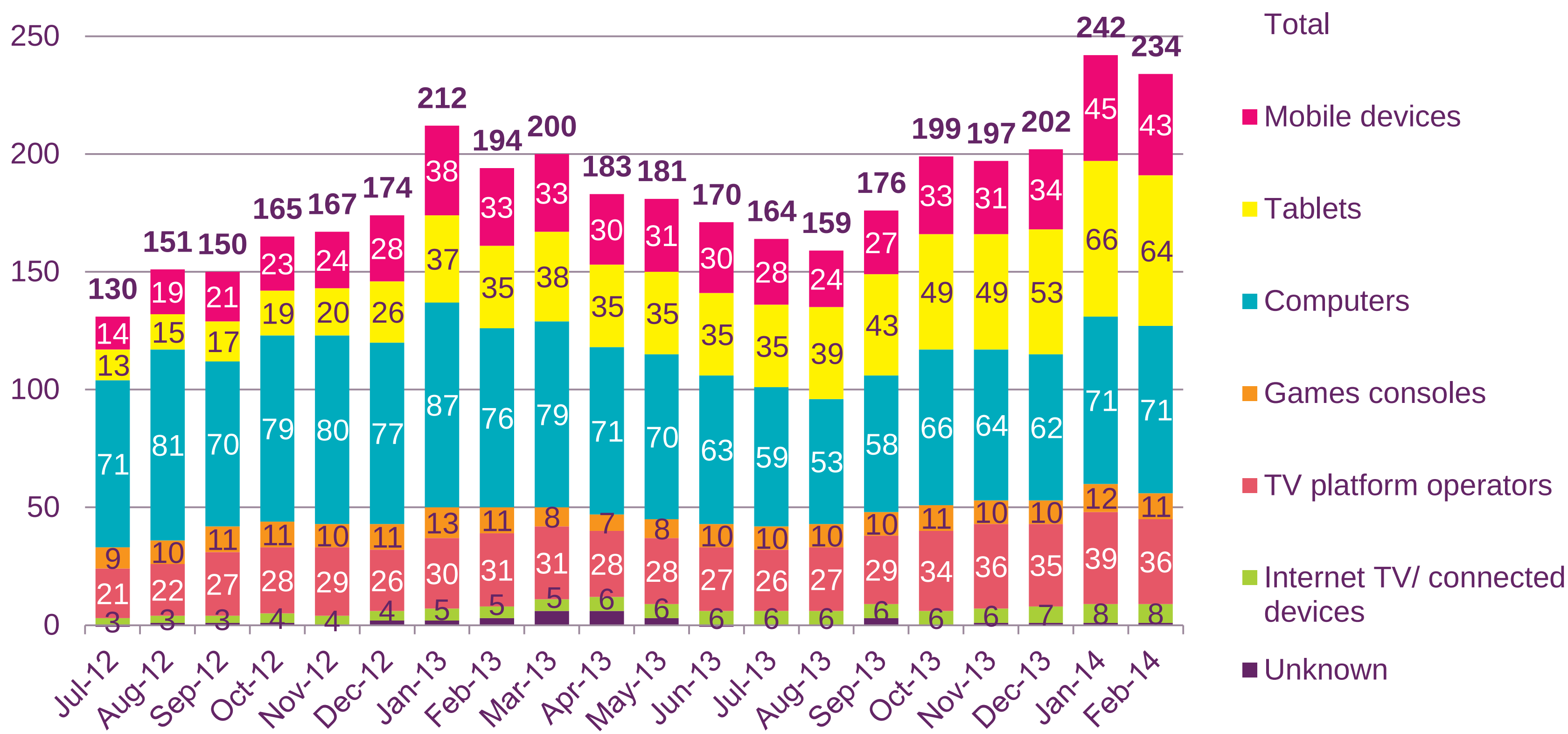
Unique audience of online catch-up services on PC/laptop



Source: : comScore MMX, home and work panel, May 2011 to April 2014.MMX Legend: [P] Property, [M] Media Title, [C] Channel

Figure 2.85

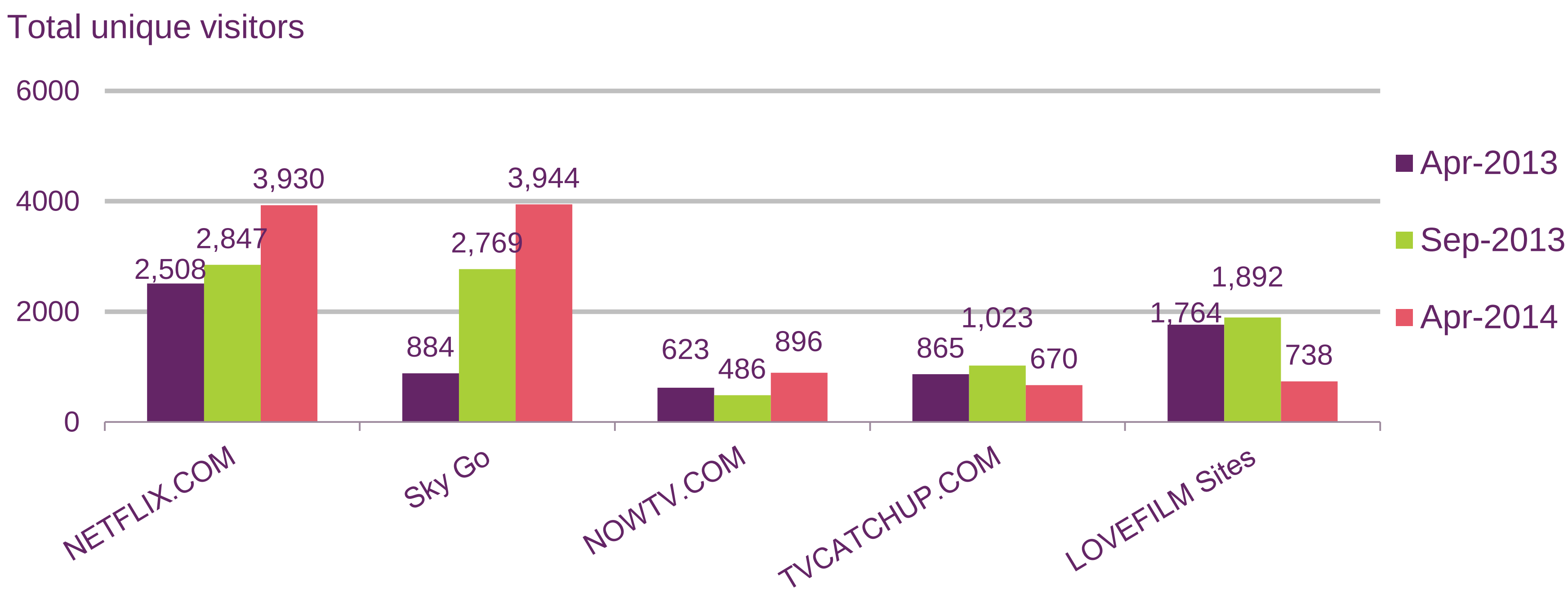
Requests for TV programmes from BBC iPlayer, by device type



Source: BBC. Note: Internet TV / connected devices include Freeview and Freesat smart TVs, set-top-boxes and devices like Roku and Blu-ray DVD players. TV platform operators include Virgin Media and BT Vision. Games consoles comprise Sony PS3, Nintendo Wii and Microsoft XBox 360. An update in iStats AV meant that PS3 devices were incorrectly classified as unknown devices between18 Feb and 21 May 2013

Figure 2.86

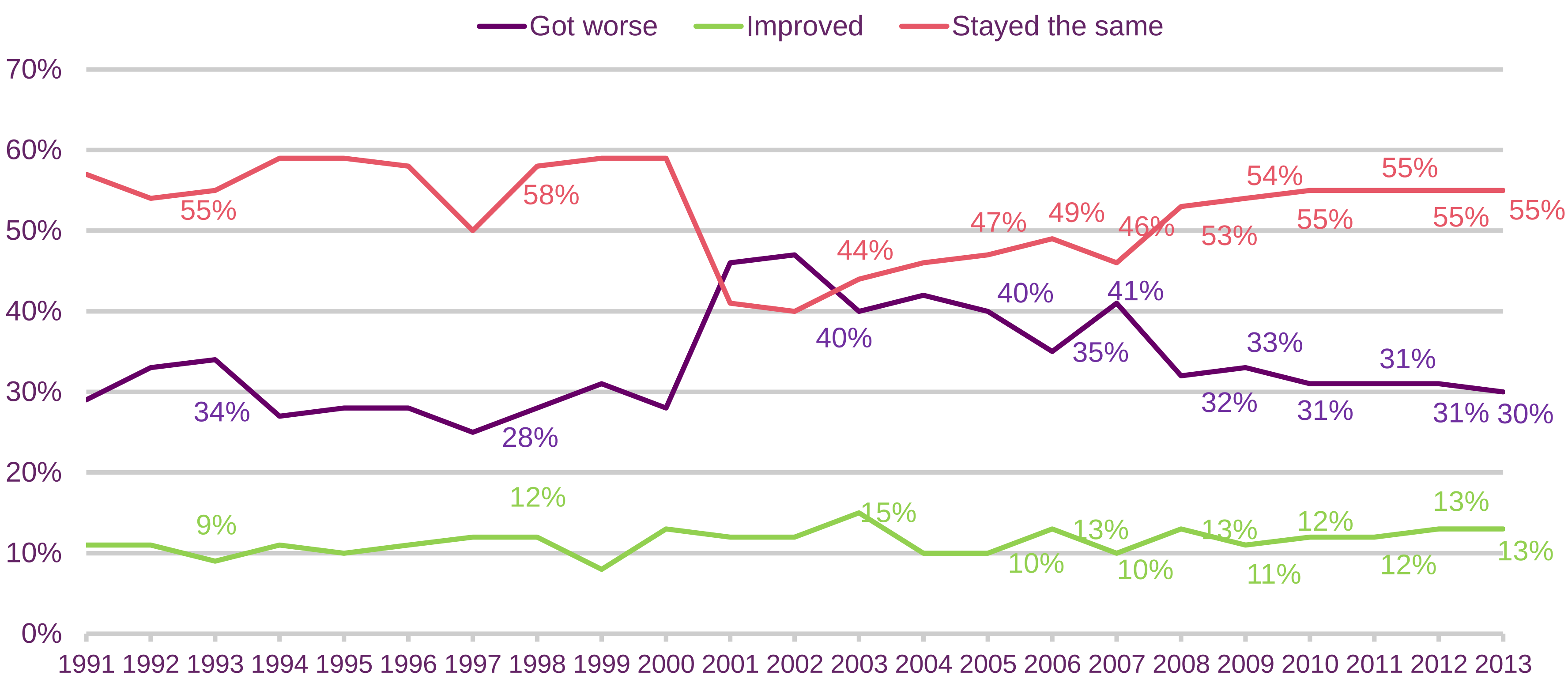
Total Unique visitors to selected online TV and film streaming sites



Source: comScore MMX-MP, UK, work and home panel, April 2013 to April 2014. MMX Legend: [P] Property, [M] Media Title, [C] Channel, [S] Sub-group. Note: In February 2014 Lovefilm Instant was folded into Amazons retail website and re-branded as Prime Instant Video. We do not currently have access via comScore to those numbers who migrated over to Amazon's Prime Instant Video websites

Figure 2.87

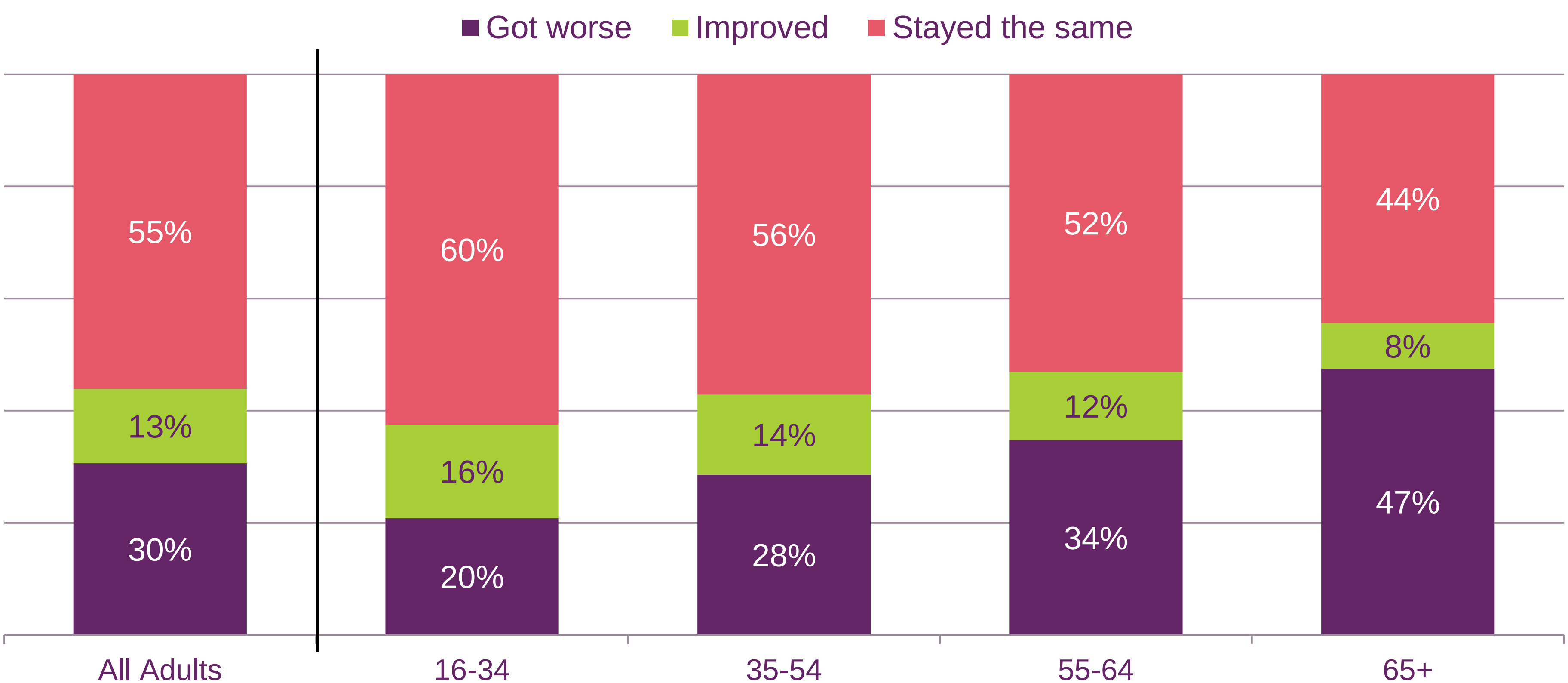
Opinion on programme standards over the past 12 months



Source: Ofcom Media tracker 2013. Base: All with TV, but excluding those never watching (1,838)
Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

Figure 2.88

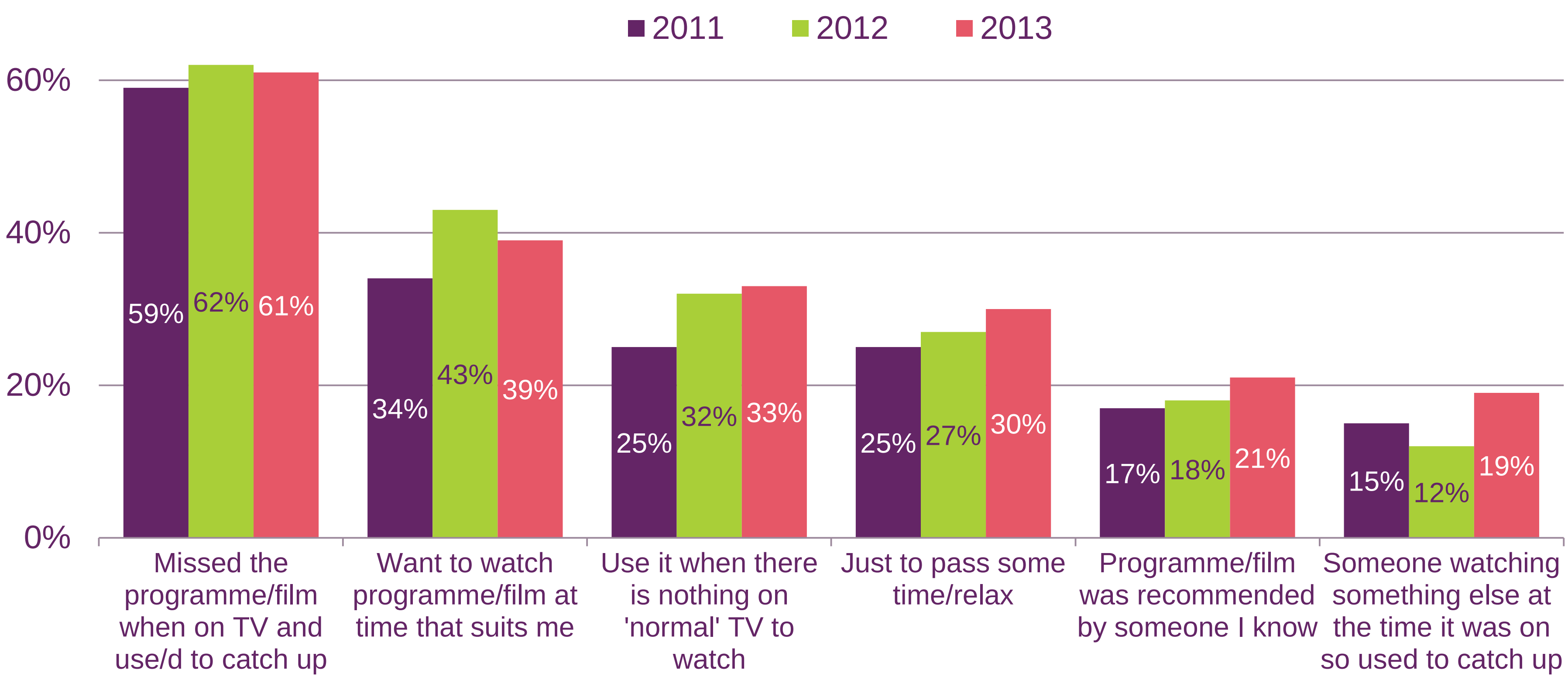
Opinion on programme standards over the past 12 months, by age



Source: Ofcom Media tracker 2013. 'Don't know' responses not charted.
Base: All with TV, but excluding those never watching (1,838); 16-34 (605); 35-54 (650); 55-64 (239); 65+ (344).
Q - Do you feel that over the past year television programmes have improved, got worse or stayed about the same?

Figure 2.89

Reasons for online on demand use: 2013



Source: Ofcom Media tracker 2013. Base: All who use online 'video on demand' 2013 (829), 2012 (725), 2011 (658). Note: Only responses ≥ 10% charted. All responses unprompted.
Q - What would you say are the reasons you use/ used your on demand service, whether you were catching up or accessing other content?

3. Radio and audio

Figure 3.1

UK radio industry key metrics

UK radio industry	2008	2009	2010	2011	2012	2013
Weekly reach of radio (% of population)	89.5%	89.8%	90.6%	90.8%	89.5%	90.4%
Average weekly hours per head	20.1	19.8	20.1	20.5	22.2	21.5
BBC share of listening	55.7%	55.3%	55.2%	54.7%	54.7%	54.6%
Total industry revenue	£1,129m	£1,101m	£1,137m	£1,164m	£1,203m	£1,178m
Commercial revenue	£478m	£439m	£452m	£457m	£475m	£454m
BBC expenditure	£644m	£653m	£675m	£697m	£717m	£713m
Community radio revenue	£7.5m	£9.0m	£10.0m	£10.5m	£10.8m	£10.9m
Radio share of advertising spend	3.4%	3.5%	3.3%	3.3%	3.3%	3.1%
DAB digital radio take-up (households)	32.1%	34.5%	38.2%	42.6%	44.3%	47.9%

Source: RAJAR (all adults age 15+), Ofcom calculations based on figures in BBC Annual Report and Accounts 2013-14 note 2c (www.bbc.co.uk/annualreport), AA/Warc, broadcasters.
Revenue figures are nominal. DAB take up - Q1 of the following year.

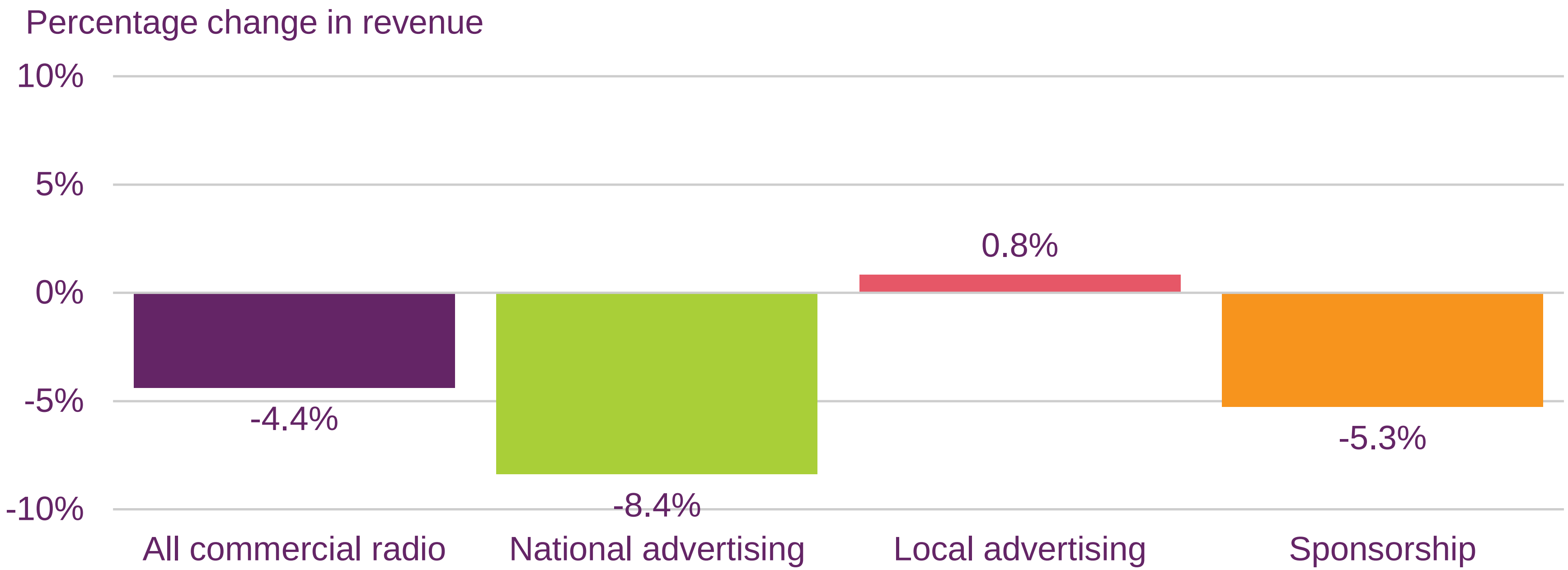
Figure 3.2

Radio industry revenue and spending 2008-2013

Source: Broadcasters
Note: BBC expenditure figures are estimated by Ofcom based on figures in Note 2c of the BBC Annual Report (www.bbc.co.uk/annualreport); figures in the chart are rounded and are nominal.
Community radio revenue is included in the total, but not shown on the chart.

Figure 3.3

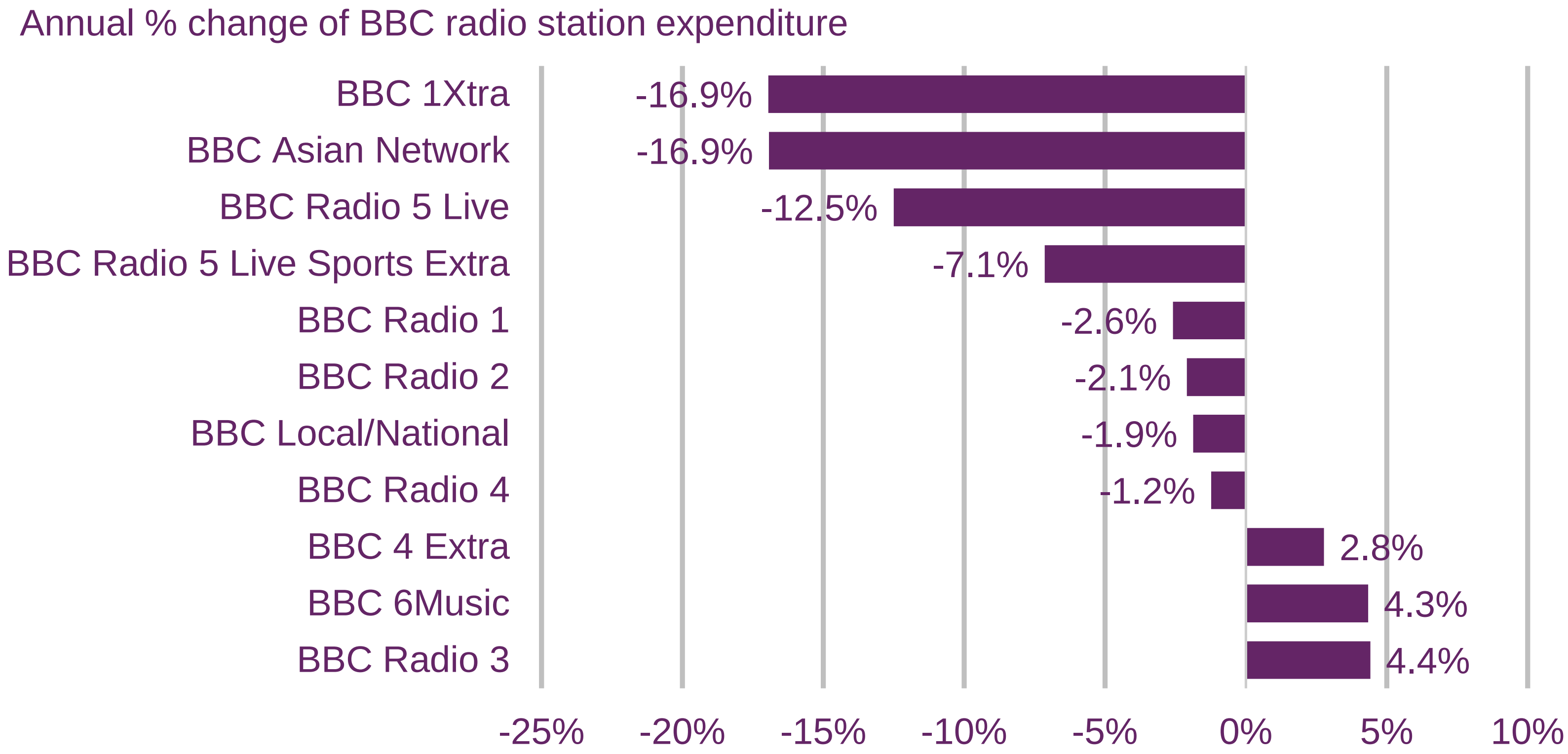
Commercial revenue percentage change 2012-2013



Source: Ofcom / operator data 2012-2013

Figure 3.4

BBC station expenditure percentage change 2012-13 to 2013-14

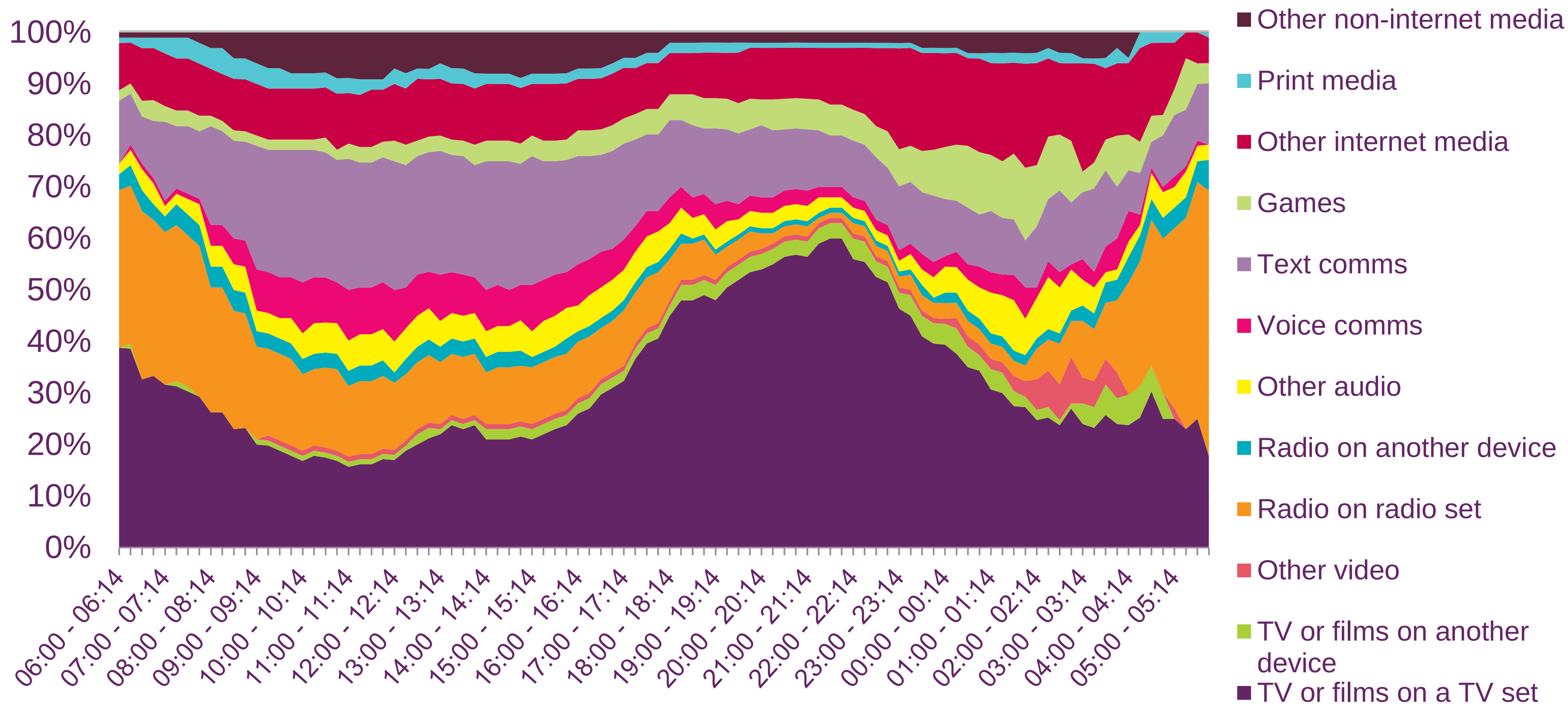


Source: BBC Annual Report 2013-14.

Note that these are financial year figures, excluding BBC-wide overheads, and are therefore not directly comparable to those set out in Section 3.2.2. Figures are nominal.

Figure 3.5

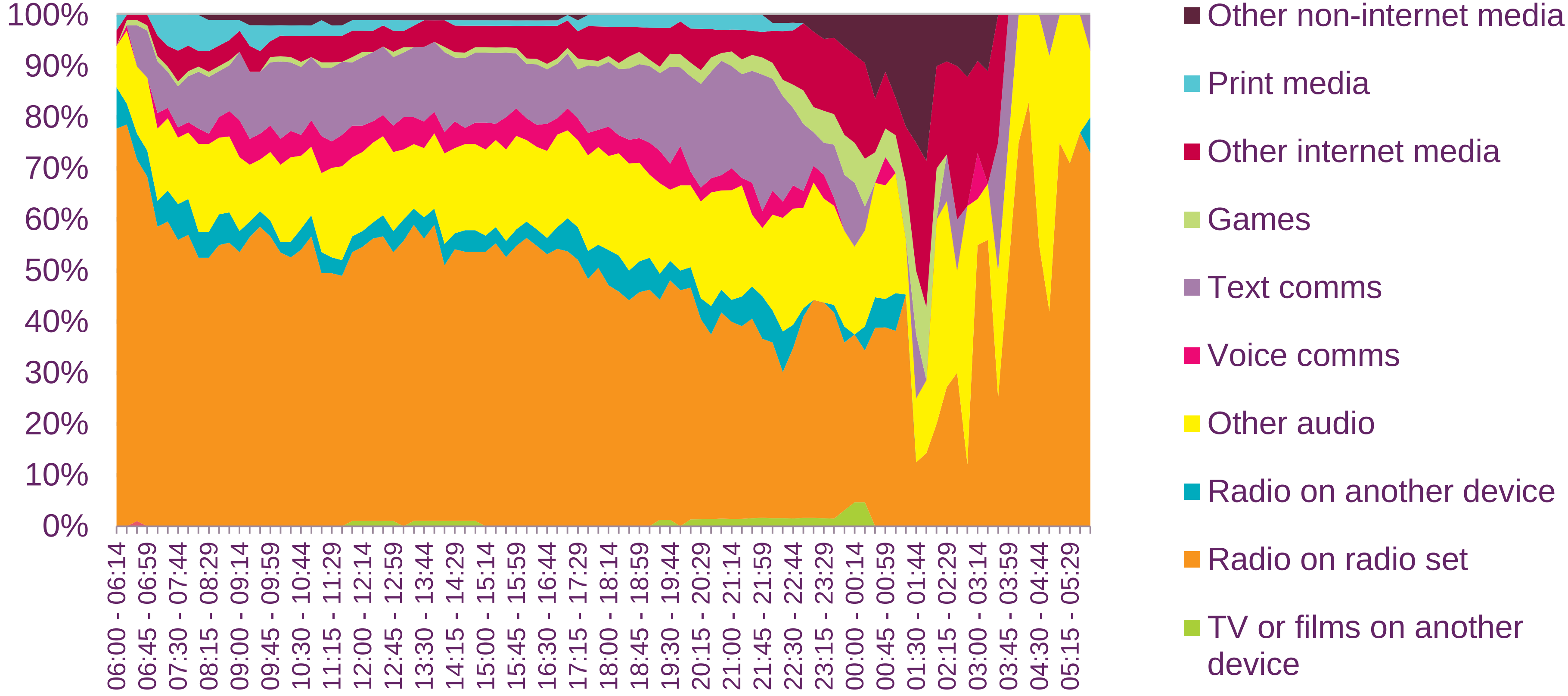
Proportion of media and communications activities across the day



Source: Digital Day 7-day diary
Base: All activity records for adults aged 16+ (108782) - data aggregated to 15 min slots
Note: The base of media activities changes every 15 min slot so is much lower during sleeping hours

Figure 3.6

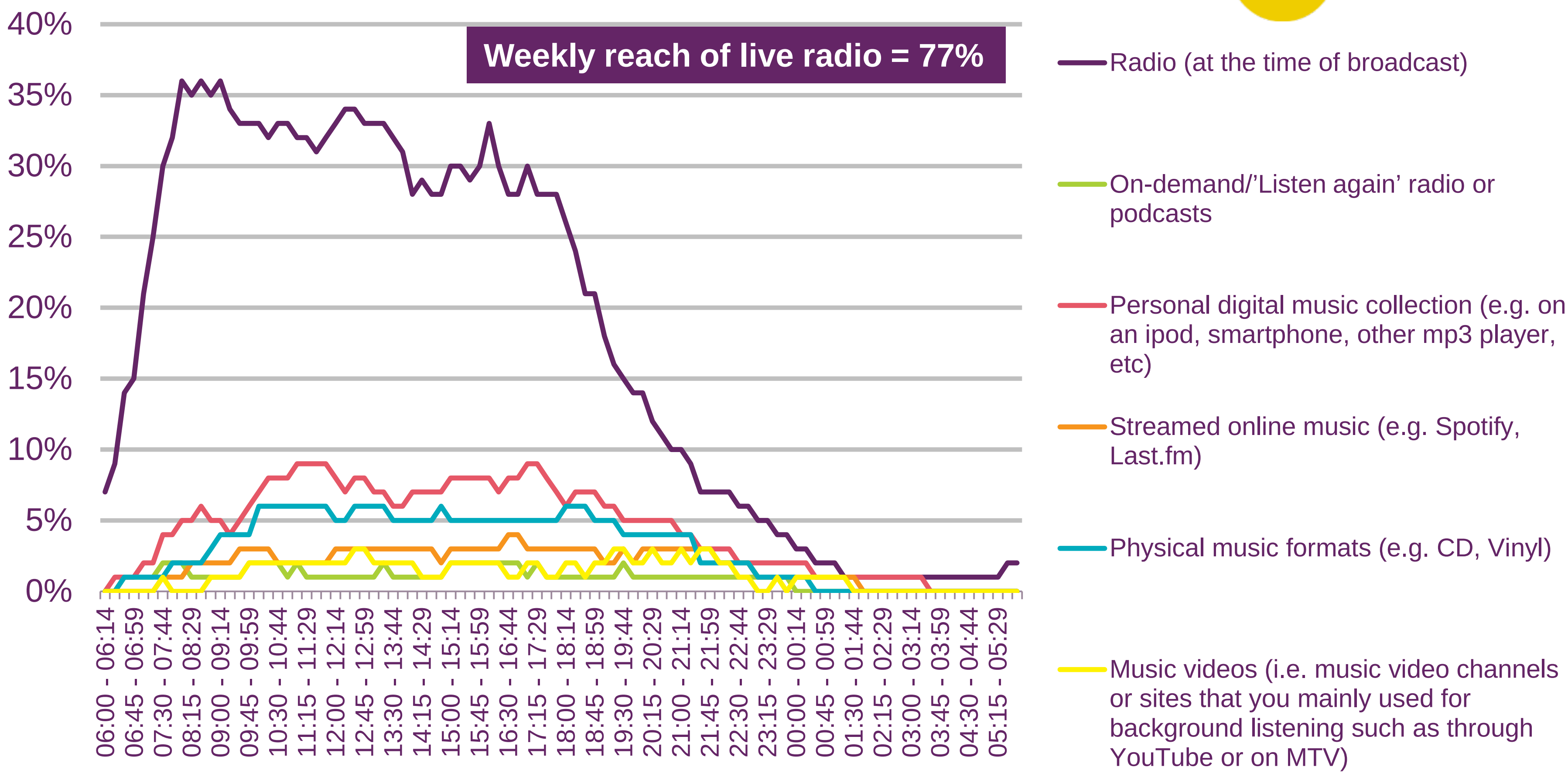
Media and communications activities while travelling, by time of day



Source: Digital Day 7 day diary
Base: All activity records for adults aged 16+ while travelling (10484) - data aggregated to 15 min slots
Note: The base of media activities changes every 15 min slot, so is much lower during sleeping hours

Figure 3.7

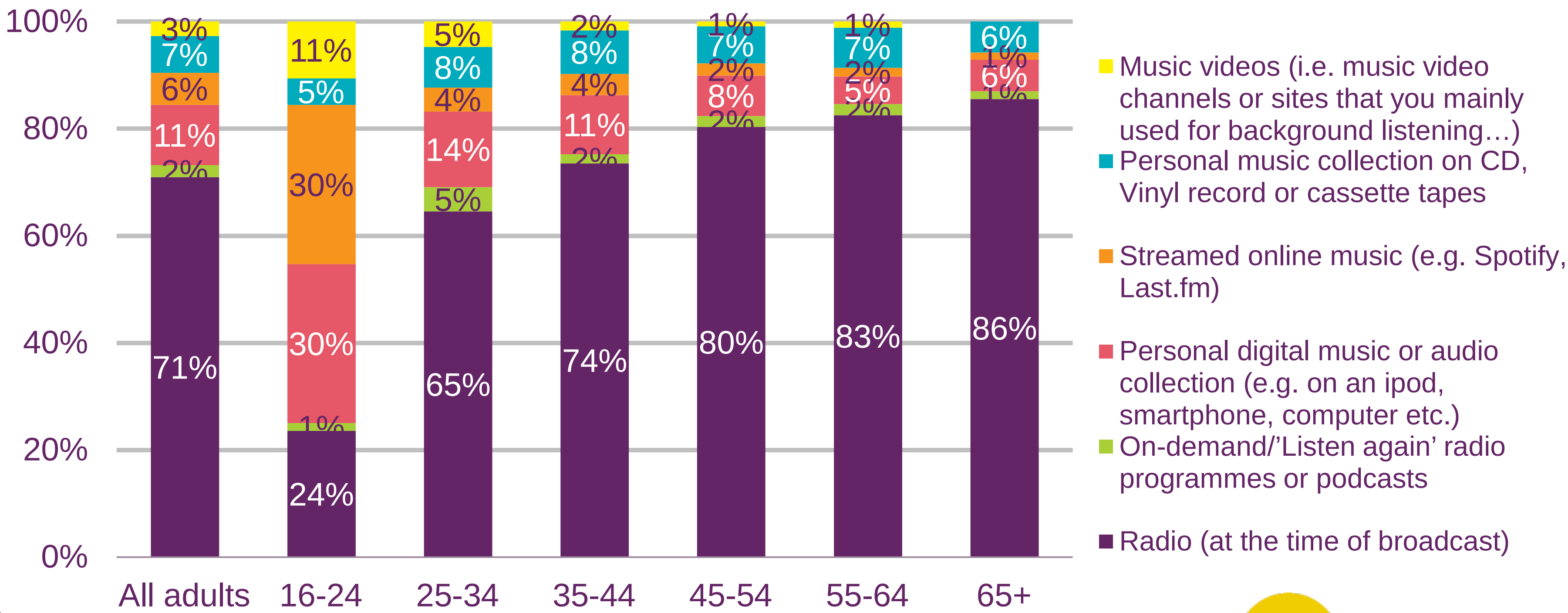
Weekly reach of listening activities, by time



Source: Digital Day 7 day diary
Base: All adults 16+ (1644) - data aggregated to 15 min slots

Figure 3.8

Proportion of listening activities, by age group



	All adults	16-24	25-34	35-44	45-54	55-64	65+
Average time spent* Hours:mins	1:51	1:39	1:44	1:56	2:11	1:52	1:42

Source: Digital Day 7 day diary

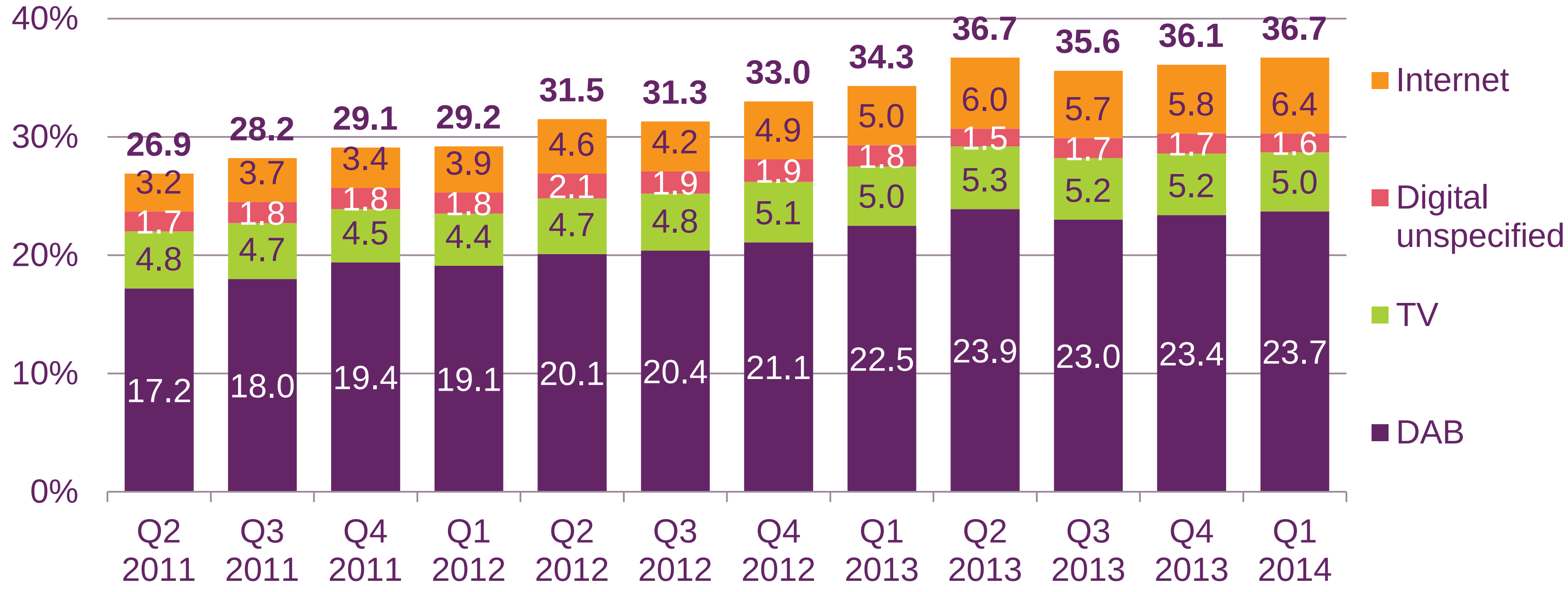
Base: All listening activity records for adults 16+ (17290), 16-24 (999), 25-34 (2342), 35-44 (4113), 45-54 (4334), 55-64 (3284), 65+ (2218)

*Average time spent is the total average daily time spent listening to media, including simultaneous activity

Figure 3.9

Digital radio's share of radio listening, Q1 2014

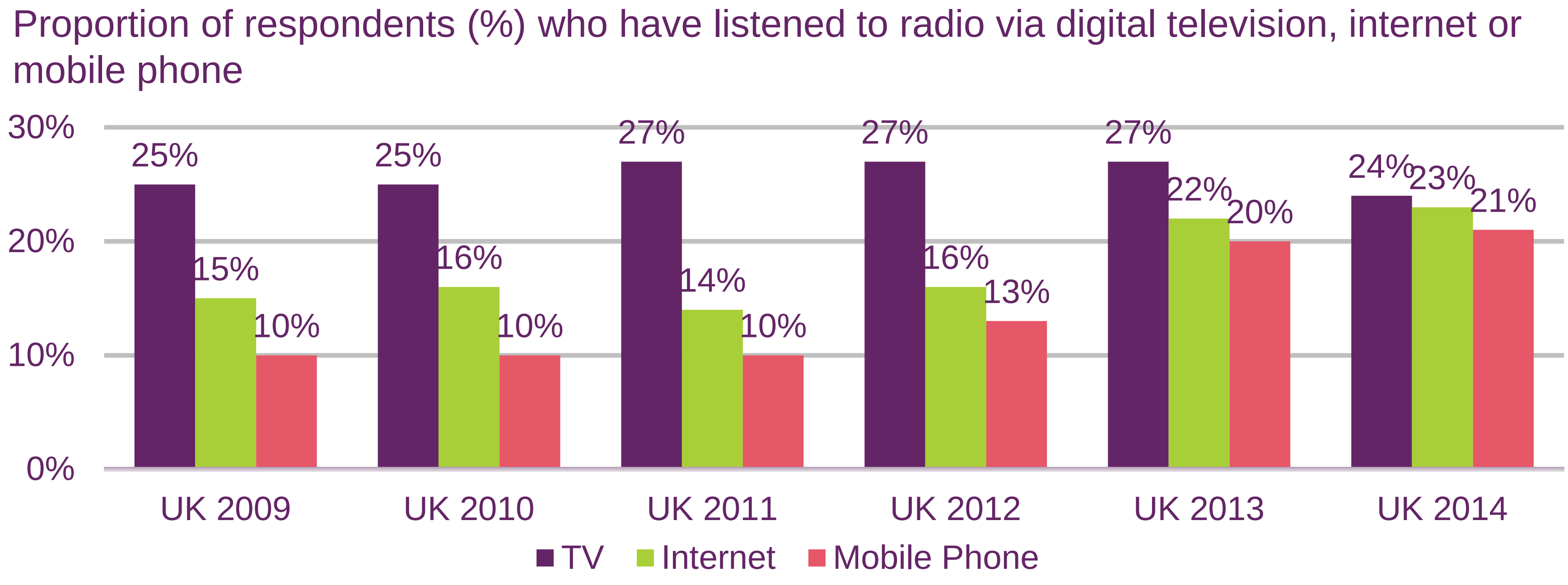
Digital radio platforms' share of all radio hours



Source: RAJAR
Note: 'Digital unspecified' relates to listening to digital-only stations where the survey respondent has not specified the listening platform used. From Q1 2012 'Internet' has been reclassified as 'Online/Apps'

Figure 3.10

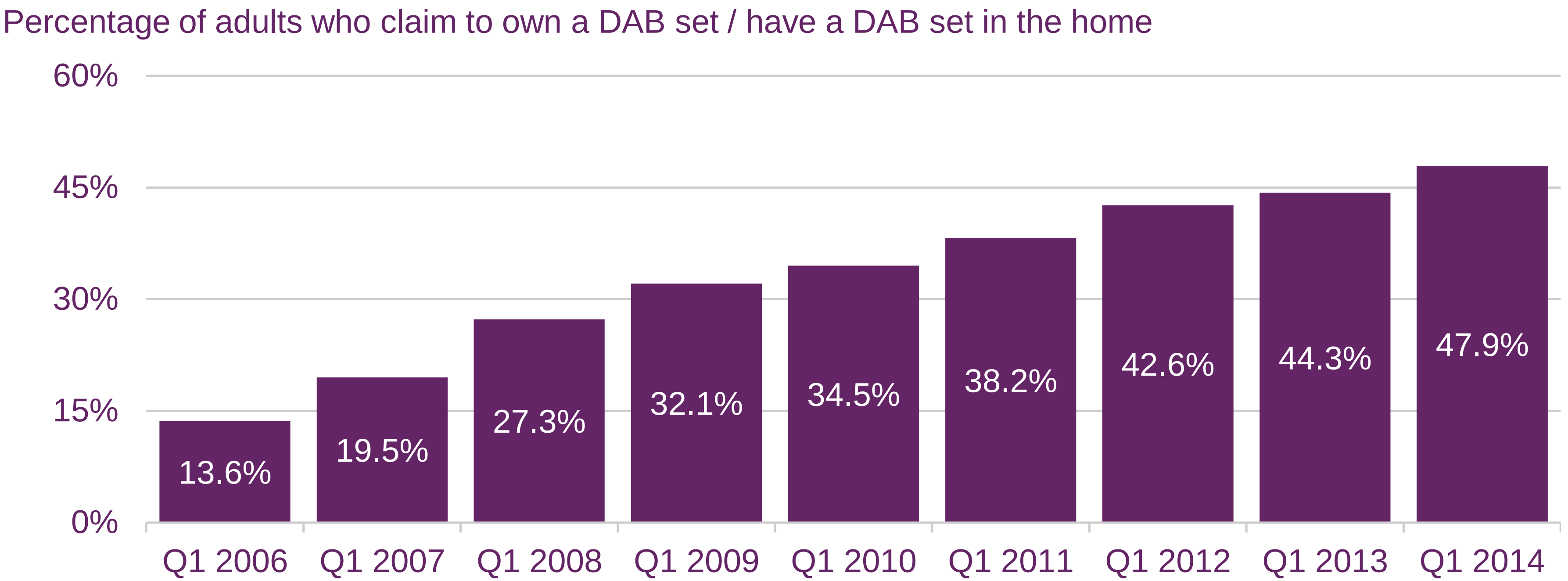
Listening to radio via TV, internet and mobile phone



Source: Ofcom research, Quarter 1 2014
Base: All adults aged 16+ (n = 6090 UK 2009, 9013 UK 2010, 3474 UK 2011, 3772 UK 2012, 3750 UK 2013, 3740 UK 2014) QP3. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio, mobile phone? *NB 2013 measures for internet combine responses across radio listeners and internet users, 2013-14 measures for mobile phone combine responses across radio listeners and mobile phone users

Figure 3.11

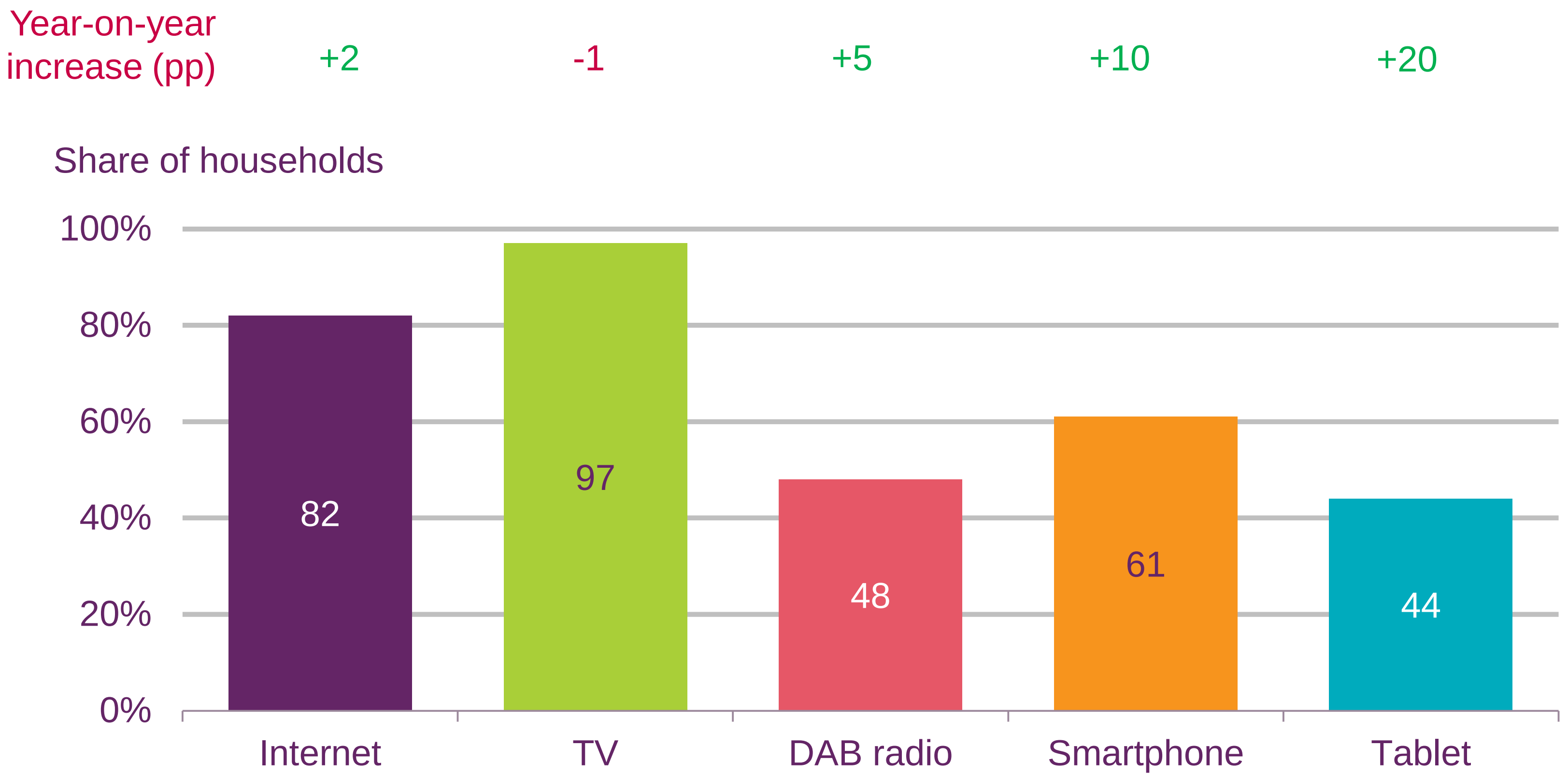
Ownership of DAB sets: Q1 2014



Source: RAJAR / Ipsos MORI / RSMB Q1 2006-2014

Figure 3.12

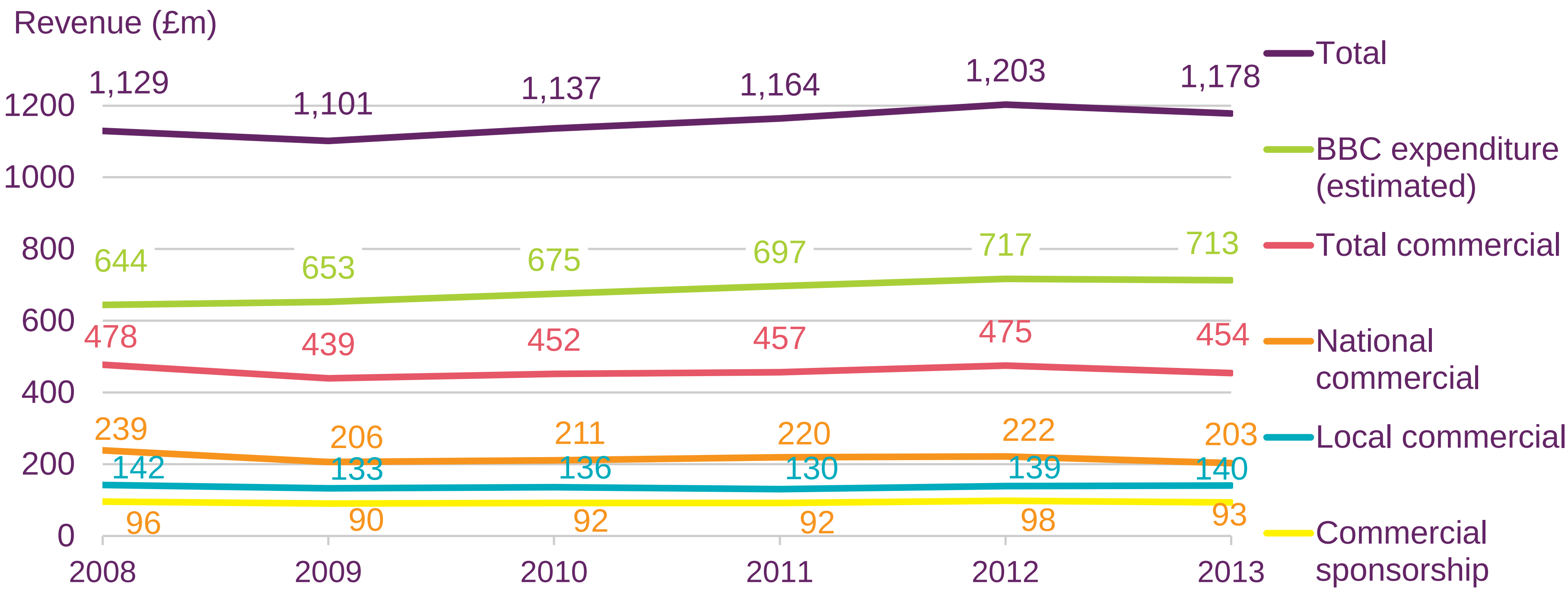
Take-up of equipment capable of receiving radio: Q1 2014



Source: Research from: Ofcom, RAJAR Q1 2014

Figure 3.13

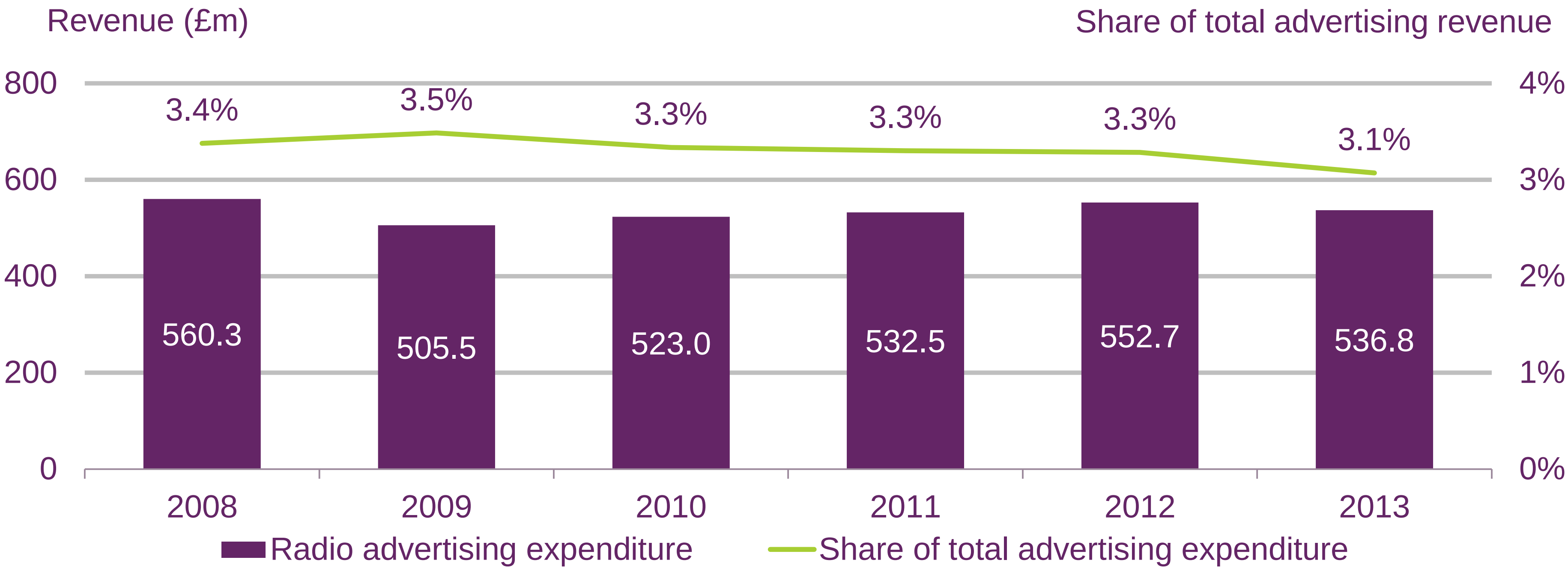
Radio industry revenue 2008-2013



Source: Ofcom / operator data / BBC Annual Report 2008-2013
Note: BBC expenditure figures are estimated by Ofcom based on figures in Note 2c of the BBC Annual Report (www.bbc.co.uk/annualreport); figures in the chart are rounded and are nominal. Total includes community radio, but community radio is not shown on the chart.

Figure 3.14

UK radio advertising spend and share of total advertising: 2008-2013



Source: AA/Warc Advertising Expenditure report. Figures are nominal.

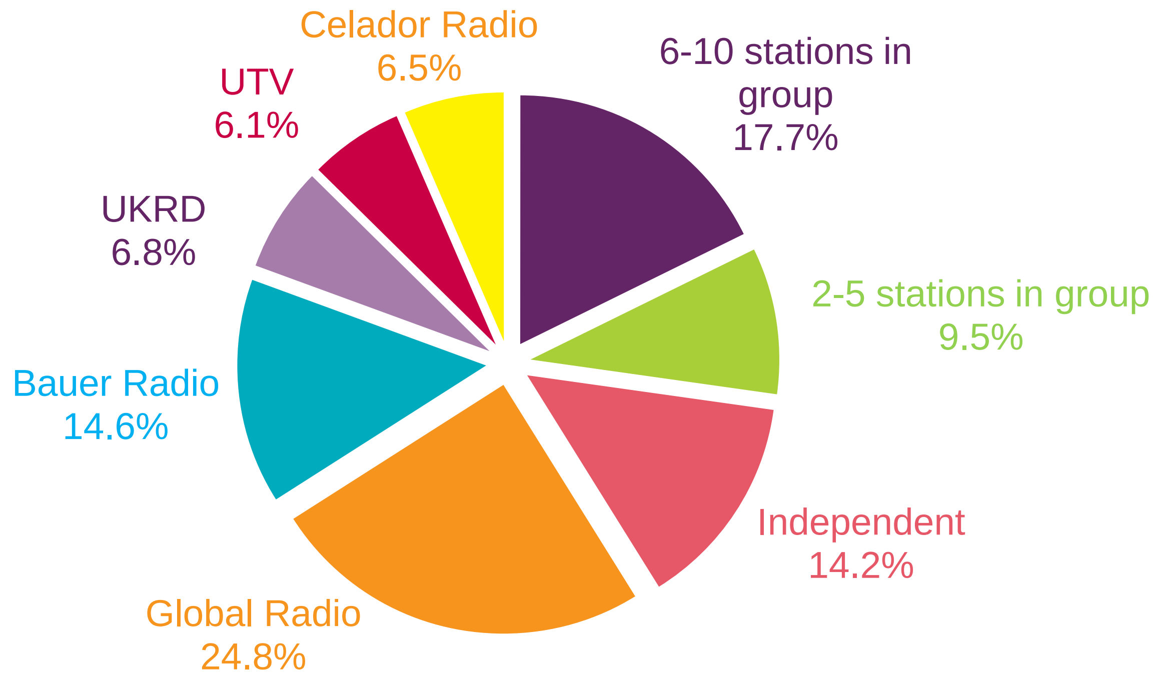
Figure 3.15

Commercial radio revenue per listener

Source: Broadcaster returns and RAJAR, 2008-2013. Figures are nominal.

Figure 3.16

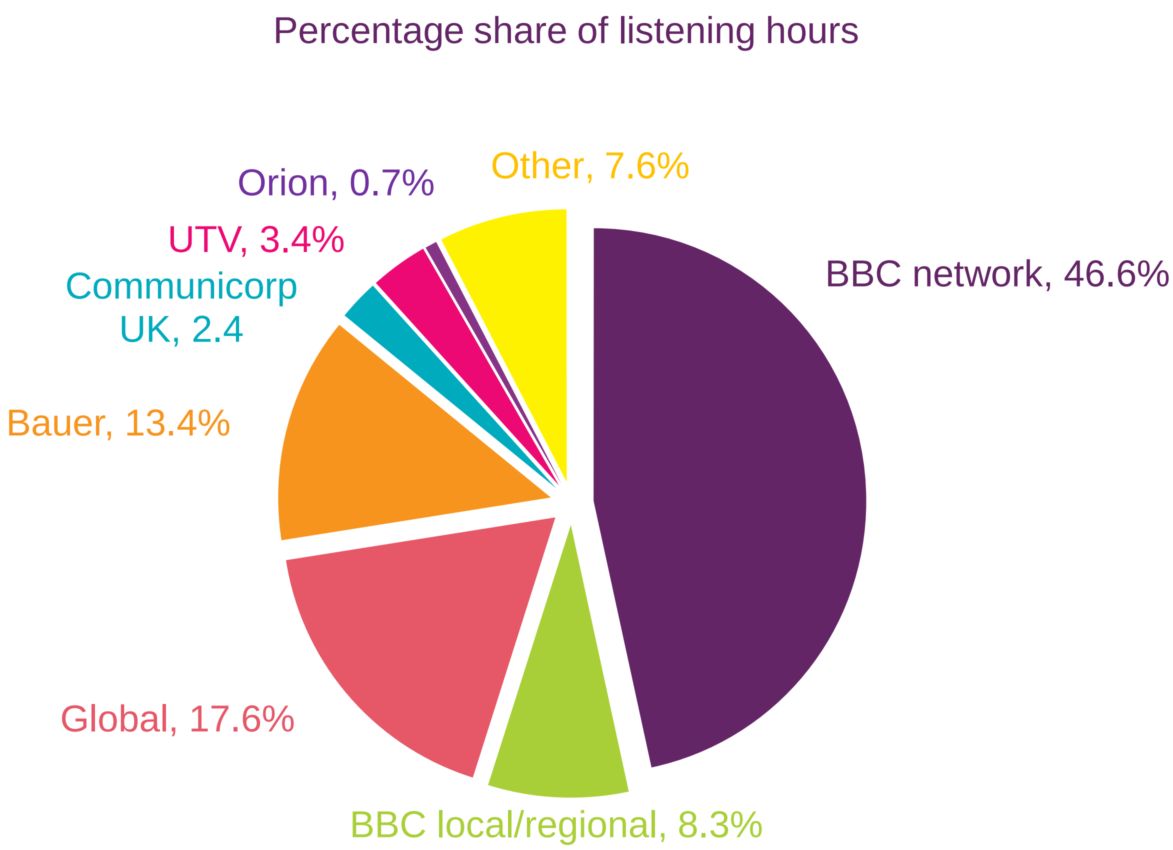
Number of commercial analogue licences owned, by group



Source: Ofcom, May 2014
The 6-10 station segment includes Communicorp UK

Figure 3.17

Share of all radio listening hours: Q1 2014

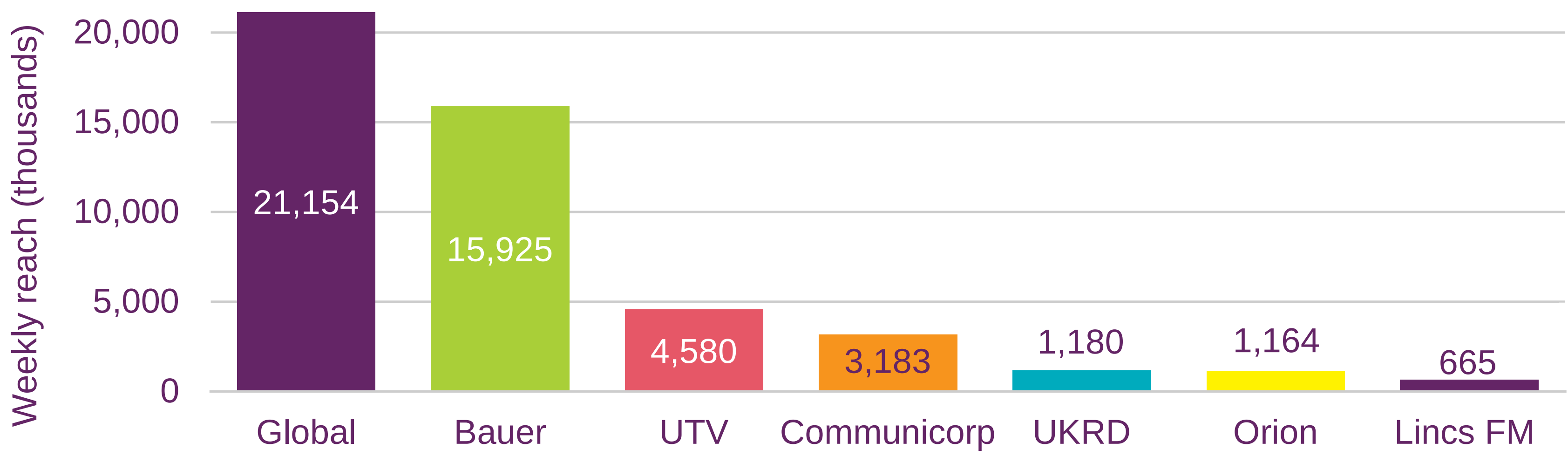


Source: RAJAR, all adults (15+), Q1 2014. Base: National Total Survey Area

Figure 3.18

Commercial radio by weekly audience reach: Q1 2014

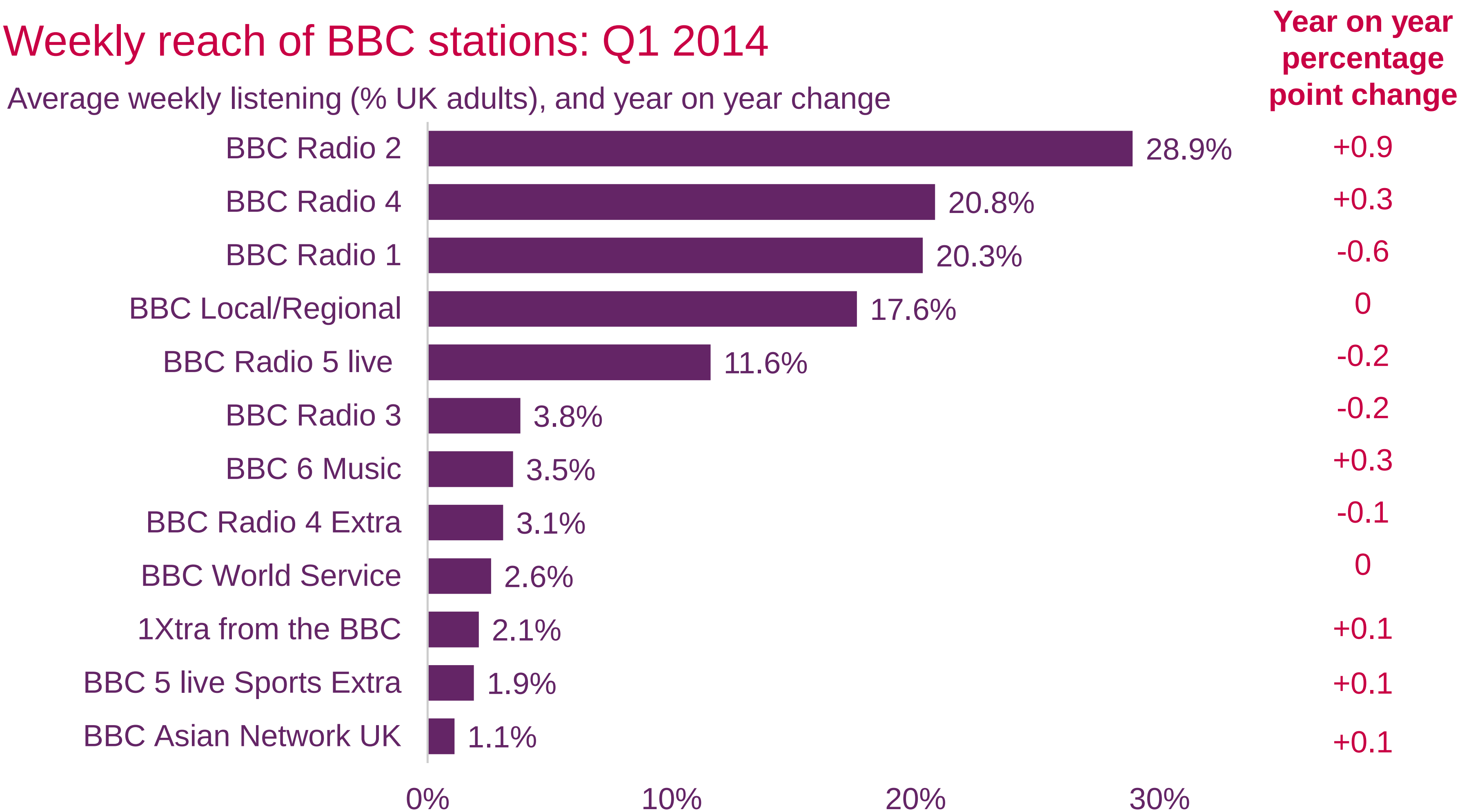
Weekly UK audience reach	**39.8%**	**29.9%**	**8.6%**	**6.0%**	**2.2%**	**1.2%**	**1.0%**
Annual change in reach*	+2.7pp	+3.6pp	0.3%	0	+0.1	0	0



Source: RAJAR, all adults (15+), Q1 2014. Base: National Total Survey Area * Q1 ‘13 and Q1 ’14
UKRD figures include The Local Radio Company

Figure 3.19

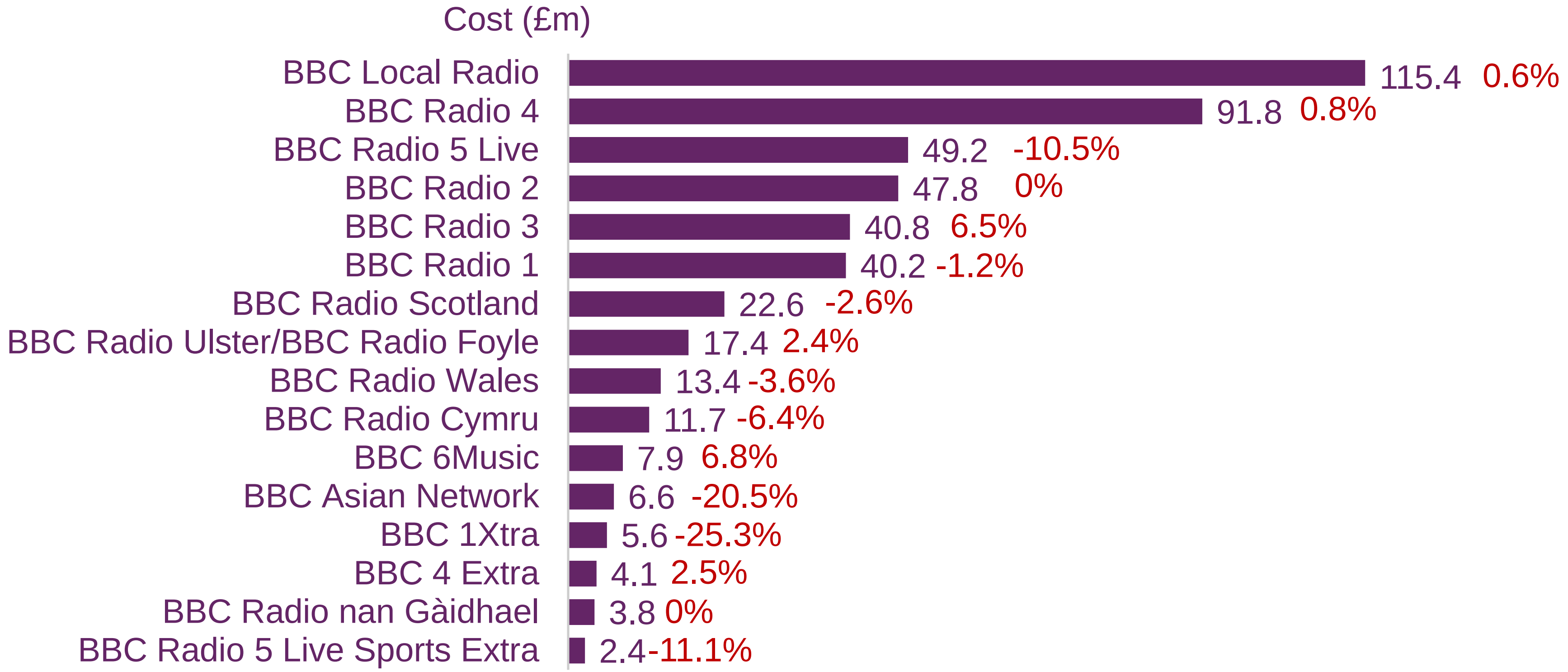
Weekly reach of BBC stations: Q1 2014



Source: RAJAR, all adults (15+), year ending Q1 2014

Figure 3.20

BBC radio stations: spend on radio content, 2012-13



Source: BBC Annual Report 2013-14

Figure 3.21

Analogue UK radio stations broadcasting May 2014

Type of station	AM	FM	AM/FM total
Local commercial	54	237	291
UK-wide commercial	2	1	3
BBC UK-wide networks	1	4	5
BBC local and nations*	35	46	46
Community radio	7	208	215
TOTAL	**99**	**496**	**560**

Source: Ofcom, May 2014
Note: 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. * Includes simulcasts.

Figure 3.22

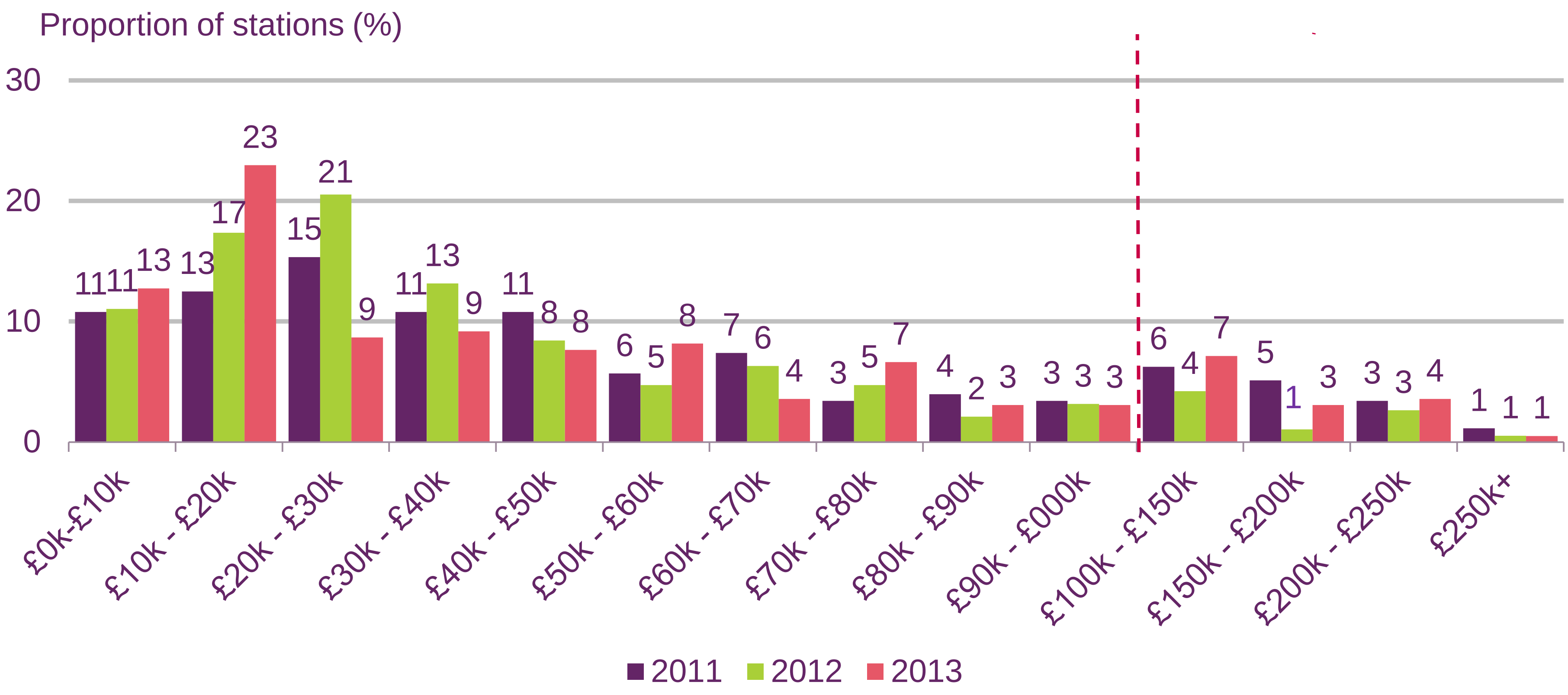
Average income for community radio stations: 2008 to 2013

Income	2008	2009	2010	2011	2012	2013
Average (mean) income	£84,000	£75,500 (-10.2%)	£65,750 (-12.9%)	£60,250 (-8.3%)	£57,000 (-5.4%)	£55,500 (-2.7%)
Median income	£53,750	£46,750 (-15.0%)	£42,500 (-7.14%)	£40,500 (-4.8%)	£35,250 (-13.1%)	£33,250 (-5.6%)

Source: Ofcom analysis of community broadcasters’ returns
Note: The data collection period changed from the financial year to the calendar year as of 2011. Data from previous years has been adjusted to reflect this.

Figure 3.23

Distribution of total income levels across the community radio sector



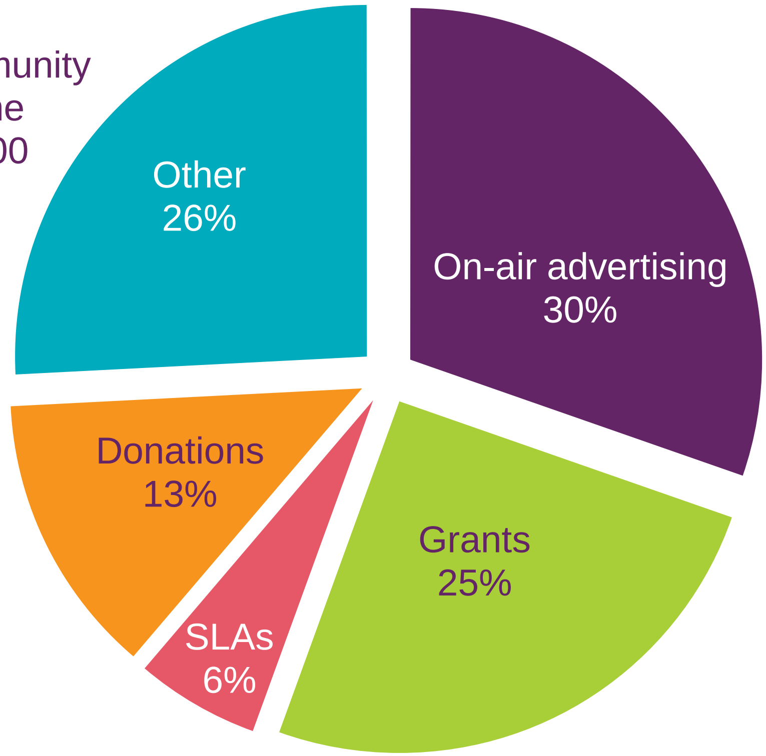
Source: Ofcom analysis of community broadcasters' returns. Figures rounded.

Figure 3.24

Community radio income, by source

Community radio stations' income 2013

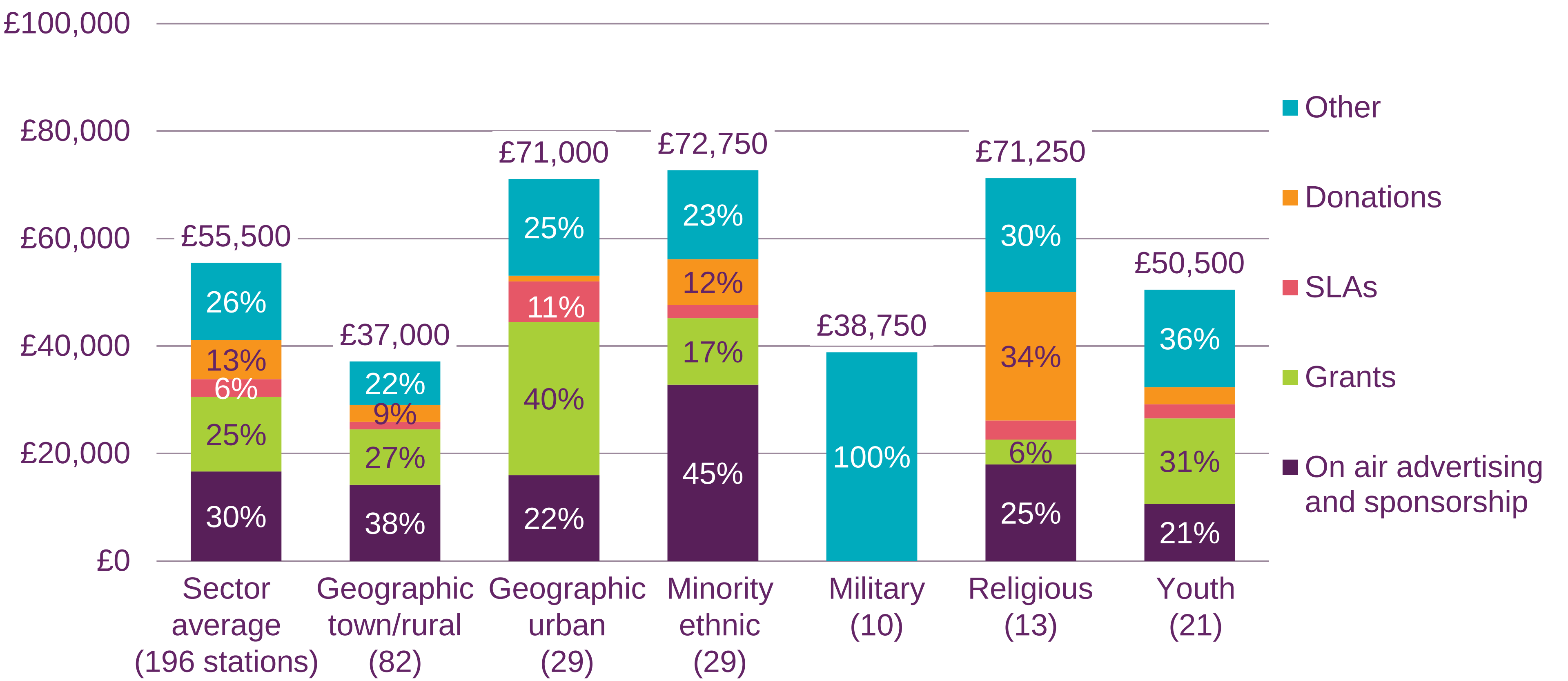
Income by type
The average community radio station income was around £55,500



Source: Ofcom analysis of community broadcasters' returns

Figure: 3.25

Average income by type of community served



Source: Ofcom analysis of community broadcasters' returns

Figure 3.26

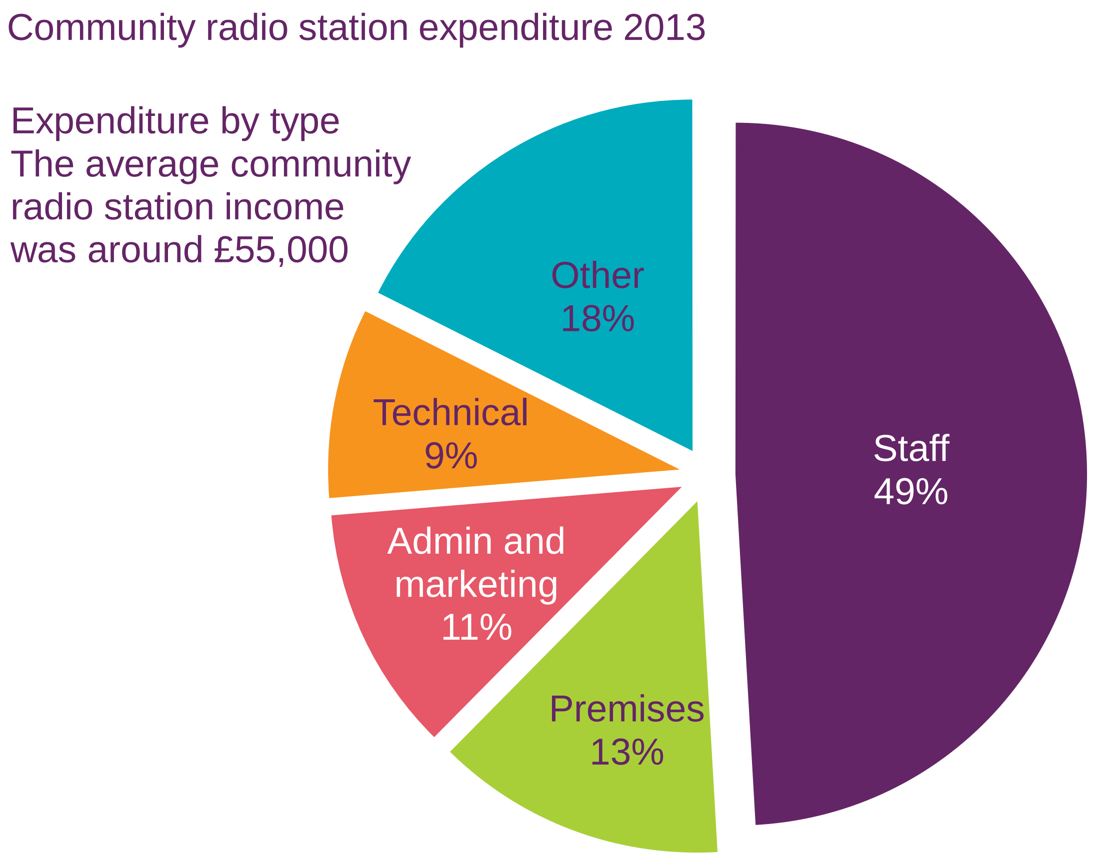
Average expenditure for community radio stations: 2008 to 2013

Expenditure	2008	2009	2010	2011	2012	2013
Average (mean) expenditure	£86,500	£76,500 (-11.4%)	£67,000 (-12.3%)	£64,250 (-4.1%)	£58,000 (-9.7%)	£55,000 (-5.0%)
Median expenditure	£55,000	£52,250 (5.3%)	£43,000 (-17.5%)	£41,000 (-4.9%)	£35,500 (-15.4%)	£35,750 (2.7%)

Source: Ofcom analysis of community broadcasters' returns
Note: The data collection period changed from the financial year to the calendar year as of 2011. Data from previous years has been adjusted to reflect this.

Figure 3.27

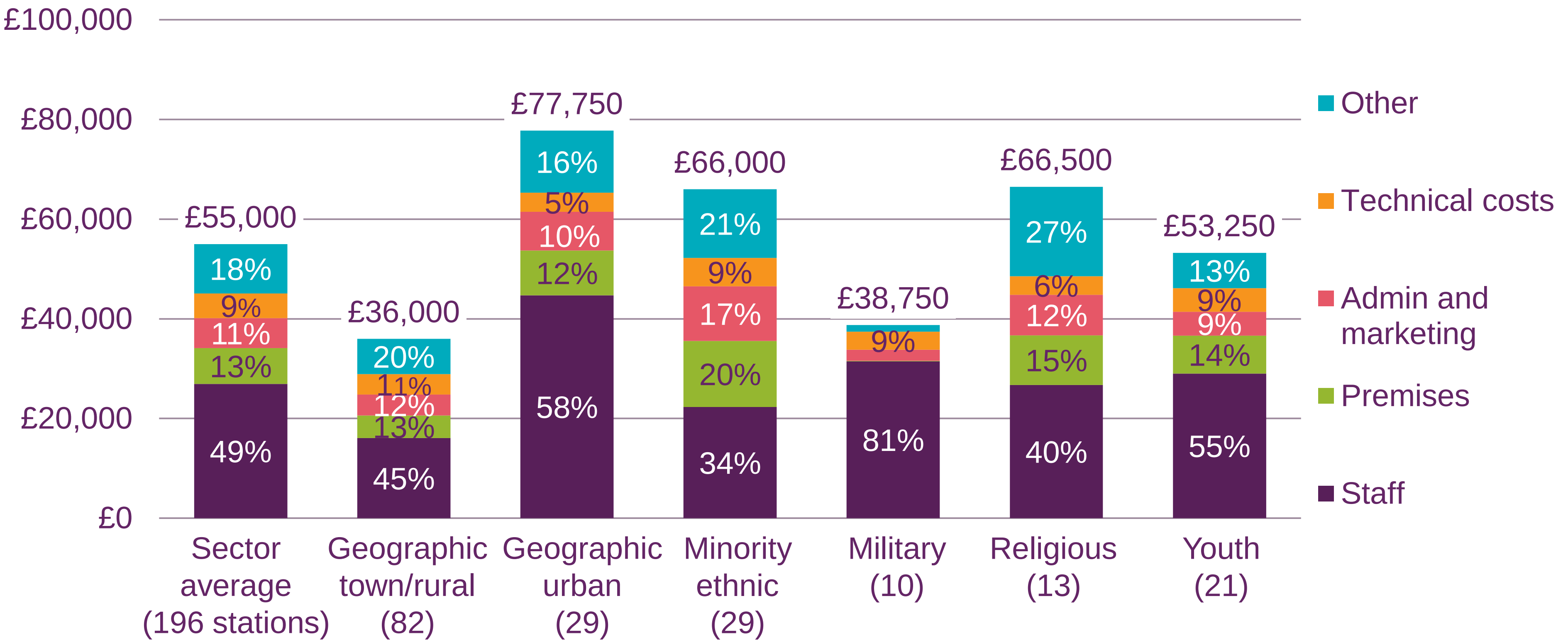
Community radio station expenditure, by type



Source: Ofcom analysis of community broadcasters' returns

Figure: 3.28

Average expenditure by type of community served



Source: Ofcom analysis of community broadcasters' returns

Figure 3.29

Community radio hours and volunteers

	Sector average
Total live hours per week	78
Total original hours per week	90
Speech output as a percentage of total daytime output	30%
Number of volunteers	82

Source: Ofcom analysis of community broadcasters’ returns

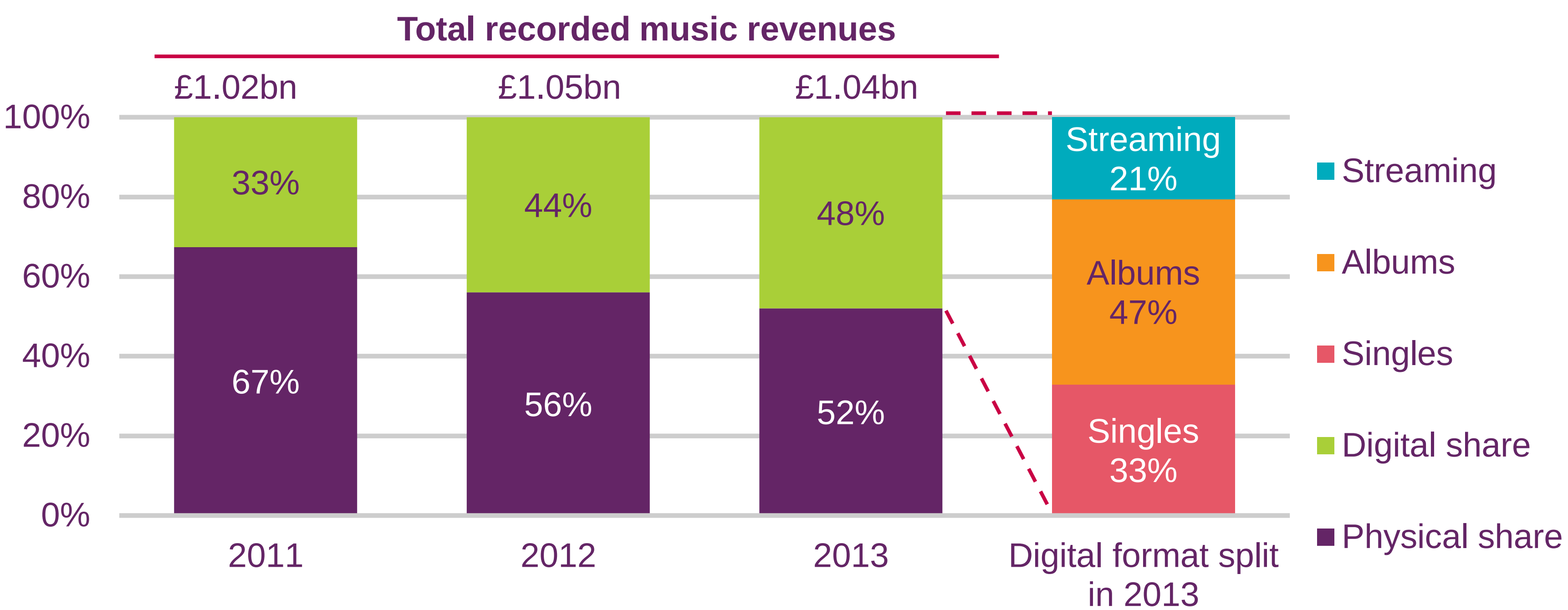
Figure 3.30

Recorded music retail revenues: 2011-2013

Source: Entertainment Retailers' Association / Official Charts. Figures are nominal.

Figure 3.31

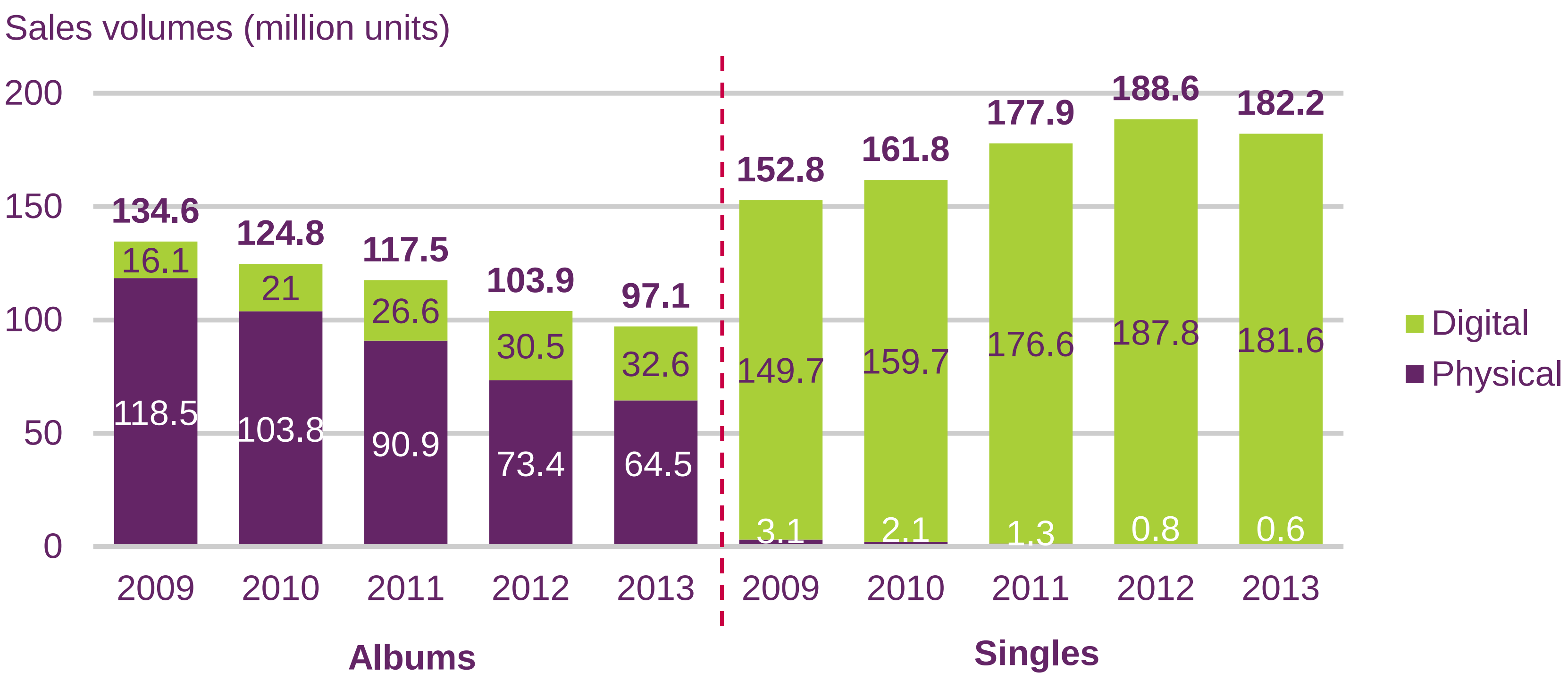
Distribution of recorded music retail revenues: 2011-2013



Source: Entertainment Retailers' Association / Official Charts

Figure 3.32

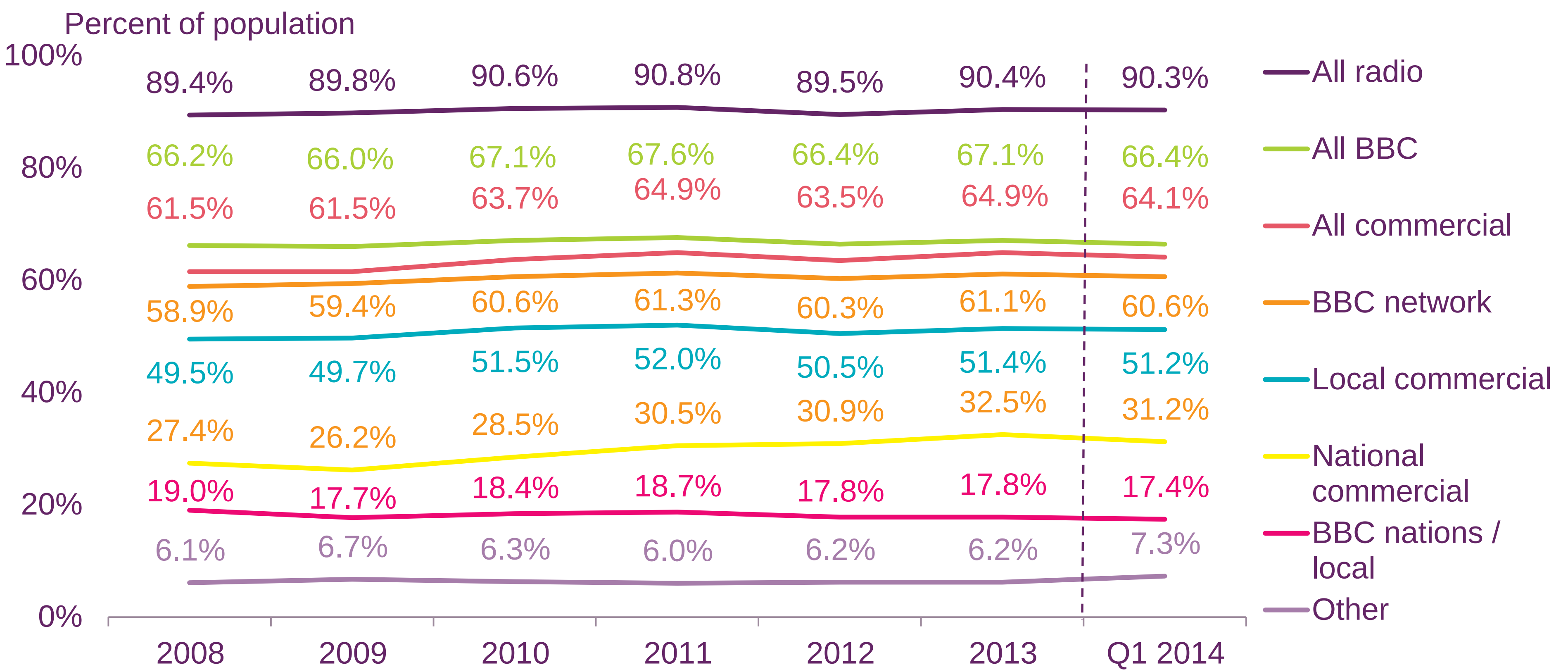
Recorded music sales, by volume: 2009-2013



Source: Entertainment Retailers' Association / Official Charts

Figure 3.33

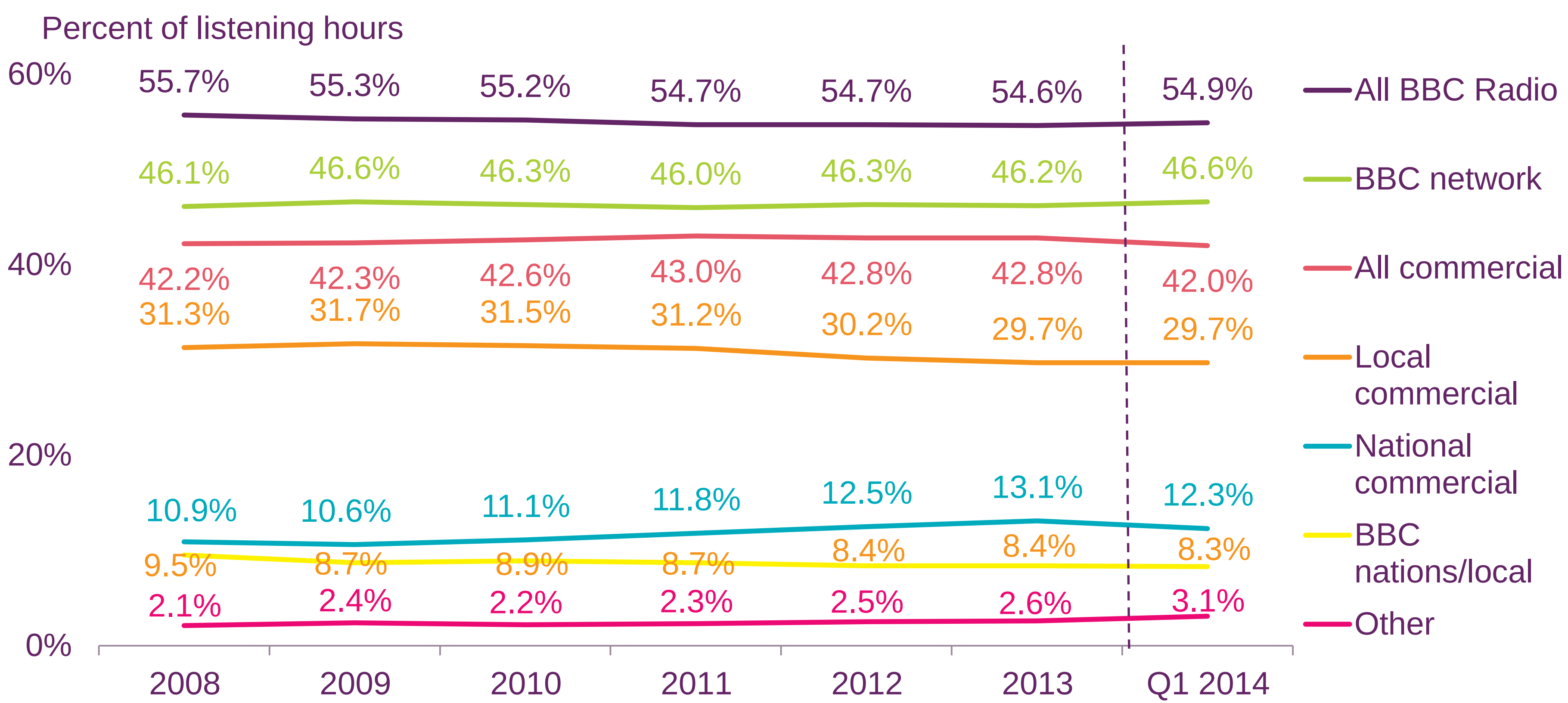
Reach of radio, by sector



Source: RAJAR, All adults (15+), calendar years 2008-2013, Q1 2014

Figure 3.34

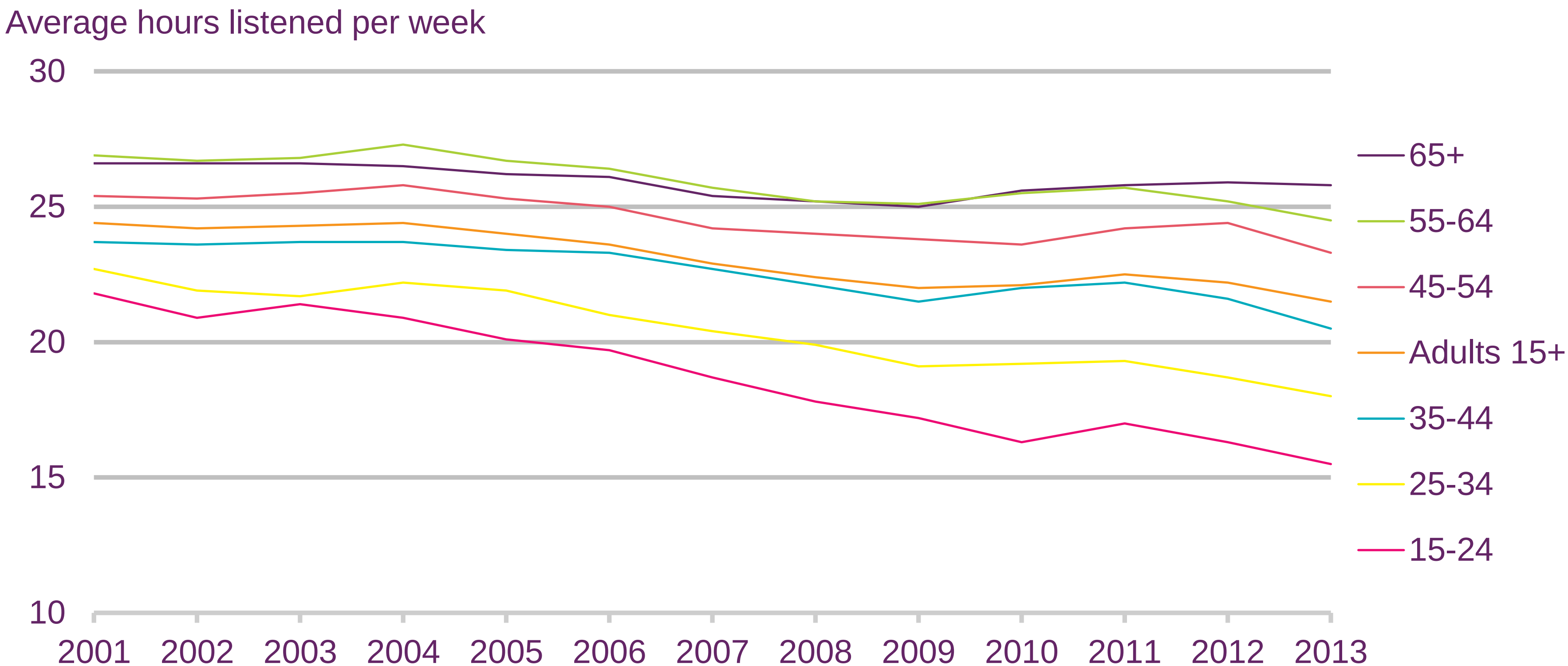
Share of listening hours, by sector



Source: RAJAR, All adults (15+), calendar years 2008-2013, Q1 2014

Figure 3.35

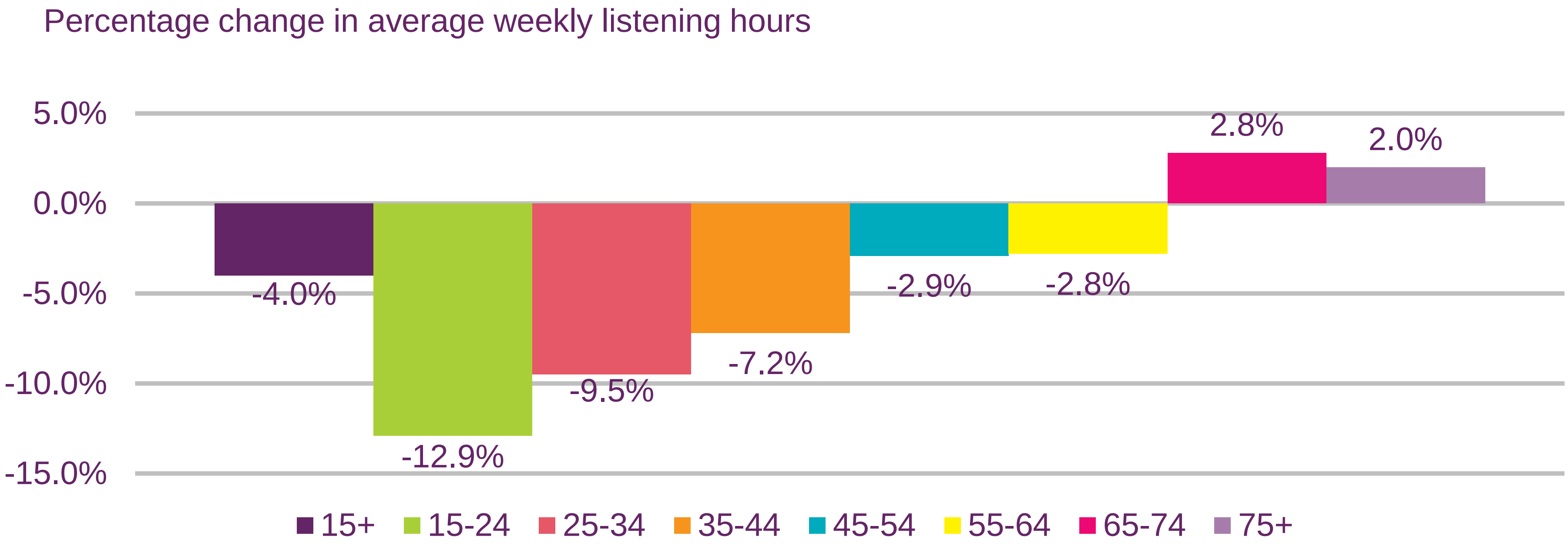
Weekly listening hours by age group, 2001-2013



Source: RAJAR, average weekly listening per listener, 2003-2013

Figure 3.36

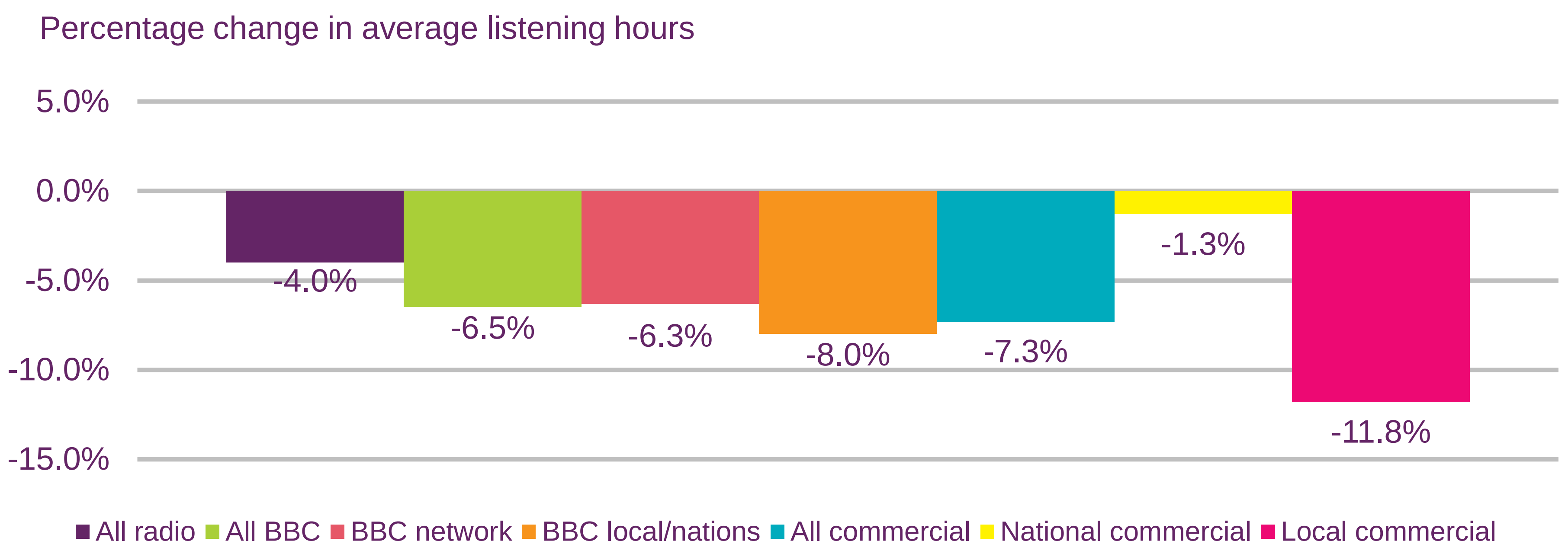
Percentage change in time spent listening, by age group: 2008-2013



Source: RAJAR, all adults 15+. Calendar years 2008 and 2013

Figure 3.37

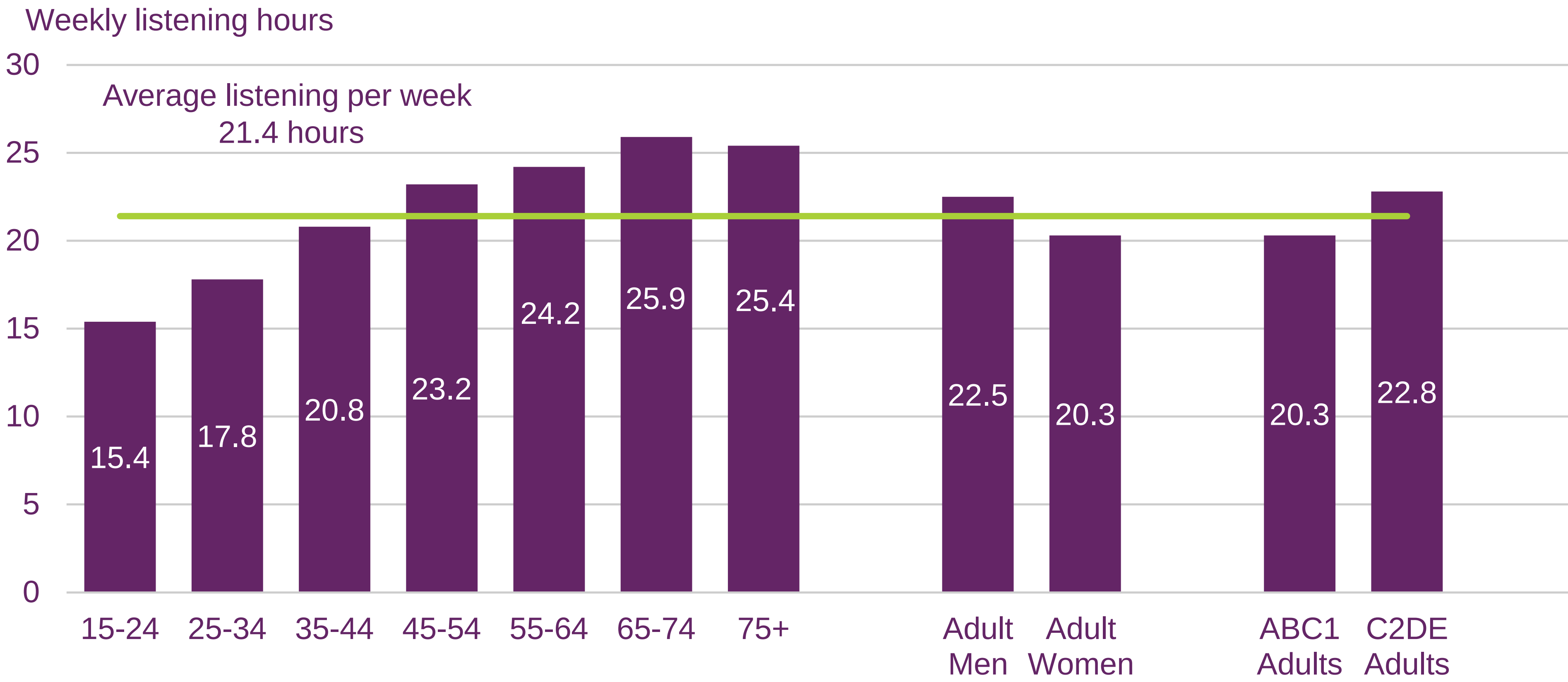
Percentage change in time spent listening, by sector: 2008-2013



Source: RAJAR, all adults 15+. Calendar years 2008 and 2013

Figure 3.38

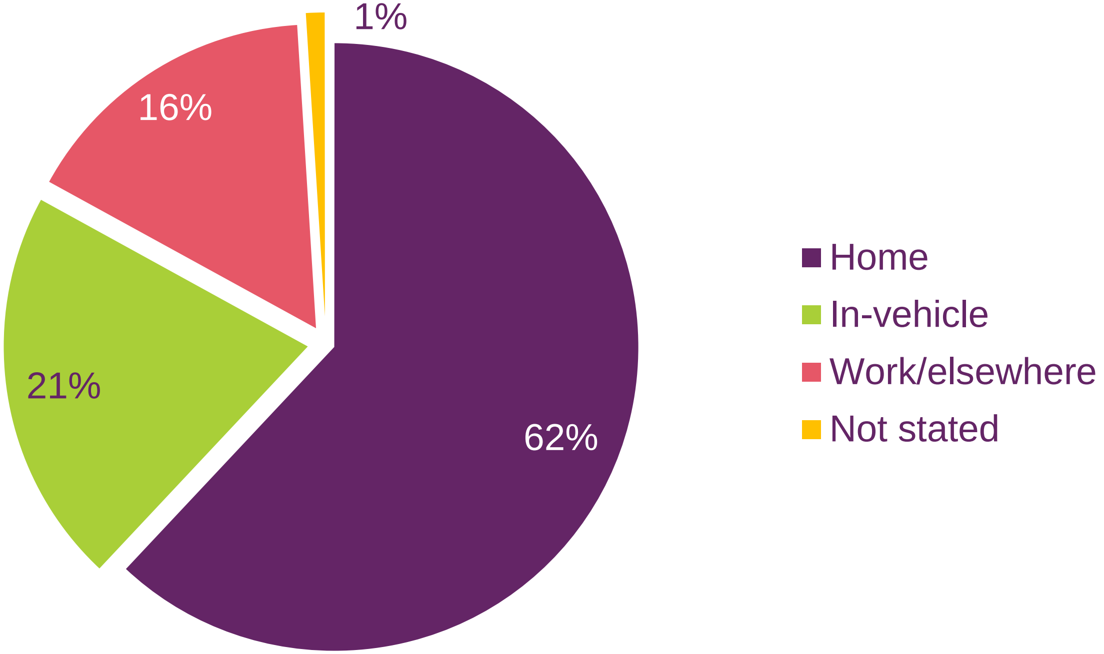
Average weekly listening by demographic, year ending Q1 2014



Source: RAJAR, all adults (15+), year ending Q1 2014, average weekly listening hours per listener

Figure 3.39

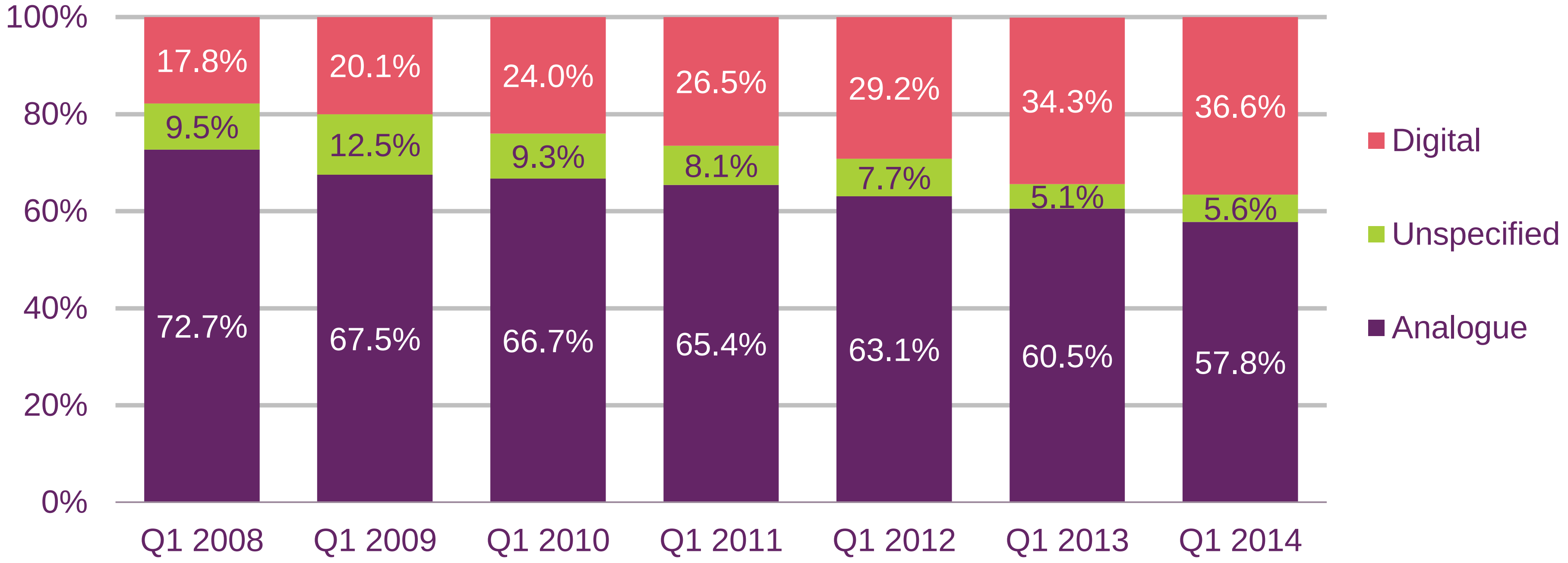
Location of listening – year to Q1 2014



Source: RAJAR, year ending Q1 2014 all adults 15+

Figure 3.40

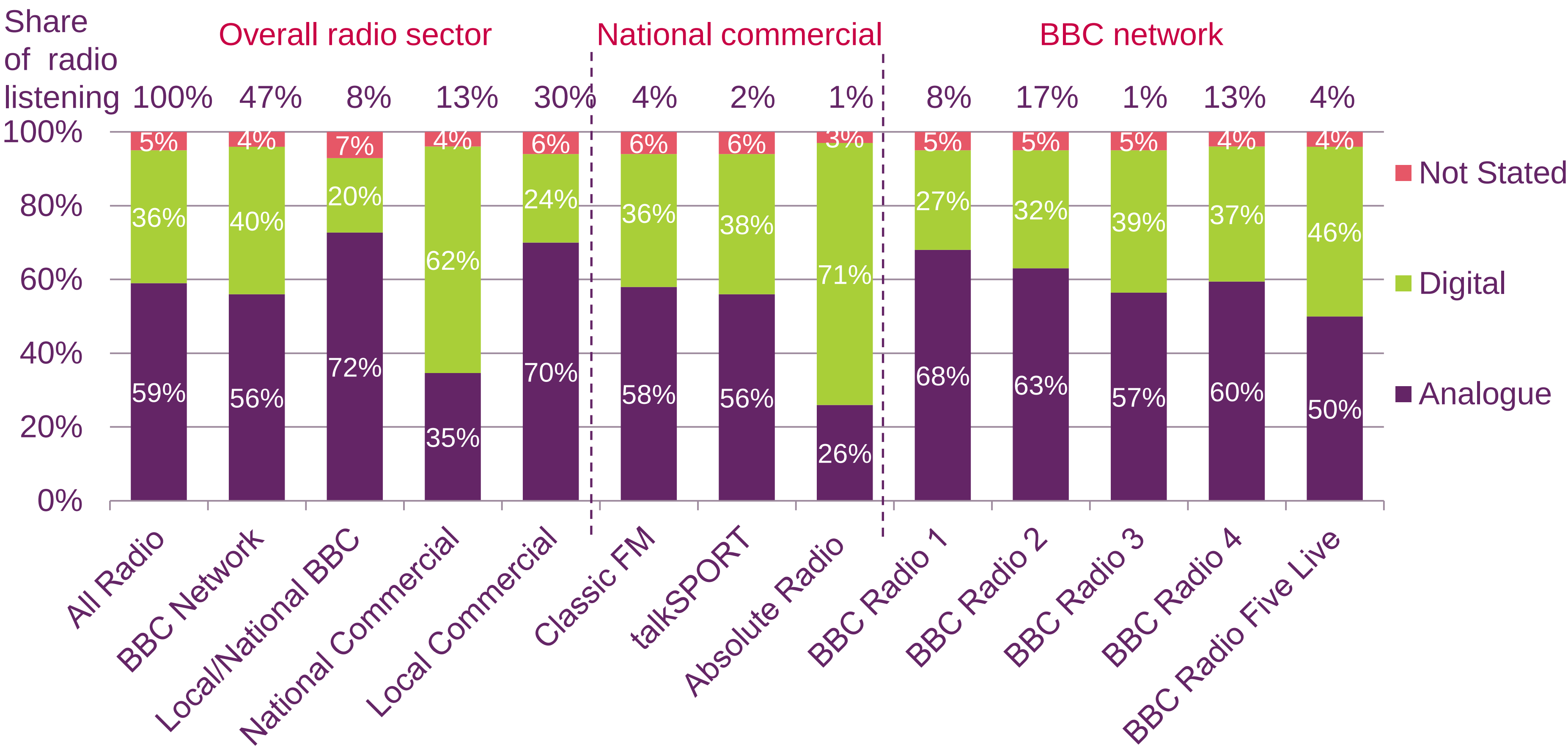
Share of listening hours across analogue and digital platforms



Source: RAJAR, all adults (15+), data relates to Q1 results as shown
Note: ‘Unspecified‘ relates to listening where the radio platform was not confirmed by the listener

Figure 3.41

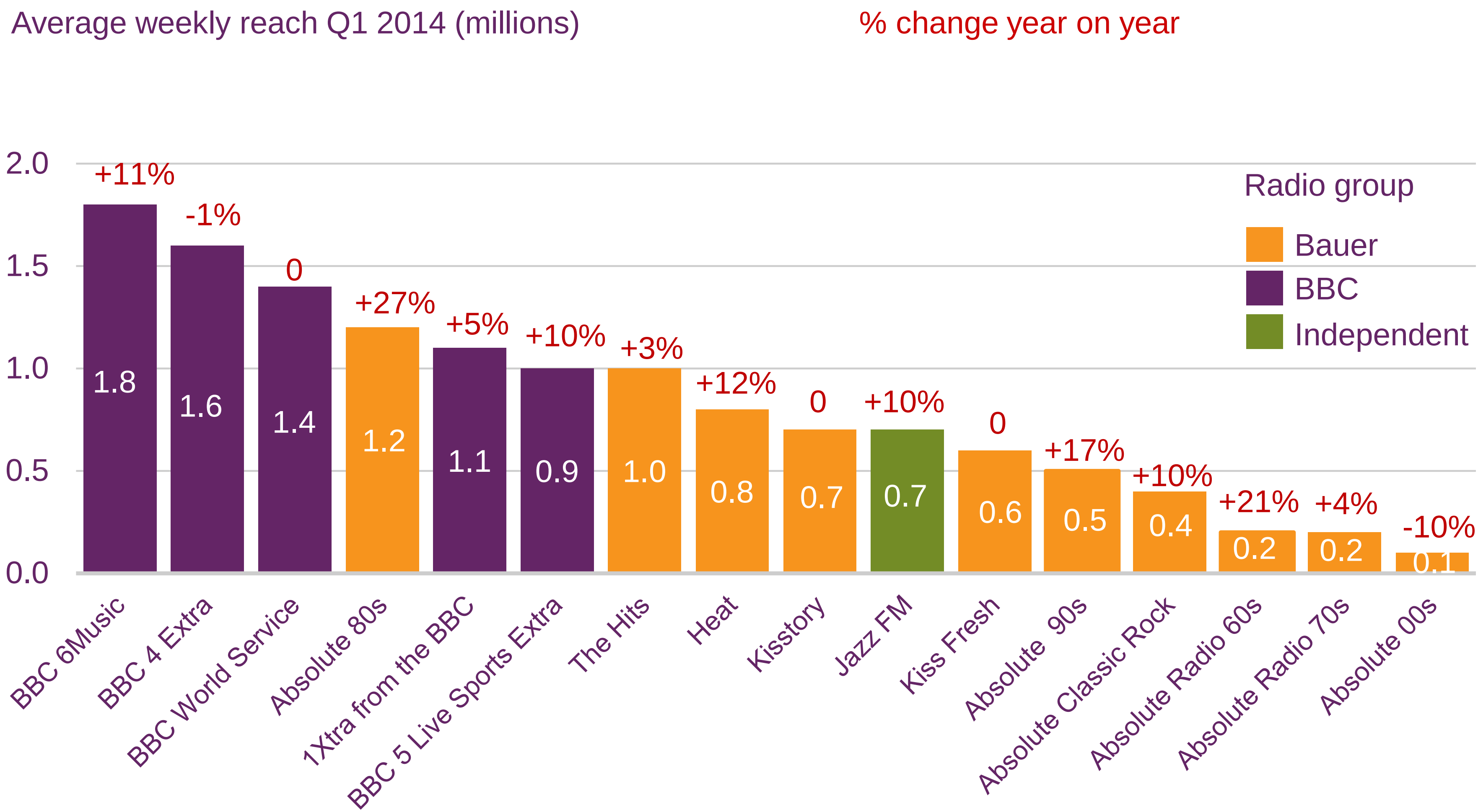
Platform split by sector and station: year ending Q1 2014



Source: RAJAR, year ending Q1 2014, adults 15+

Figure 3.42

Most popular digital-only stations - UK, Q1 2014

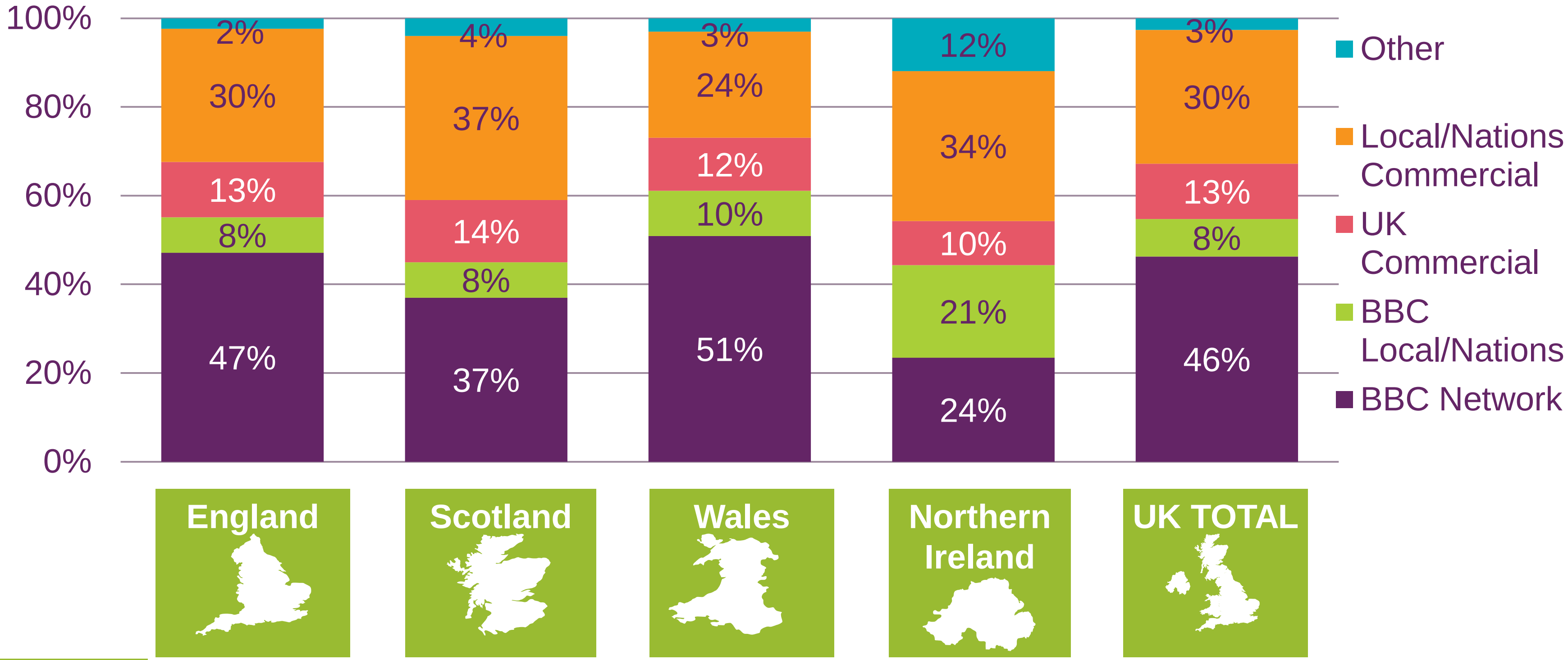


Source: RAJAR, year ending Q1 2014 adults 15+

Figure 3.43

Share of listening hours, by nation

Listening hours share

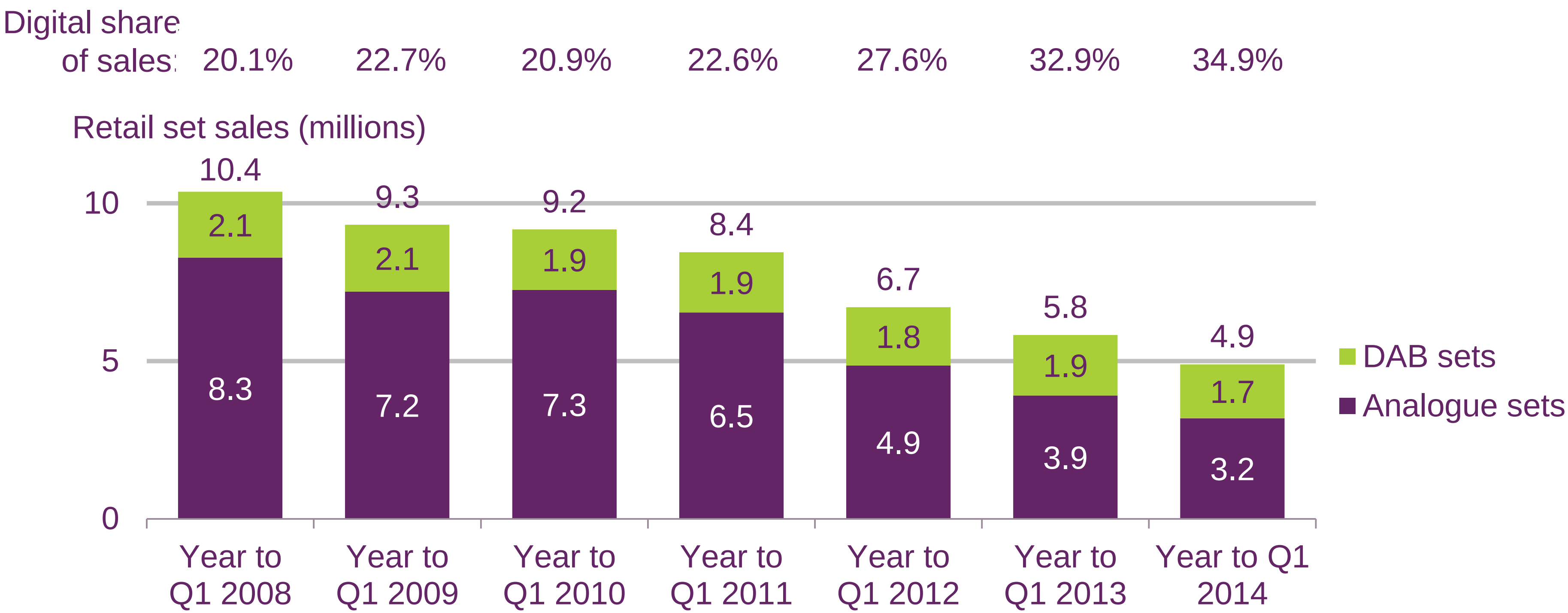


	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	21.6 hours	20.6 hours	21.7 hours	19.8 hours	21.4 hours
Reach	90.4%	85.9%	95.4%	88.9%	90.4%

Source: RAJAR, All adults (15+), calendar year 2014

Figure 3.44

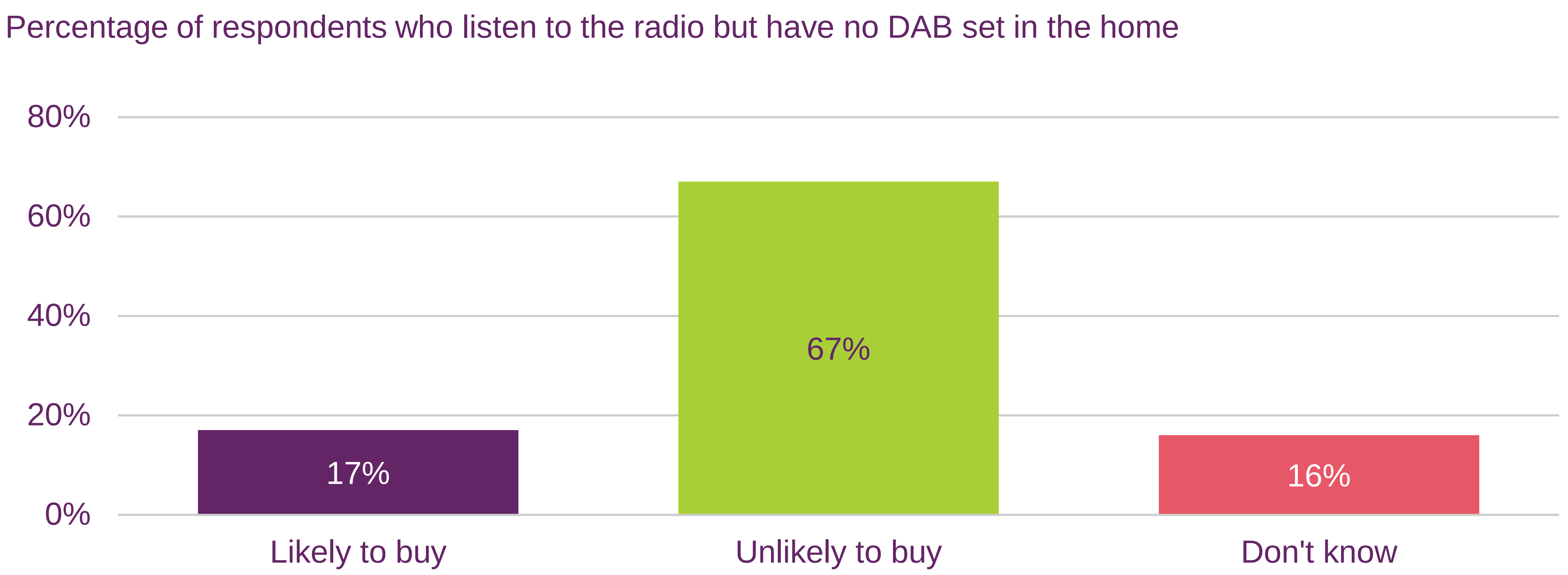
Number of analogue and digital radio sets sold



Source: GfK sales data, 2007-2014.
Note: Figures cover GB only, GfK Panelmarket data represent over 90% of the market. Categories of device included are; portable radios, personal media players, car audio systems, home audio systems, clock radios, radio recorders, headphone stereos, tuners and receivers.

Figure 3.45

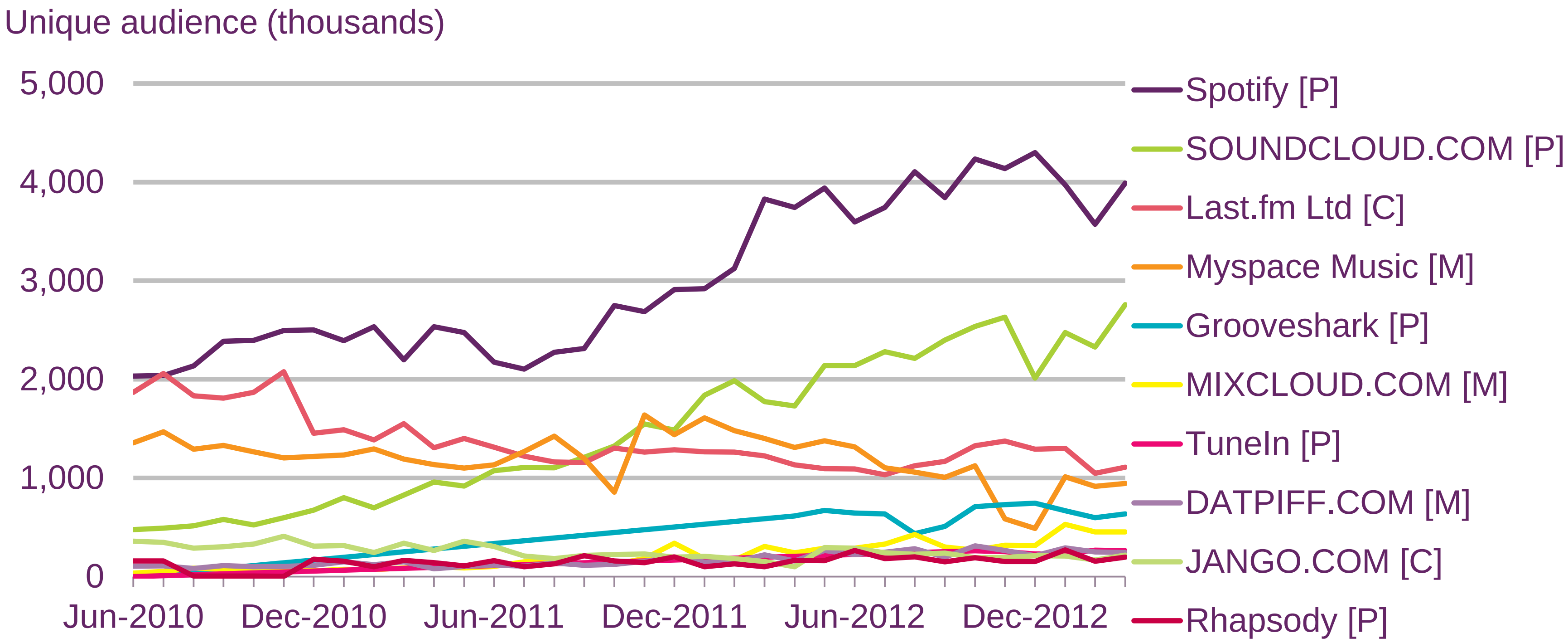
Likelihood to buy a DAB radio within the next 12 months



Source: Ofcom research, Q1 2014
Base: Those who listen to the radio but have no DAB sets in the home (n=1679)
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Figure 3.46

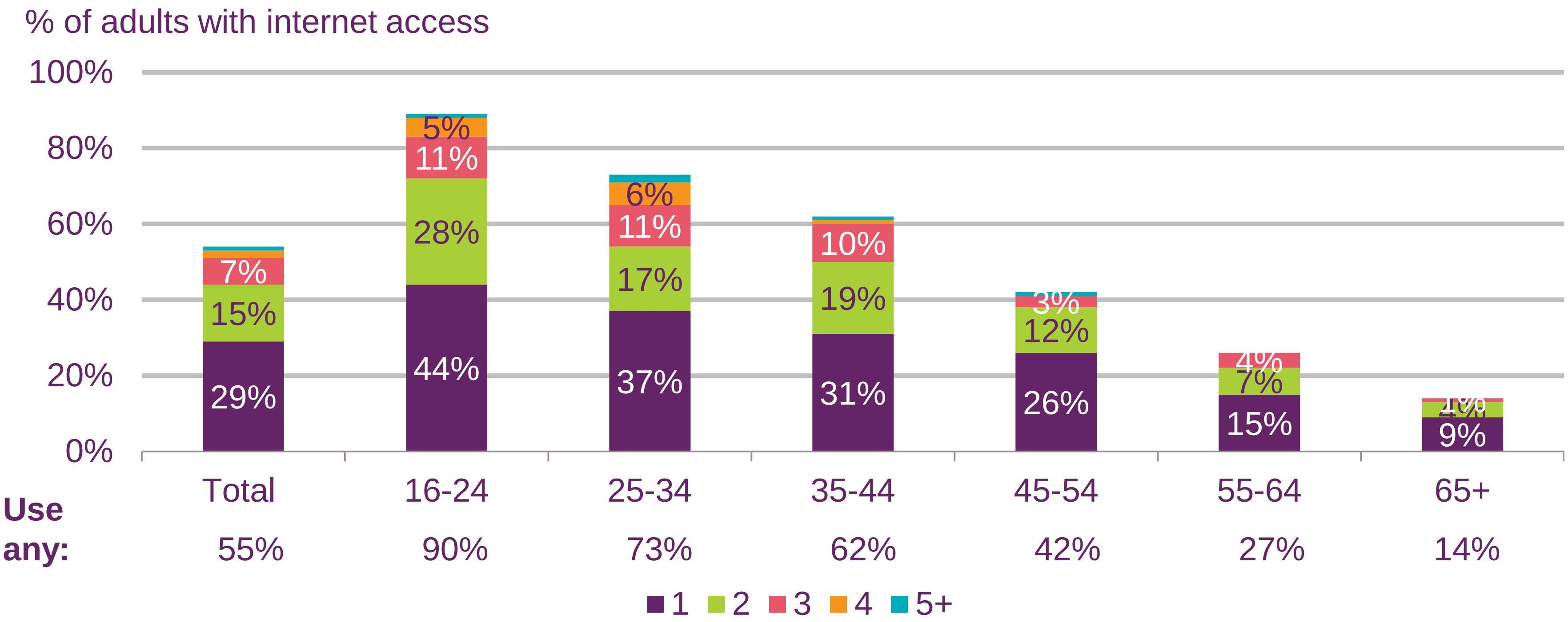
Unique audiences of selected music streaming sites



Source: comScore MMX UK, total digital population 18+, March 2014

Figure 3.47

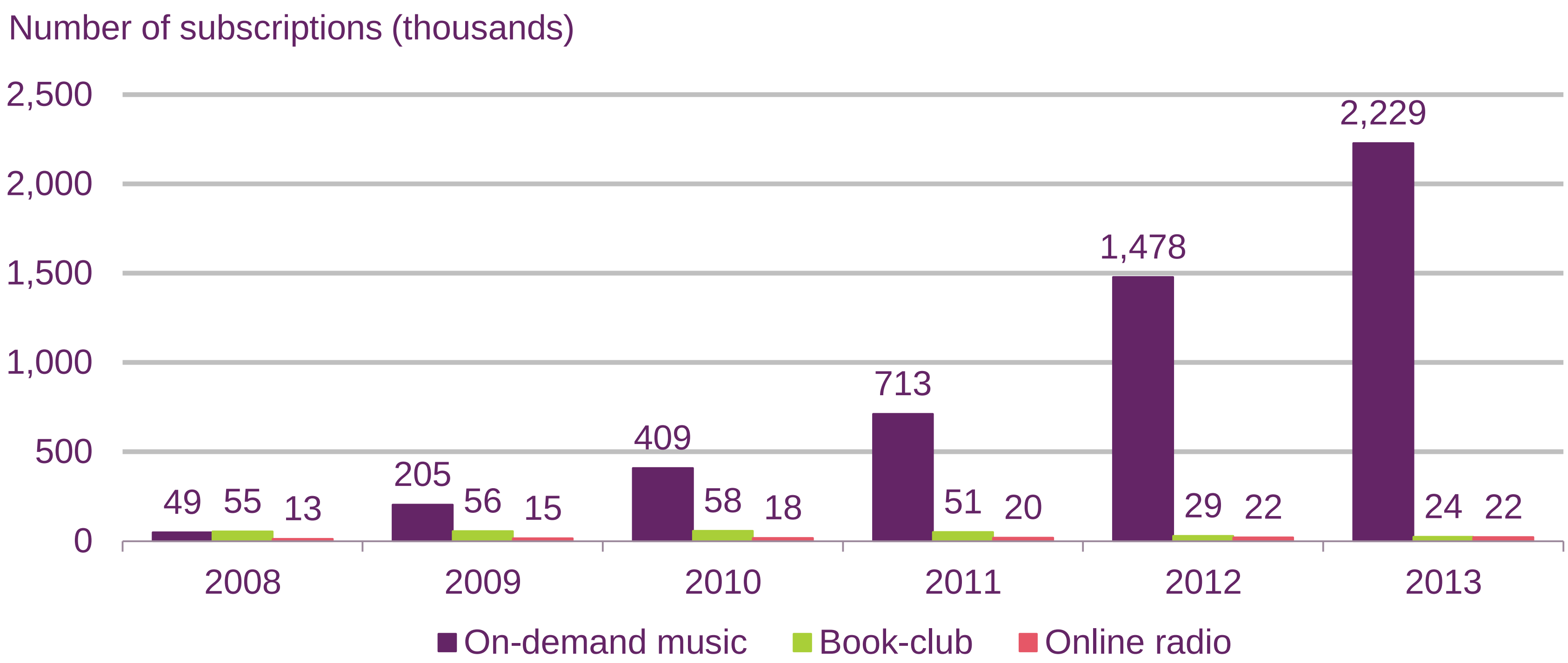
Number of music streaming services used by age



Source: Ofcom research, March 2014
Base: All with internet access (N=1,650) - Number of services used is amongst those who use any i.e. excludes zeros Question: Q4 Which, if any, of the following music streaming services do you use?

Figure 3.48

Number of subscriptions to online music services: 2007-2012



Source: IHS Screen Digest

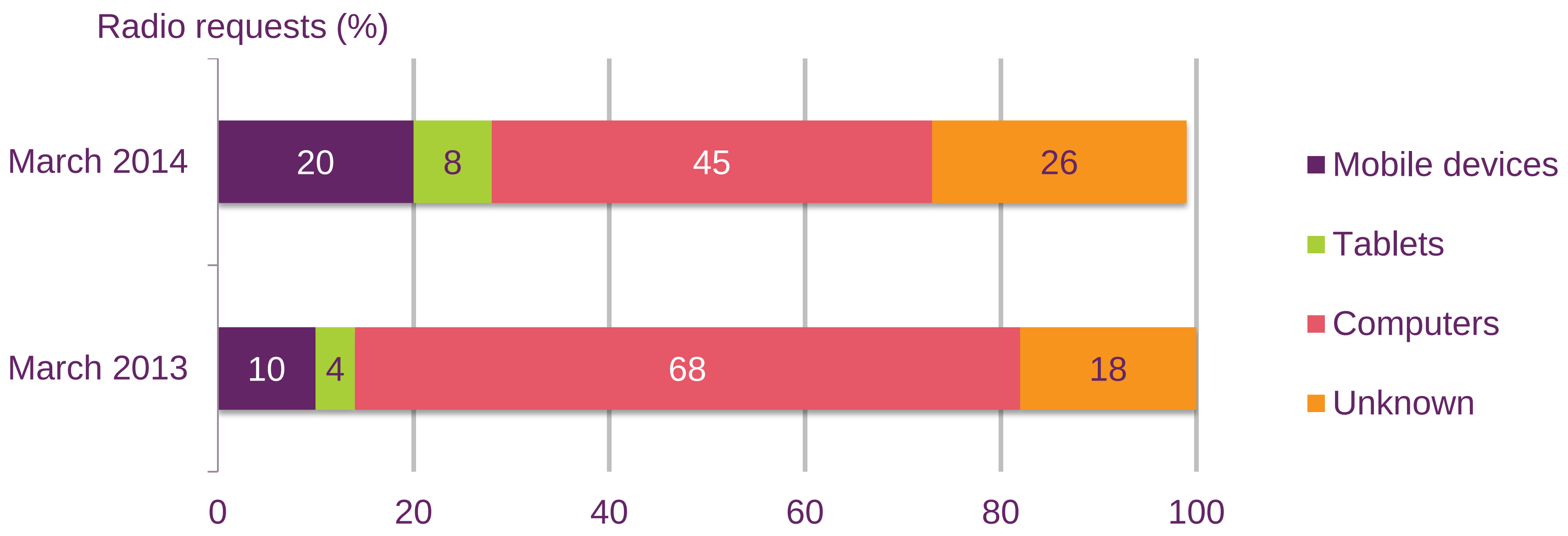
Figure 3.49

BBC iPlayer quarterly radio requests

Source: Ofcom calculations based on BBC iStats
Note: A change in methodology means that Q1 2013 is not comparable to previous data.

Figure 3.50

BBC iPlayer requests year on year by device type



Source: BBC iStats

4. Internet and web-based content

UK Communications Market Report 2014

Figure 4.1

UK internet and web-based content market: key statistics

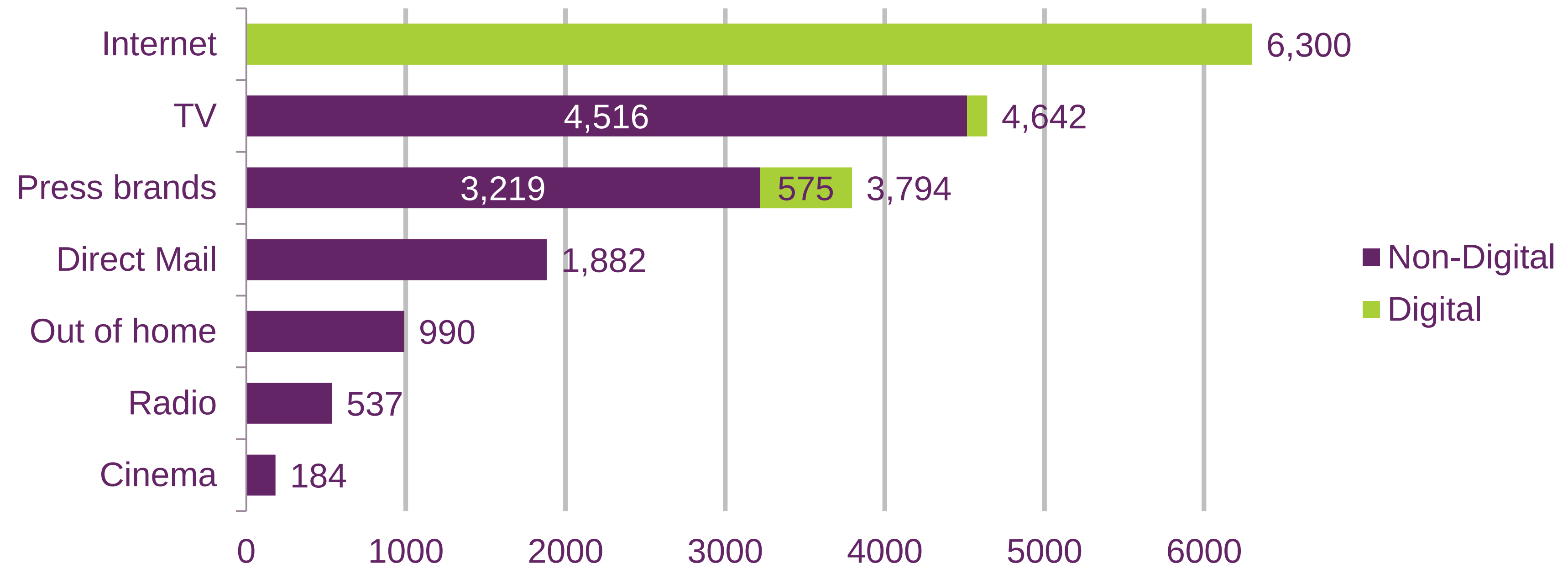
UK internet and web-based content market	2009	2010	2011	2012	2013	2014
[1]Internet take-up (%)	73	75	77	79	80	82
[1]Internet on mobile-phone take-up (%)	20	21	32	39	49	57
[2]Monthly active audience on laptop/desktop computers	38.6m	43.1m	42.2m	43.6m	44.6m	n/a
[2]Time spent web browsing per laptop/desktop internet user per month (hours)	29.4	30.9	31.5	34.7	34.2	n/a
[3]Digital advertising expenditure (£)	3.5bn	4.1bn	4.8bn	5.4bn	6.3bn	n/a
[3]Mobile advertising revenue (£)	38m	83m	203m	526m	1031m	n/a

Source: [1]Ofcom consumer research, Q1 each year, [2]comScore MMX, UK, annual average from reported monthly values; [3]Internet Advertising Bureau/PwC.
Note: Caution is advised in comparing values before and after February 2011 because of a change in comScore methodology.

Figure 4.2

UK advertising expenditure: 2013

Expenditure (£ millions)



Source: AA/Warc Expenditure Report, July 2014, http://expenditurereport.warc.com/
Note: 'Press brands' is a consolidation of magazine brands and national and regional news brands. Total digital advertising spend is double-counted in digital TV spend (broadcaster VOD revenue), and in press brands' digital spend.

Figure 4.3

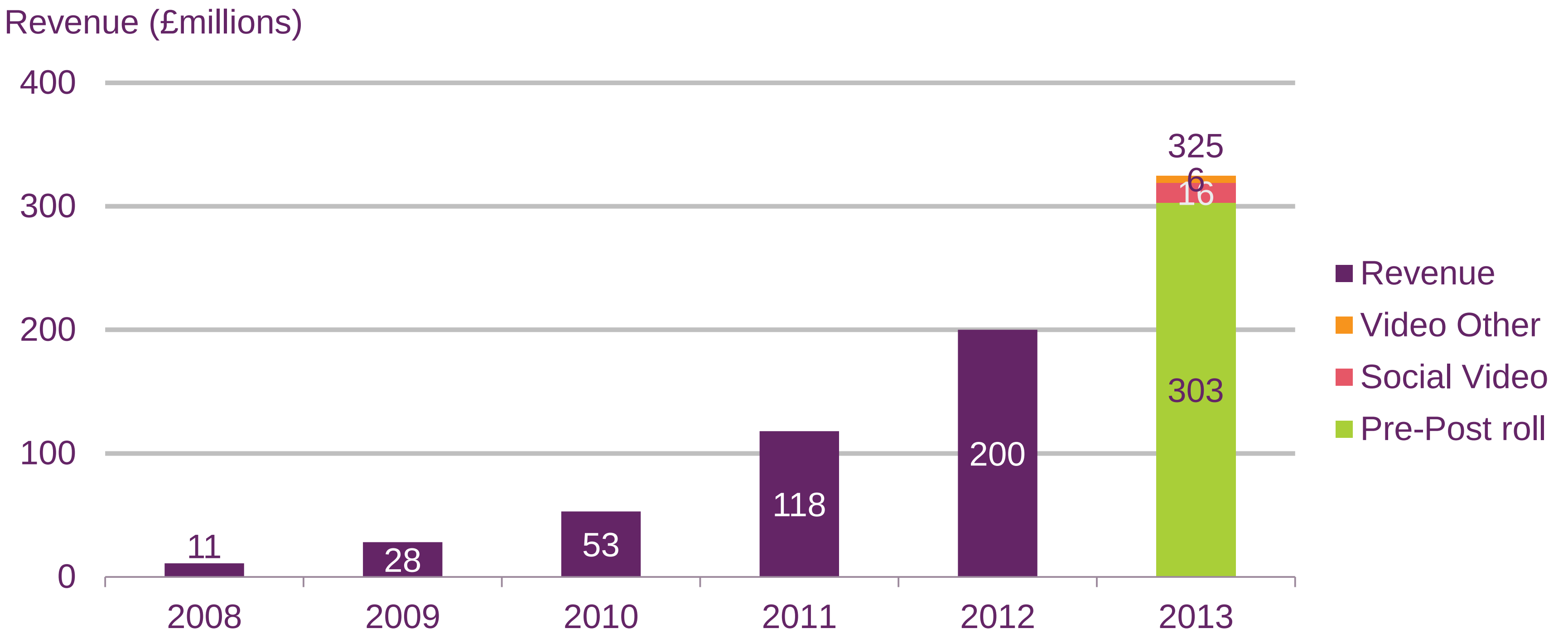
Digital advertising expenditure, by type: 2008 - 2013

£ millions

Source: IAB / PwC Digital Adspend 2008 – 2013
Note: Figures are revised yearly by IAB / PwC and might not match previous reports

Figure 4.4

Digital display video advertising revenue: 2008-2013

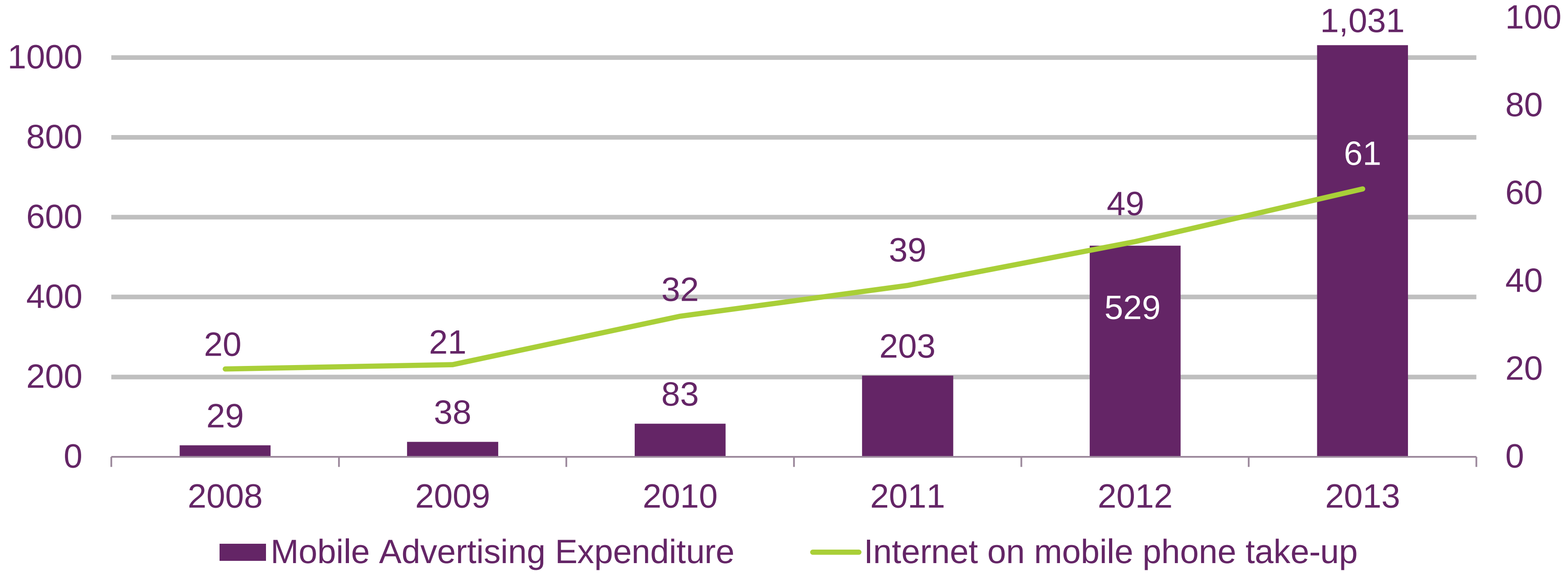


Source: IAB / PwC Digital Adspend 2008-2013

Figure 4.5

Mobile advertising expenditure, and mobile internet take-up

Expenditure (£ millions) \ UK adult take-up (%)



Source: IAB / PwC Digital Adspend 2008-2013; Ofcom consumer research.
Note: Take-up figures are from Q1 of the following year.

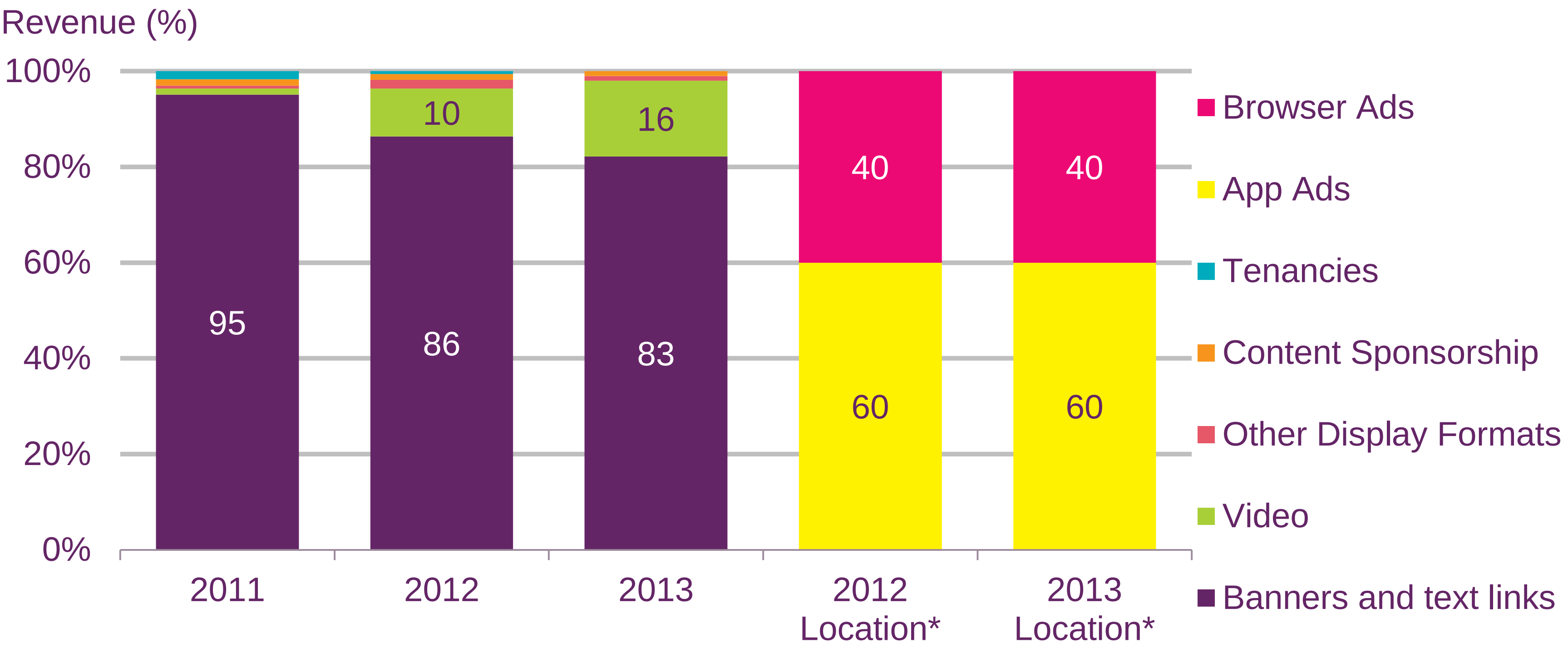
Figure 4.6

Mobile advertising, by type: 2008-2013

Source: IAB / PwC Digital Adspend 2008-2013

Figure 4.7

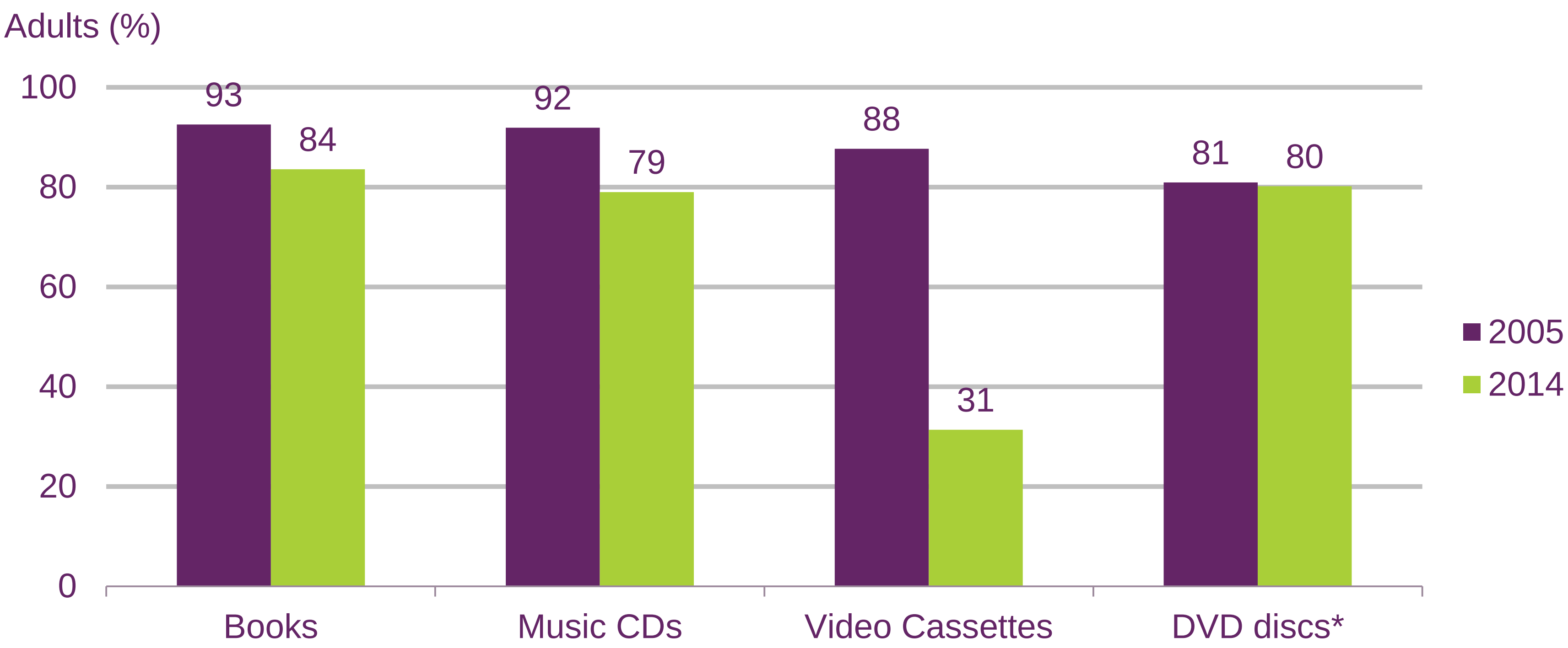
Mobile video display advertising revenue, by type and location: 2011-2013



Source: IAB / PwC Digital Adspend 2008-2013
Note: *Location data is based on a smaller number of datapoints than type data and as should only be treated as indicative.

Figure 4.8

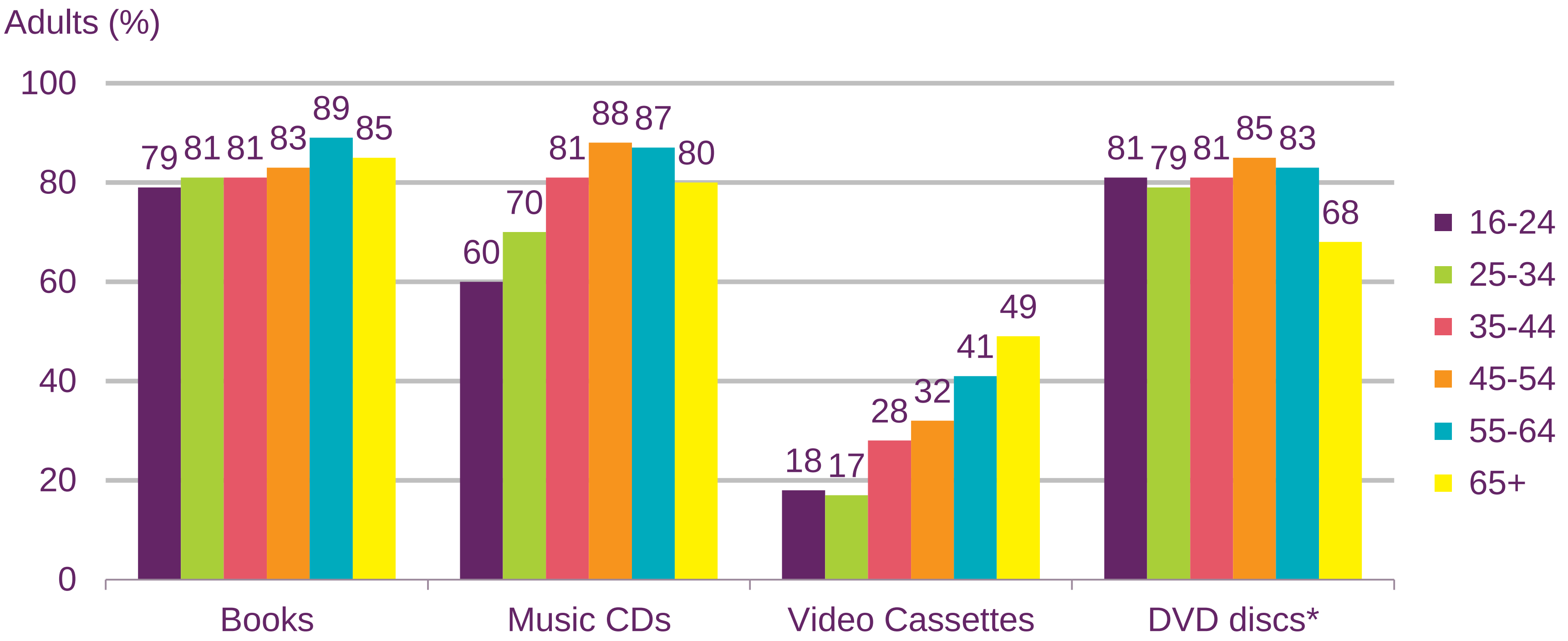
Take-up of physical media



Source: Ofcom Media Literacy Research 2005, Kantar Media Omnibus 2014
Base: 2005 n=3244 UK adults 16+; 2014 n=2026 UK adults 16+
Note: * includes Blu-ray discs in 2014

Figure 4.9

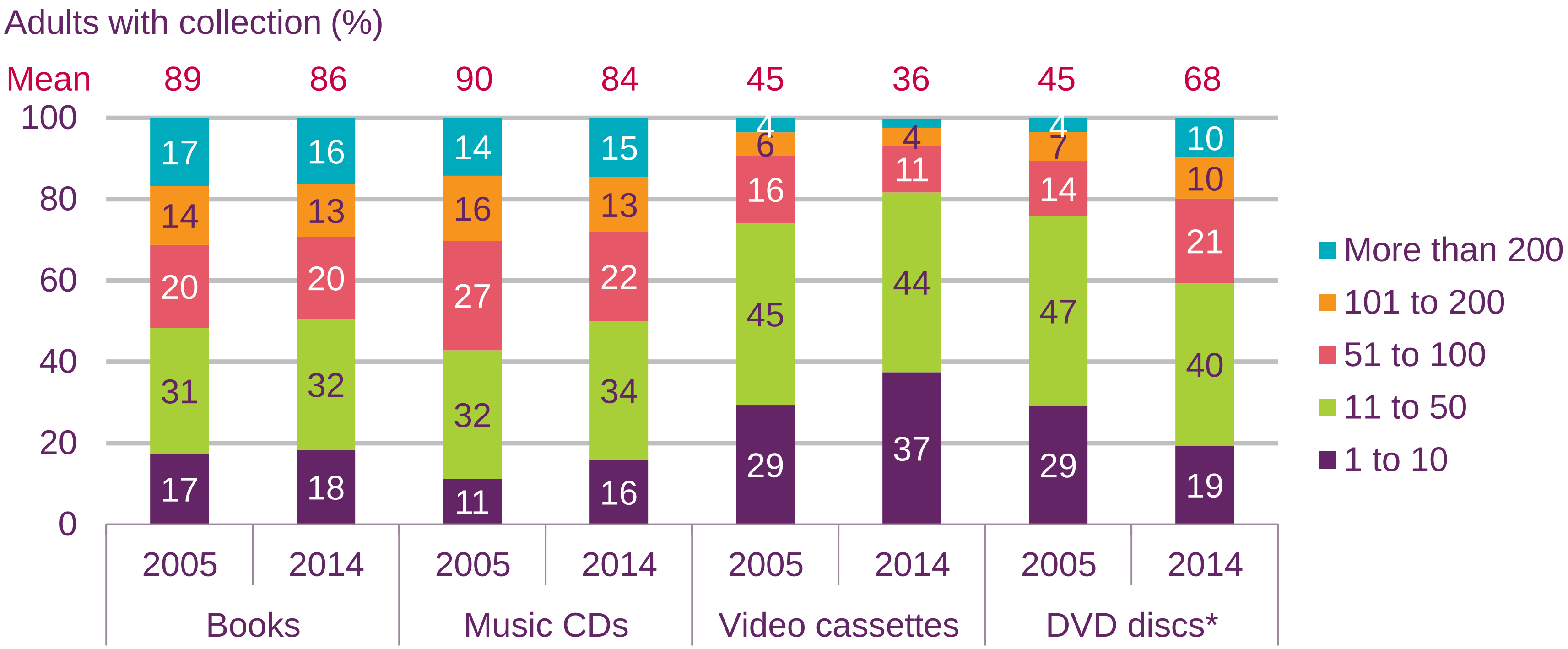
Reach of physical media, by age: 2014



Source: Kantar Media Omnibus 2014
Base: Adults 16+, 16-24 n=295; 25-34 n=335; 35-44 n=277; 45-54 n=318; 55-64 n=269; 65+ n=532
Note: * includes Blu-ray discs in 2014

Figure 4.10

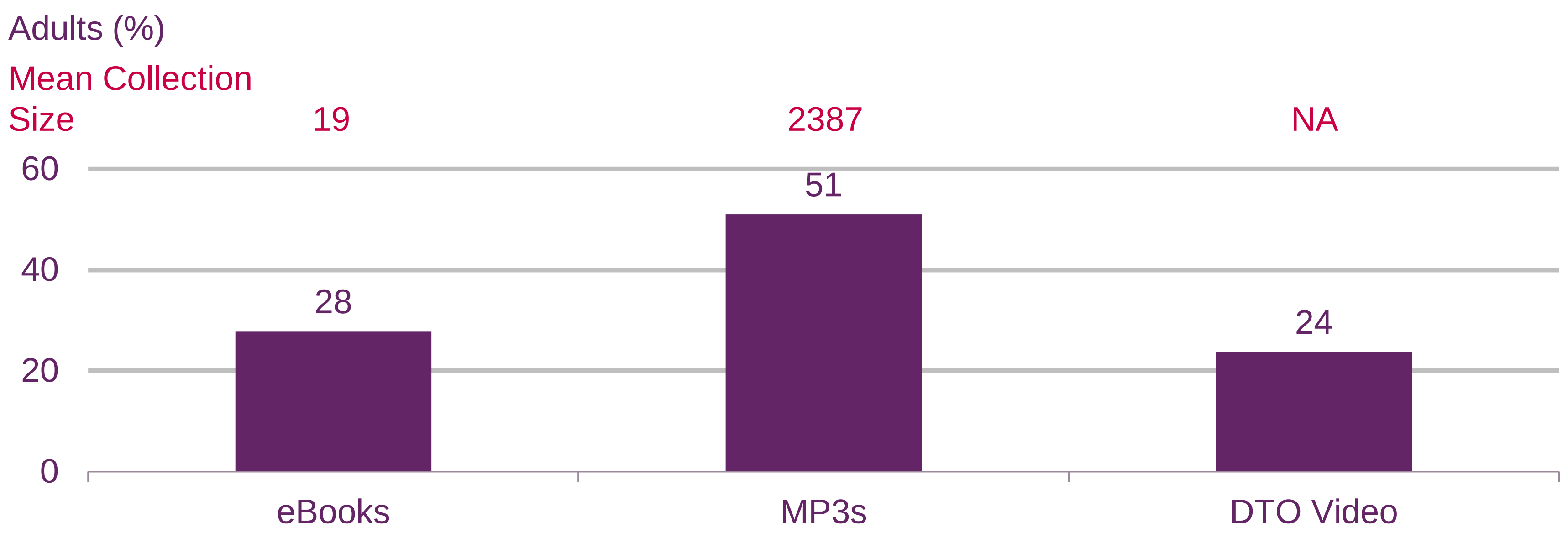
Size of physical media collections, 2005 and 2014



Source: Ofcom Media Literacy Research 2005, Kantar Media Omnibus 2014
Base: 2005 n=3244 UK adults 16+; 2014 n=2026 UK adults 16+
Note: * includes Blu-ray discs in 2014. Only collections of one or more are included in the calculation of mean collection size

Figure 4.11

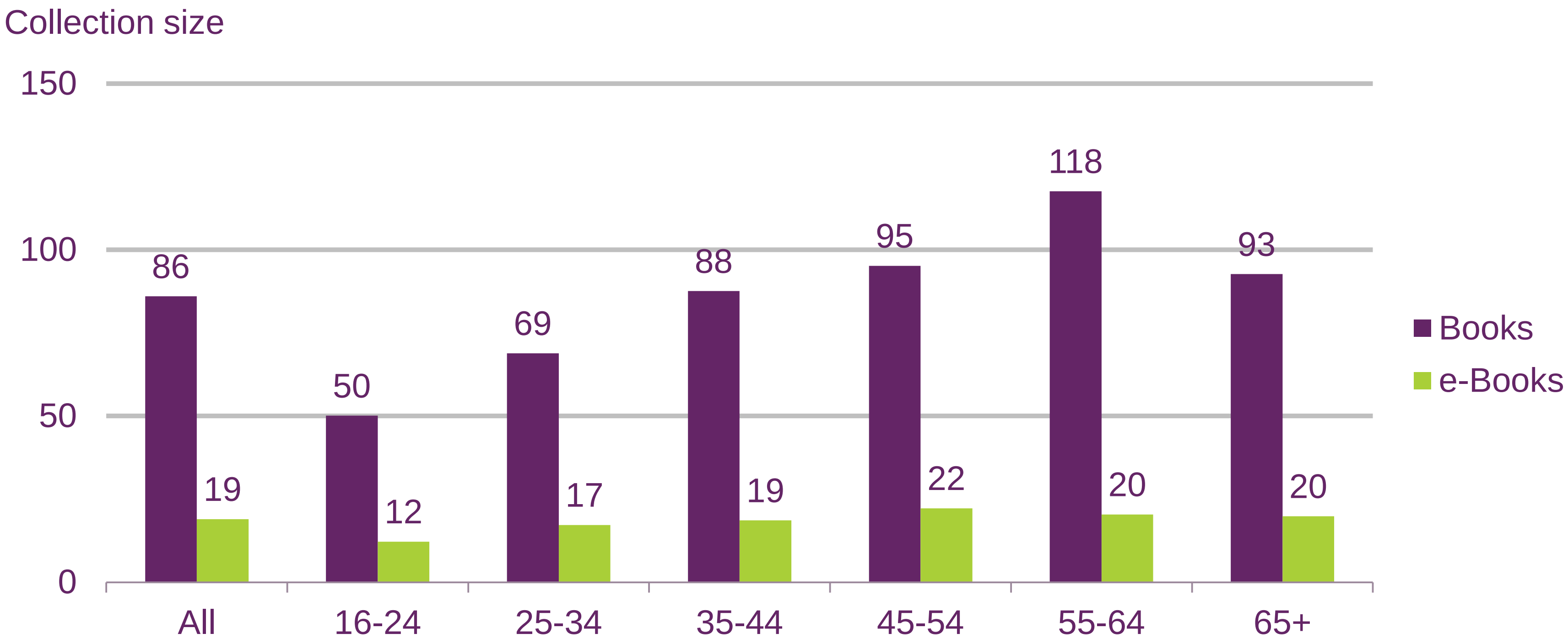
Take up and collection size of digital media



Source: Kantar Media Omnibus 2014
Base: n=2026 UK adults 16+
Note Only collections of one or more are included in the calculation of mean collection size

Figure 4.12

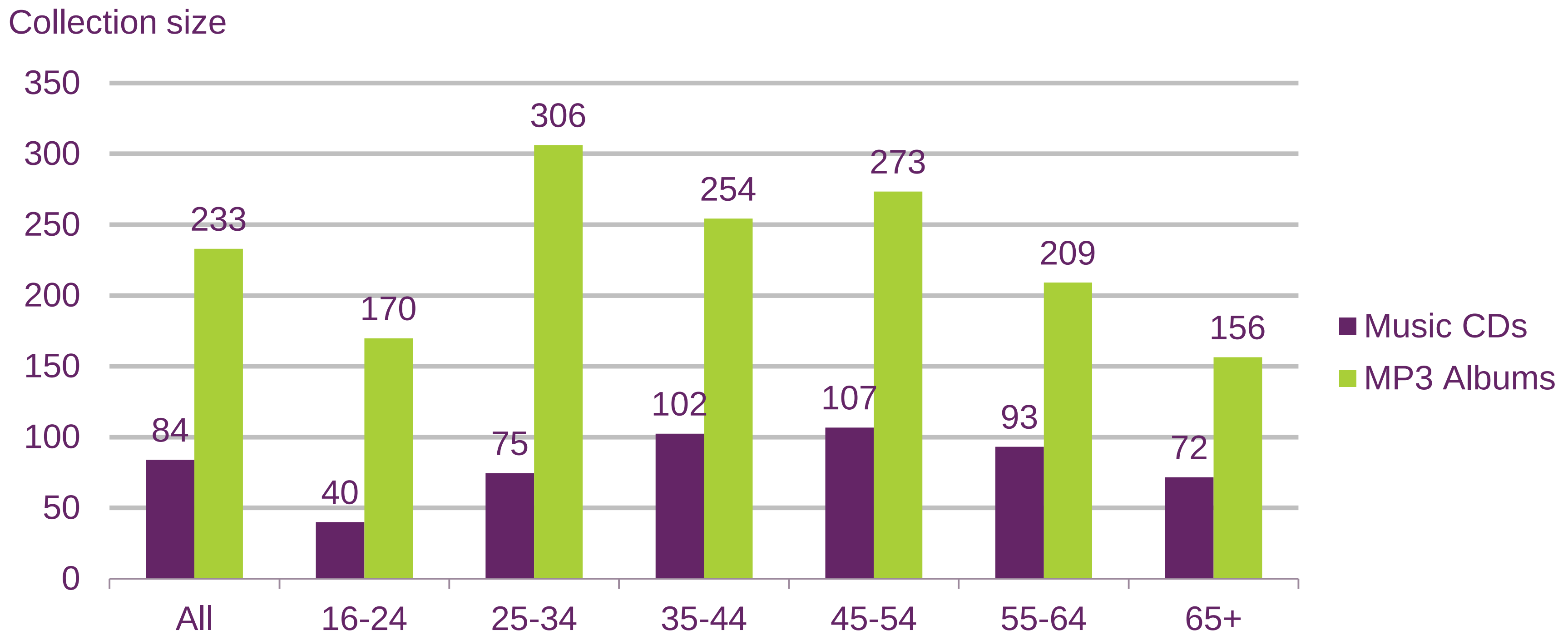
Average size of book and e-book collections, by age



Source: Kantar Media Omnibus 2014
Base: n=2026 UK adults 16+
Note: Only collections of one or more are included in the calculation of mean collection size

Figure 4.13

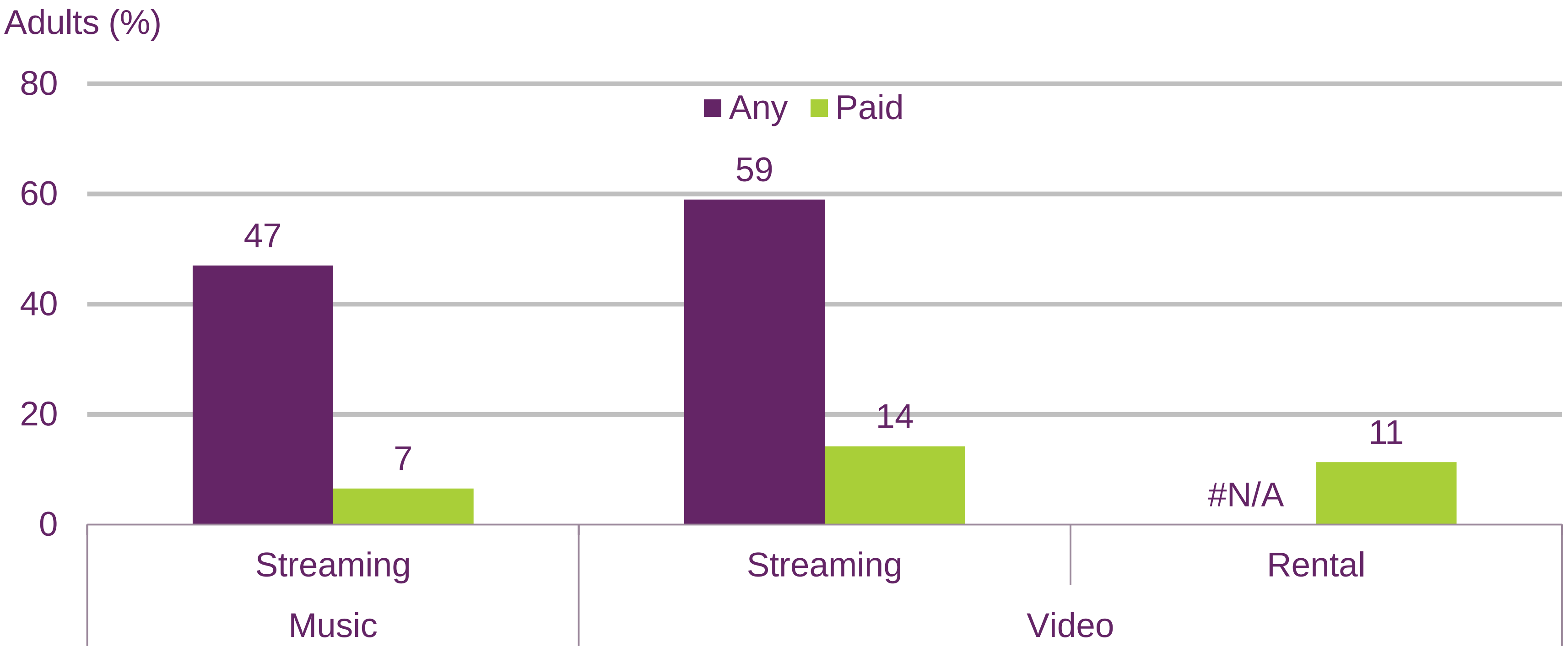
Average size of music CD and MP3 collections, by age: 2014



Source: Kantar Media Omnibus 2014
Base: n=2026 UK adults 16+
Note: Only collections of one or more are included in the calculation of mean collection size. MP3 albums are approximated as 10 MP3s

Figure 4.14

Take up of free and paid-for digital music or video media services

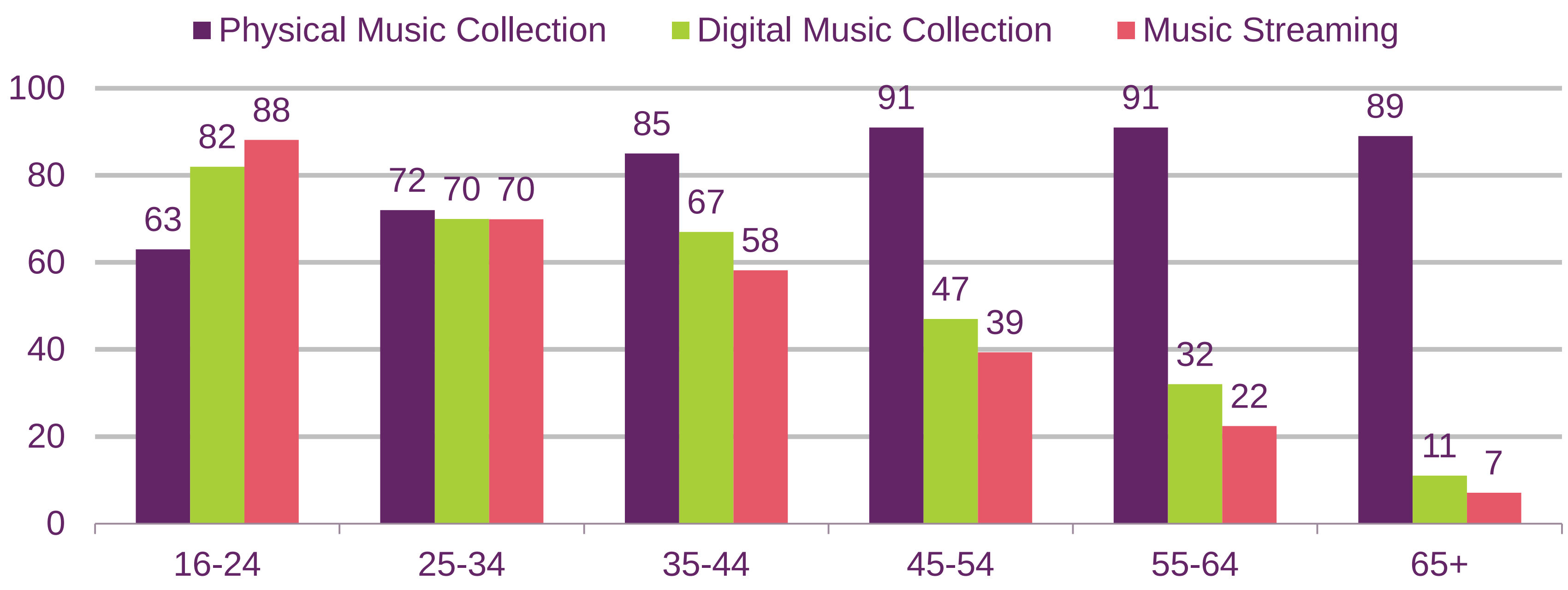


Source: Kantar Media Omnibus 2014
Base: n=2026 UK adults 16+

Figure 4.15

Take up of physical music, digital music and music streaming, by age

Adults (%)

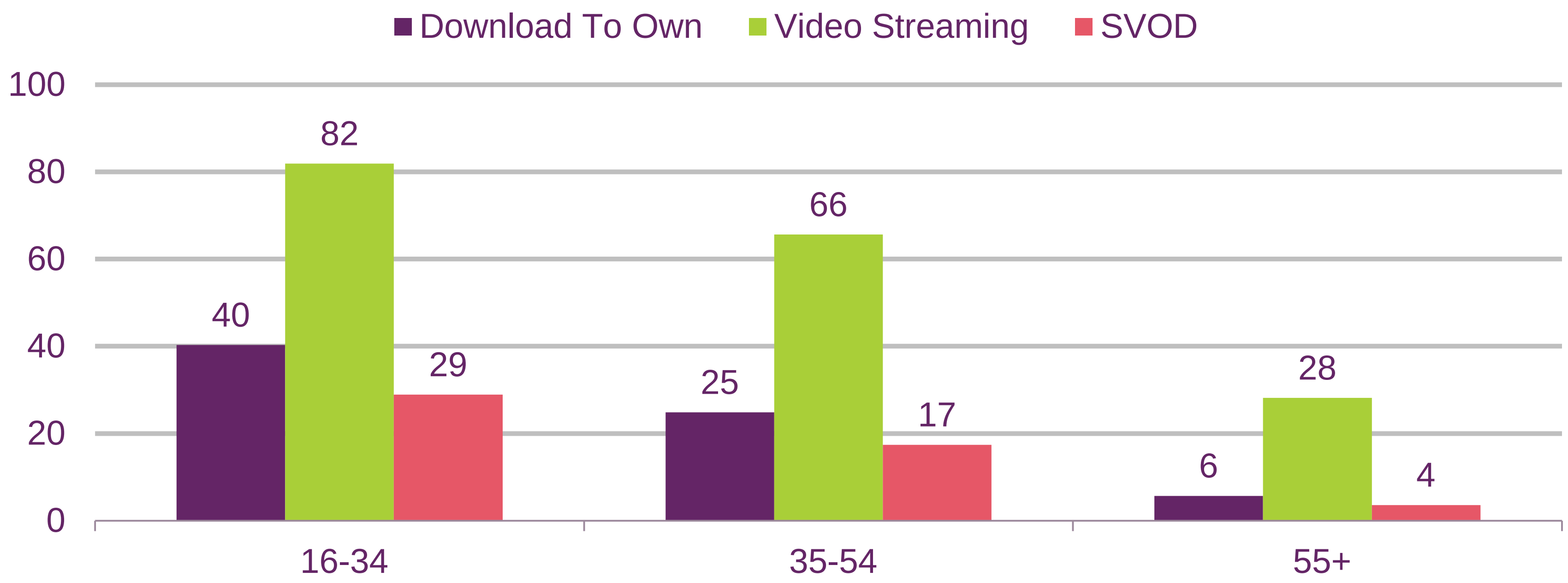


Source: Kantar Media Omnibus 2014
Base: n=2026 UK adults 16+
Note: Physical music includes music CDs, vinyl and cassettes.

Figure 4.16

Take up of digital video services, by age

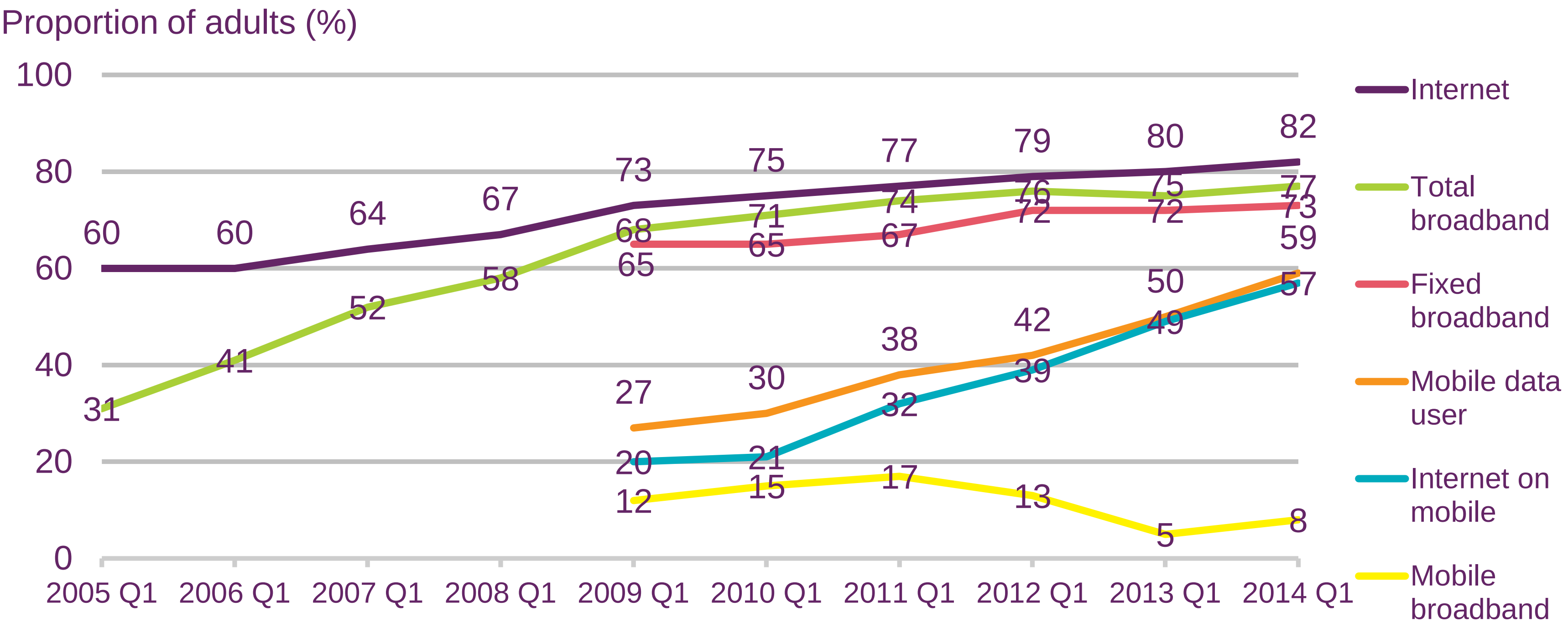
Adults (%)



Source: Kantar Media Omnibus 2014
Base: n=2026 UK adults 16+

Figure 4.17

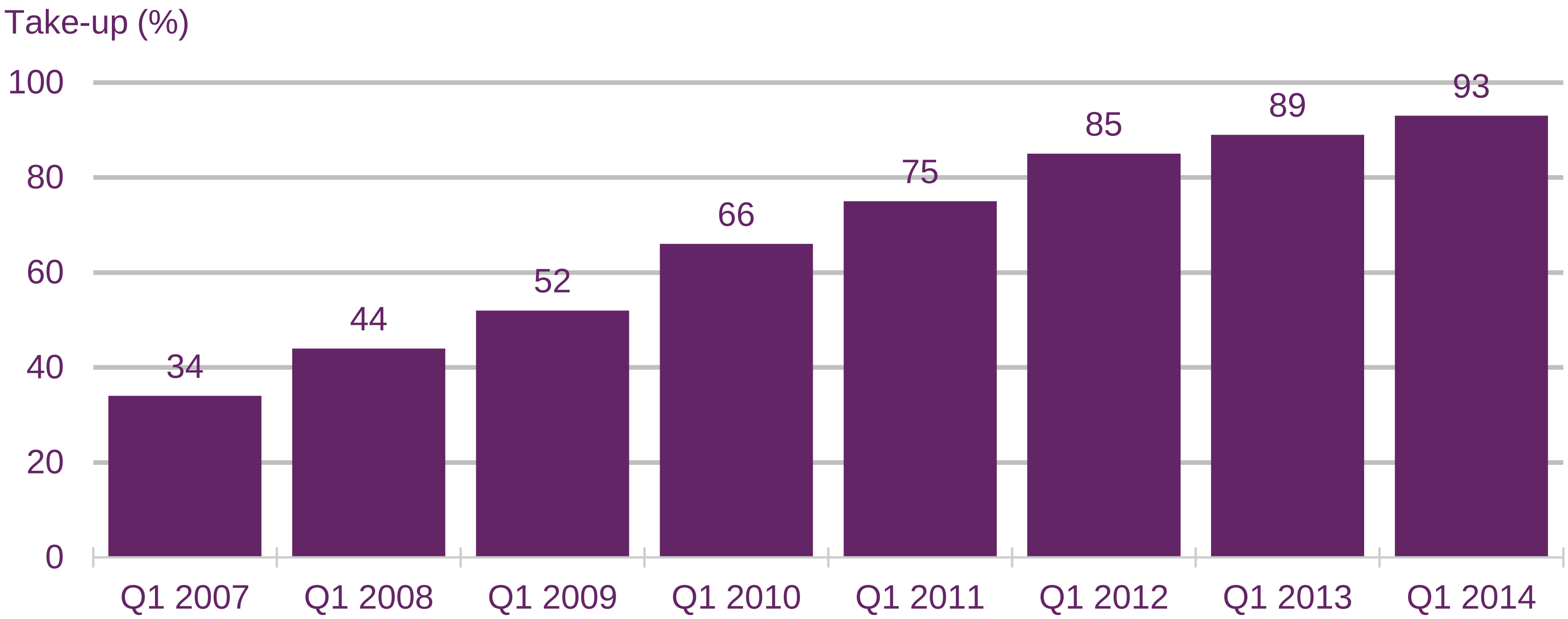
Household internet access: 2005 to 2014



Source: Ofcom technology tracker, Q1 2014. Base: All adults aged 16+ (n=3740). Note 1: "Internet on mobile" is the % of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, Email, Internet access, downloading video, video streaming, visiting social networking sites. Note 2: From,Q1 2009 the 'Internet' figure includes those who access the internet on mobile phones. 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)? / QE9: Which of these methods does your household use to connect to the Internet at home?

Figure 4.18

Wireless routers : 2007 to 2014

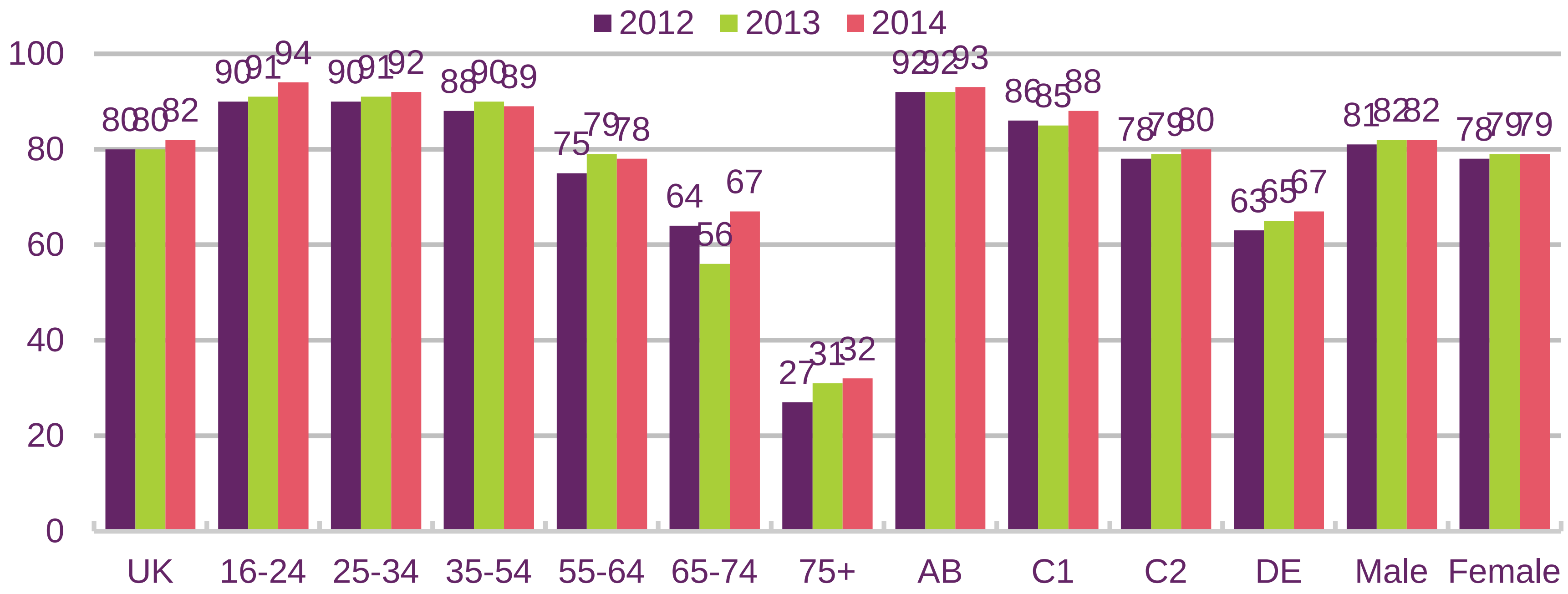


Source: Ofcom research, Quarter 1 2014
Base: Wireless router take-up - adults aged 16+ with a broadband connection at home. From 2009 this is based on fixed broadband connections only.

Figure 4.19

Home internet access: by age, socio-economic group and gender: 2014

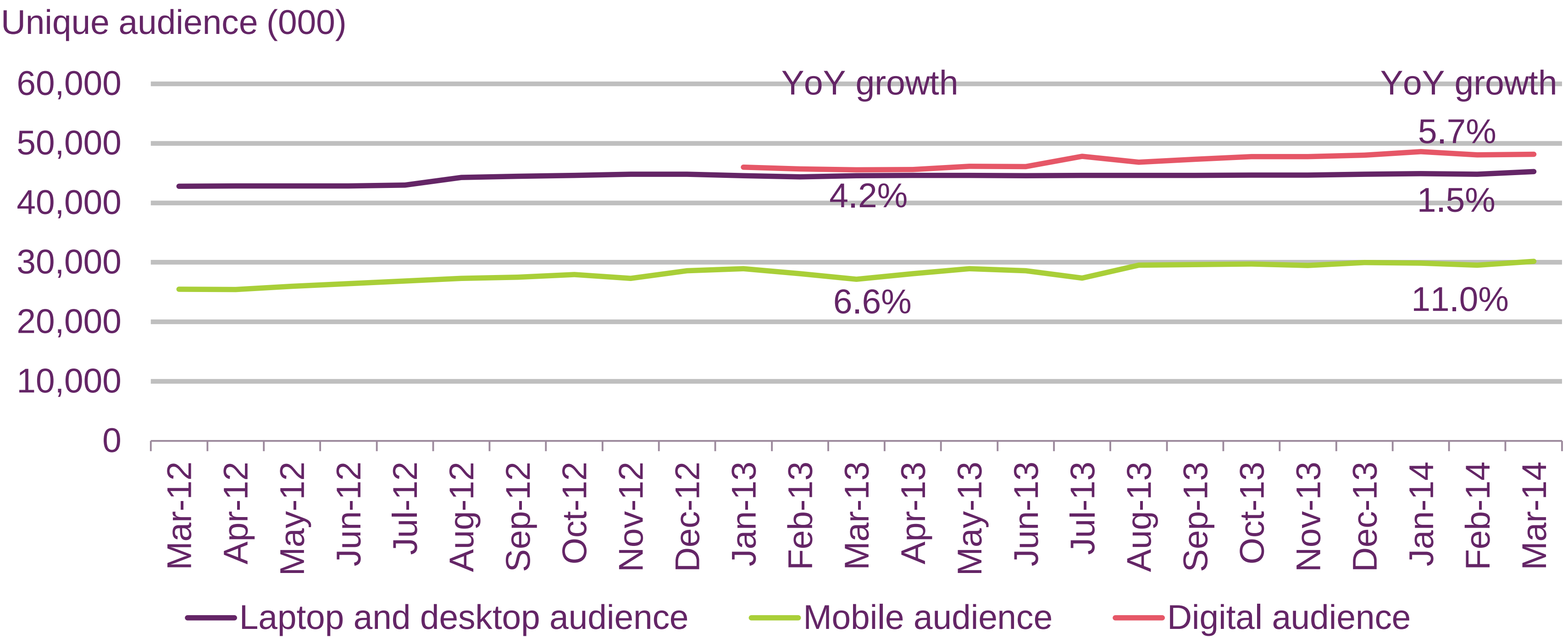
Proportion of adults (%)



Source: Ofcom research, data as at Q1 2014.
Base: All adults aged 16+
QE2: Do you or does anyone in your household have access to the internet/ worldwide web at home?

Figure 4.20

Active audience on laptop, desktop, and mobile devices

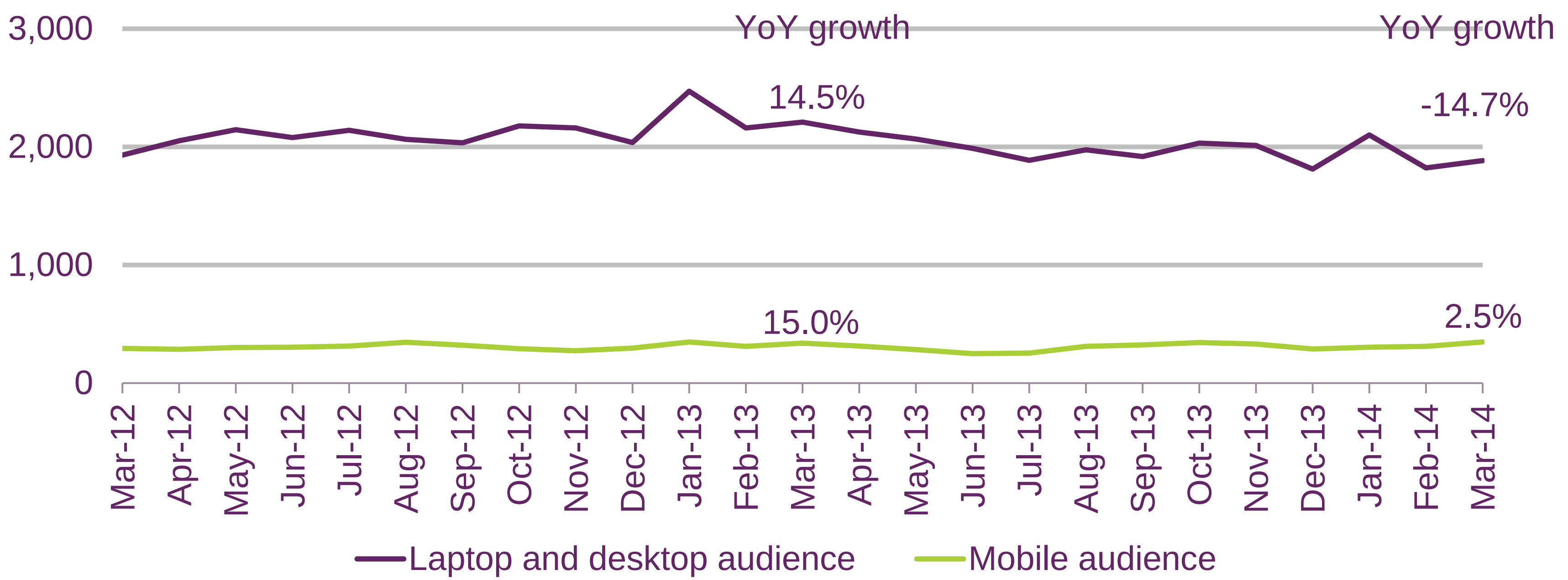


Source: comScore MMX,UK, home and work panel, March 2012 to March 2014; comScore MMX Multi-Platform, UK, home and work panel, January 2013 to March 2014; comScore GSMA MMM, UK, March 2012 to March 2014.
Note: Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report tablet usage data.

Figure 4.21

Average time spent page browsing per internet user (across laptop, desktop and mobile)

Minutes spent browsing

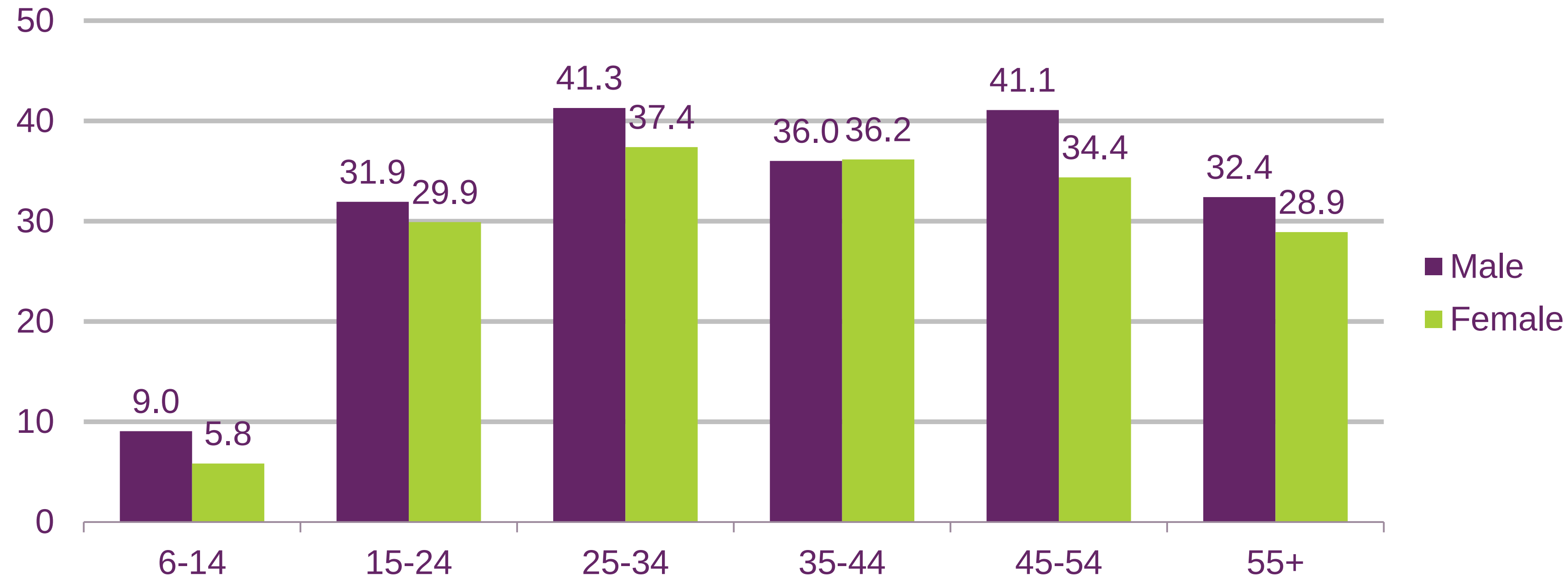


Source: comScore MMX, UK, home and work panel, March 2012 to March 2014; comScore GSMA MMM, UK, March 2012 to March 2014.
Note: Time spent online excludes time spent accessing other media such as audio or video content, and on mobile excludes time spent using mobile apps.

Figure 4.22

Average time online on a laptop/desktop, by age and gender: March 2014

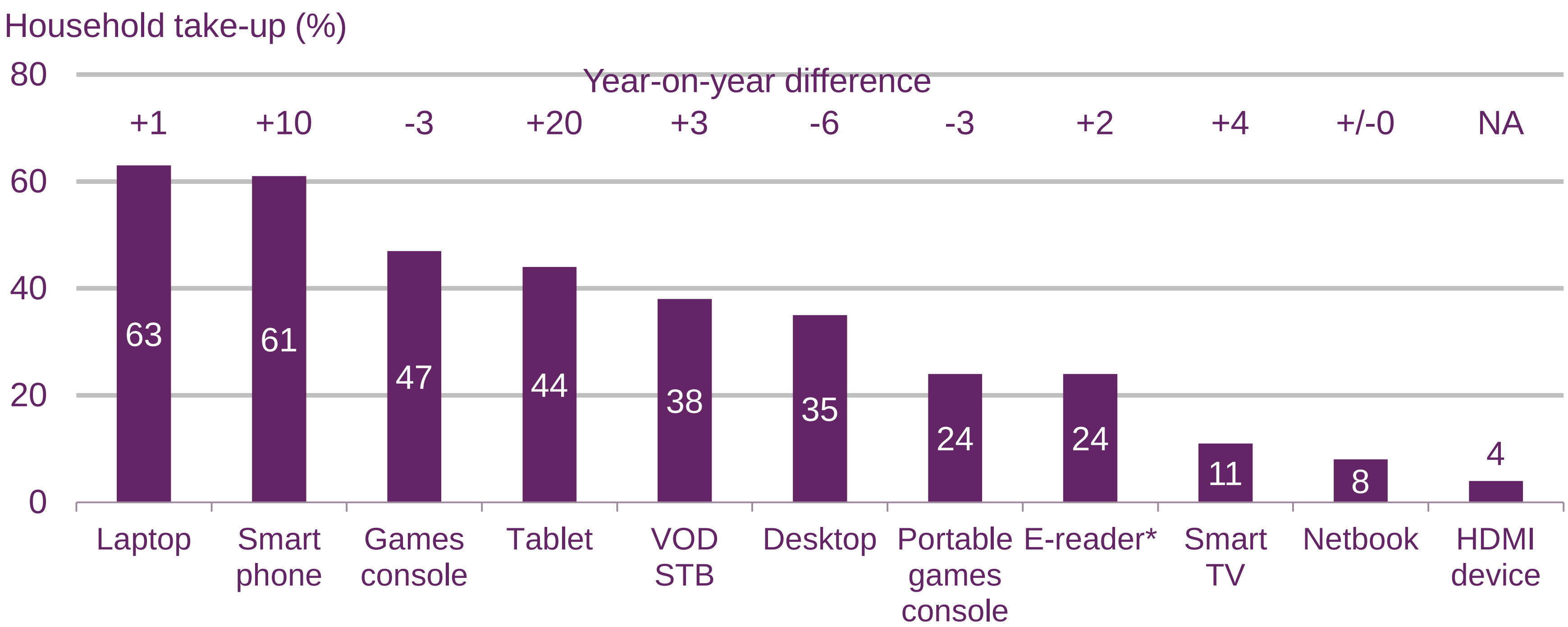
Average monthly hours online per internet user



Source: comScore MMX, home and work panel, March 2014
Note: Time spent online is a measure of time spent browsing web pages on laptop and desktop computers only. It excludes time spent accessing other media such as audio or video content.

Figure 4.23

Ownership of internet-enabled devices

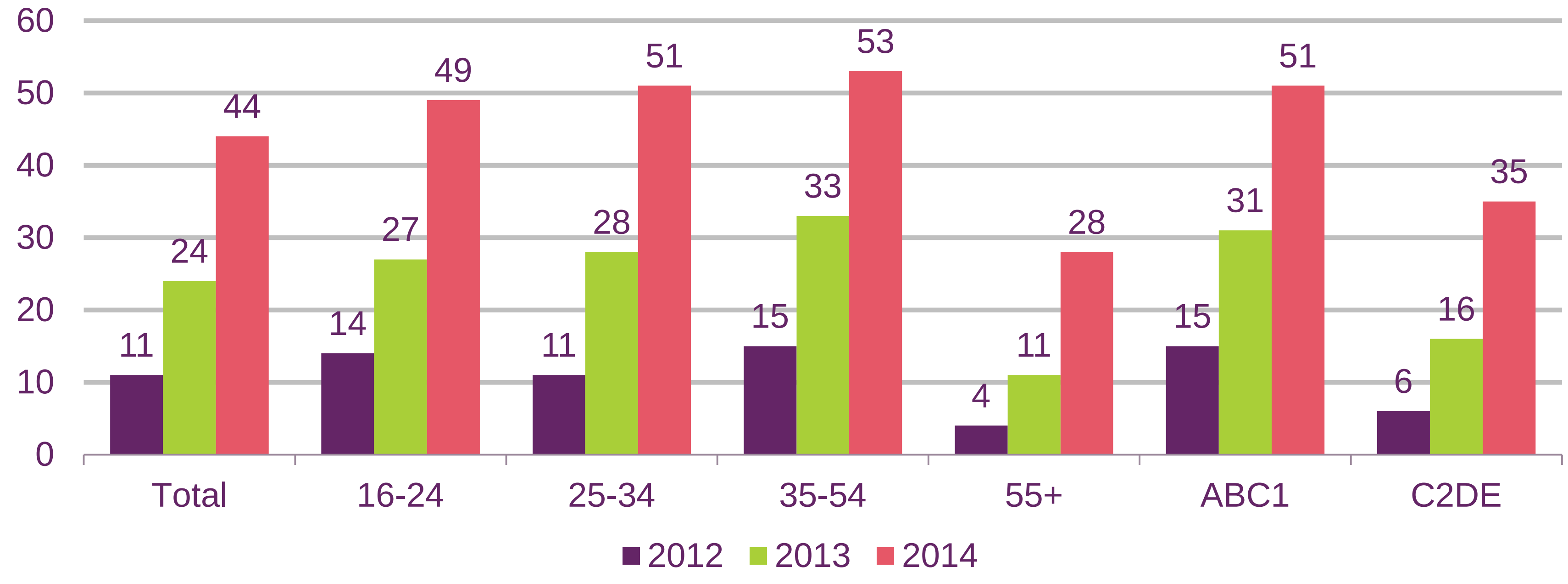


Source: Ofcom research, Q1 2014; Base: Adults aged 16+ n = 3740
Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), VOD STB (all Virgin TV customers, Sky+ HD, BT TV, TalkTalk TV and YouView), e-reader, tablet, netbook, smart TV, and HDMI device (Roku, Chromecast, Now TV). *E-reader take-up stated here is per household while elsewhere in the report we state figures by individual take-up.

Figure 4.24

Tablet computer ownership, by age and socio-economic group: 2012 to 2014

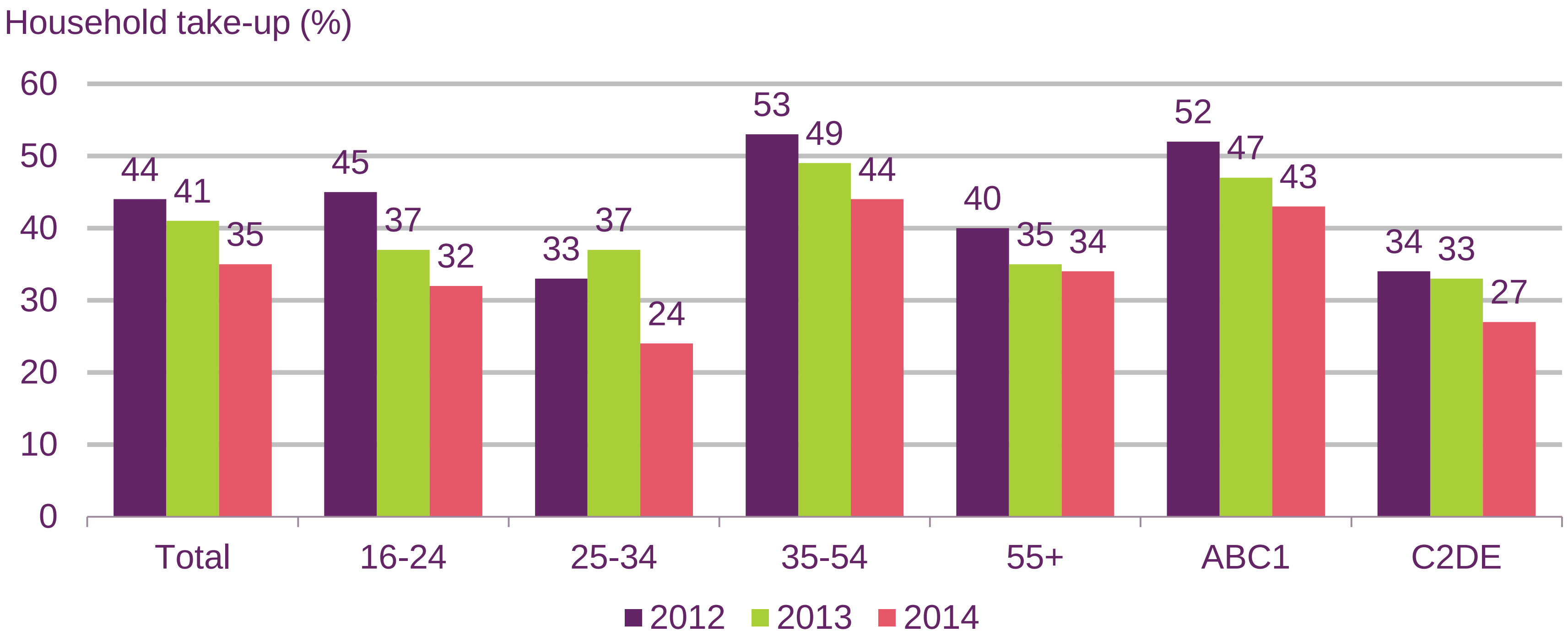
Household take-up (%)



Source: Ofcom research, Q1 2012, Q1 2013, Q1 2014
Q: Does your household have a PC, laptop, netbook or tablet computer?
Base: All respondents, 2012=3772, 2013=3750, 2014=3740

Figure 4.25

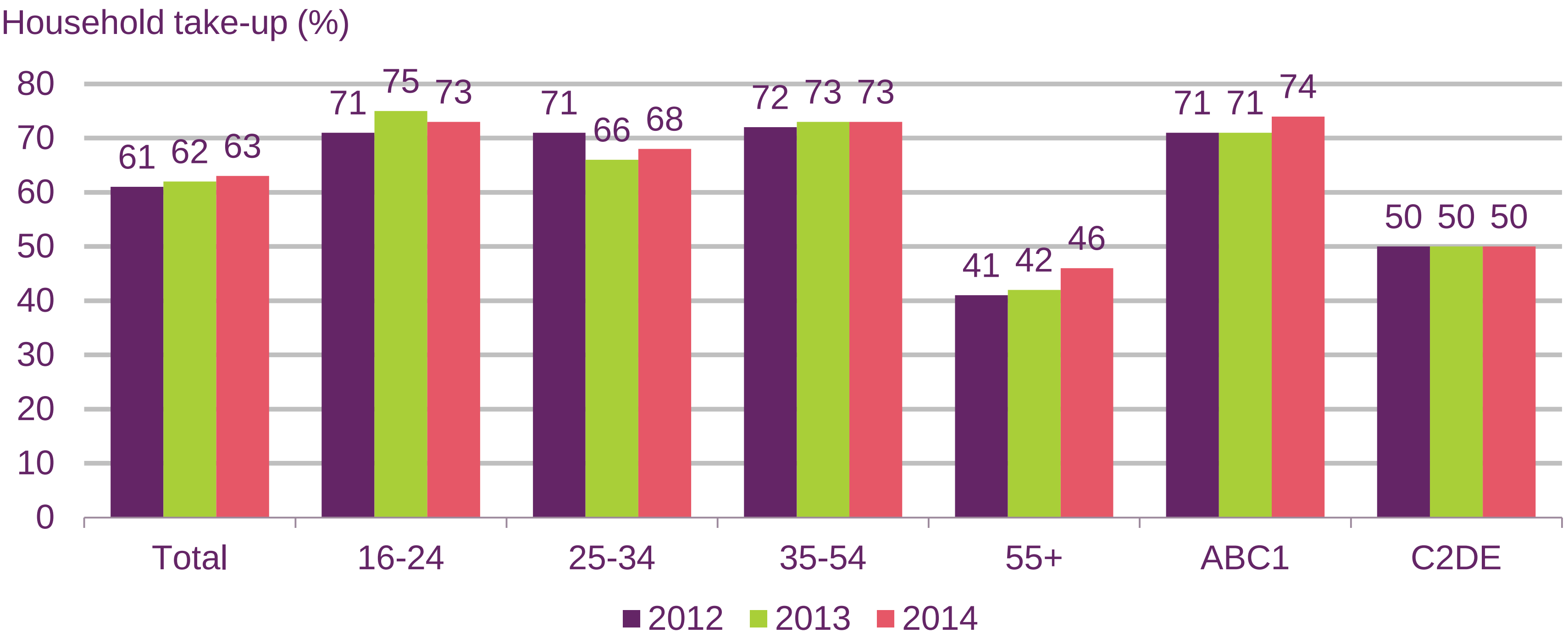
PC ownership, by age and socio-economic group: 2012 to 2014



Source: Ofcom research, Q1 2012, Q1 2013, Q1 2014
Q: Does your household have a PC, laptop, netbook or tablet computer?
Base: All respondents, 2012=3772, 2013=3750, 2014=3740

Figure 4.26

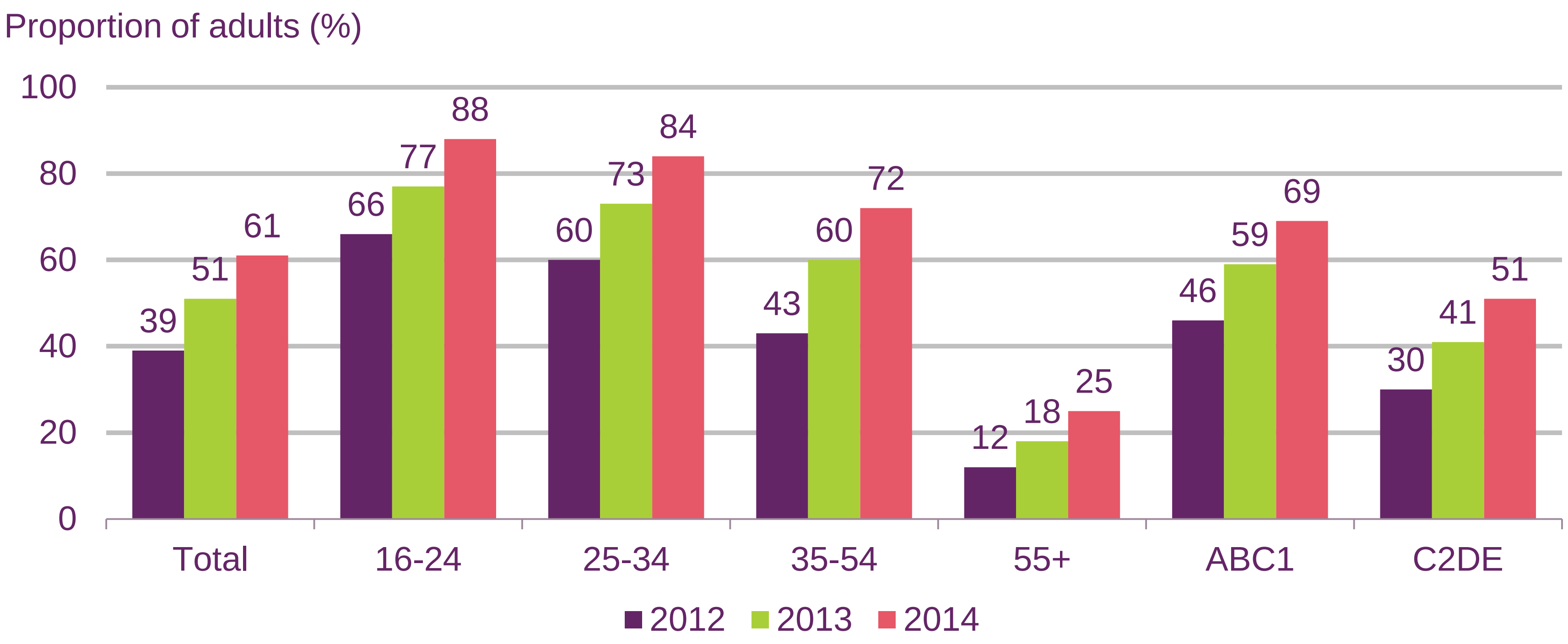
Laptop ownership, by age and socio-economic group: 2012 to 2014



Source: Ofcom research, Q1 2012, Q1 2013, Q1 2014
Q: Does your household have a PC, laptop, netbook or tablet computer?
Base: All respondents, 2012=3772, 2013=3750, 2014=3740

Figure 4.27

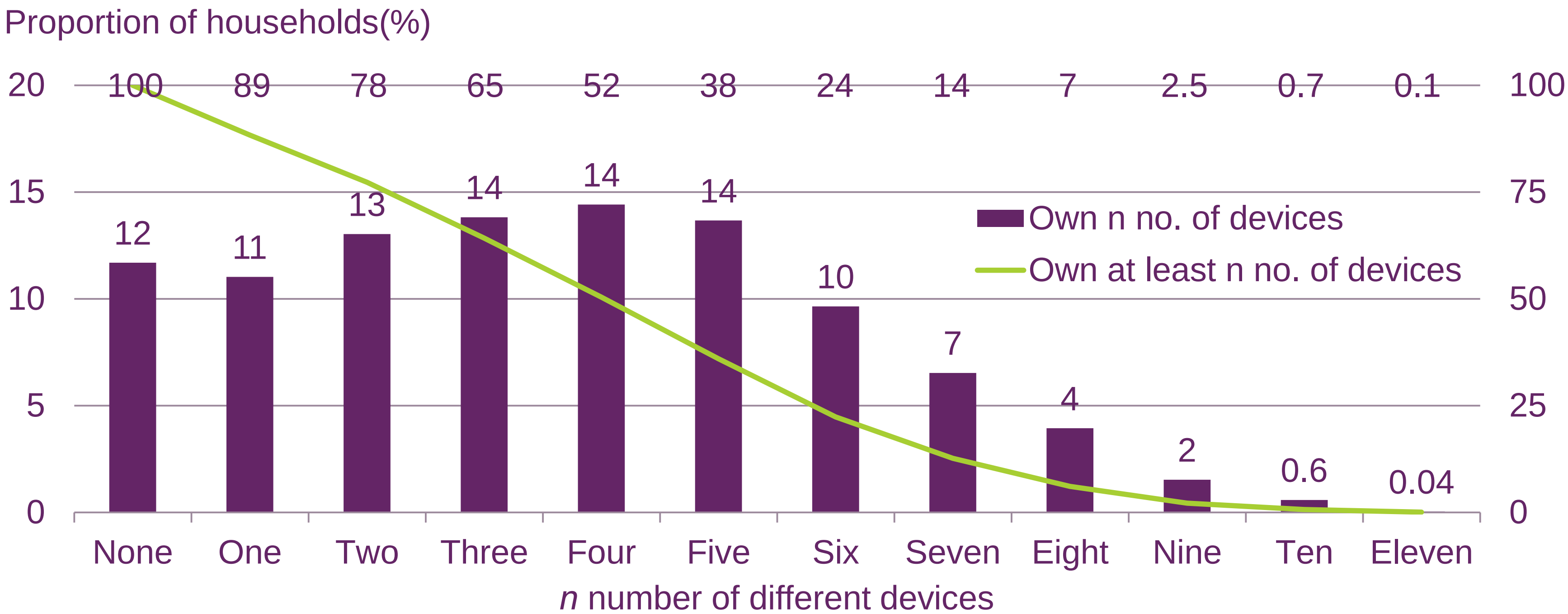
Smartphone ownership, by age and socio-economic group: 2012 to 2014



Source: Ofcom research, Q1 2012, Q1 2013, Q1 2014
Q: Do you personally use a smartphone?
Base: All respondents, 2012=3772, 2013=3750, 2014=3740

Figure 4.28

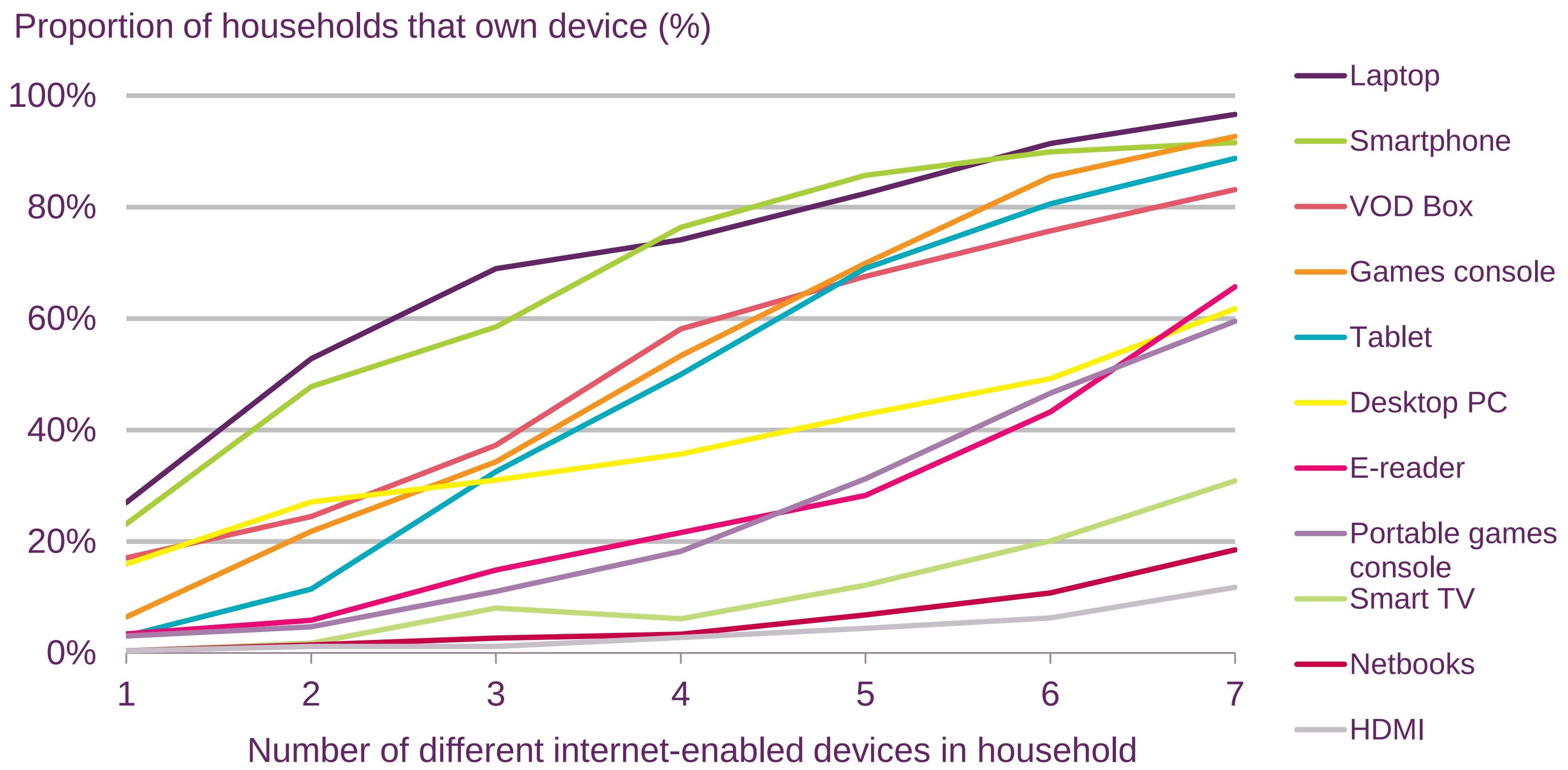
Number of different internet-enabled devices per household, Q1 2014



Source: Ofcom research, Quarter 1 2014, Base: Adults aged 16+ n = 2256
Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), VOD Box (all Virgin TV customers, Sky+ HD, BT Vision, TalkTalk TV and YouView), e-reader, tablet, netbook, smart TV and HDMI device.

Figure 4.29

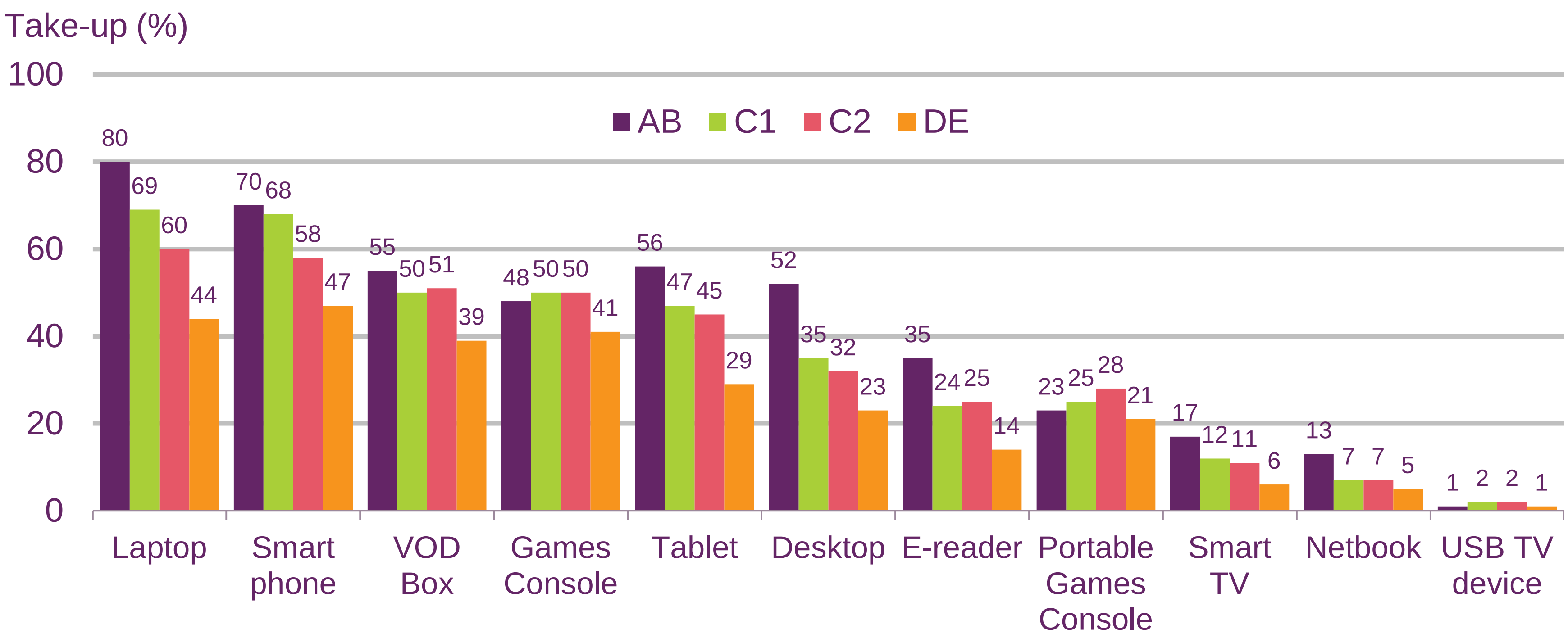
Device ownership, by number of different internet-enabled devices in the household



Source: Ofcom research, Quarter 1 2014; Base: Adults aged 16+ that own at least one IP enabled device n = 2242 (one device 280; two devices 331; three devices 351; four devices 366; five devices 347; six devices 245, seven devices 166.)Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), VOD Box (all Virgin pay-TV customers, Sky customers with a Sky+ HD STB, BT Vision customers, TalkTalk TV customers and YouView owners), e-reader, tablet, netbook, smart TV and HDMI devices (such as Chromecast).

Figure 4.30

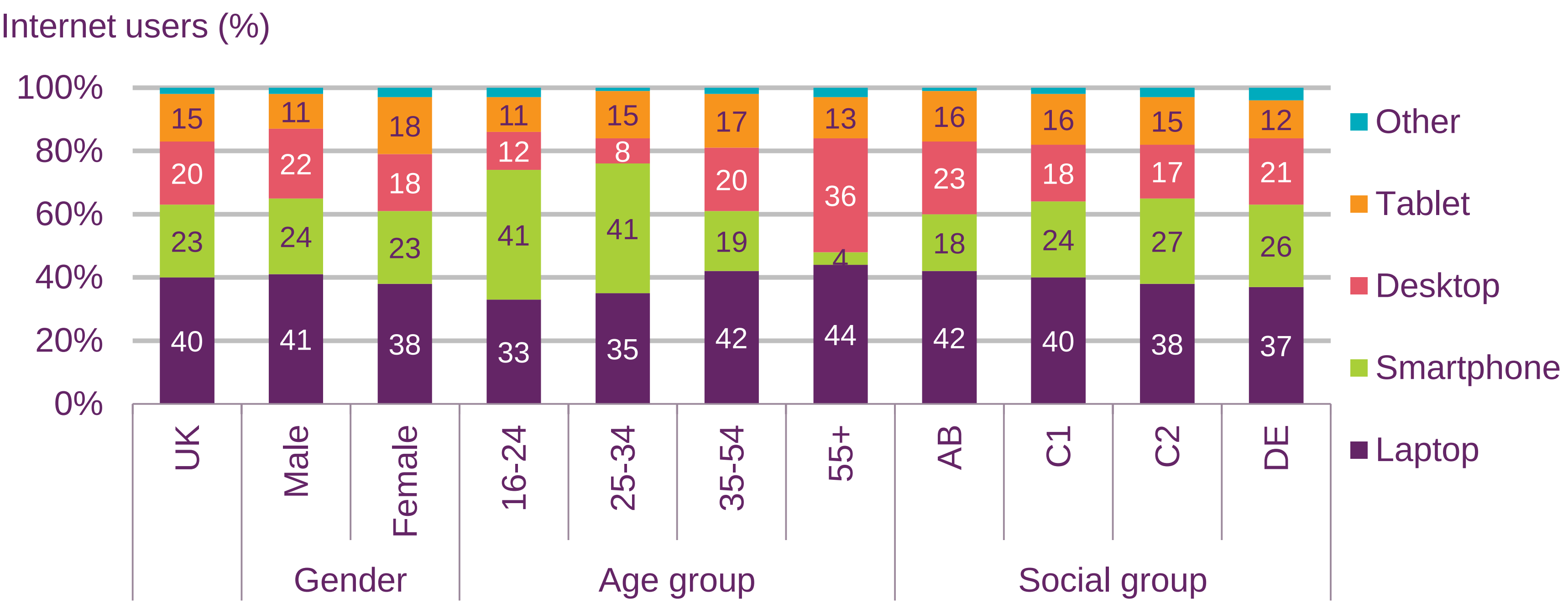
Take-up among each social group of internet-enabled devices



Source: Ofcom research, Quarter 1 2014
Base: Adults aged 16+, AB n = 777, C1 n = 1115, C2 n = 800, DE n = 1042

Figure 4.31

Most important device for internet access

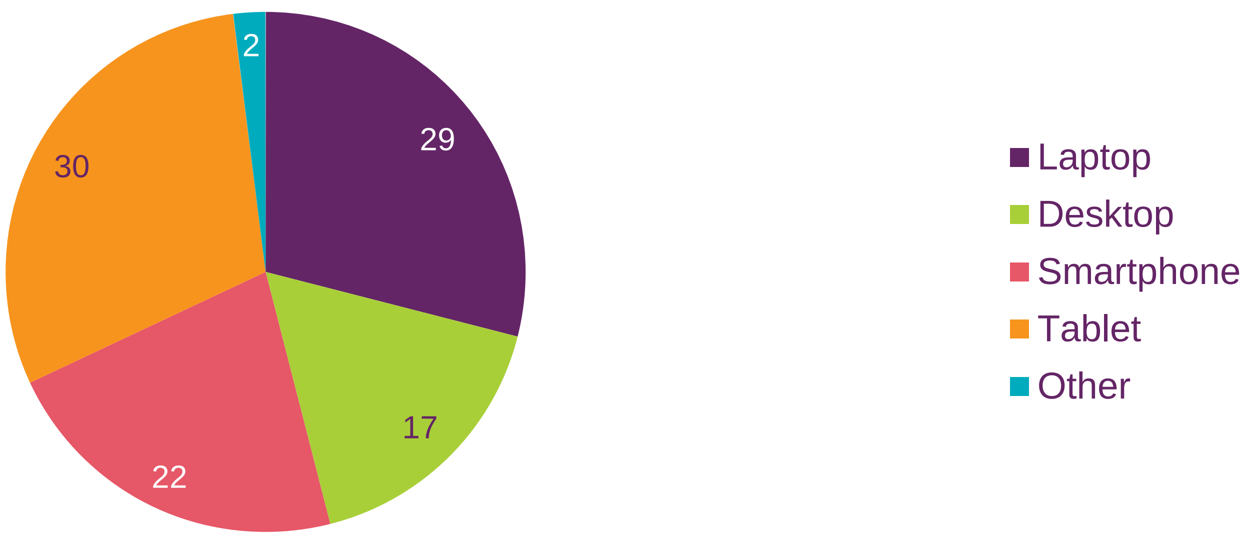


Source: Ofcom research, Q1 2014
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2976 UK). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “Netbook”, “Games console”, “Other device”, “None” and “don’t know”.

Figure 4.32

Most important device for internet access by device ownership

Device owners (%)



Source: Ofcom research, Q1 2014
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2976 UK) and have a desktop and laptop in the household, and who personally use a smartphone and tablet. Question: Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “Netbook”, “Games console”, “Other device”, “None” and “don’t know”.

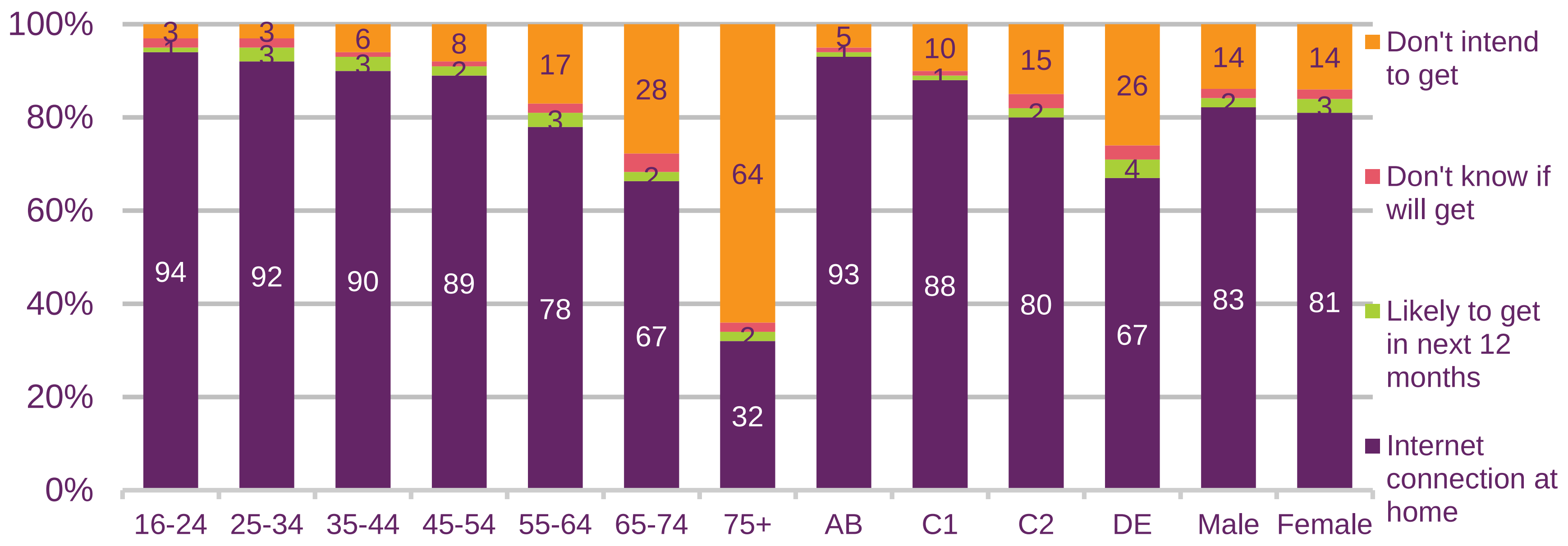
Figure 4.33

Internet take up and intentions: 2008 - 2014

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in January to February 2014
QE2/ QE24 – Do you or does anyone in your household have access to the internet / world wide web at home (via any device)?/ How likely are you to get internet access at home in the next 12 months?
Base: All adults aged 16+ (5812 aged 16+ in 2008, 6090 aged 16+ in 2009, 9013 aged 16+ in 2010, 3474 aged 16+ in 2011, 3772 aged 16+ in 2012, 3750 aged 16+ in 2013, 3740 aged 16+ in 2014).

Figure 4.34

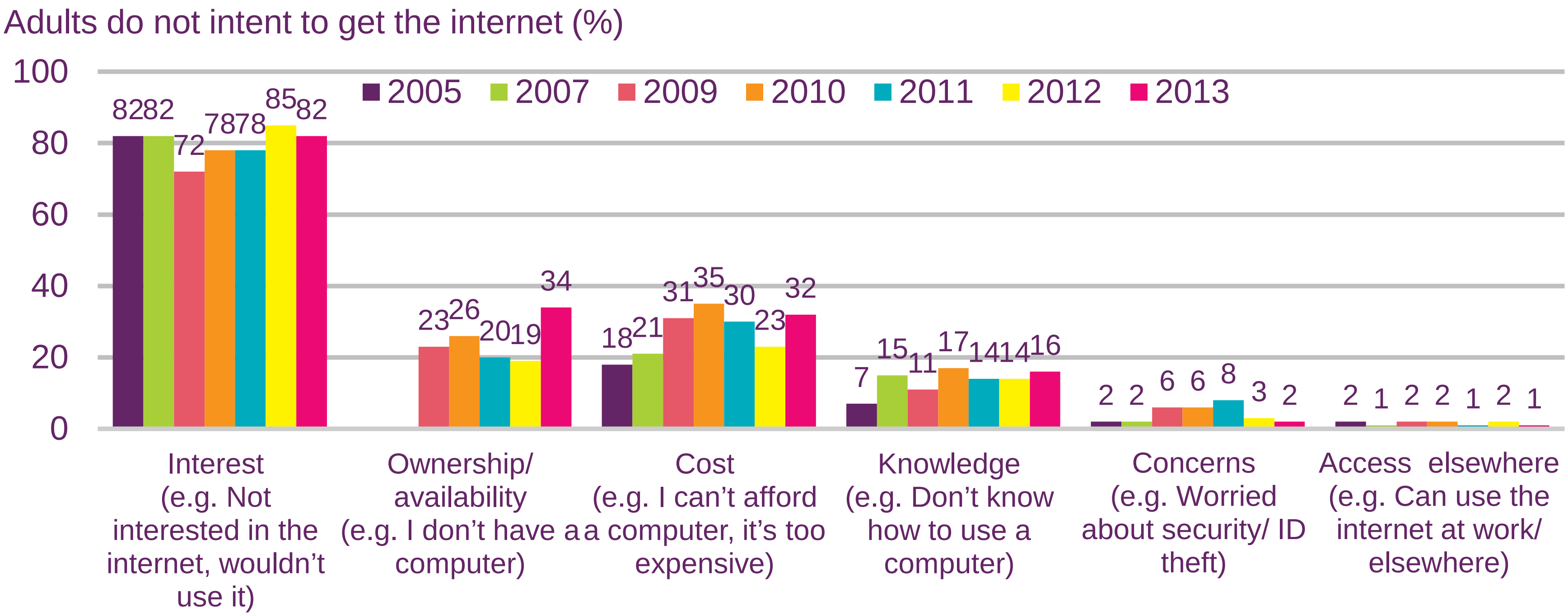
Internet take-up and intentions, by demographic group



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in January to February 2014
QE2/ QE24 – Do you or does anyone in your household have access to the internet / world wide web at home (via any device)?/ How likely are you to get internet access at home in the next 12 months?
Base: All adults aged 16+ (5812 aged 16+ in 2008, 6090 aged 16+ in 2009, 9013 aged 16+ in 2010, 3474 aged 16+ in 2011, 3772 aged 16+ in 2012, 3750 aged 16+ in 2013, 3740 aged 16+ in 2014).

Figure 4.35

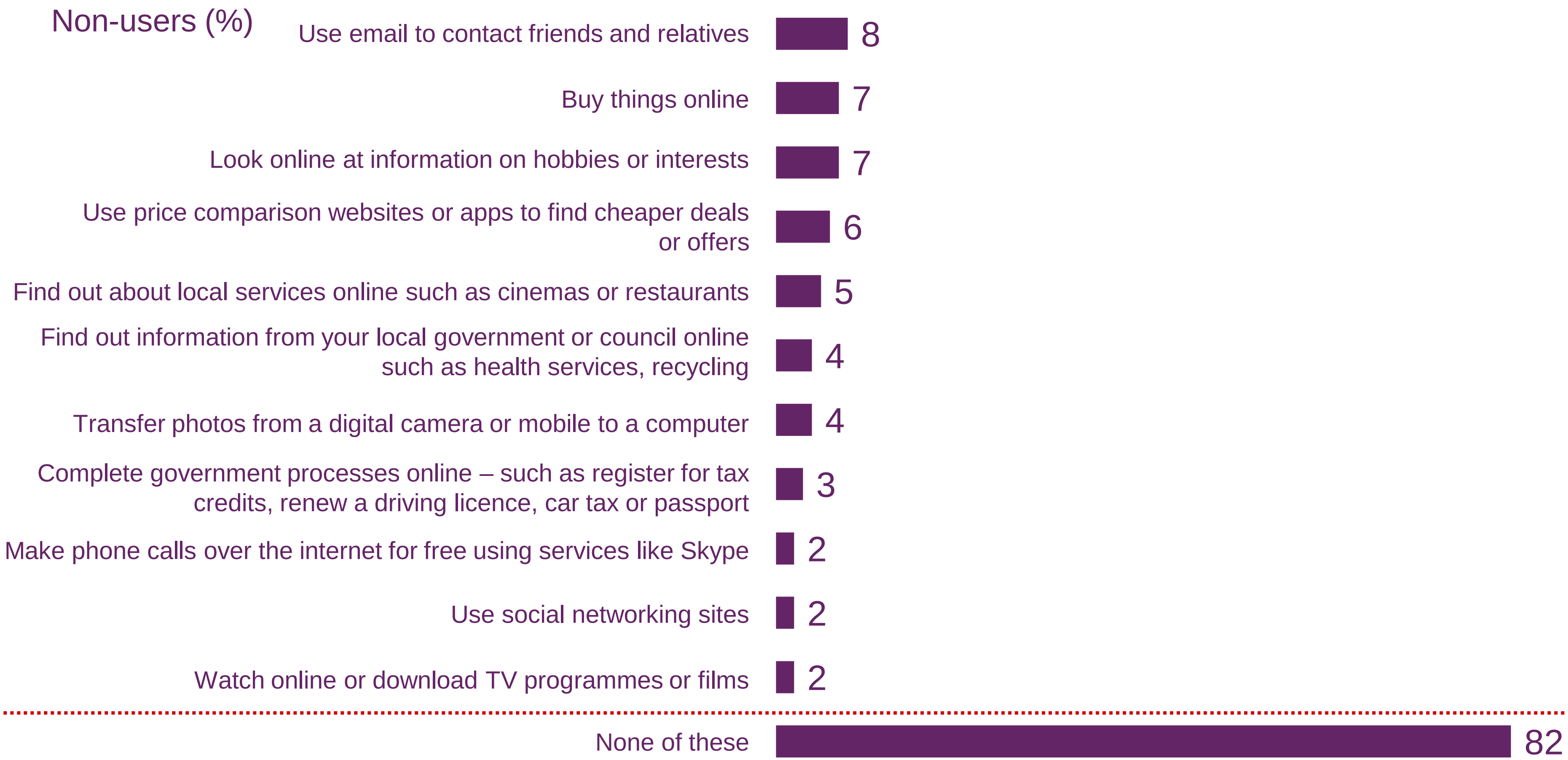
Stated reasons for not intending to get home internet access in the next 12 months: 2005, 2007, 2009, 2010, 2011, 2012 and 2013



IN13 – Can you tell me what your reasons are for not getting internet access at home? (Unprompted responses, multi-coded)
Base: All adults aged 16+ who do not intend to get internet access at home (930 in 2005, 743 in 2007, 410 in 2009, 478 in 2010, 328 in 2011, 305 in 2012, 267 in 2013). Percentages may add to more than 100% as respondents can nominate more than one reason.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 4.36

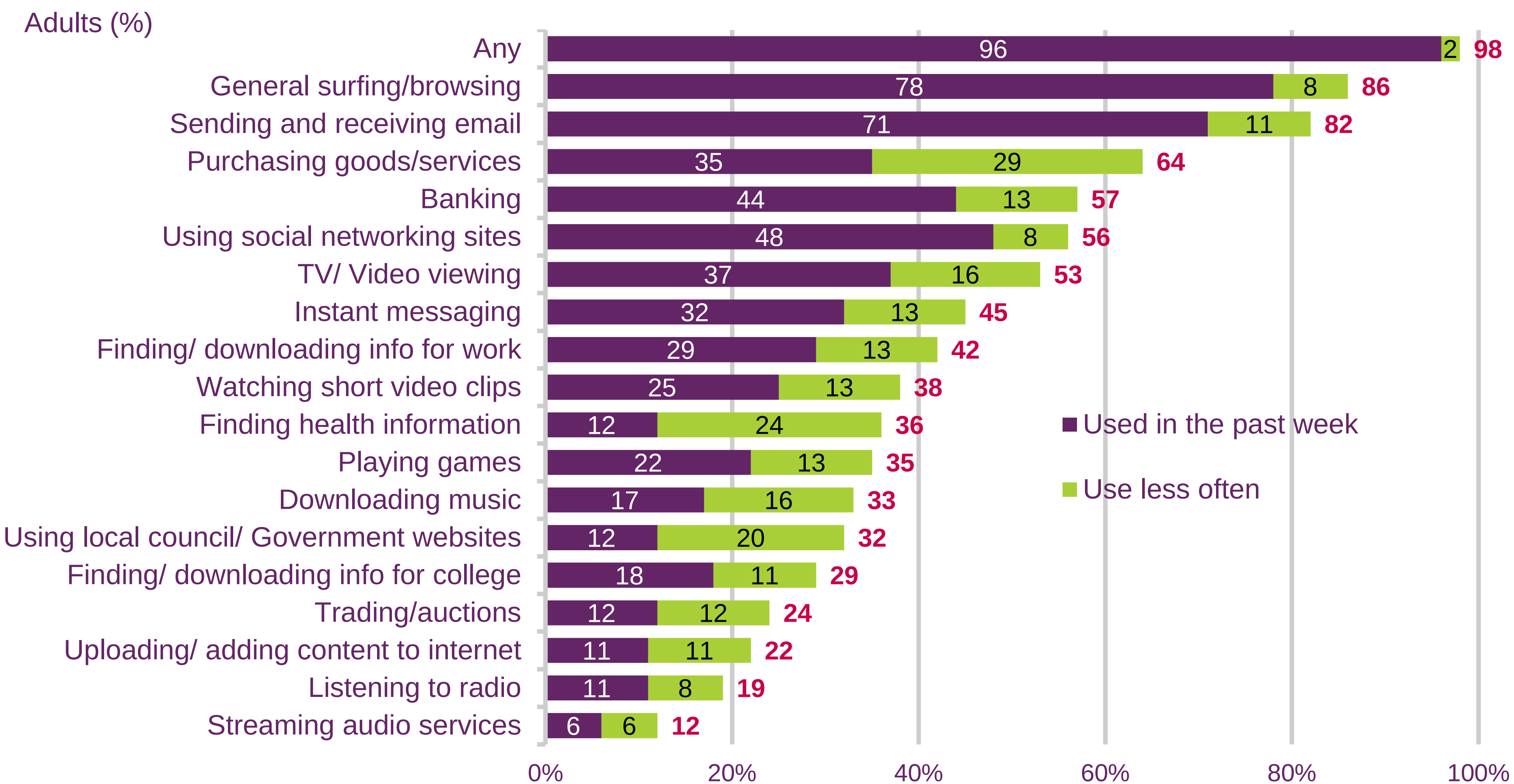
Interest in internet activities among non-users: 2013



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013
IN10 I'm going to read out some different types of things you can do online and for each one I'd like you to say if this is something that you are interested in (prompted responses, multi-coded)
Base: Those who do not go online at home (on any device) and do not use elsewhere (370)

Figure 4.37

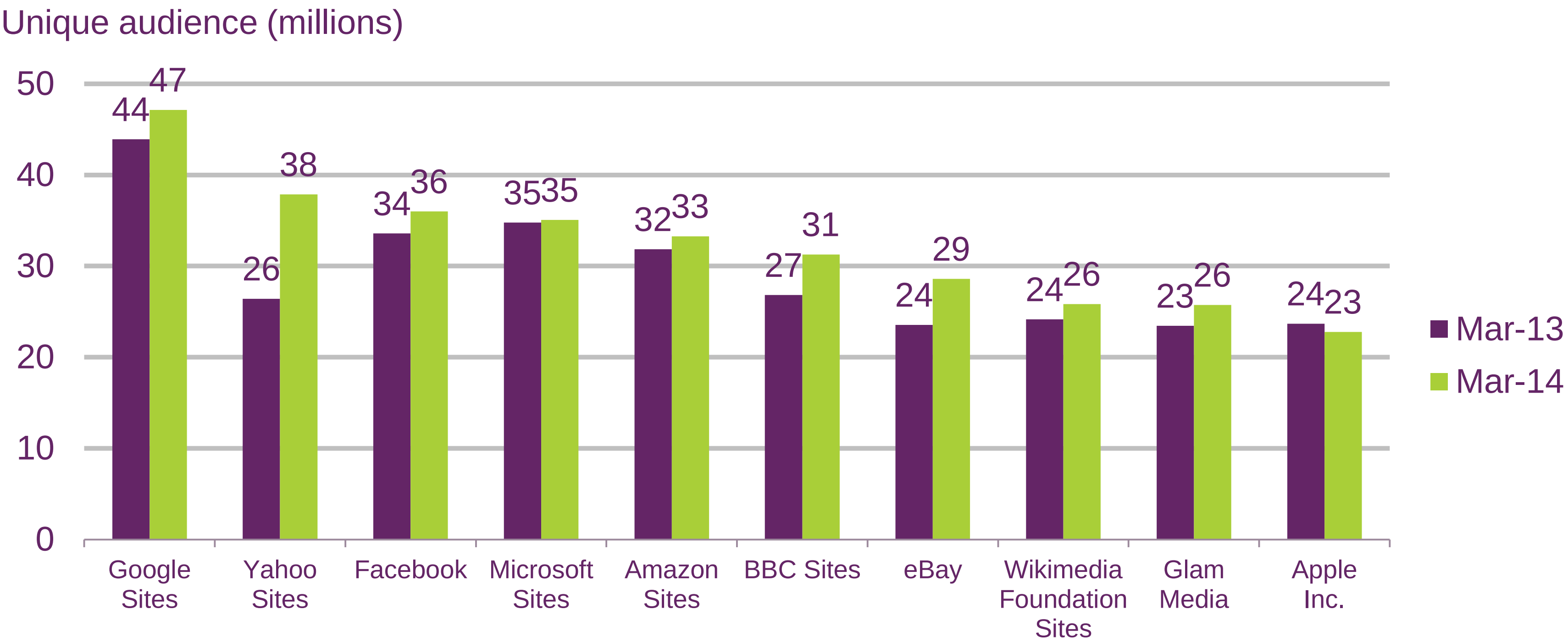
Claimed use of the internet for selected activities



QE5. Which, if any, of these do you use the internet for?
Source: Ofcom research, Quarter 1 2014
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2976 UK)

Figure 4.38

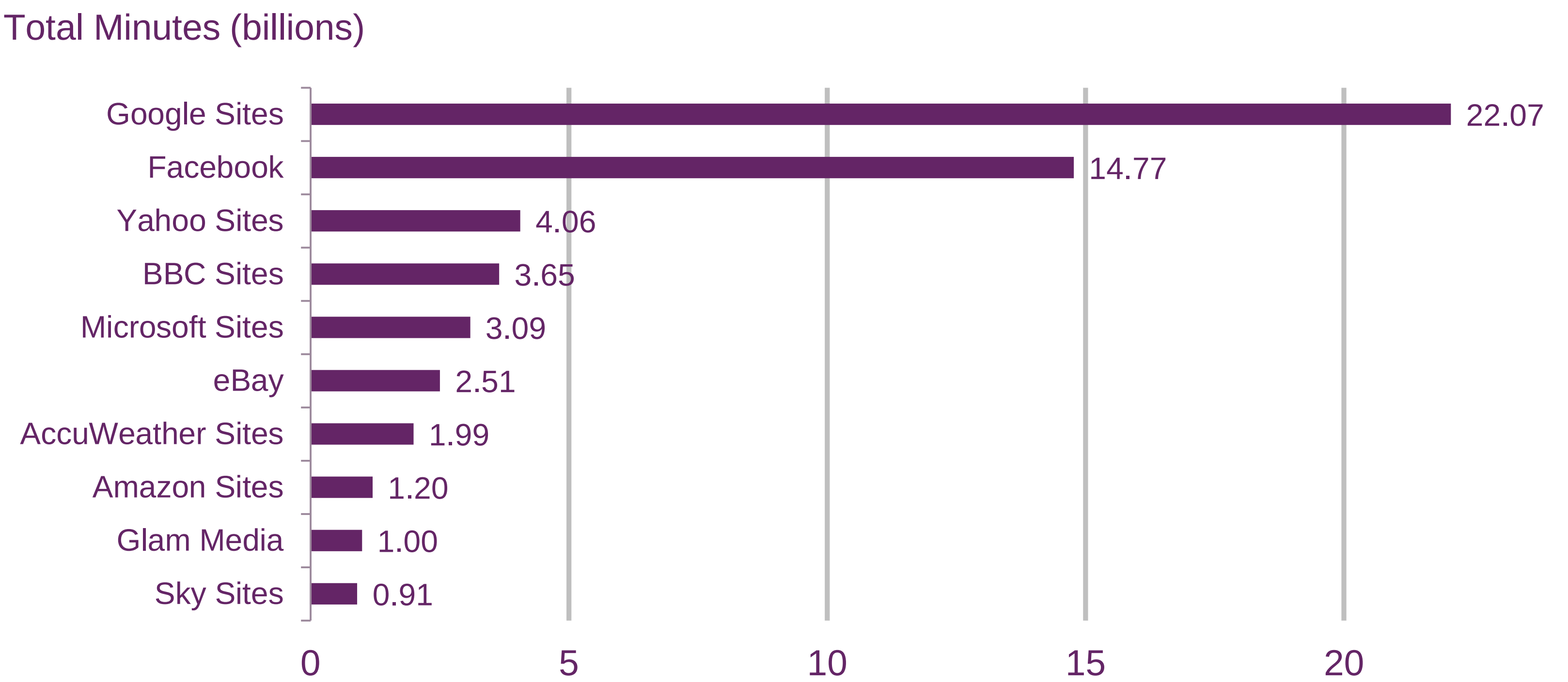
Top ten most popular internet properties among the digital audience: March 2013 and March 2014



Source: comScore MMX Multi-Platform, UK, March 2013 and March 2014
All sites listed are at the property level [P]. Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network and WiFi mobile browsing and app use.
Note: Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report tablet usage data.

Figure 4.39

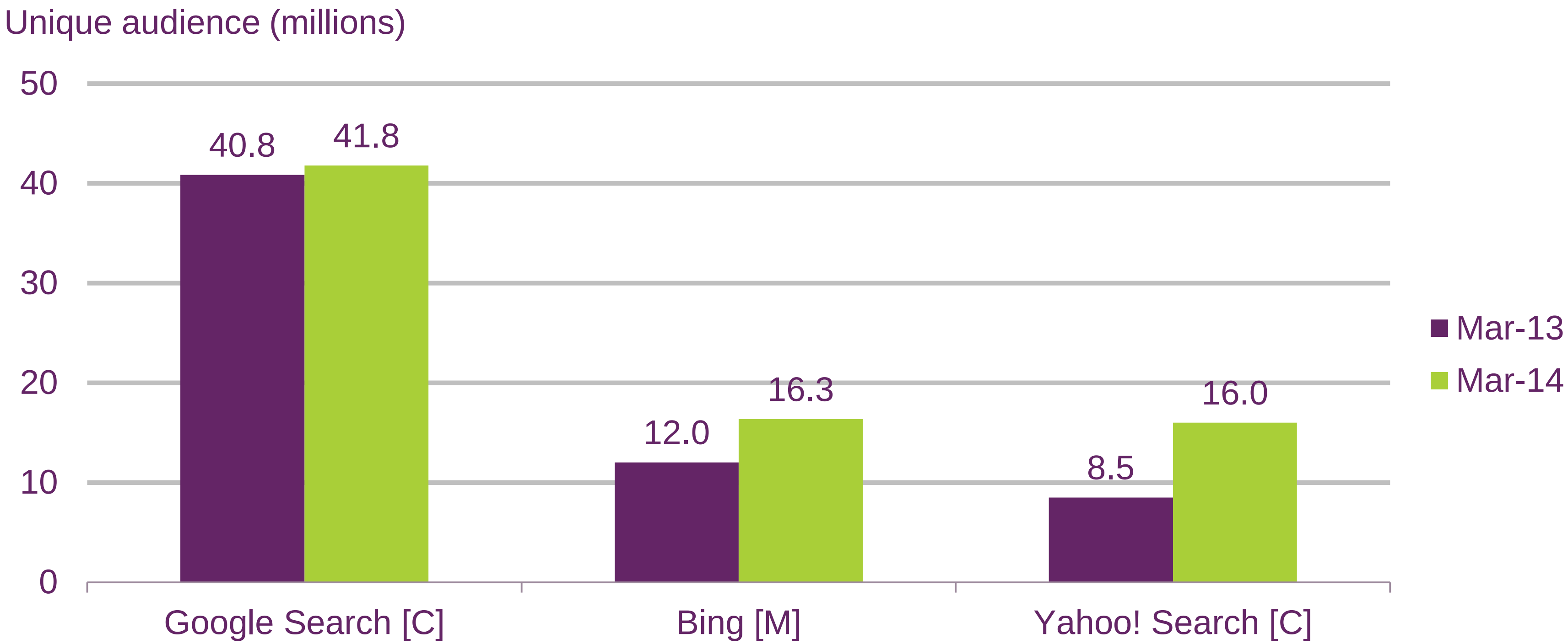
Top ten internet properties among the digital audience, by time spent



Source: comScore MMX Multi-Platform, UK, March 2014
Note: All sites listed are at the property level. Time spent online is a measure of time spent laptop/desktop webpage browsing and on-network and WiFi mobile browsing and application data. It excludes time spent accessing audio content.
Note: Starting with July 2013 data, comScore added Tablet data to the Mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report Tablet usage data.

Figure 4.40

Digital audience of search websites: March 2013 and March 2014

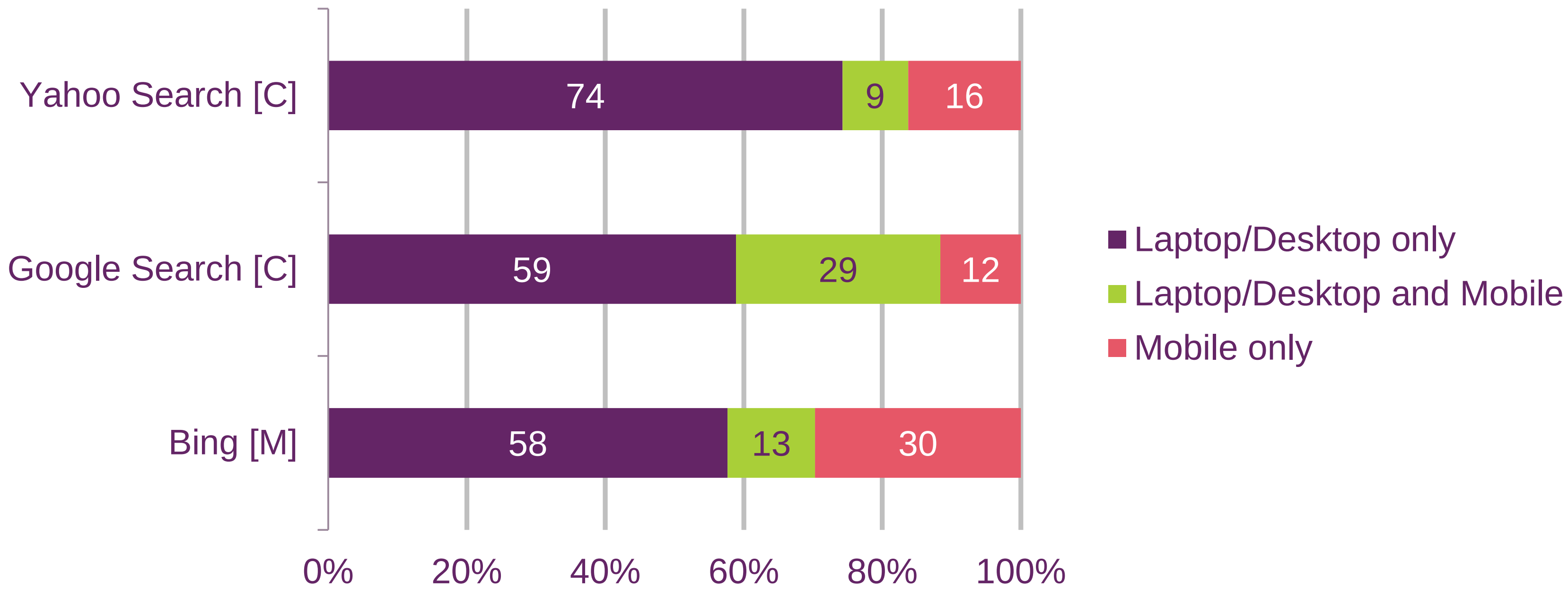


Source: comScore MMX Multi-Platform, UK, March 2013 and March 2014
Note: Starting with July 2013 data, comScore added Tablet data to the Mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report Tablet usage data.

Figure 4.41

Overlap of search website audiences between platforms: March 2014

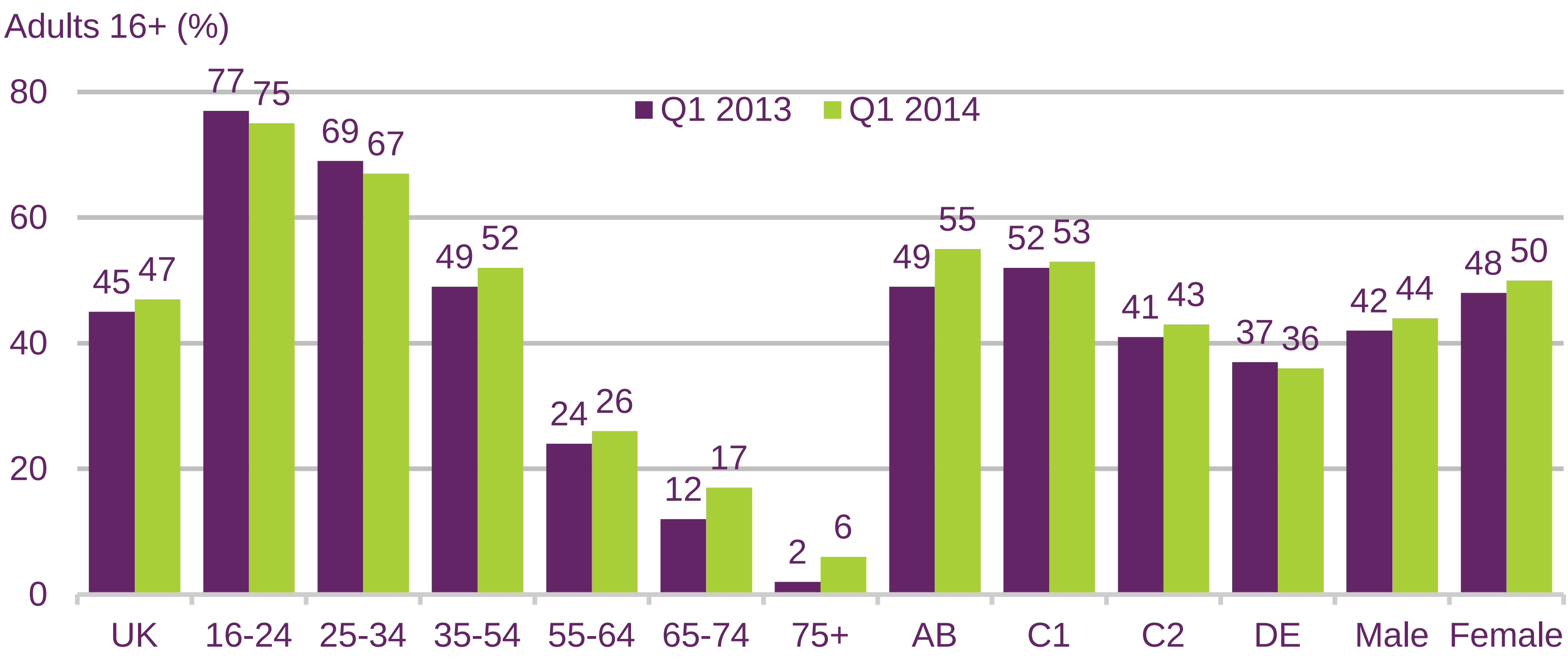
Share of audience (%)



Source: comScore MMX Multi-Platform, UK, March 2014
Note: The entities above have not been tagged as part of the census network report, and therefore to do not include tablet usage data.

Figure 4.42

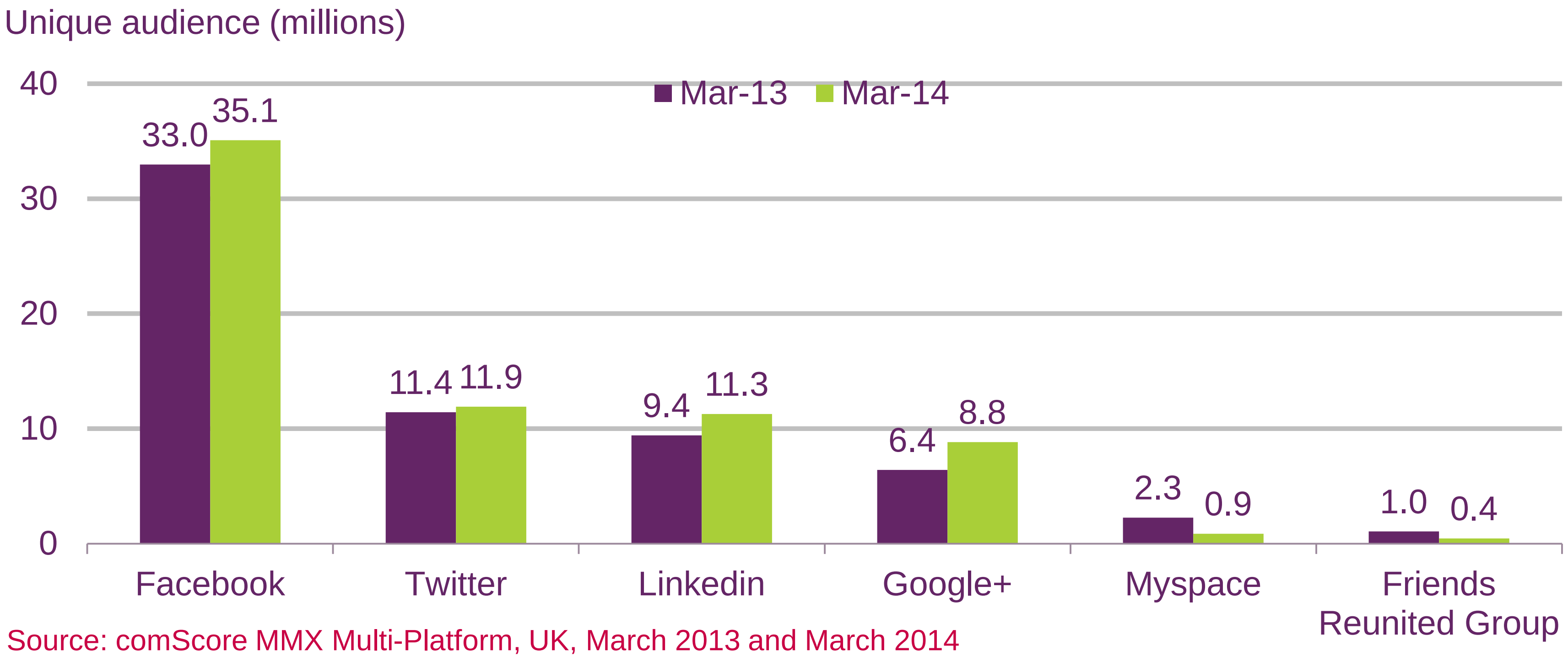
Proportion of adults who access social networking sites at home



Source: Ofcom Consumer Research Q1 2014
Base: All adults aged 16+ (n = 3740 Q1 2014, 3750 Q1 2013)
QE5. Which, if any, of these do you use the internet for?

Figure 4.43

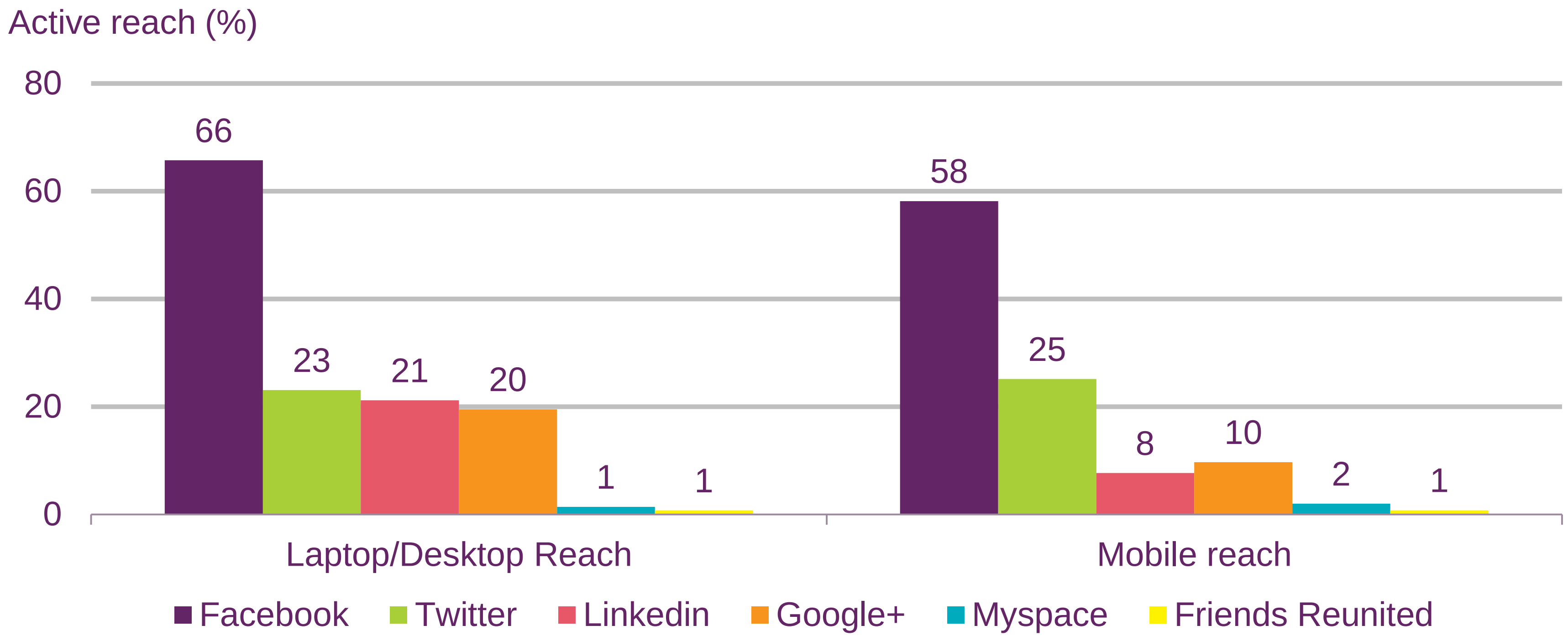
Digital audience of social networking websites: March 2013 and 2014



Source: comScore MMX Multi-Platform, UK, March 2013 and March 2014
Note: Entities cited from comScore MMX Multi-Platform: FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google Plus [E], MySpace [P], Friends Reunited Group [P] and includes laptop/desktop webpage browsing, laptop/desktop video streams, and on-network and WiFi mobile browsing. Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report tablet usage data.

Figure 4.44

Active reach of social networking websites across laptop/desktop and mobile audiences: March 2014

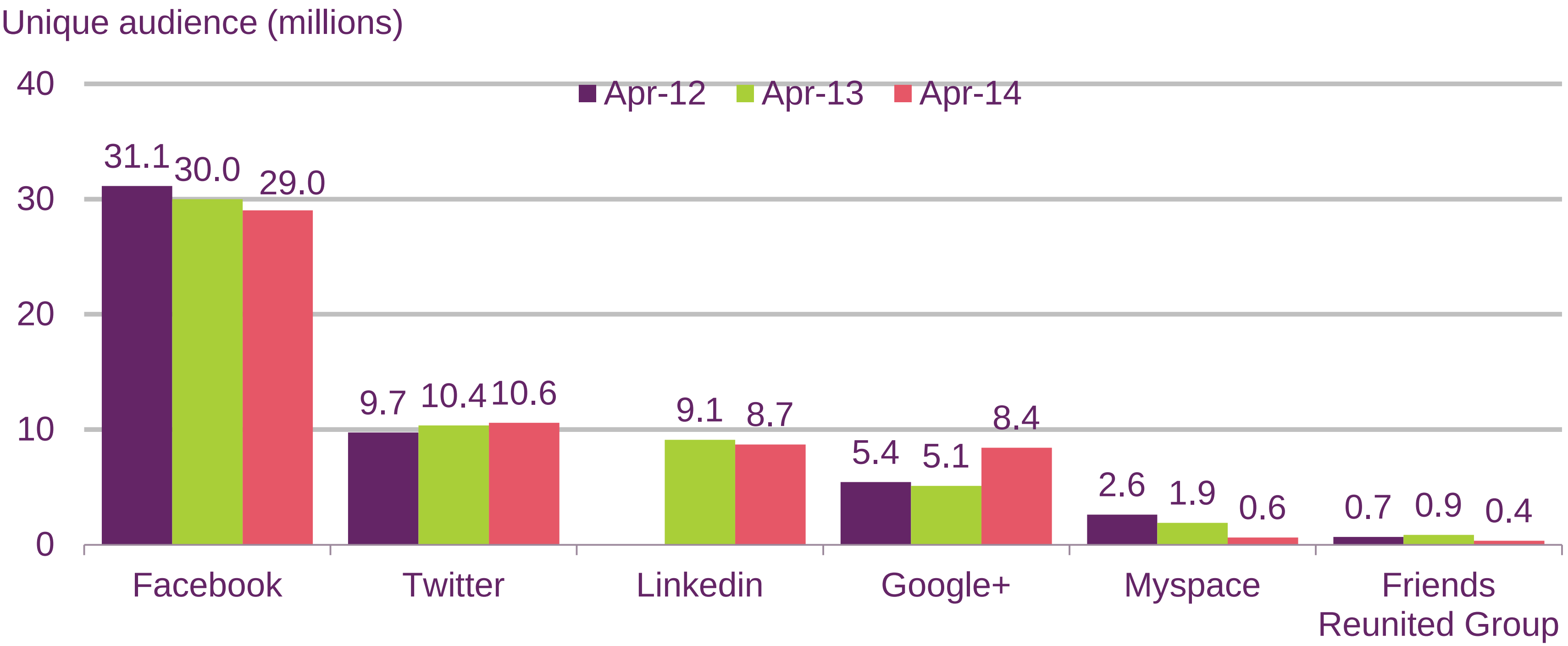


Source: comScore MMX Home and Work Panel, UK March 2014; comScore MobiLens, UK, March 2014, mobile internet users 13+

Note: Entities cited from comScore MMX MP: FACEBOOK.COM [M], TWITTER.COM [P], Linkedin [P], Google Plus [E], Myspace [P], Friends Reunited Group [P] and includes laptop/desktop browsing and laptop/desktop video streams.

Figure 4.45

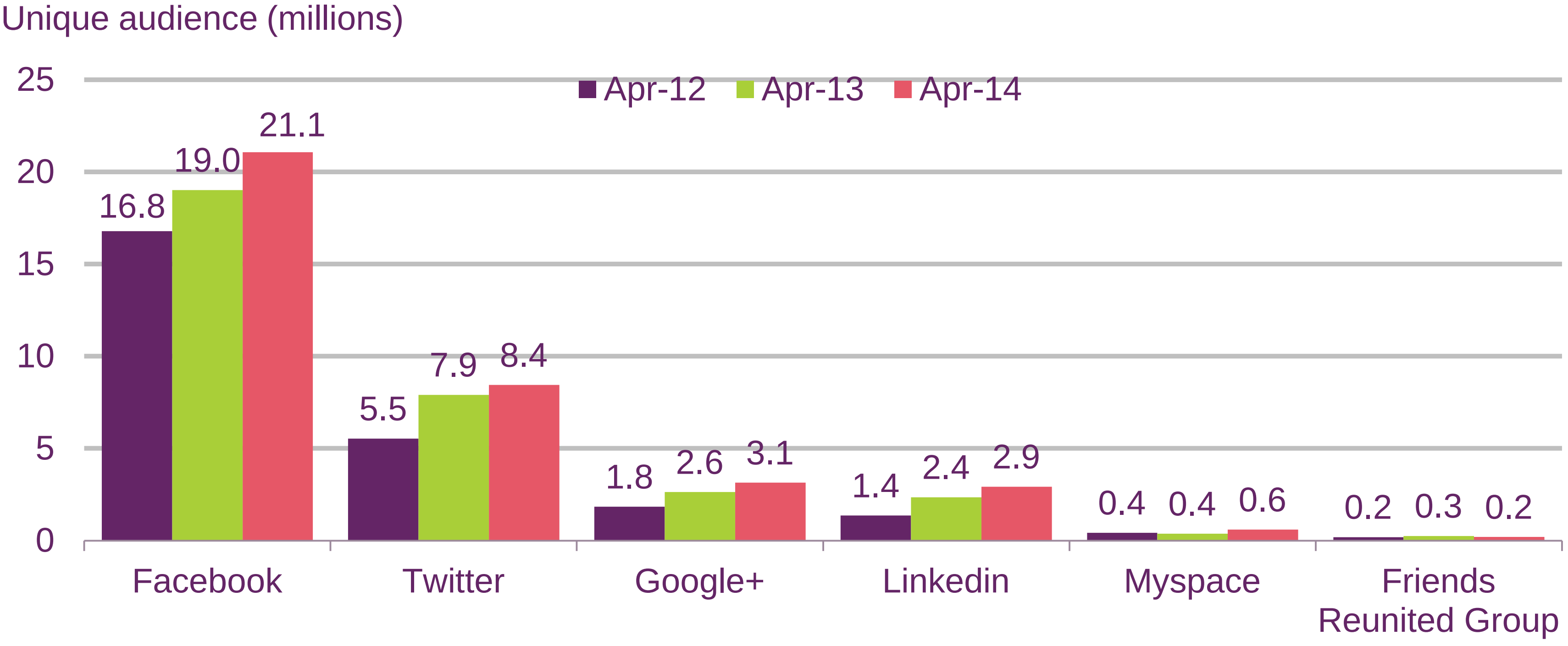
Unique audience of selected social networking websites on laptop/desktop computers: April 2012 to 2014



Source: comScore MMX, UK, home and work panel, April 2012 to April 2014
Note: Entities cited from comScore MMX: FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google Plus [E], MySpace [P], Friends Reunited Group [P]

Figure 4.46

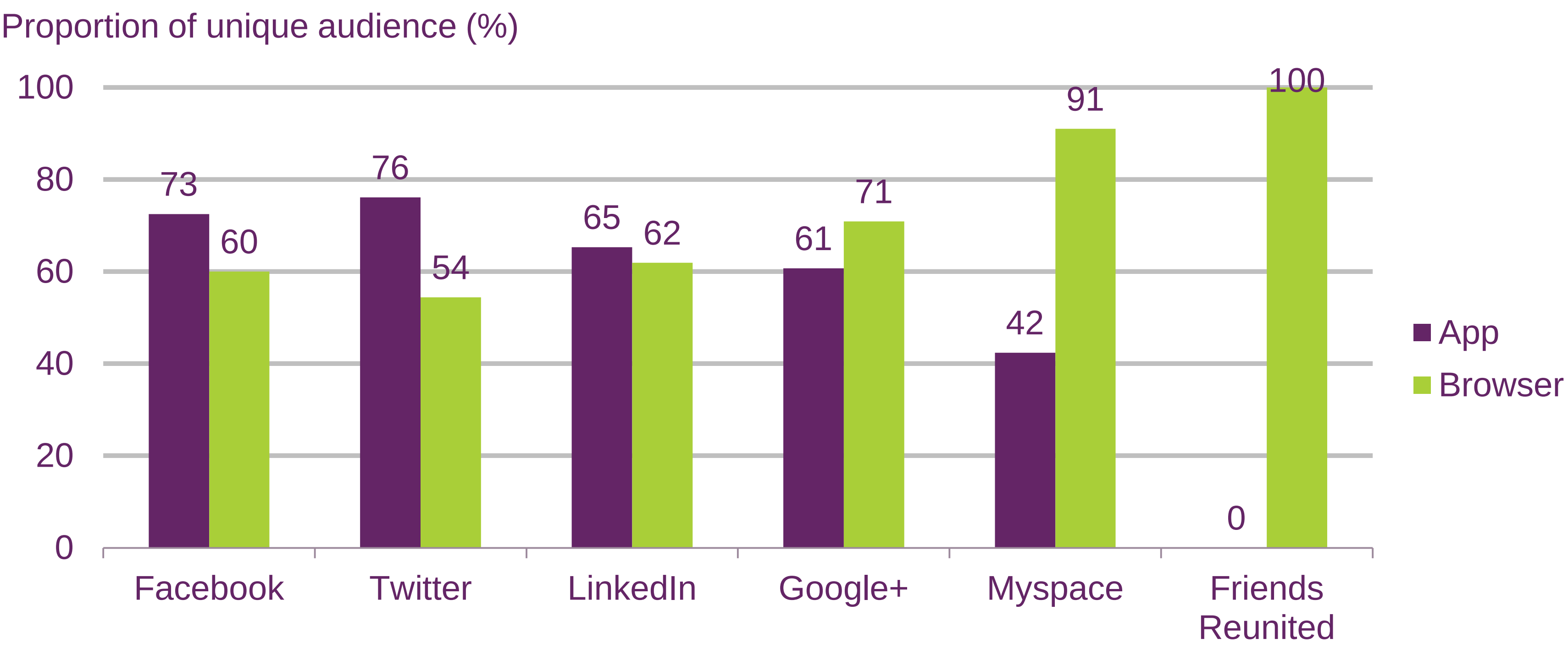
Unique audience of selected social networking websites on mobile phones: April 2012 to 2014



Source: comScore MobiLens, UK, April 2012 to April 2014
Base: Mobile internet users 13+

Figure 4.47

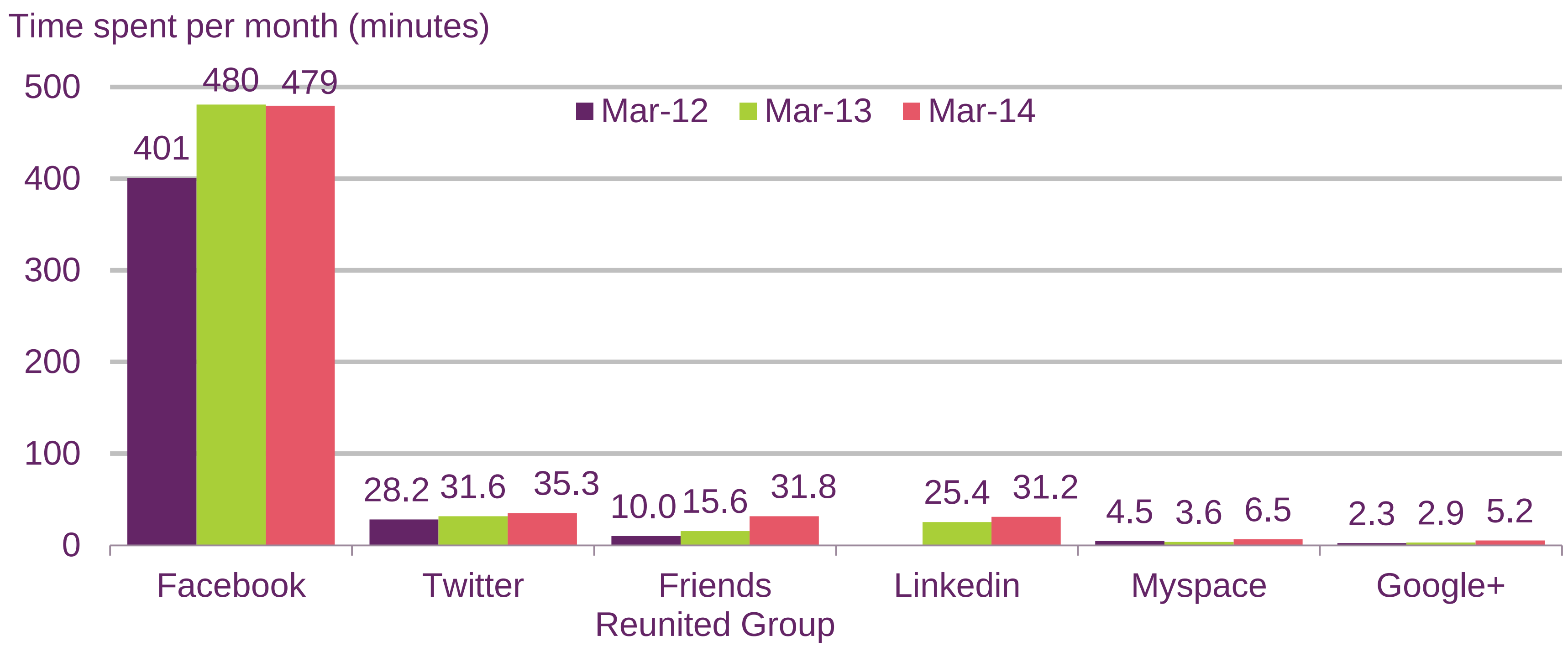
App and browser access of social networks on a mobile phone



Source: comScore MobilLens, UK, 3 month average ending March 2014,
Base: Mobile users 13+

Figure 4.48

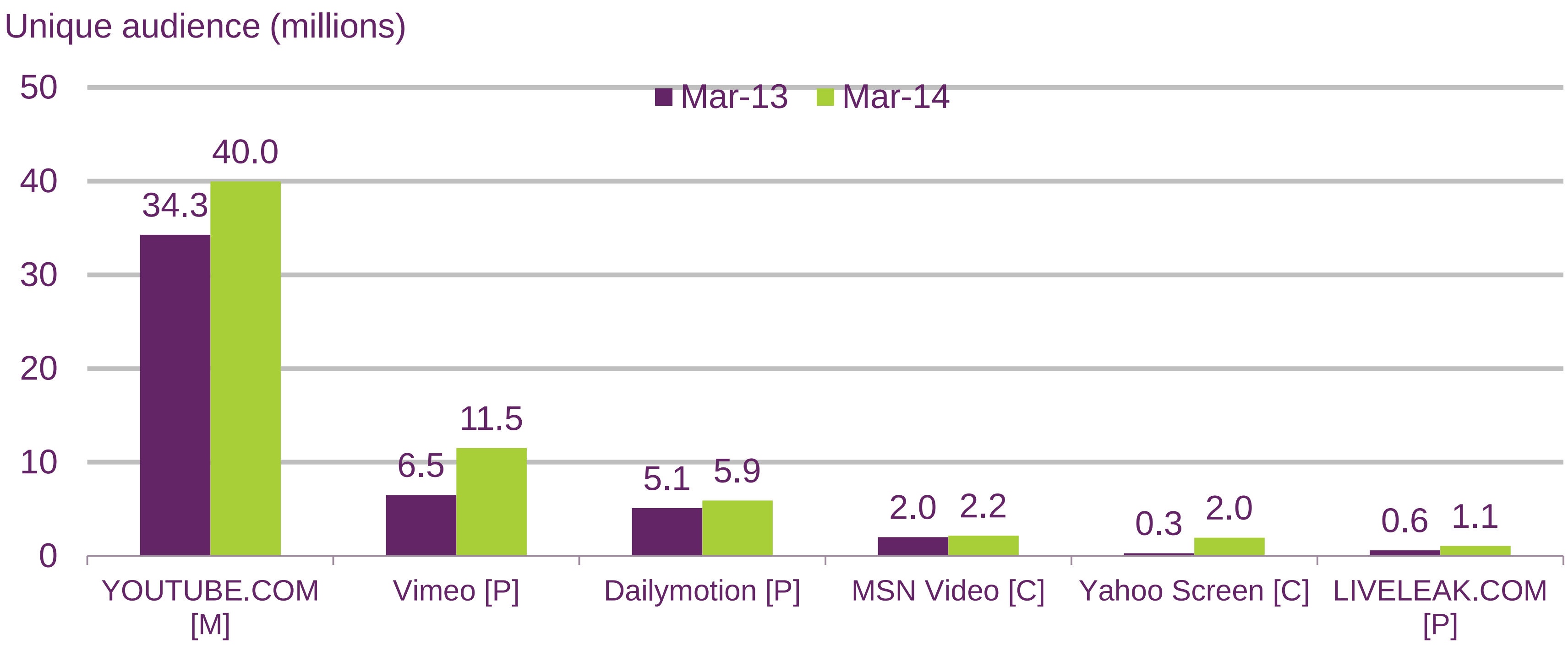
Time spent on social networking sites on laptop/desktop computers



Source: comScore MMX, UK, home and work panel, March: 2012 – 2014
Note: Entities cited from comScore MMX: FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google Plus [E], MySpace [P], Friends Reunited Group [P]

Figure 4.49

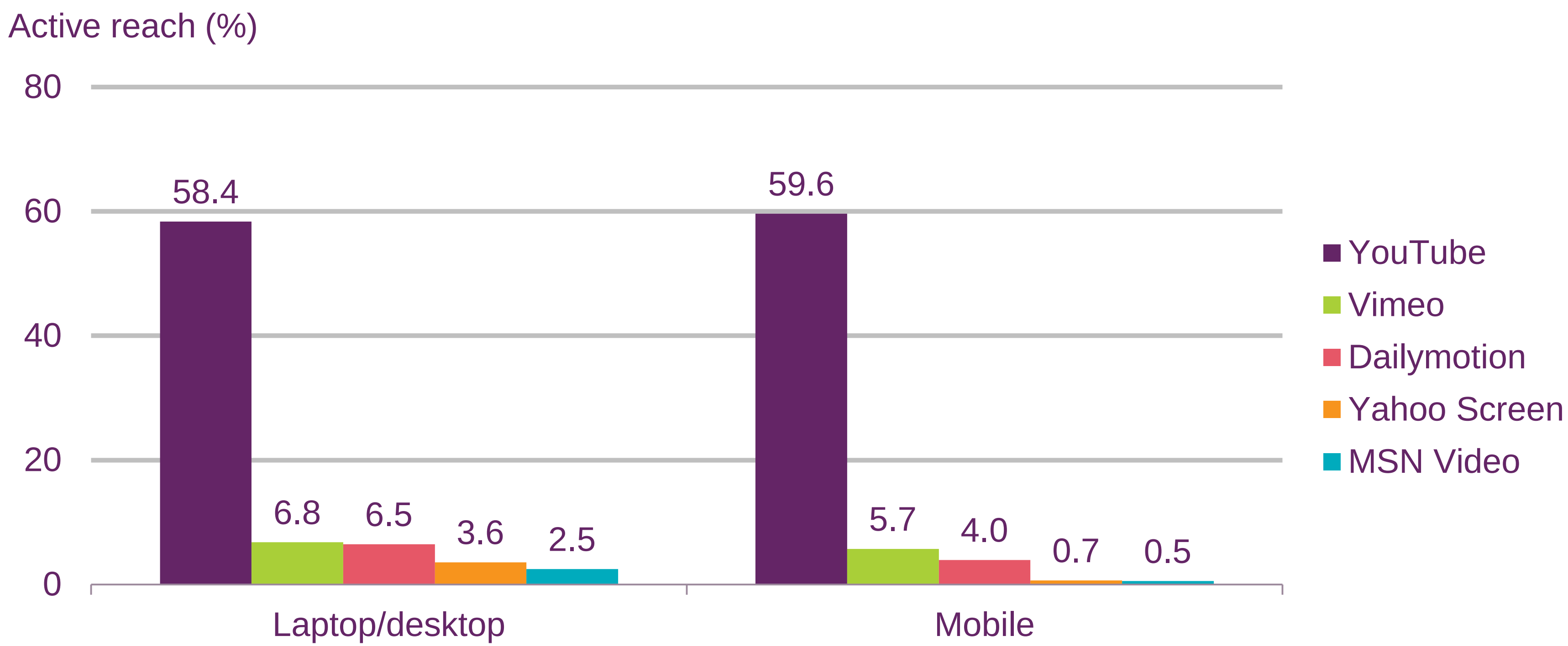
Unique audience for selected online video websites: March 2013 and March 2014



Source: comScore MMX Multi-Platform, UK, March 2013 and March 2014
Note: Starting with July 2013 data, comScore added Tablet data to the Mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report Tablet usage data.

Figure 4.50

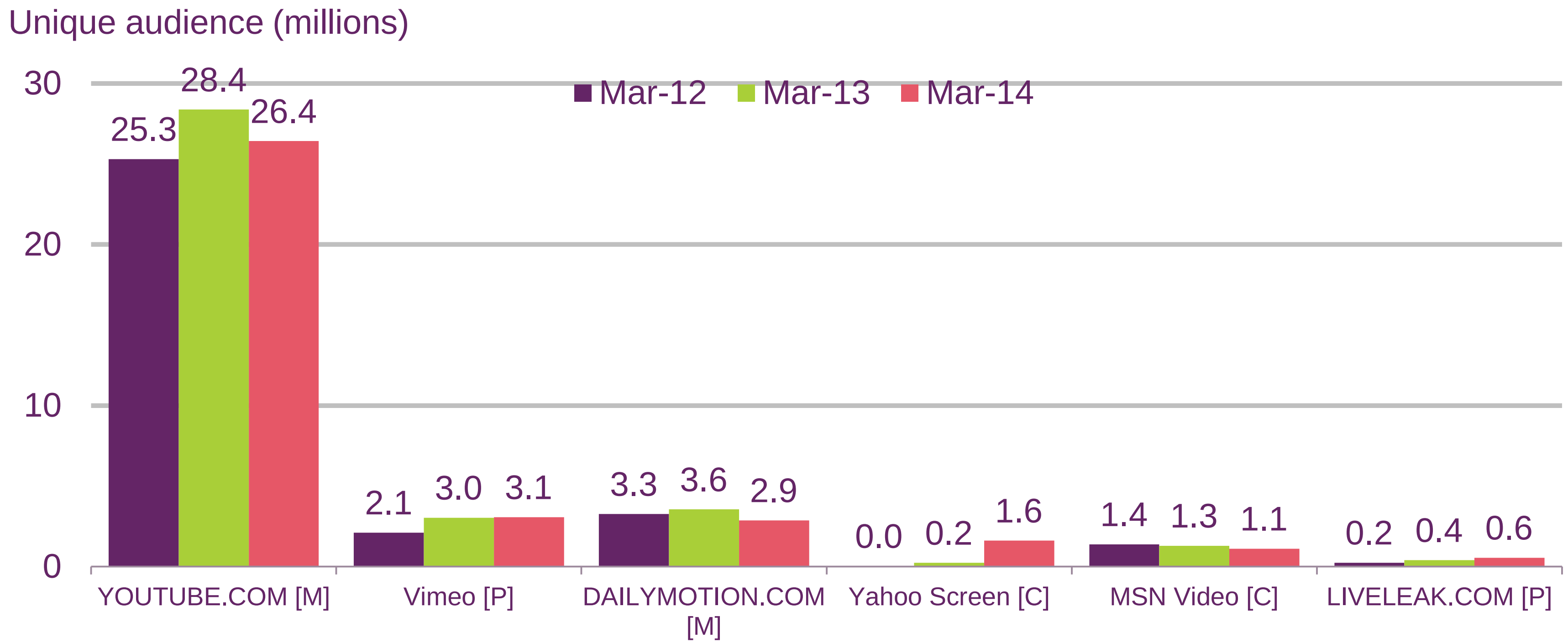
Reach of online video services on laptop/desktop and mobile: March 2014



Source: comScore MMX, home and work panel UK, March 2014; comScore GSMA MMM, UK, browser and application access, on and off network, March 2014
Note: Entities from comScore MMX and GSMA MMM were YOUTUBE.COM [M], Vimeo [P], Dailymotion.com [P], MSN Video [C] and include laptop/desktop browsing and laptop/desktop video streams.

Figure 4.51

Unique audience of selected online video sites on laptop and desktop computers: March 2012 to March 2014



Source: comScore MMX, UK, home and work panel, March 2012, 2013, 2014

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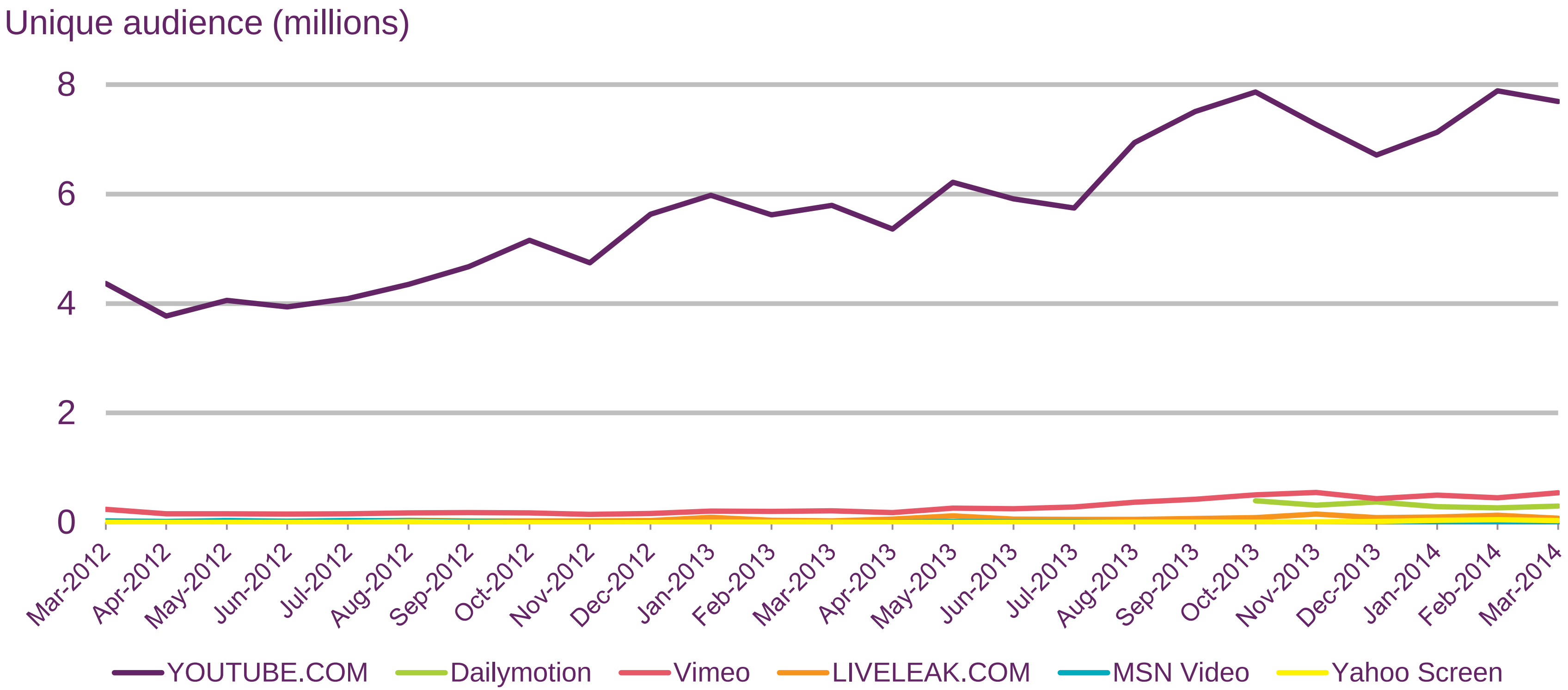
Figure 4.52

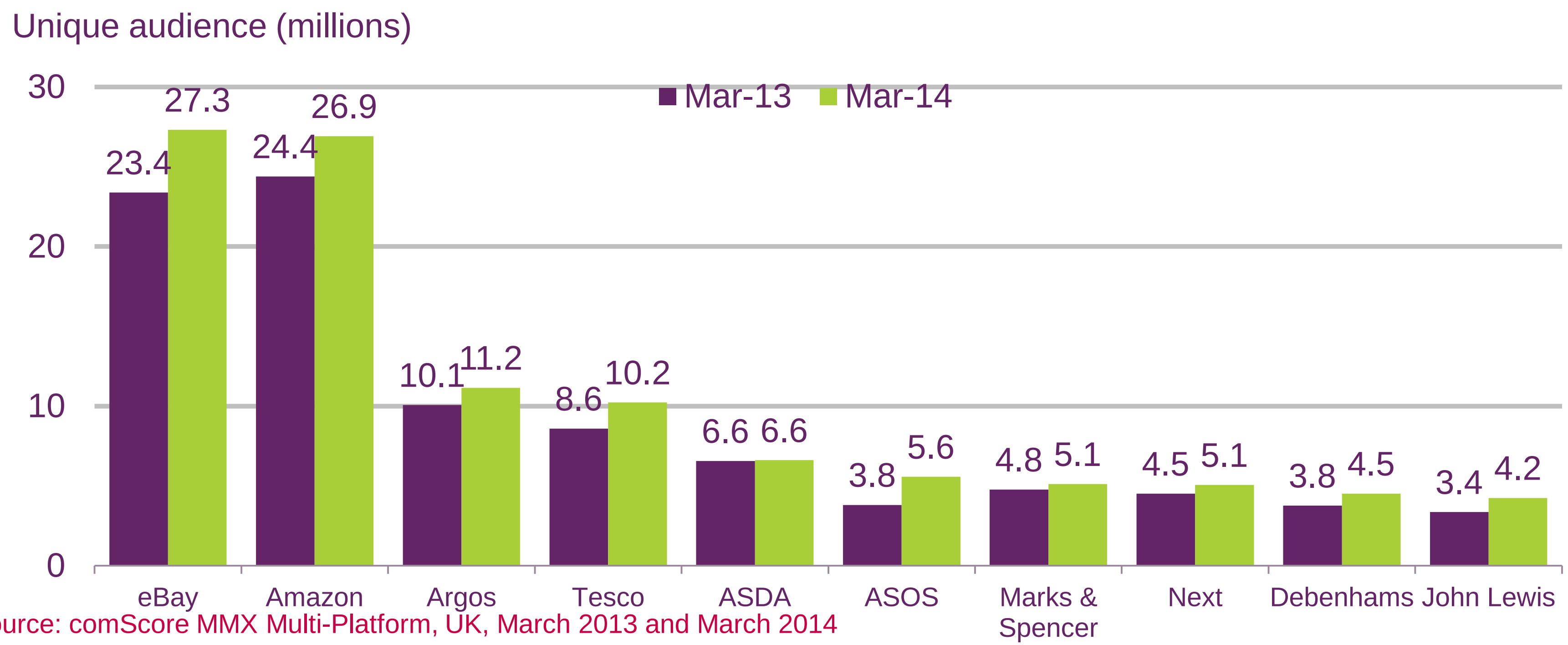
Unique audience of selected online video websites on mobile phones: March 2012 – March 2014



Source: comScore GSMA MMM, UK, browser access only, on network, March 2012 to March 2014
Note: comScore dictionary entities used were YOUTUBE.COM [M], Vimeo [P], DAILYMOTION.COM [M], Yahoo Screen [C], MSN Video [C], LIVELEAK.COM [P]

Figure 4.53

Digital audience of selected online retail websites: March 2013 and March 2014

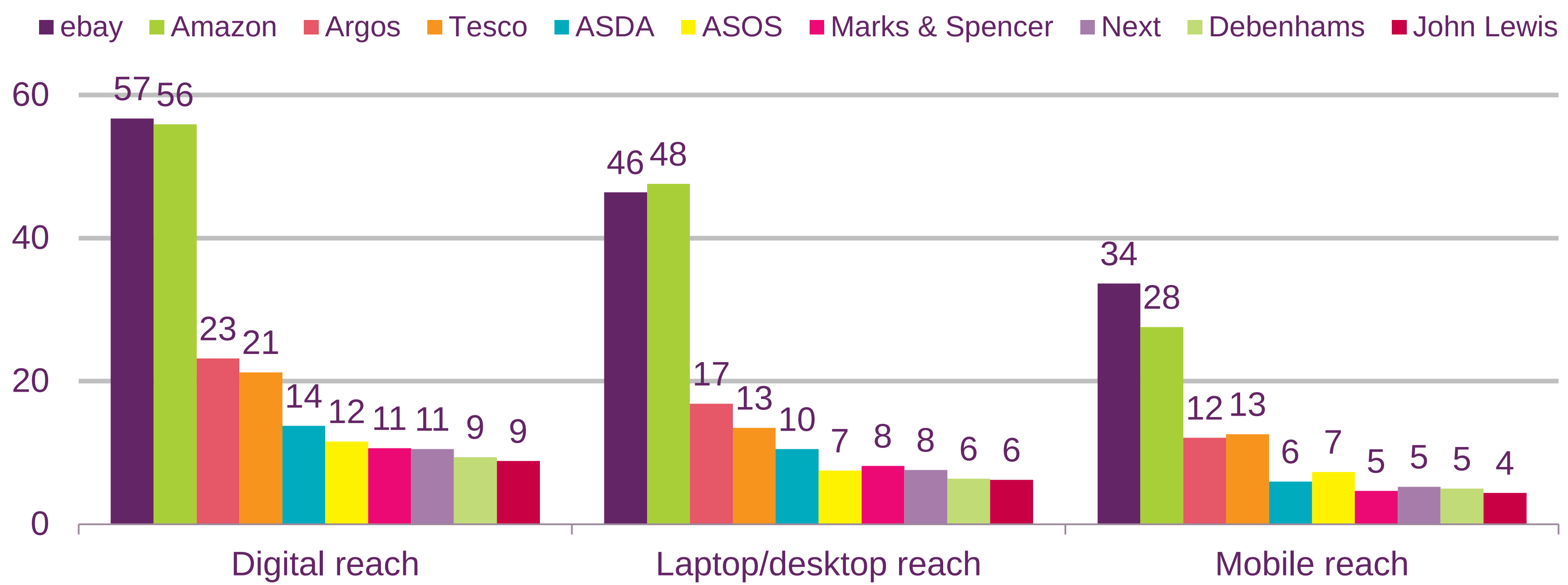


Source: comScore MMX Multi-Platform, UK, March 2013 and March 2014
MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network and WiFi mobile browsing and application data.
Note: Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX MP. Only those entities that have been tagged as party of the census network report tablet usage data. comScore dictionary entities used were Amazon [M], eBay Sites [M], Argos [M], TESCO.COM* [M], Asda [M], MARKSANDSPENCER.COM [M], NEXT.CO.UK [M], ASOS.COM [M], DEBENHAMS.COM [M], John Lewis [M]

Figure 4.54

Active reach of online retail websites across platforms: March 2014

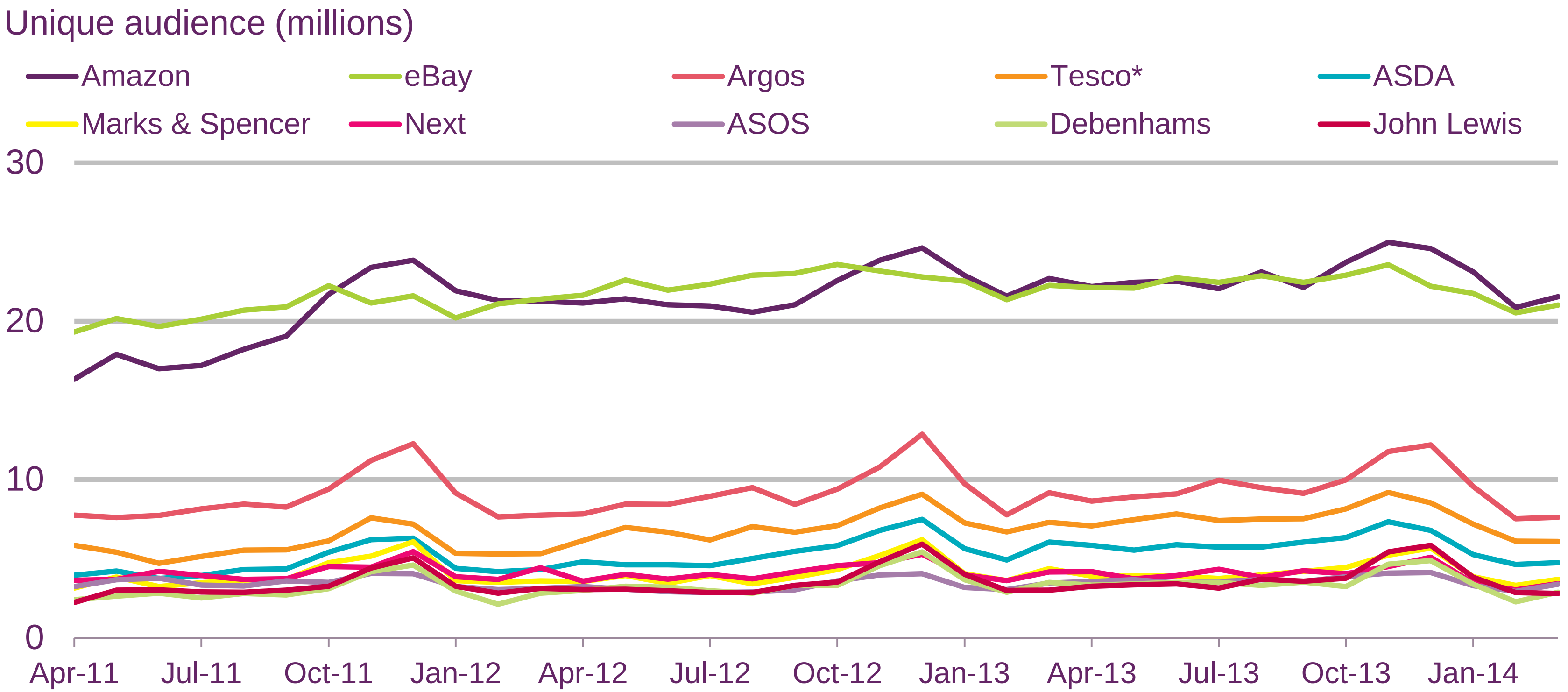
Active reach (%)



Source: comScore MMX Multi-Platform, UK, March 2014; comScore MMX, UK, home and work panel, March 2014. MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network and WiFi mobile browsing and application data. Note: Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report tablet usage data. comScore dictionary entities used were Amazon [M], eBay Sites [M], Argos [M], TESCO.COM* [M], Asda [M], MARKSANDSPENCER.COM [M], NEXT.CO.UK [M], ASOS.COM [M], DEBENHAMS.COM [M], John Lewis [M]

Figure 4.55

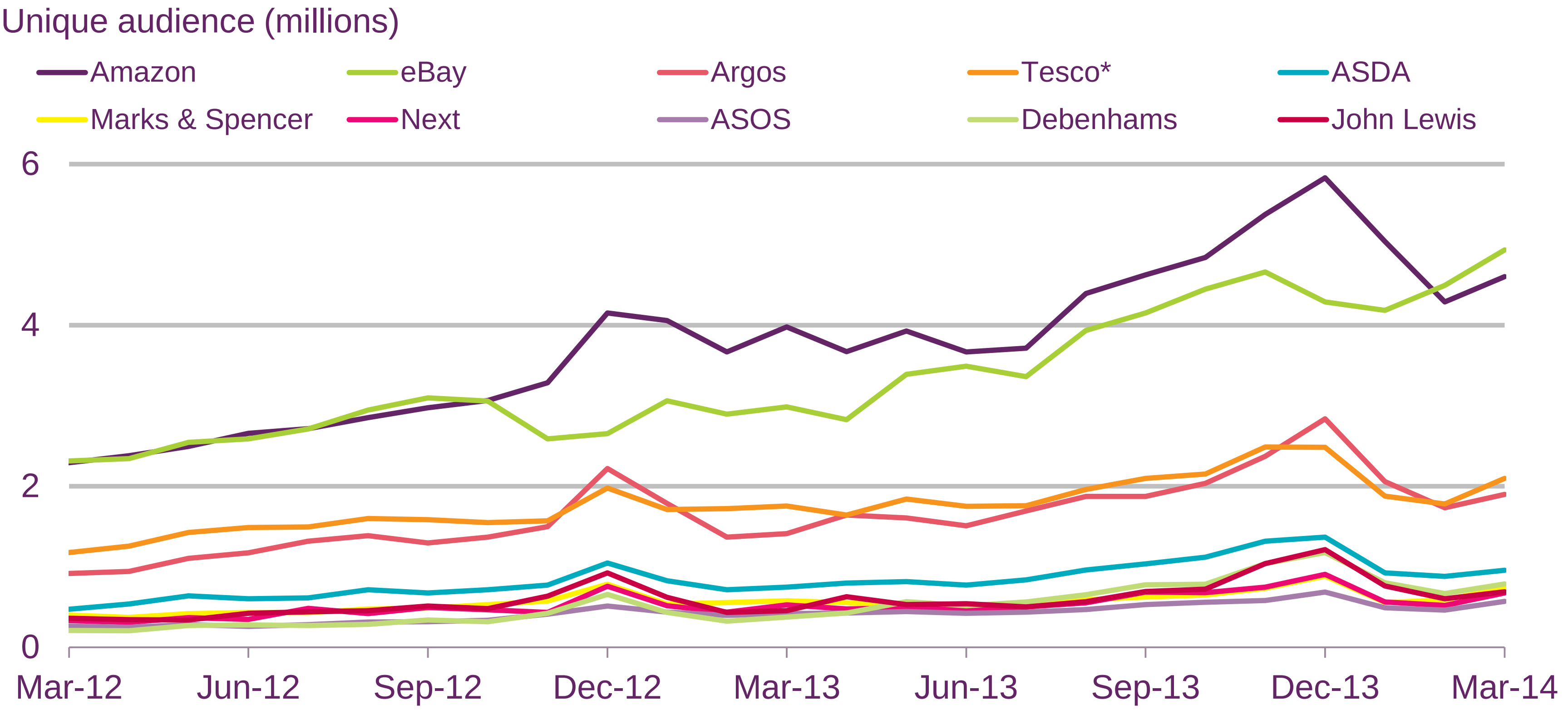
Unique audience of selected online retailers on laptop/desktop computers: April 2011 to March 2014



Source: comScore MMX, UK, home and work panel, April 2011 to March 2014;
Note: comScore dictionary entities used were Amazon [M], eBay Sites [M], Argos [M], TESCO.COM* [M], Asda [M], MARKSANDSPENCER.COM [M], NEXT.CO.UK [M], ASOS.COM [M], DEBENHAMS.COM [M], John Lewis [M]

Figure 4.56

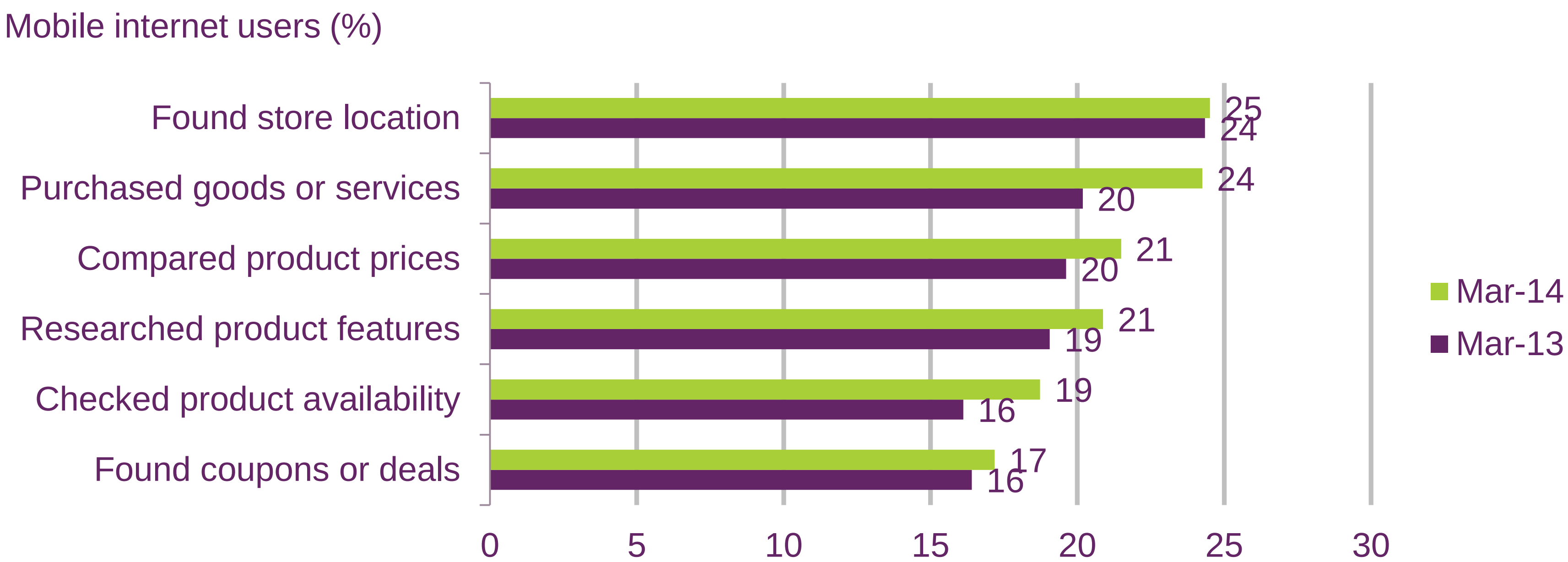
Mobile unique audience of selected online retailers: March 2012 to March 2014



Source: comScore GSMA MMM, UK, browser access only, on network, March 2012 to March 2014
Note: comScore dictionary entities used were Amazon [M], eBay Sites [M], Argos [M], TESCO.COM [M], Asda [M], MARKSANDSPENCER.COM [M], NEXT.CO.UK [M], ASOS.COM [M], DEBENHAMS.COM [M], John Lewis [M]*

Figure 4.57

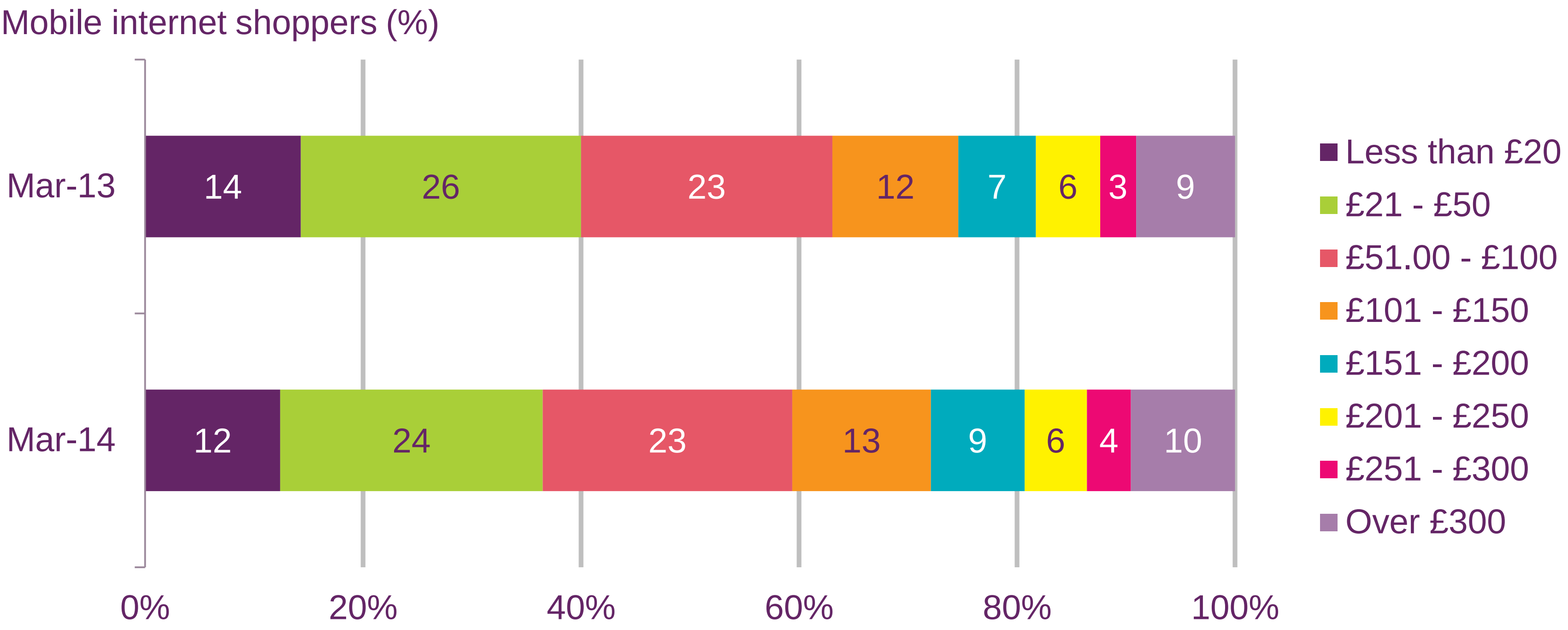
Mobile retail activities conducted by mobile internet users, March 2013 and March 2014



Source: comScore MobiLens, UK, 3 month averages ending March 2013 and March 2014
Base: mobile internet users 13+

Figure 4.58

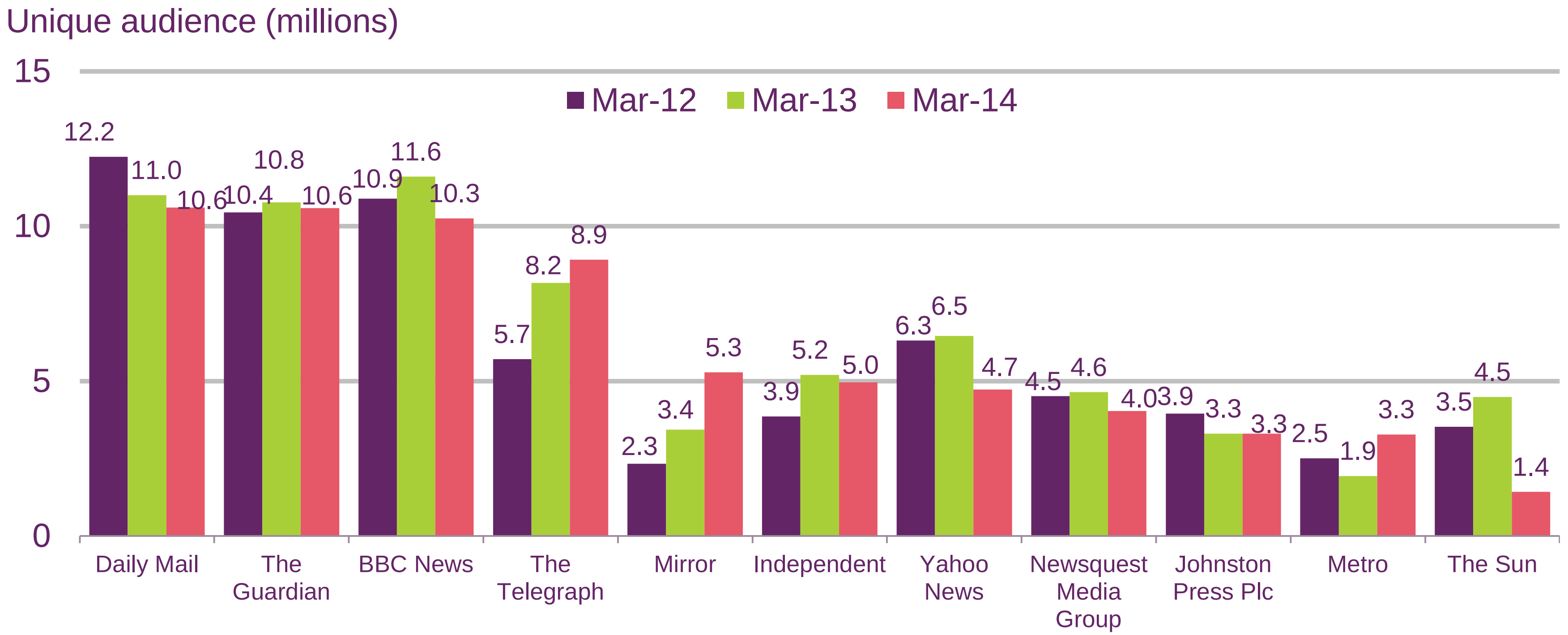
Amount spent on goods and services among mobile internet shoppers, March 2013 and March 2014



Source: comScore MobiLens, UK, 3 month averages ending March 2013 and March 2014
Base: mobile internet users 13+ who have purchased goods or services

Figure 4.59

Unique audience of selected news websites on laptop/desktop computers : March 2012 to March 2014



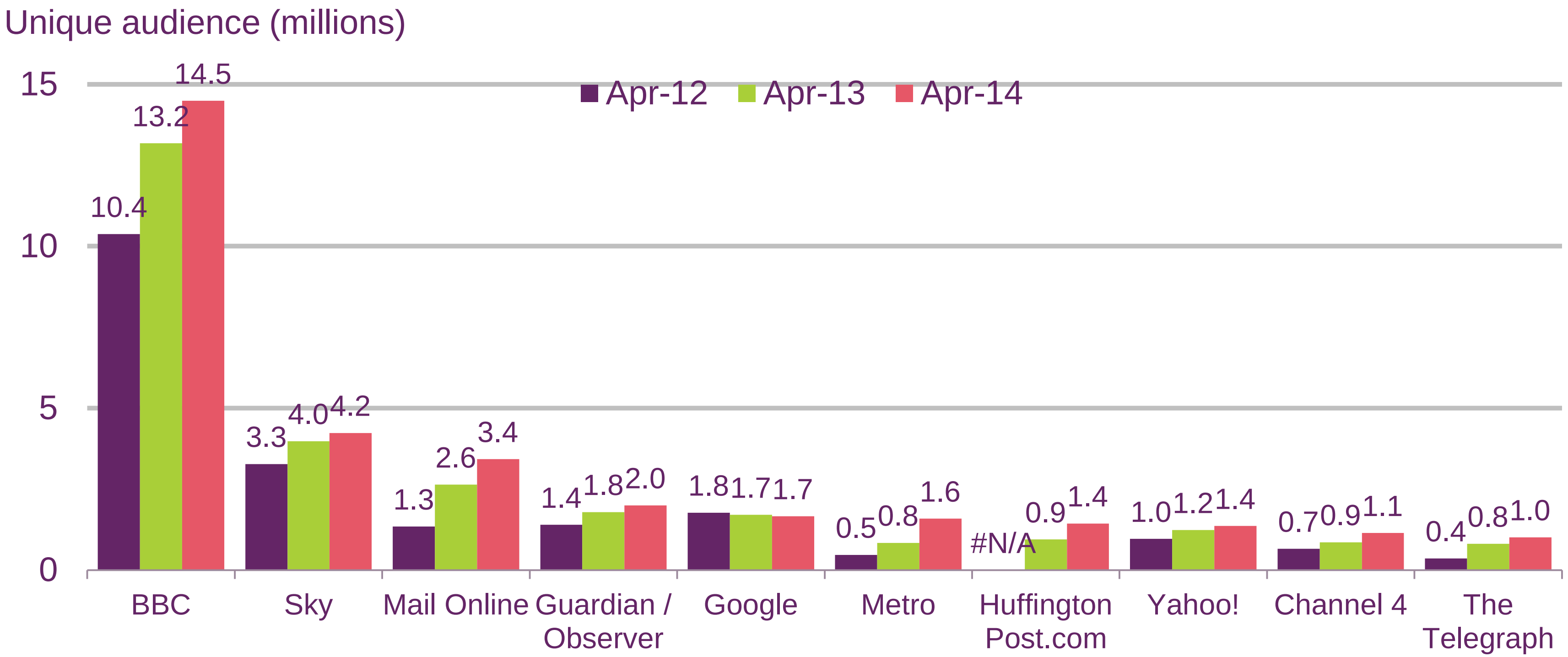
Source: comScore MMX, UK, home and work panel, March 2012 to March 2014

Note: comScore dictionary entities used were DAILYMAIL.CO.UK [S], BBC News [C], The Guardian [P], TELEGRAPH.CO.UK [M], MIRROR.CO.UK [C], Newsquest Media Group [M], METRO.CO.UK [M], INDEPENDENT.CO.UK [P], Johnston Press Plc [P], Yahoo News [S], HUFFINGTONPOST.CO.UK* [C], THESUN.CO.UK [C]

* Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Figure 4.60

Unique audience of selected news brands on mobile for world/national/ local news: April 2012 to April 2014

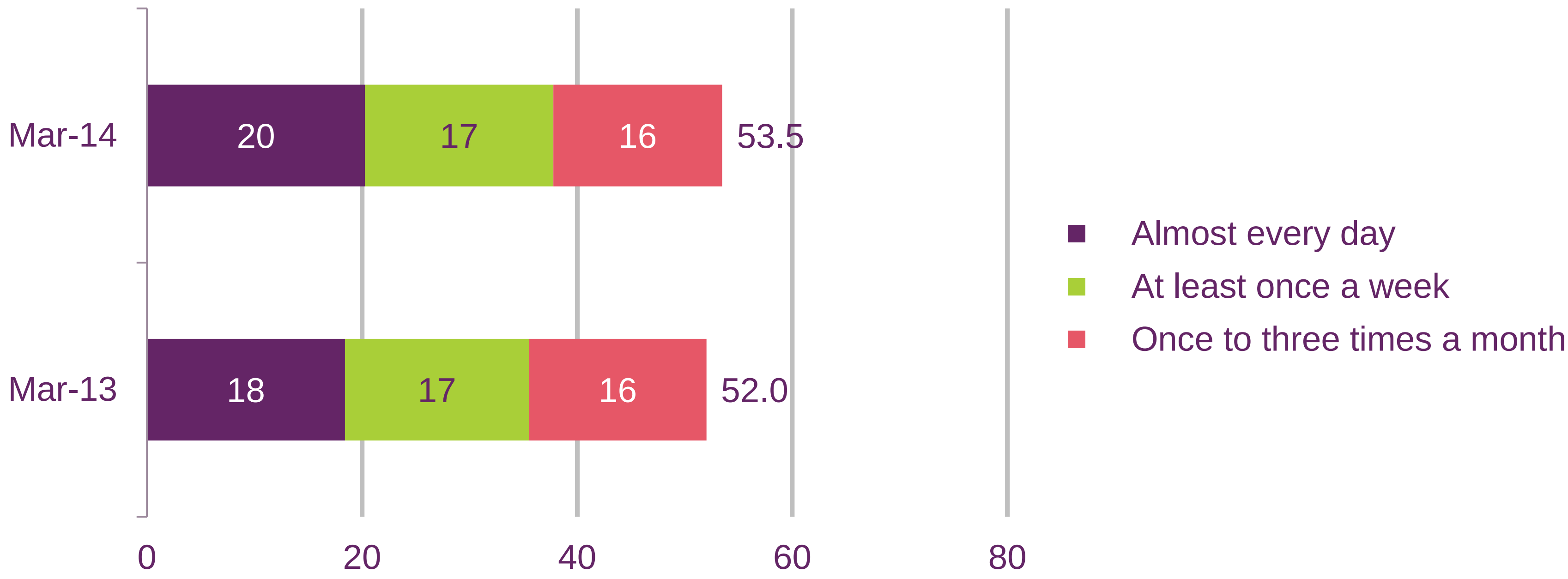


Source: comScore MobiLens, UK, 3 month averages ending April 2014, April 2013 and April 2012
Base: mobile users 13+

Figure 4.61

Frequency of accessing news among mobile internet users, March 2013 and March 2014

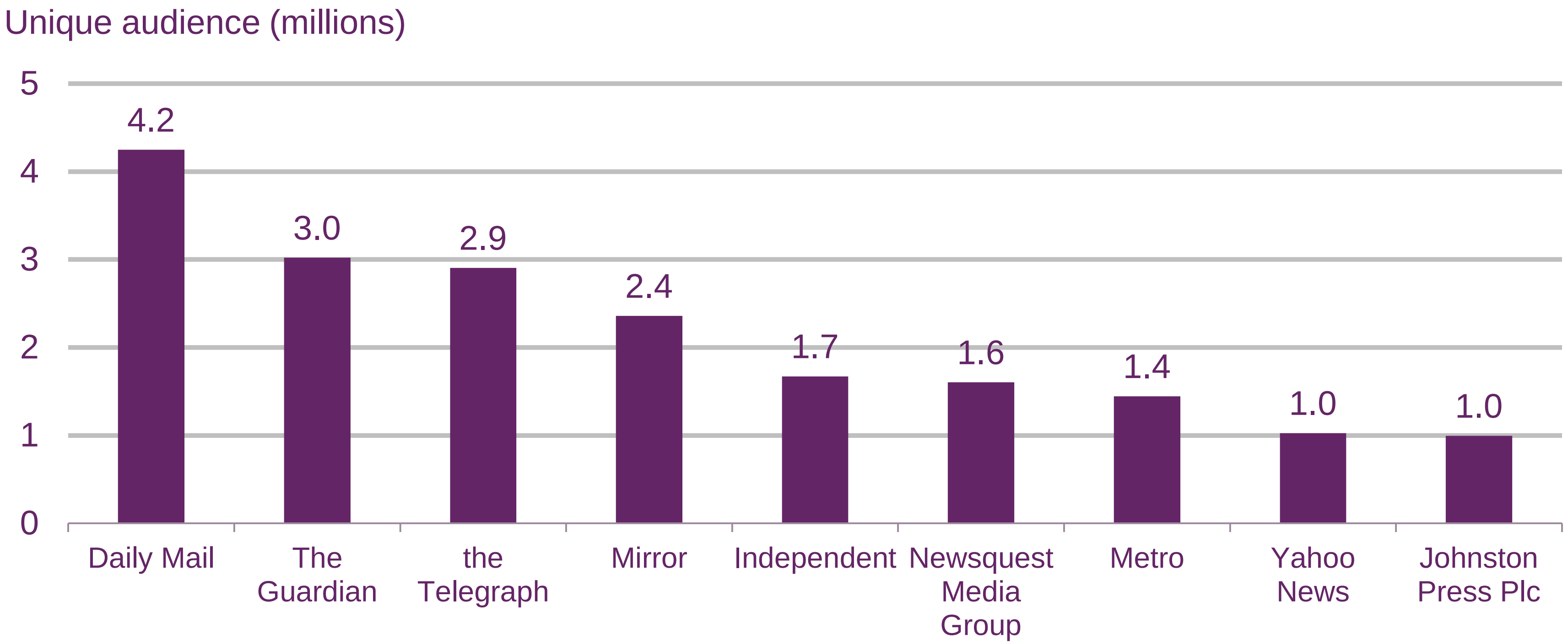
Mobile internet users (%)



Source: comScore MobiLens, UK, 3 month averages ending March 2013 and March 2014
Base: mobile internet users 13+

Figure 4.62

Tablet audience of selected online news providers, March 2014



Source: comScore GSMA MMM, UK, tablet browser access only, on and off network, March 2014
Note: comScore dictionary entities used were DAILYMAIL.CO.UK [S], The Guardian [P], TELEGRAPH.CO.UK [M], MIRROR.CO.UK [C], Newsquest Media Group [M], METRO.CO.UK [M], INDEPENDENT.CO.UK [P], Johnston Press Plc [P], Yahoo News [S]
* Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Industry metrics and summary

Figure 5.1 UK telecoms industry: key statistics

	2008	2009	2010	2011	2012	2013
Total operator-reported revenue (£bn)	41.6	41.1	40.5	39.4	39.3	38.6
Operator-reported retail revenue (£bn) (excl. CDS)	28.2	27.9	27.7	27.8	28.2	28.0
Operator-reported wholesale revenue (£bn)	10.7	10.5	10.1	8.9	8.3	7.9
Average monthly household telecoms spend (2013 prices) (£)	91.67	87.21	86.09	84.29	83.58	81.17
Fixed access and call revenue (£bn)	10.2	9.6	9.3	8.9	8.6	8.4
Fixed internet revenue (£bn)	3.2	3.3	3.2	3.4	3.7	4.0
Fixed lines (millions)	34.2	33.51	33.41	33.25	33.2	33.38
Fixed broadband connections (millions)	17.3	18.2	19.5	20.6	21.7	22.6
Superfast broadband connections (millions)	0.0	0.0	0.2	1.1	3.2	5.6
Fixed voice call minutes (billions)	141	128	123	111	103	92
Mobile retail revenues (£bn)	14.8	15.0	15.1	15.4	15.9	15.6
Mobile voice call minutes (billions)	118.6	126.6	131.2	131.5	132.3	134.1
SMS messages sent (billions)	87.0	127.6	153.9	171.7	171.9	129.9
Active mobile subscriptions (millions)	77.5	80.6	81.6	82.4	83.4	83.1

Source: Ofcom / operators

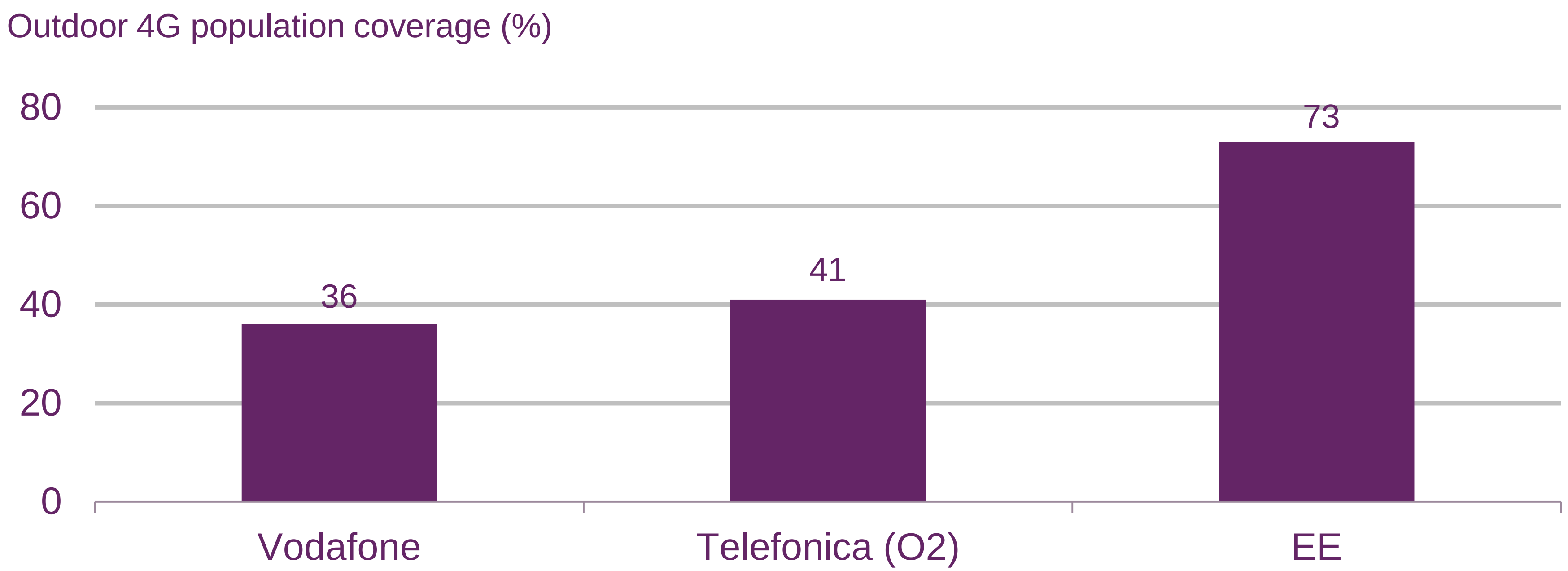
Notes: CDS refers to corporate data services; connection figures are at year end.

Key market developments

4G take-up gains momentum

Figure 5.2

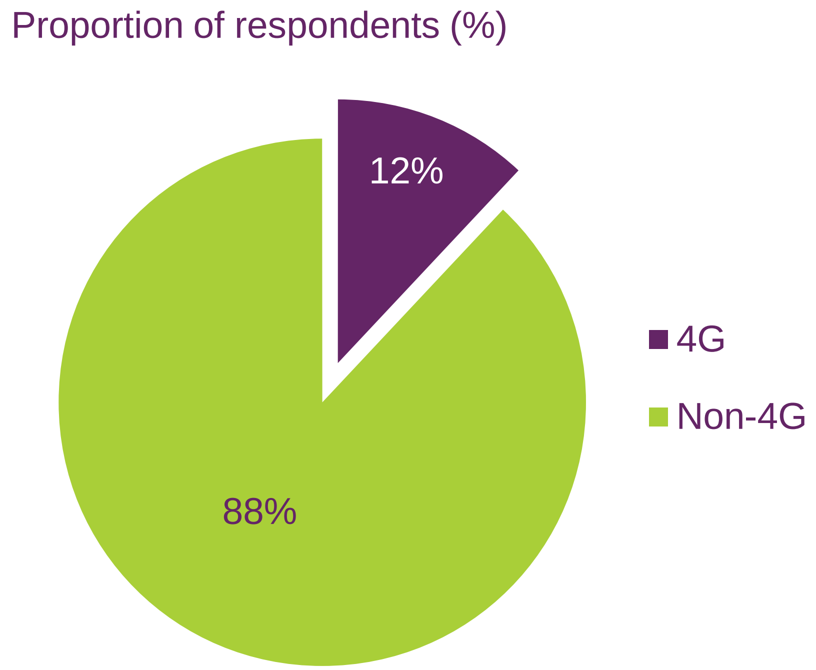
4G population coverage, by network (mobile operators' own estimates)



Source: http://ee.co.uk/help/mobile-and-home-connections/checking-and-improving-your-network-coverage/our-network/4g-coverage
http://www.telefonica.com/en/shareholders_investors/pdf/rdos14t1-eng.pdf
http://www.vodafone.co.uk/cs/groups/configfiles/documents/contentdocuments/vftst048992.pdf

Figure 5.3

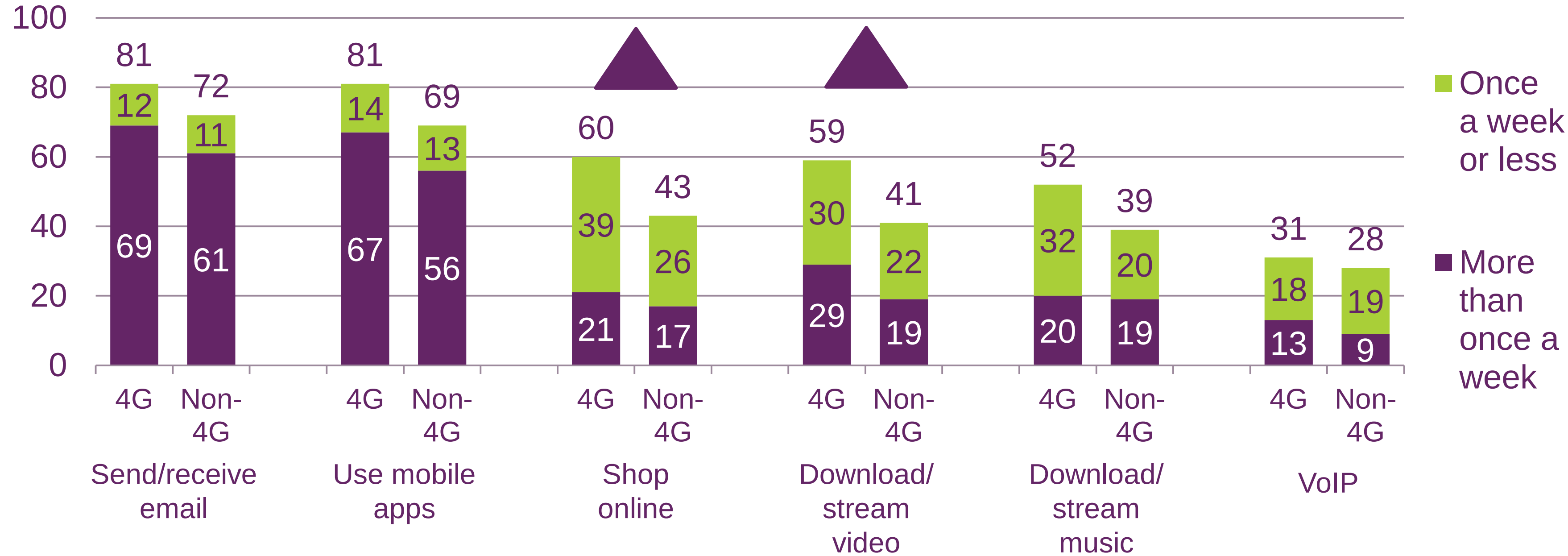
Use of 4G services among UK adults



Source: Ofcom research April 2014
Base: All UK adults 16+
Question: Do you have a 4G service? This is a relatively new service that enables faster mobile internet access.

Figure 5.4

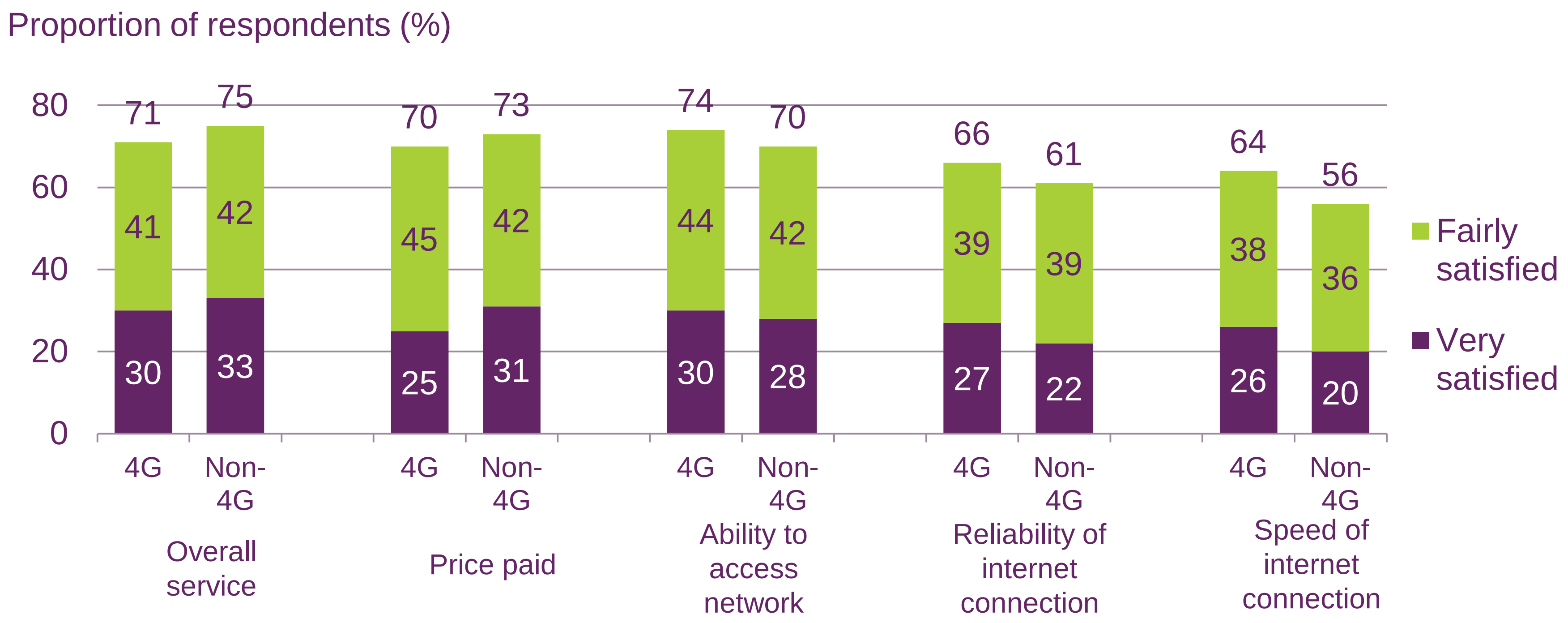
4G and non-4G mobile use of mobile services



Source: Ofcom mobile coverage questionnaire
Base: All respondents with a smartphone and aware of services they receive with 4G, n=125
Question: Q20 How often, if at all, do you use your main mobile phone to…?
Note: Statistically significant differences in overall use of mobile services between 4G and non-4G respondents are indicated by triangles.

Figure 5.5

Satisfaction with aspects of mobile services

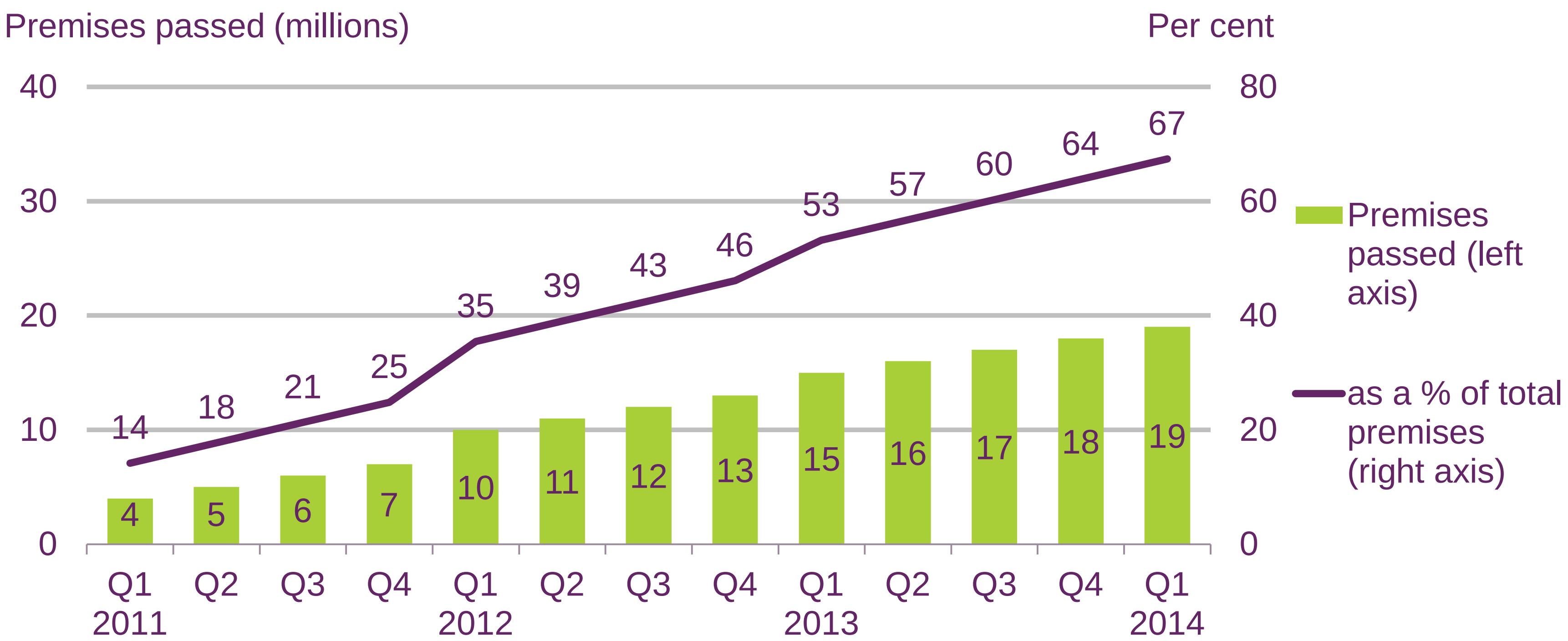


Source: Ofcom mobile coverage questionnaire
Base: All respondents with a smartphone and aware of services they receive with 4G, n=125
Question: Q22 I'm going to read out different aspects of your mobile phone service and for each one I'd like you to tell me how satisfied or dissatisfied you are with it.

Superfast broadband availability is growing fast

Figure 5.6

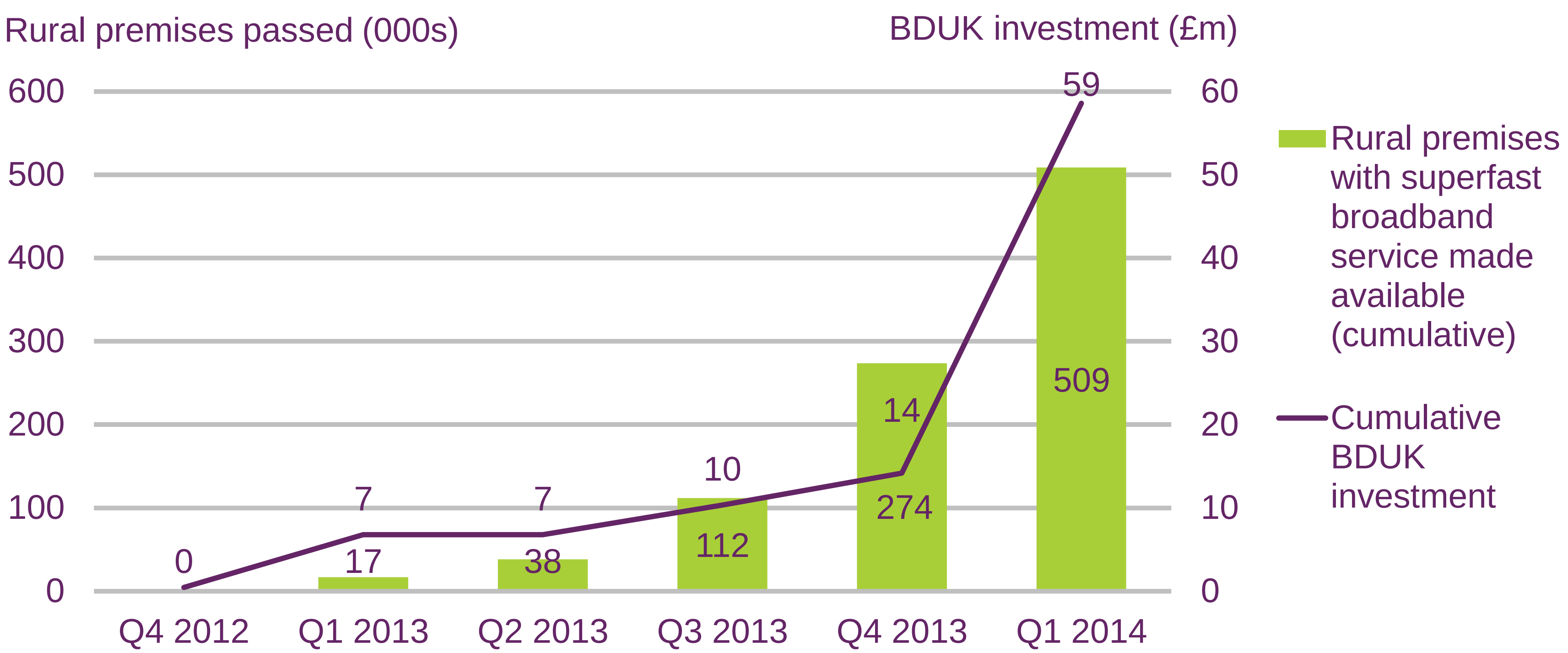
Premises passed by BT Openreach's fibre broadband network



Source: BT Company Reports / Enders Analysis

Figure 5.7

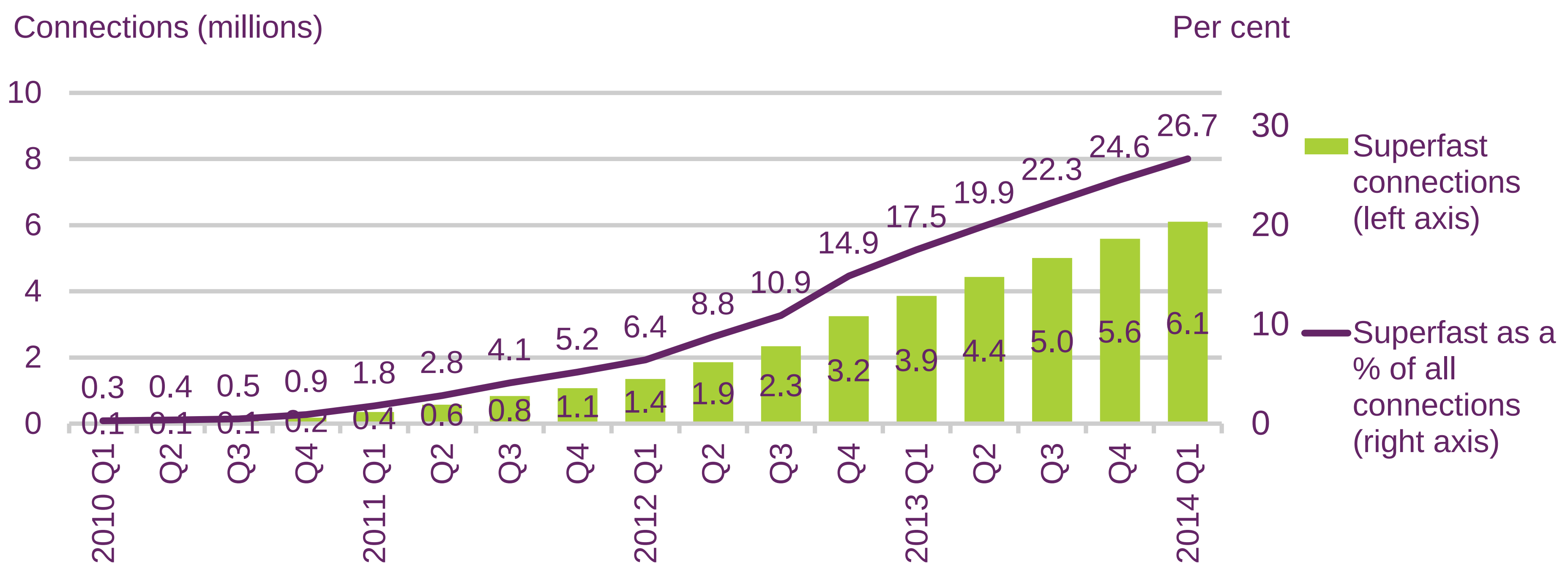
Broadband performance indicator



Source: Department for Culture, Media and Sport – Broadband Delivery UK – March 2014

Figure 5.8

Take-up of superfast broadband services



Source: Ofcom / operator data
Note: Includes estimates where Ofcom does not receive data from operators; the 'total connections' figure used to calculate the percentages above does not include an adjustment for corporate connections, which is used elsewhere in this report.

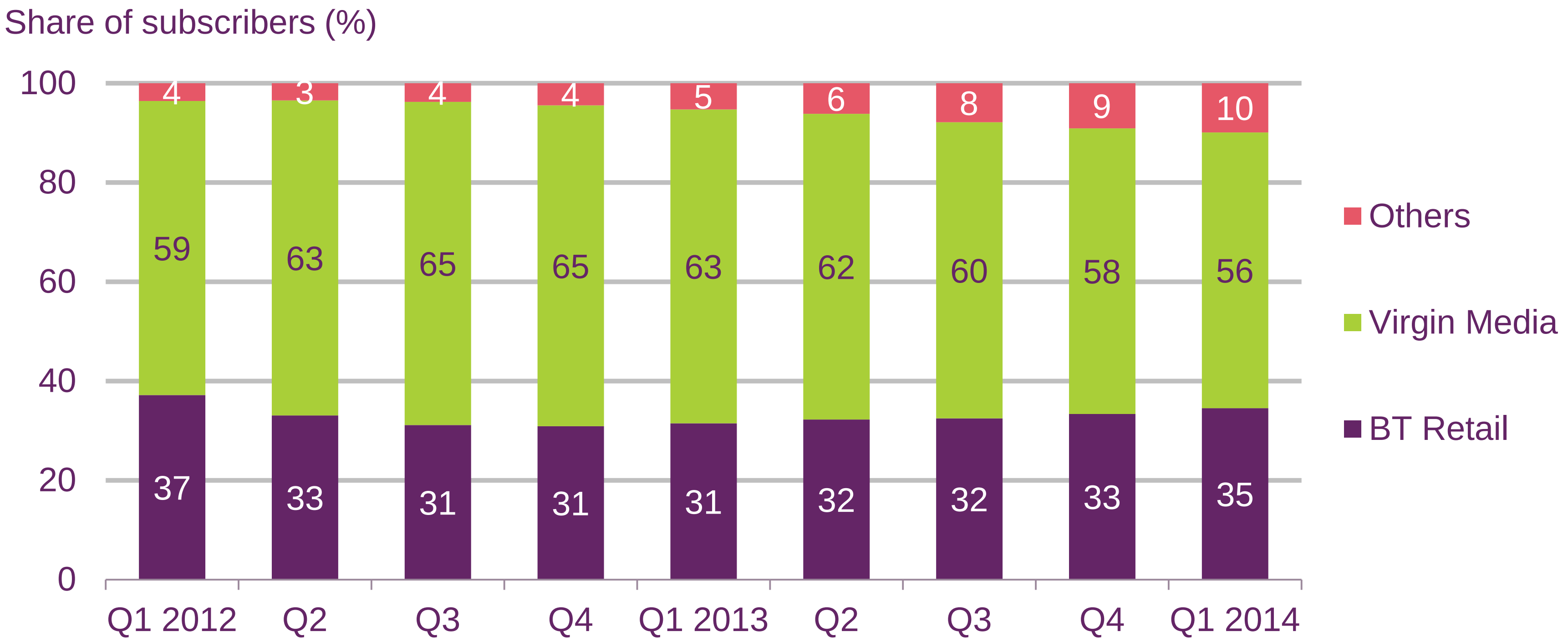
Figure 5.9

Comparison of major ISPs’ superfast and current-

		BT	Virgin Media	TalkTalk	Plusnet	Sky	EE
Lowest cost superfast service	Headline download speed/technology	38Mbit/s FTTC	50Mbit/s cable	38Mbit/s FTTC	38Mbit/s FTTC	38Mbit/s FTTC	38Mbit/s FTTC
	Data allowance	20GB plus unlimited WiFi	Unlimited	Unlimited	40GB plus unlimited off-peak	Unlimited	Unlimited
	Call allowance	Fixed weekends	Virgin mobile plus fixed weekend	Fixed on-net	Fixed weekends & on-net	Fixed weekends	Fixed weekends
	Monthly cost	£15 plus line rental	£15.50 plus line rental (or stand alone at £25.00)	£13.50 plus line rental	£15.99 plus line rental	£20 plus line rental	£26 plus line rental
Lowest cost current generation service	Headline download speed/technology	16Mbit/s ADSL2+	n/a	16Mbit/s ADSL2+	16Mbit/s ADSL2+	A17Mbit/s ADSL2+	17Mbit/s ADSL2+
	Data allowance	10GB	n/a	Unlimited	10GB plus unlimited off-peak	Unlimited	Unlimited
	Call allowance	Fixed weekends	n/a	Fixed on-net	Fixed weekends & on-net	Fixed weekends	Fixed weekends
	Monthly cost	£10 plus line rental	n/a	£3.50 plus line rental	£5.99 plus line rental	£10 plus line rental	£16 plus line rental

Figure 5.10

Operator share of superfast broadband subscribers

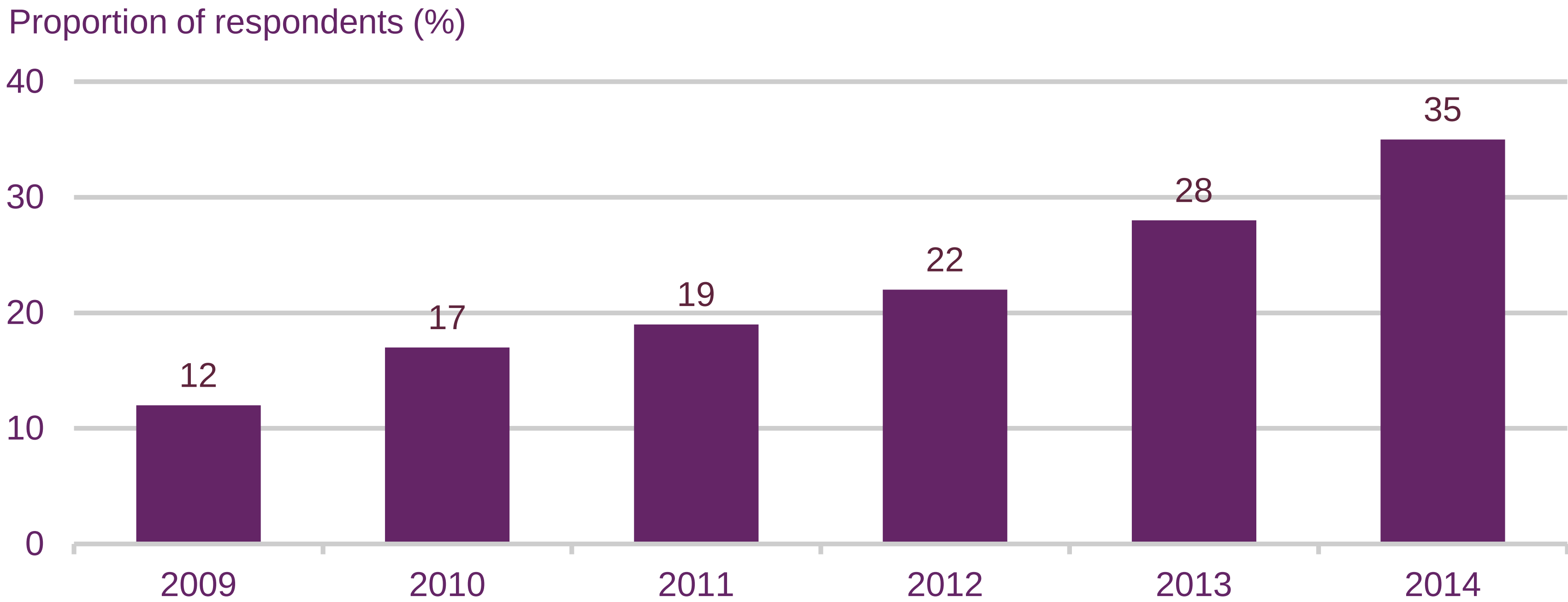


Source: Enders Analysis

Consumers’ use of voice over IP services

Figure 5.11

Take-up of VoIP services: 2009 to 2014



Source: Ofcom research, data as at Q1 of each year
Base: All adults
Note: Data from 2013 onwards are not comparable to those from previous years they have been compiled on a different basis.

Figure 5.12

Use of VoIP, by age and socio-economic group

Source: Ofcom research Q1 2014
Base: All adults aged 16+

Figure 5.13

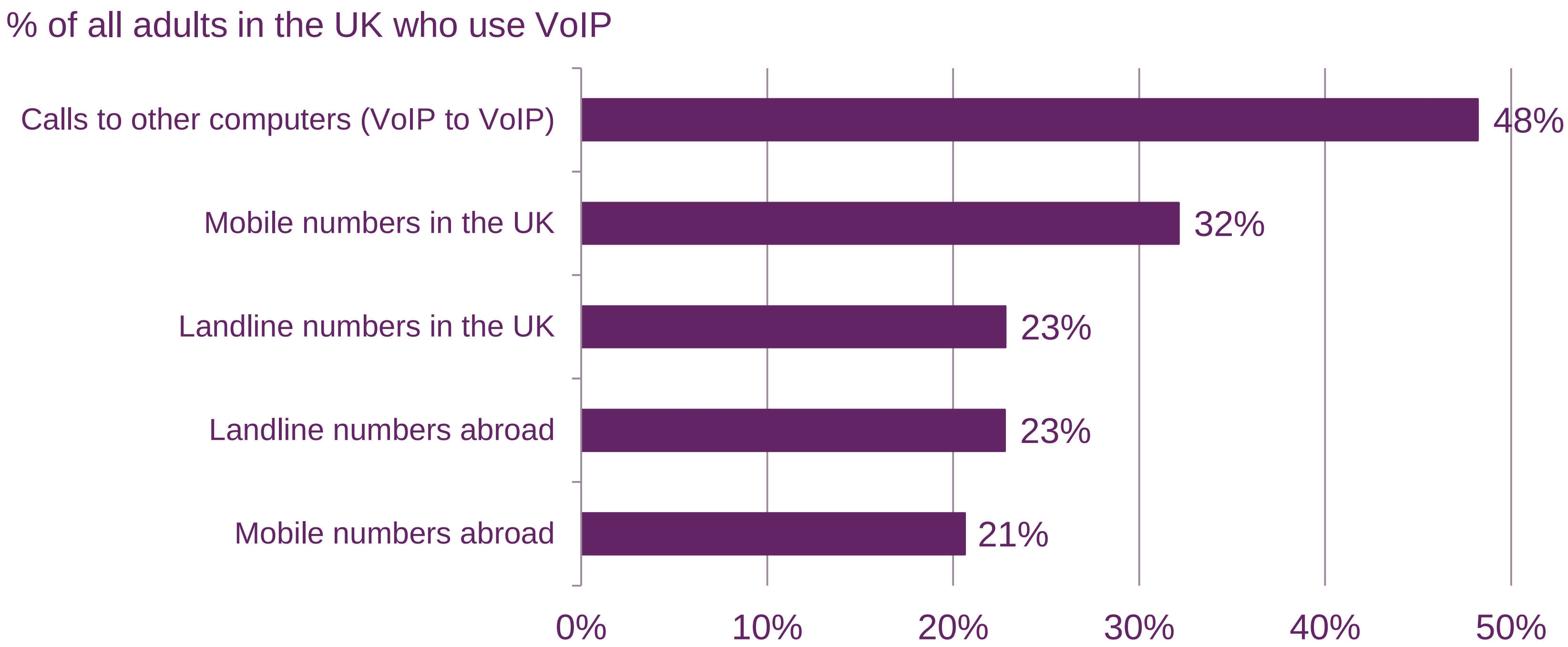
Advantages of using VoIP over traditional methods of calling

% of all adults in the UK who use VoIP

Source: YouGov online survey
Base: All adults 16+ in UK who use VoIP (398)
Question: Q14. Which of these, if any, do you feel are advantages of using VoIP over traditional methods of calling? Please choose all that apply.

Figure 5.14

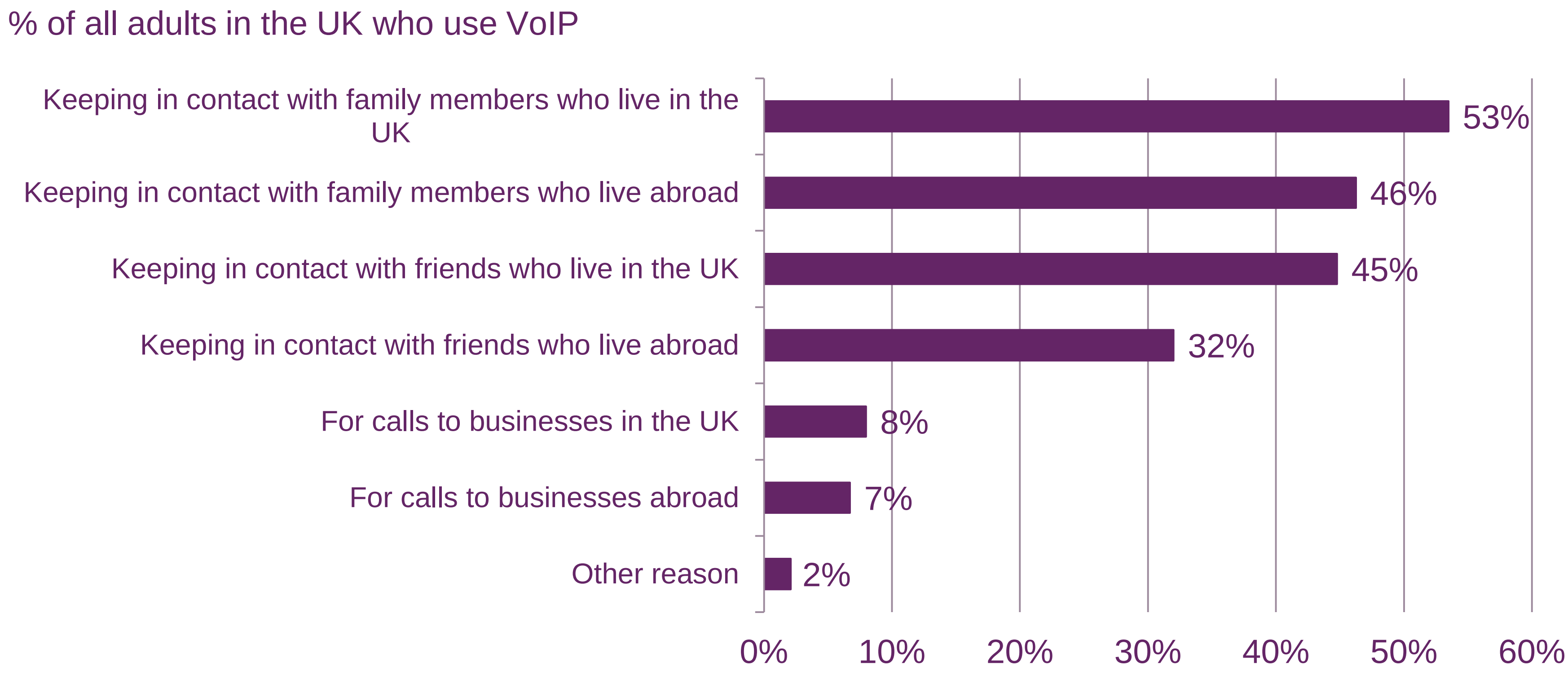
Types of numbers called when using VoIP



Source: YouGov online survey
Base: All adults 16+ in UK who use VoIP (398)
Question: Q7. Which type of numbers do you call using VoIP services? Please choose all that apply.

Figure 5.15

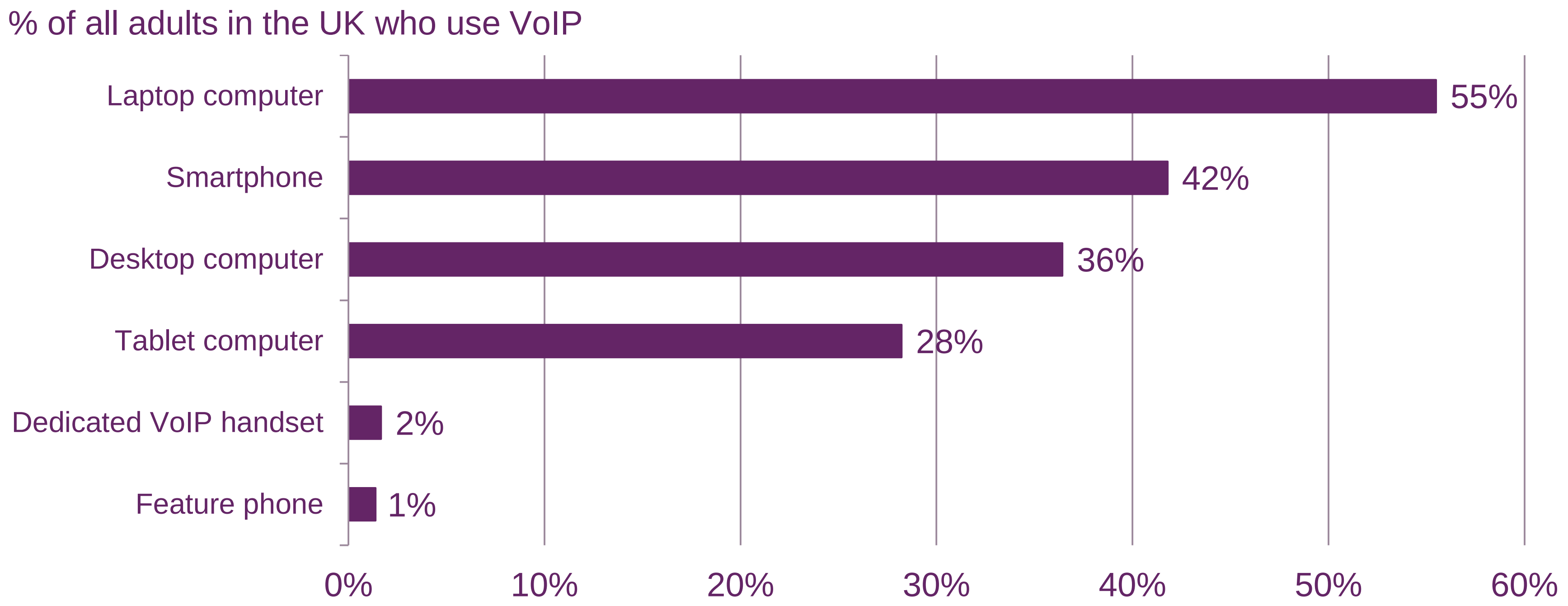
Use of VoIP



Source: YouGov online survey
Base: All adults 16+ in UK who use VoIP (398)
Question: Q6. For what purpose or purposes do you use the service or services selected in the previous question? You may choose all that apply.

Figure 5.16

Devices used to make VoIP calls

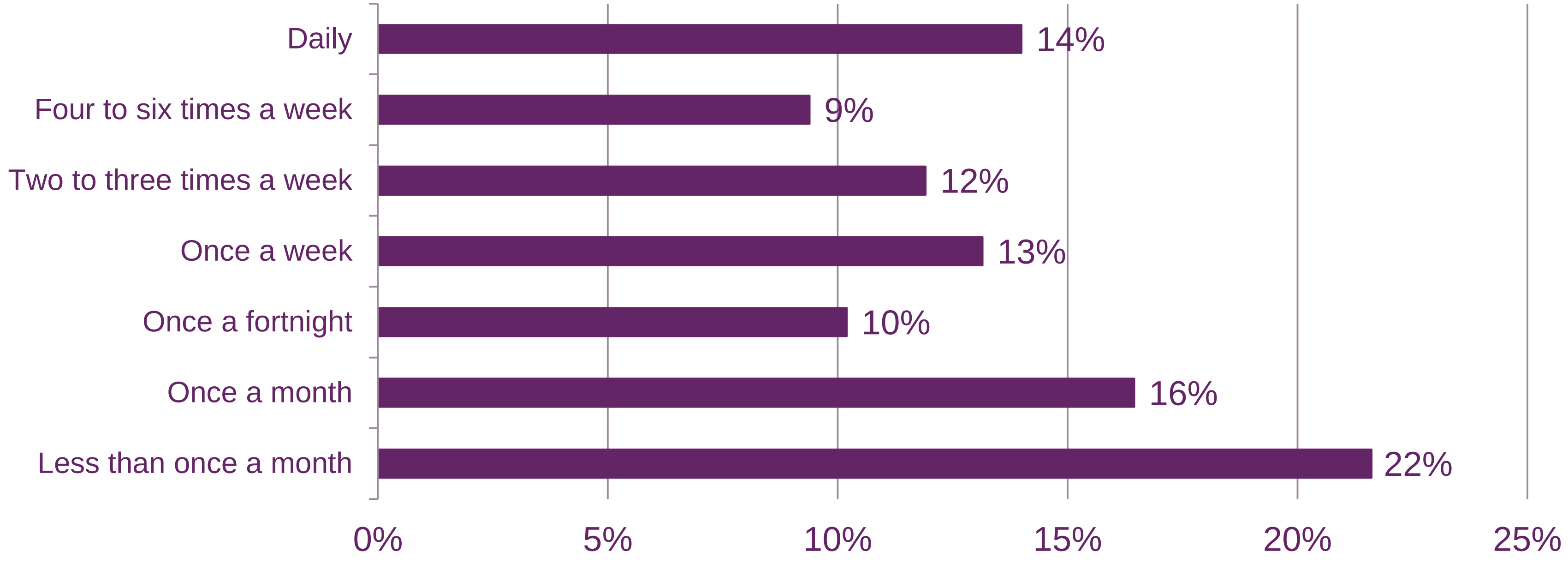


Source: YouGov online survey
Base: All adults 16+ in UK who use VoIP (398)
Question: Q10. On which of the following devices, do you use VoIP services, whether for making phone calls, video calls, instant messaging and/or faxing? Please choose all that apply.

Figure 5.17

Frequency of VoIP use

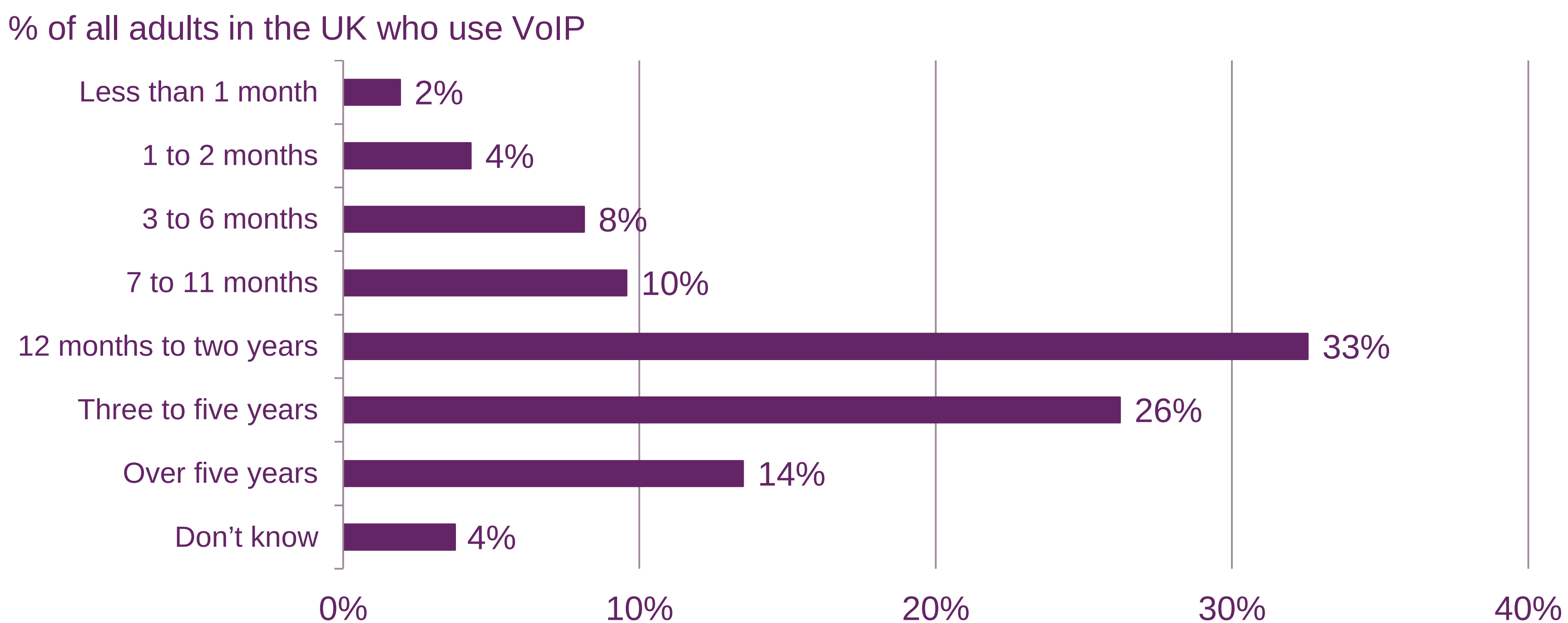
% of all adults in the UK who use VoIP



Source: YouGov online survey
Base: All adults 16+ in UK who use VoIP (398)
Question: Q8. How frequently do you use VoIP services?

Figure 5.18

Length of time VoIP has been used

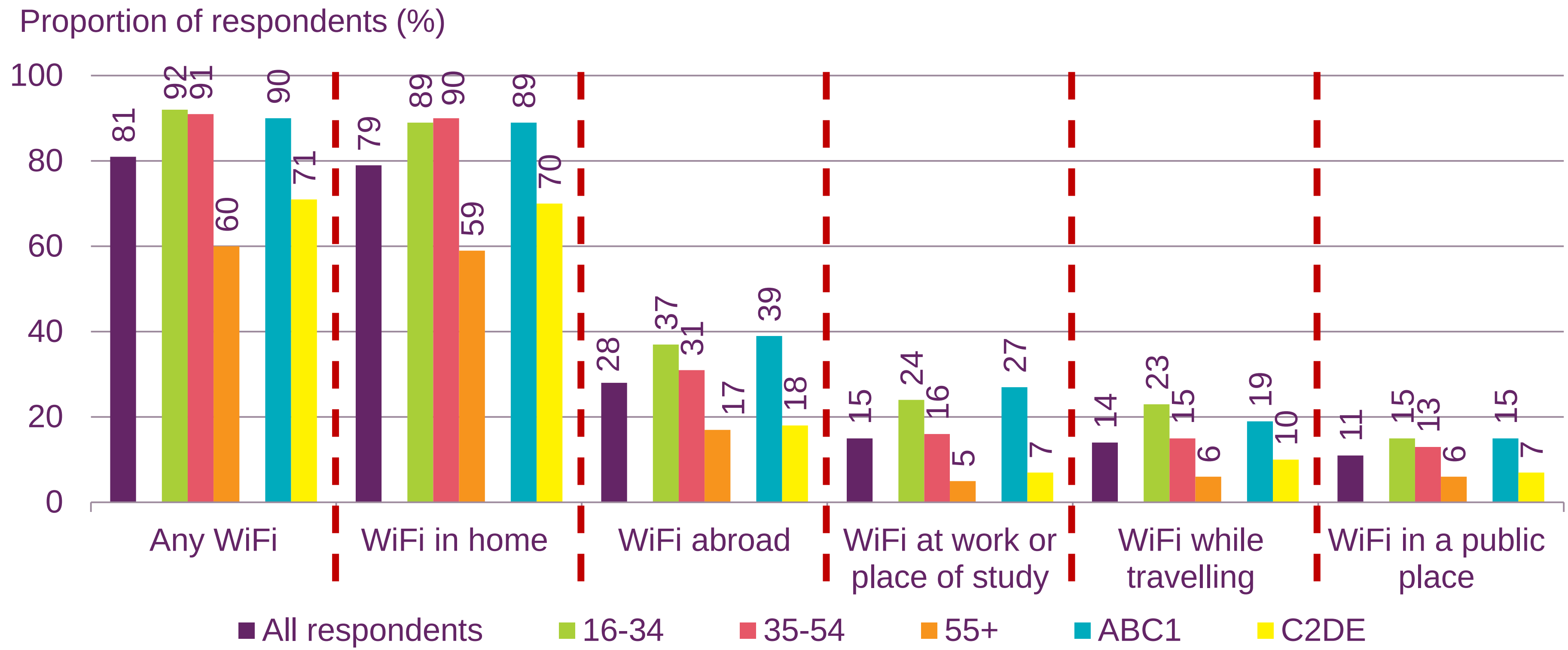


Source: YouGov online survey
Base: All adults 16+ in UK who use VoIP (398)
Question: Q9. How long have you been using VoIP services?

WiFi use inside and outside the home

Figure 5.19

WiFi access in different locations, by age and socio-economic group



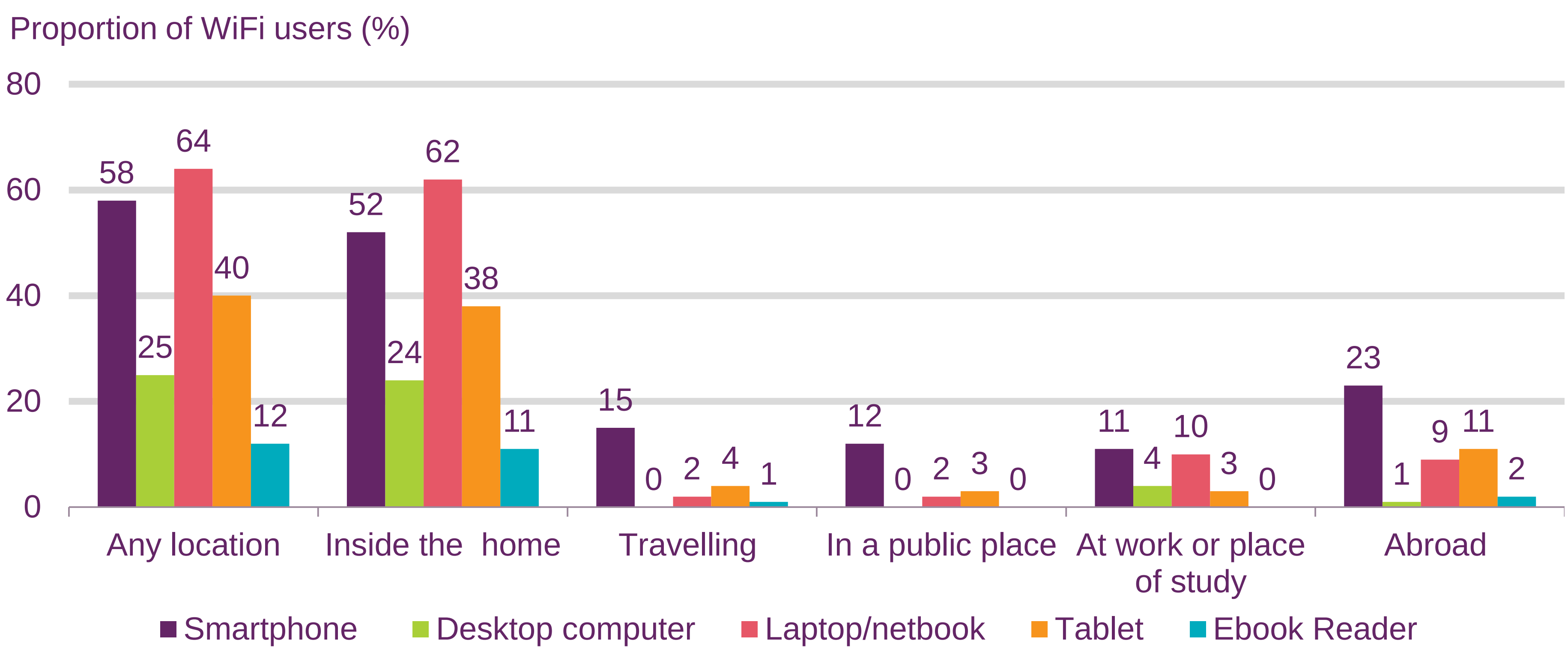
Source: Kantar Media Omnibus

Base: Q.A All adults 16+ in UK (N=2,026), Q.A2 All with internet access at work or place of study (N=349), Q.A3 All adults 16+ in UK (N=2,026)

Question: Q.A Which of the following do you currently ever use, if at all?/ Q.A2 Which of the following ways do you access internet in your work or place of study? / Q.A3 Do you ever use any of the following to connect to the internet when you are abroad?

Figure 5.20

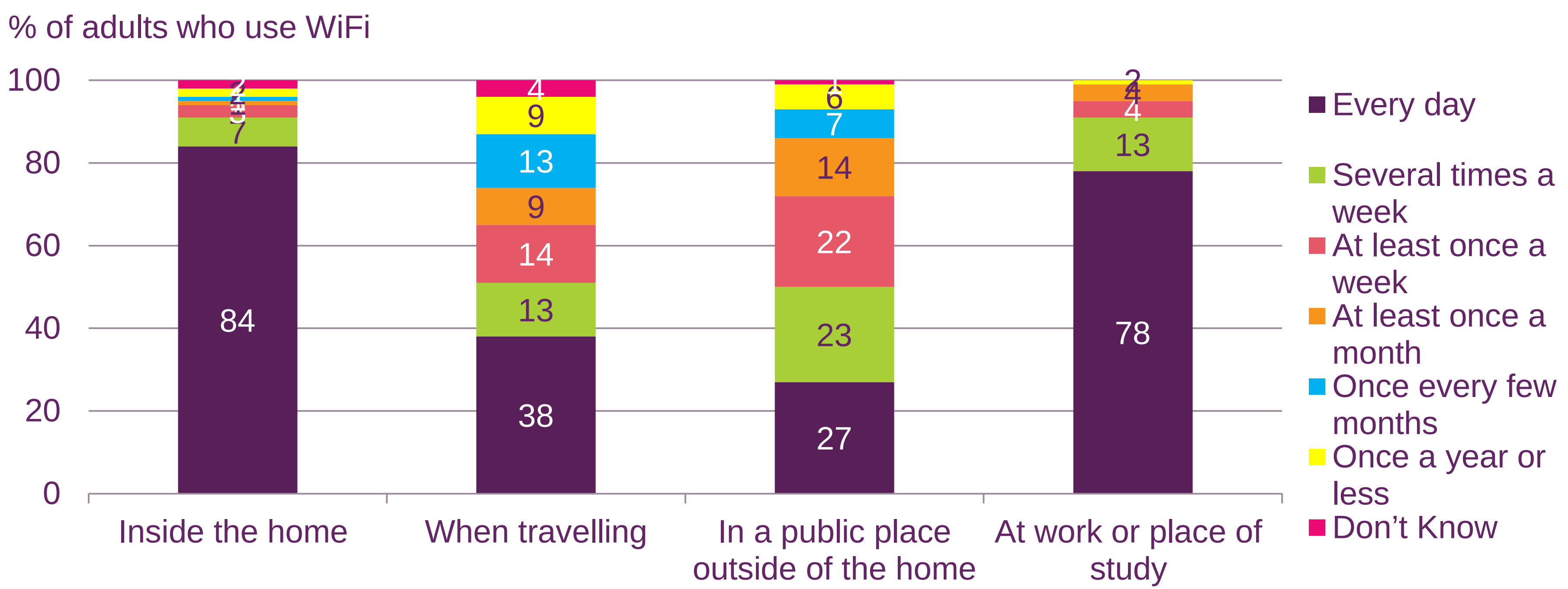
Devices used to connect to WiFi in different locations



Source: Kantar Media Omnibus
Base: All who use WiFi inside the home (N=1,505), When travelling (N=264), In a public place (N=216), At work or place of study (N=248), Abroad (N=512)
Question: Q.2 Which devices do you use to connect to WiFi?

Figure 5.21

Frequency of WiFi use, by location

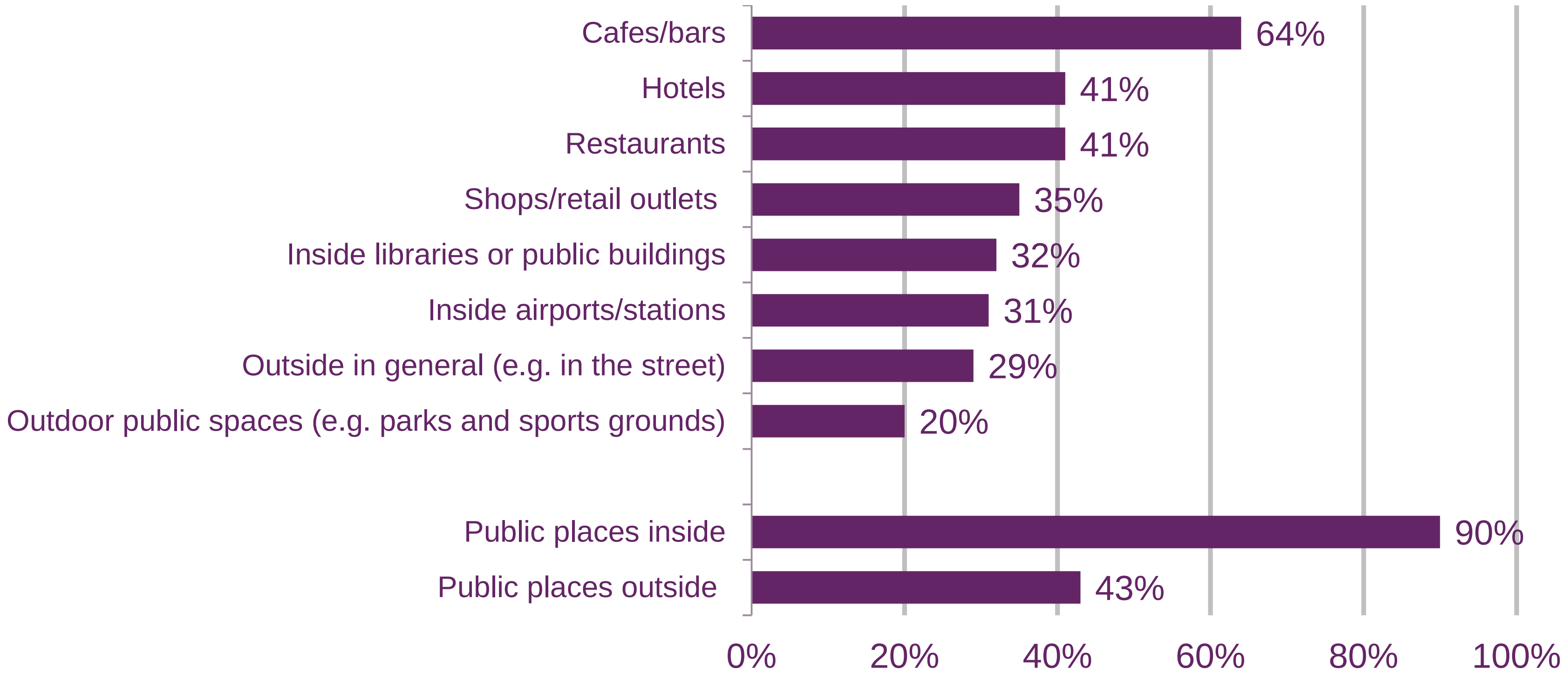


Source: Kantar Media Omnibus
Base: All who use WiFi at home (N=1,532), work (N=248) travelling (N=265) or in public (N=216), excluding abroad
Question: Q.3A How often do you use WiFi <insert location>?

Figure 5.22

Public places where WiFi is used

% of adults using WiFi in public places

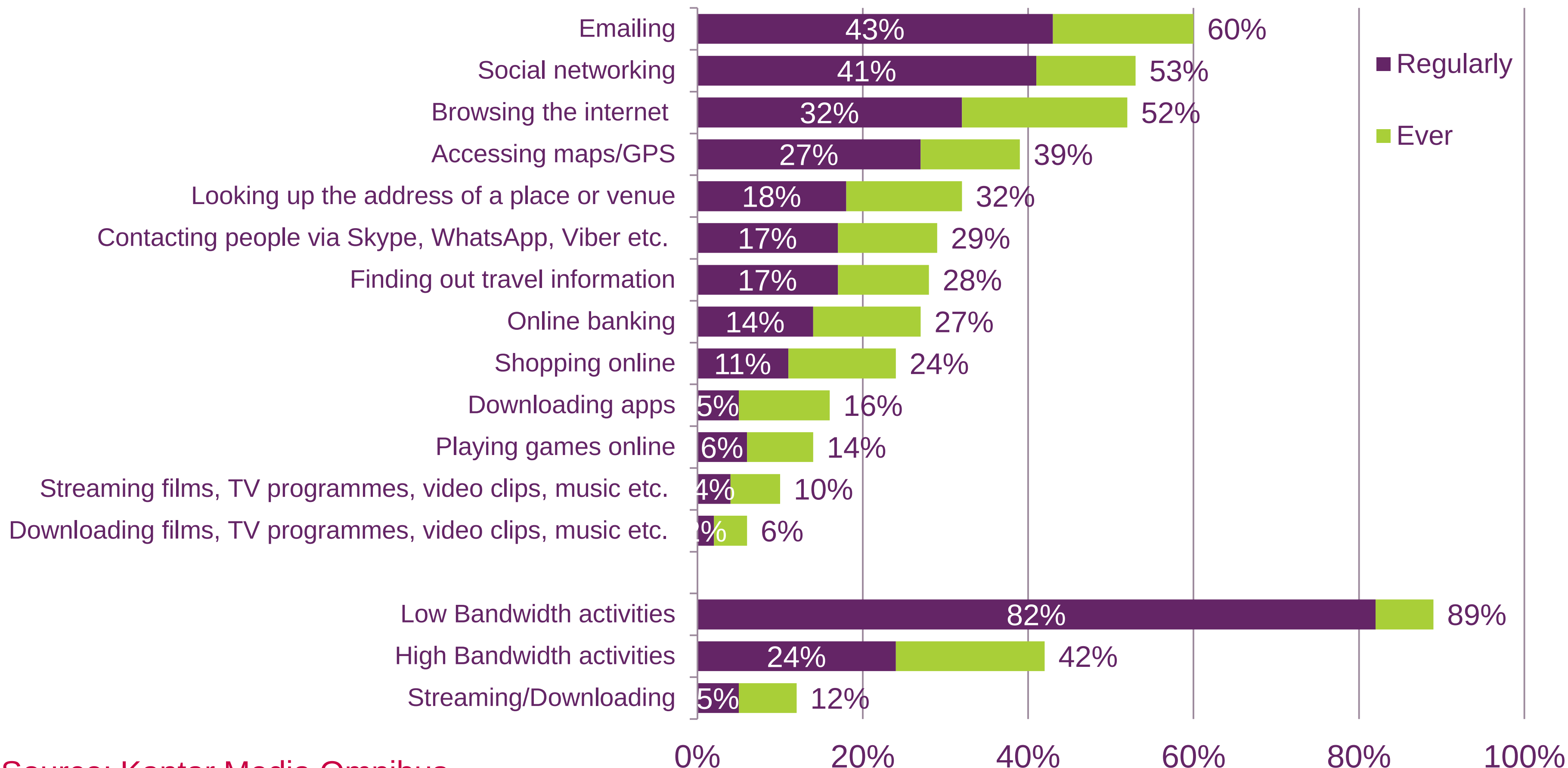


Source: Kantar Media Omnibus
Base: All who use WiFi in a public place outside of the home (excluding travelling) (N=216)
Question: Q.4 In which of the following public places do you use WiFi when outside of the home? This does not include travelling, transport or when you are on the move.

Figure 5.23

Activities WiFi connections ‘ever’ used for outside the home

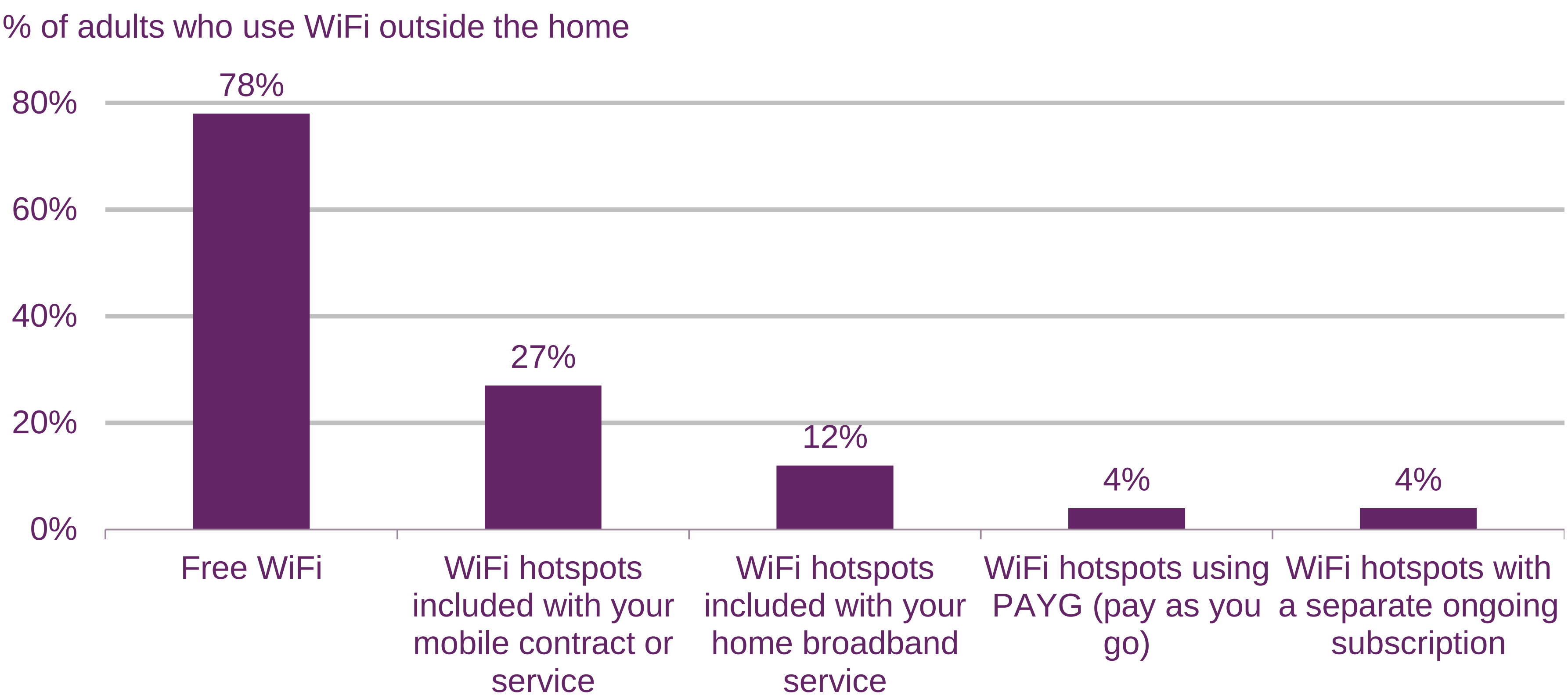
% of adults who ever use WiFi outside of the home



Source: Kantar Media Omnibus
Base: All who use WiFi outside the home, while travelling or abroad (773)
Question: Q.7A Which of the following do you ever use WiFi for when you are outside the home?

Figure 5.24

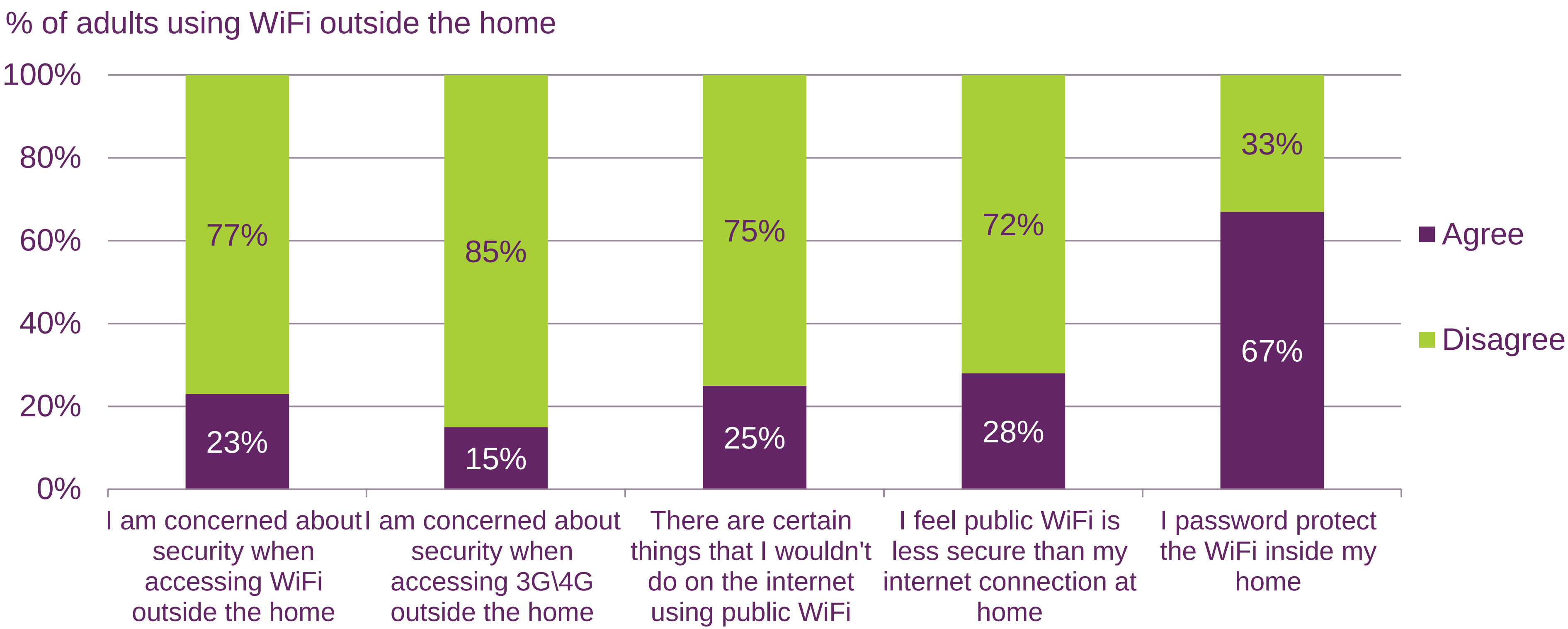
Types of WiFi used in public places outside the home or while travelling



Source: Kantar Media Omnibus
Base: All who use WiFi outside the home or while travelling (N=348)
Question: Q.6A Which of the following types of WiFi do you use when you are in public places outside the home or while you are travelling?

Figure 5.25

Attitudes towards WiFi and mobile internet security



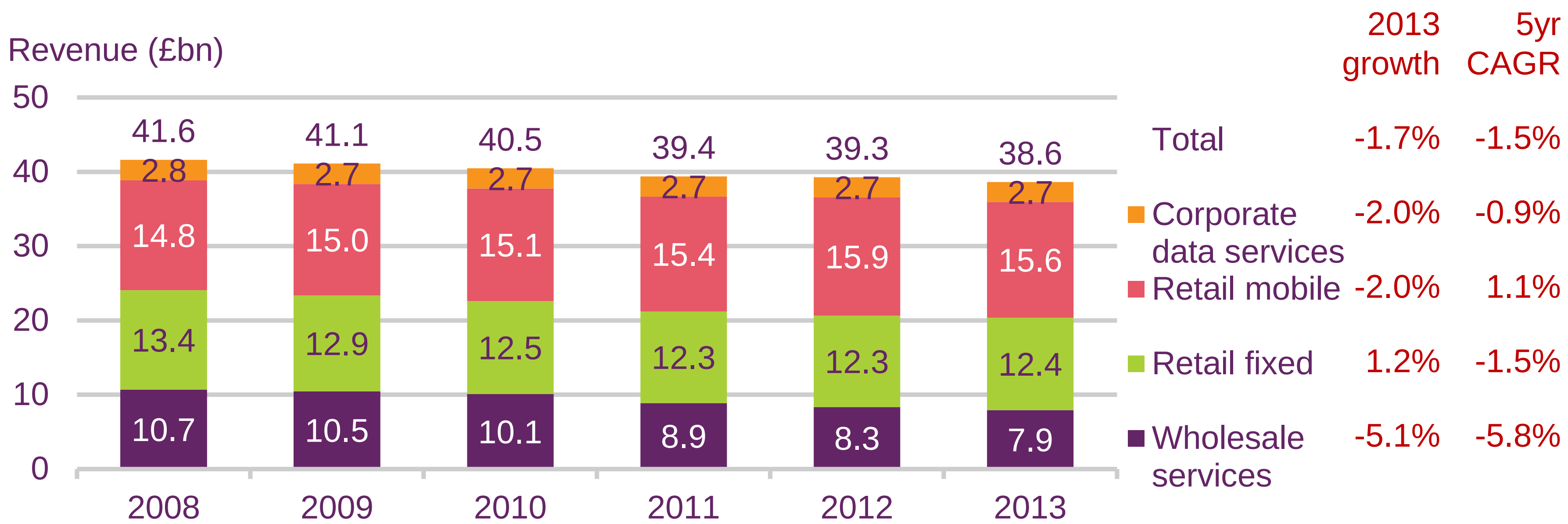
Source: Kantar Media Omnibus
Base: All who use WiFi outside the home (N=737); All who use 3G/4G outside the home (N=766); All who use WiFi at home (N=1532)
Question: Q.20 Which of the following statements apply to you?

The telecoms industry

Market overview

Figure 5.26

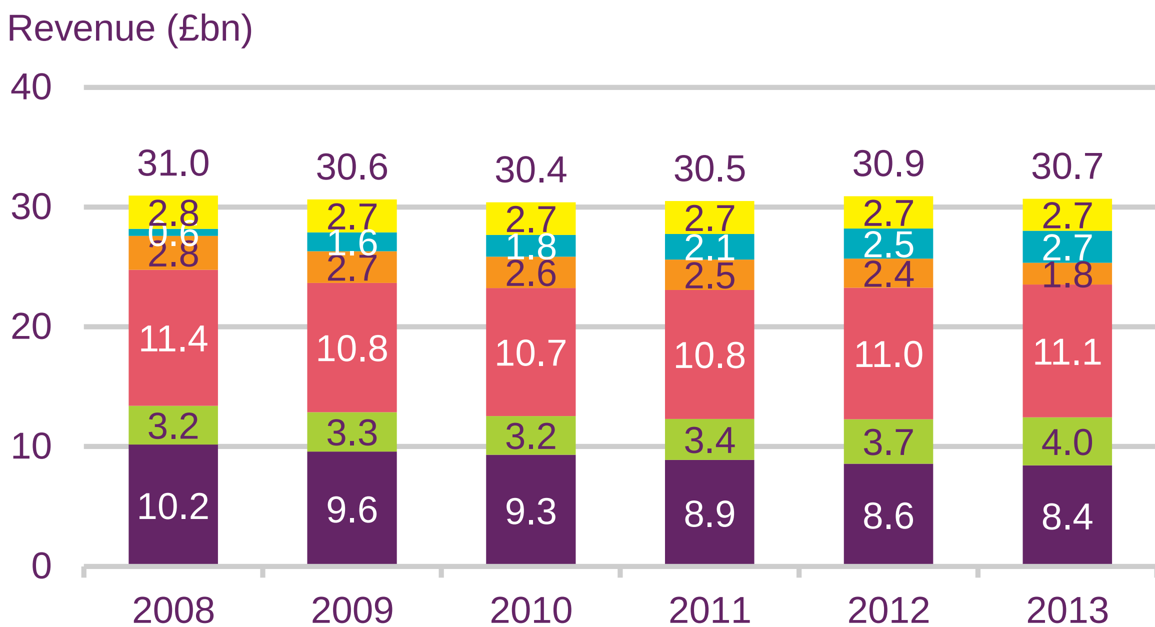
Summary of UK telecoms revenues: 2008 to 2013



Source: Ofcom / operators, with the exception of corporate data services, which sourced from IDC.
Notes: ‘Corporate data services’ comprises web hosting, Ethernet, IP VPN, digital leased line, corporate VoIP and frame relay/ATM services; wholesale mobile comprises wholesale mobile voice, messaging and data services, mobile voice and SMS termination revenue and wholesale inbound roaming revenue (i.e. - revenue from overseas operators when their subscribers use UK networks).

Figure 5.27

Retail telecoms revenue, by service

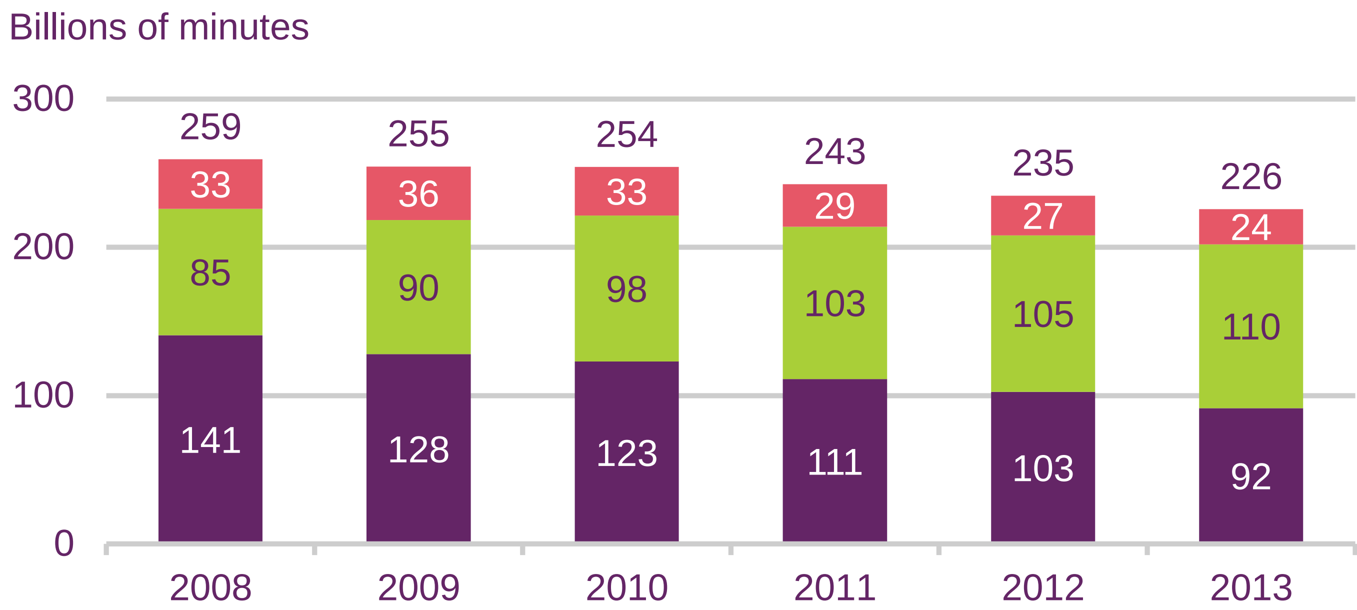


	2013 growth	5yr CAGR
Total	-0.7%	-0.2%
Corporate data services	-2.0%	-0.9%
Mobile data	6.9%	35.6%
Mobile messaging	-24.6%	-8.4%
Mobile access & voice	0.9%	-0.5%
Broadband and narrowband	8.0%	4.4%
Fixed voice	-1.7%	-3.7%

Source: Ofcom / operators, with the exception of corporate data services, sourced from IDC.
Notes: ‘Corporate data services’ comprises web hosting, Ethernet, IP VPN, digital leased line, corporate VoIP and frame relay/ATM services.

Figure 5.28

Outgoing fixed and mobile voice call minutes

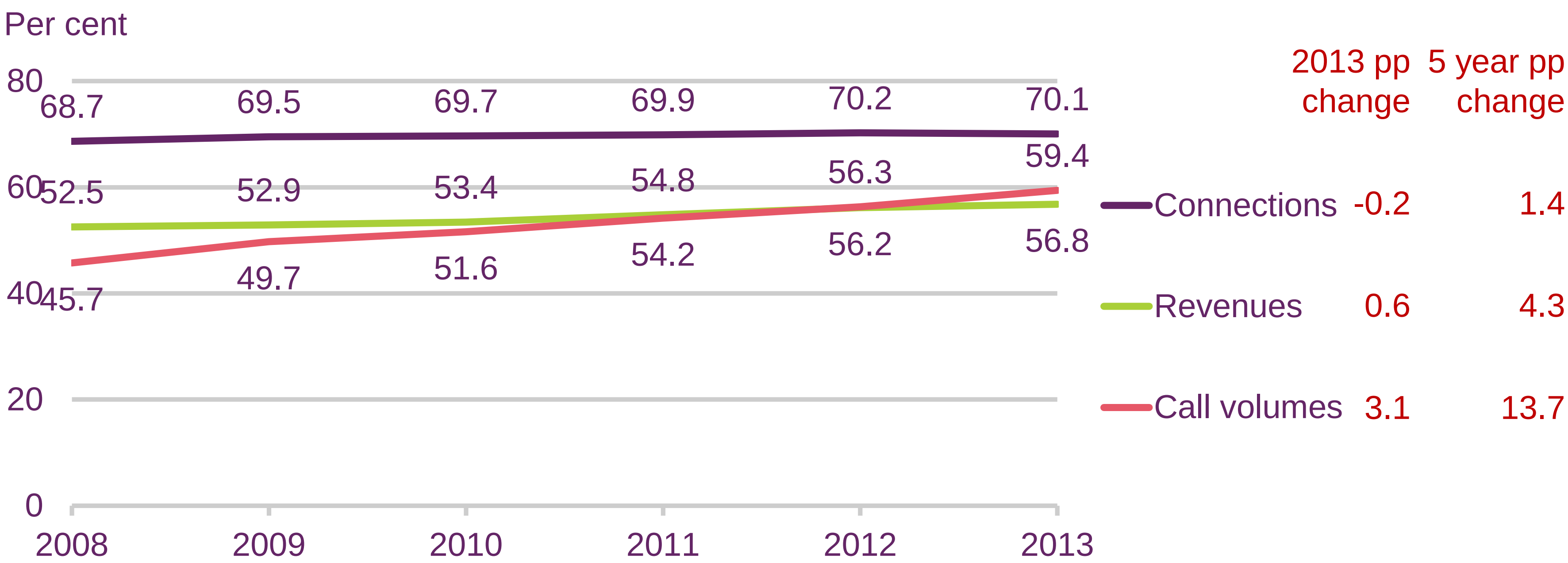


	2013 growth	5yr CAGR
Total	-3.9%	-2.7%
Pre-pay mobile	-11.9%	-6.6%
Post-pay mobile	4.7%	5.3%
Fixed	-10.7%	-8.2%

Source: Ofcom / operators

Figure 5.29

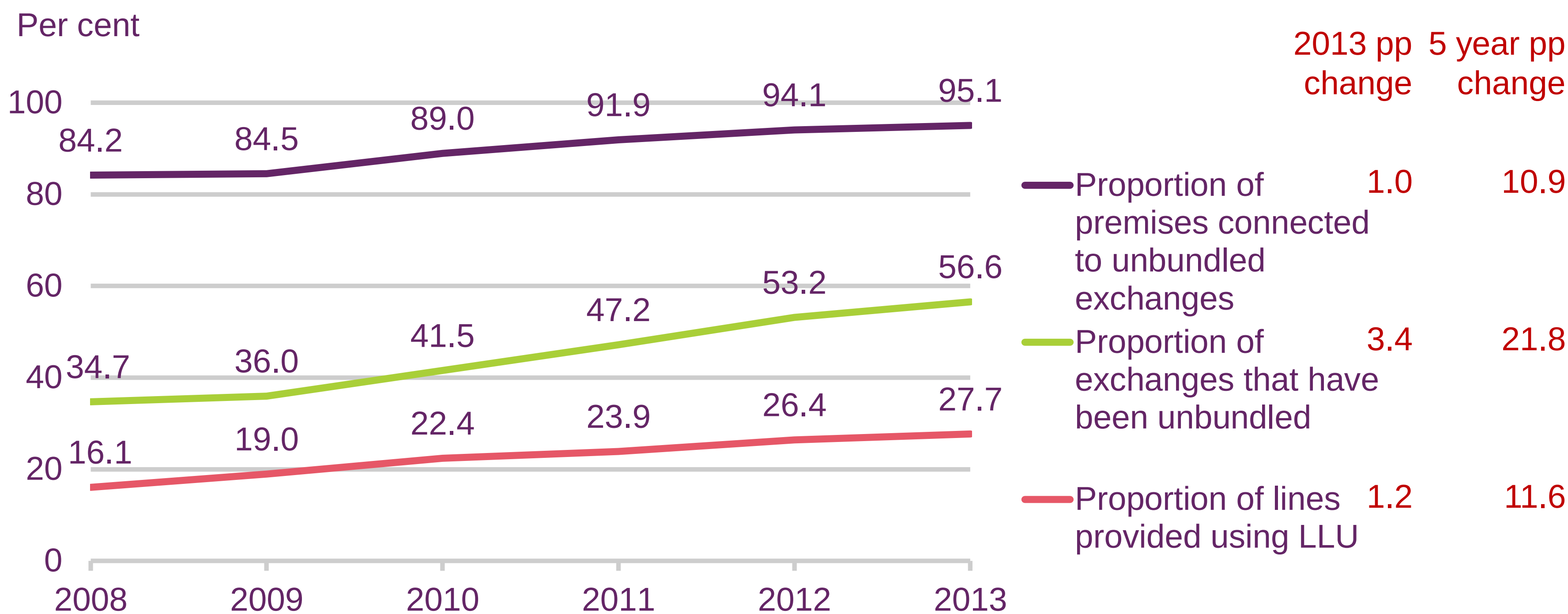
Mobile share of voice connections, revenues and volumes



Source: Ofcom / operators
Note: Mobile voice revenues include revenues from bundled messaging and data services.

Figure 5.30

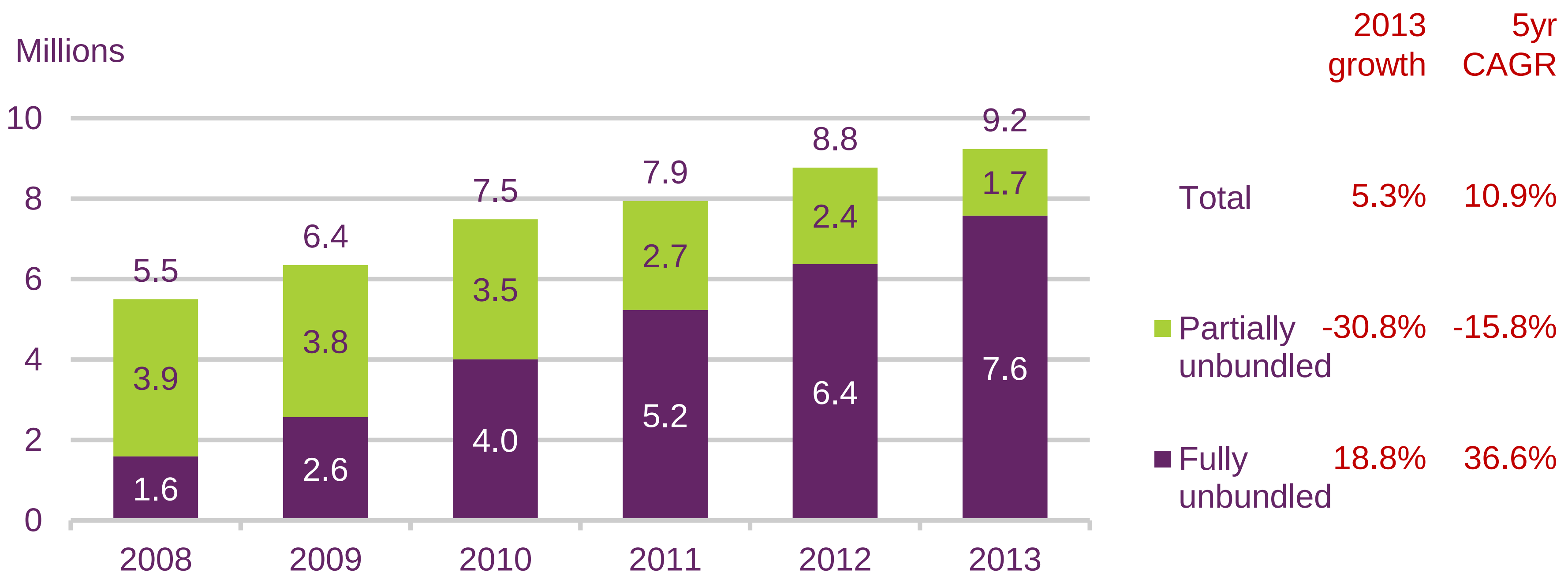
Proportion of unbundled BT local exchanges and connected premises



Source: Ofcom / BT

Figure 5.31

Unbundled fixed lines

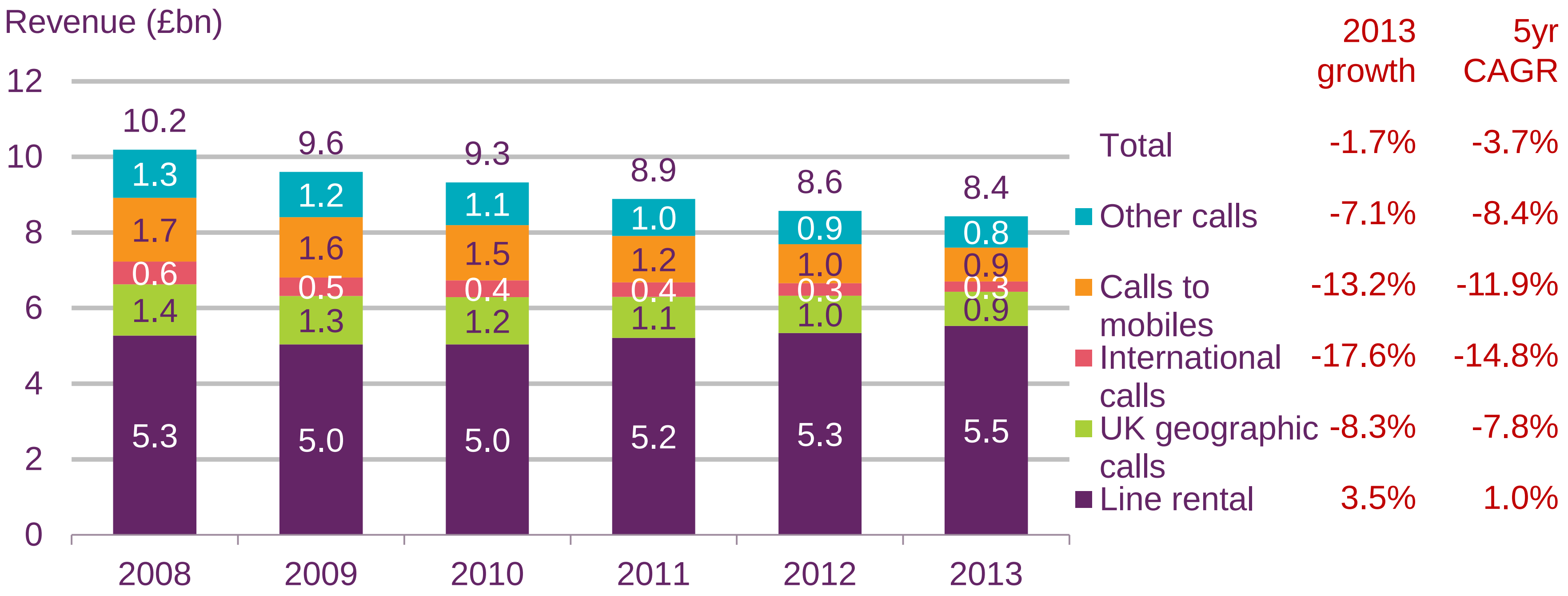


Source: BT

Fixed voice services

Figure 5.32

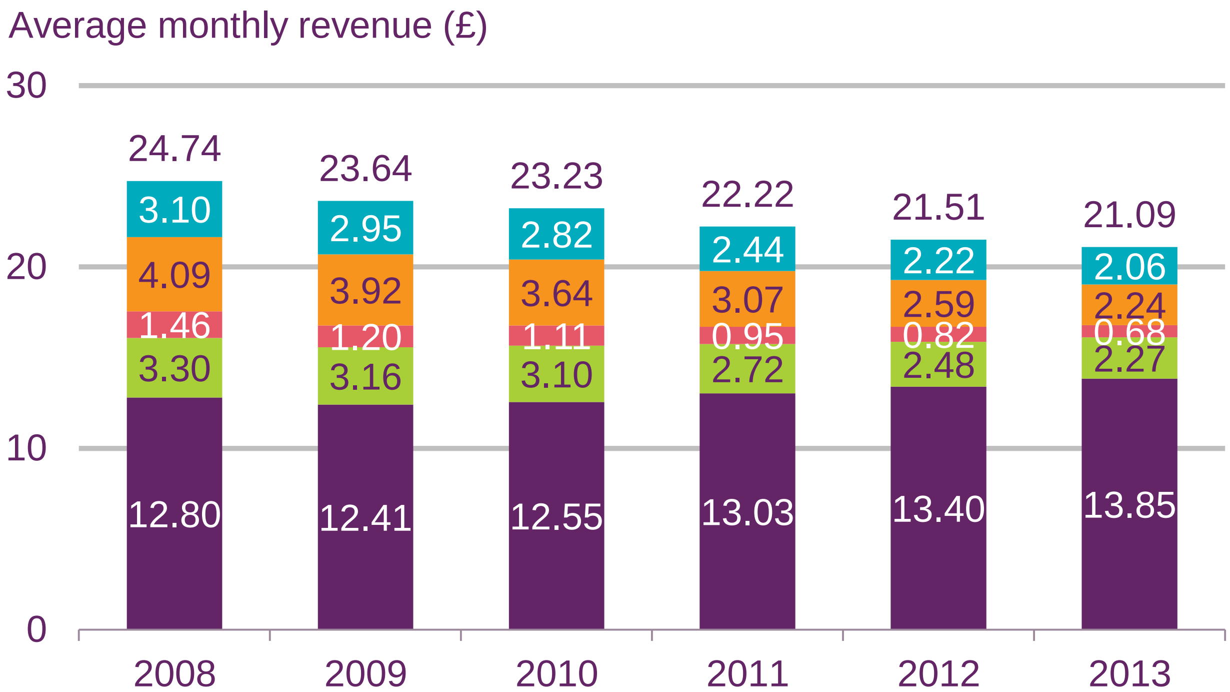
Retail fixed voice revenues



Source: Ofcom / operators

Figure 5.33

Average monthly retail revenue per fixed line

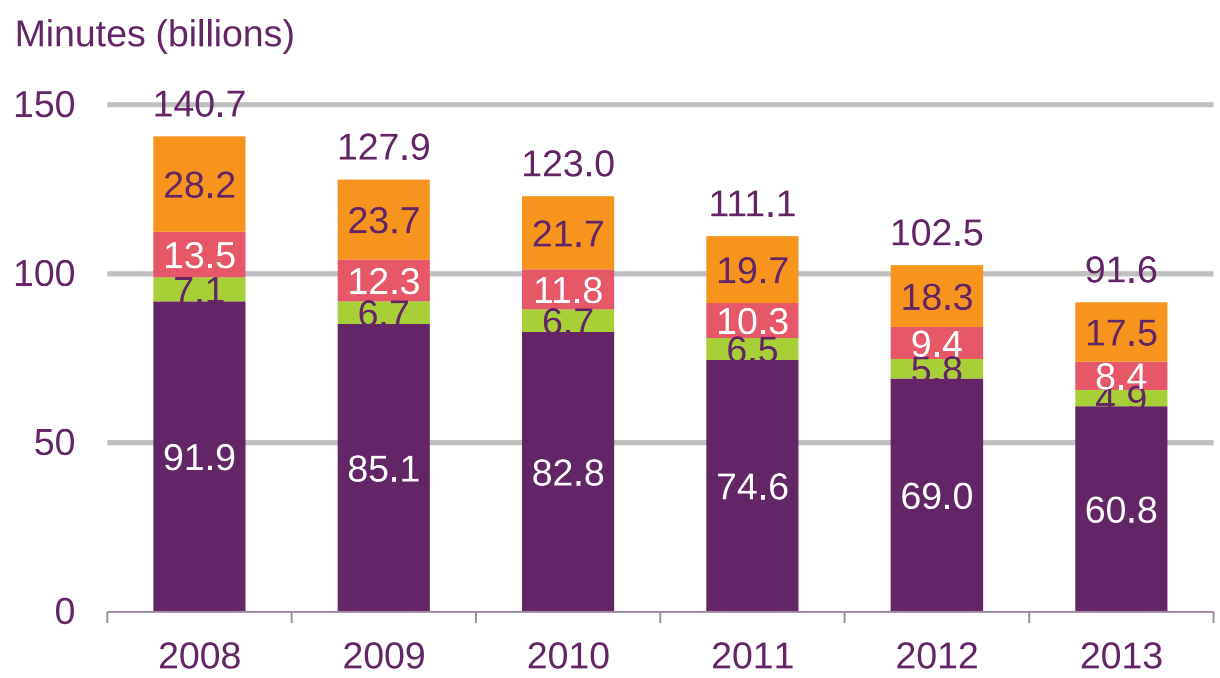


	2013 growth	5yr CAGR
Total	-1.9%	-3.1%
Other calls	-7.3%	-7.8%
Calls to mobiles	-13.4%	-11.3%
International calls	-17.8%	-14.3%
UK geographic calls	-8.5%	-7.2%
Line rental & bundled calls	3.3%	1.6%

Source: Ofcom / operators

Figure 5.34

Fixed voice call volumes, by type of call

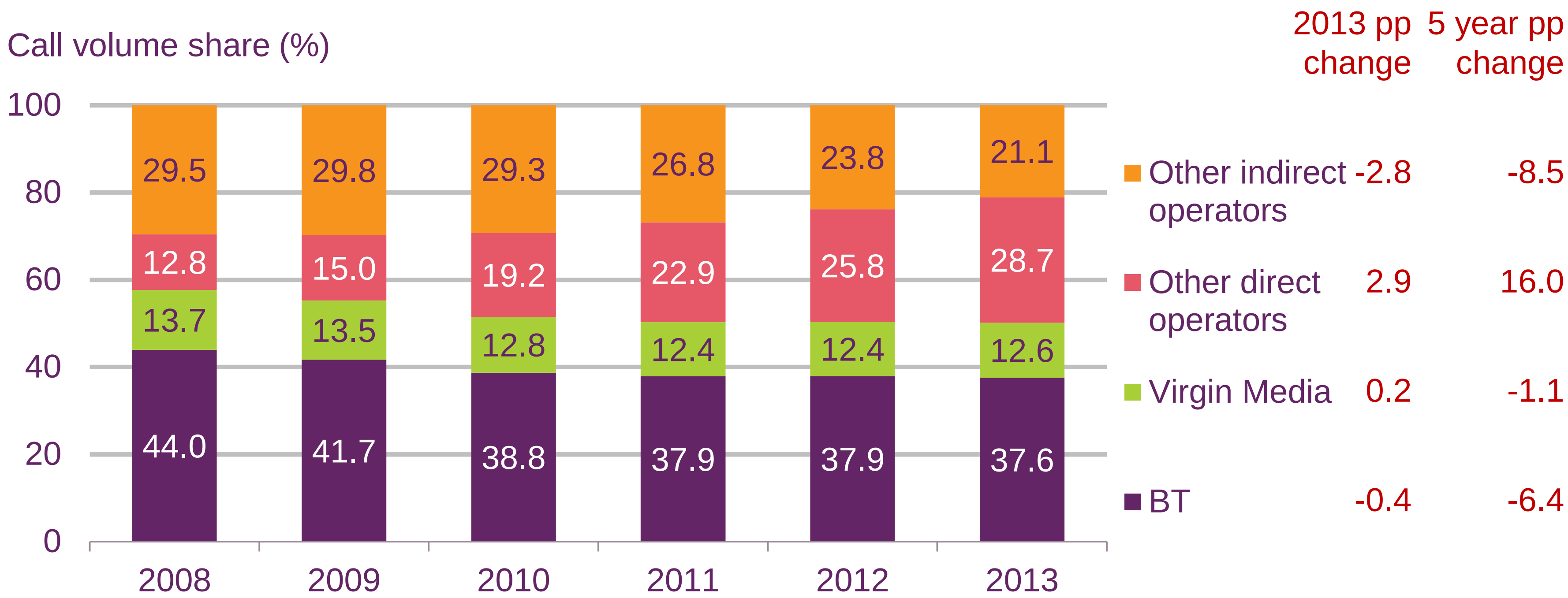


	2013 growth	5yr CAGR
Total	-10.7%	-8.2%
Other calls	-4.2%	-9.1%
Calls to mobiles	-10.9%	-9.2%
International calls	-16.3%	-7.1%
UK geographic calls	-11.9%	-7.9%

Source: Ofcom / operators

Figure 5.35

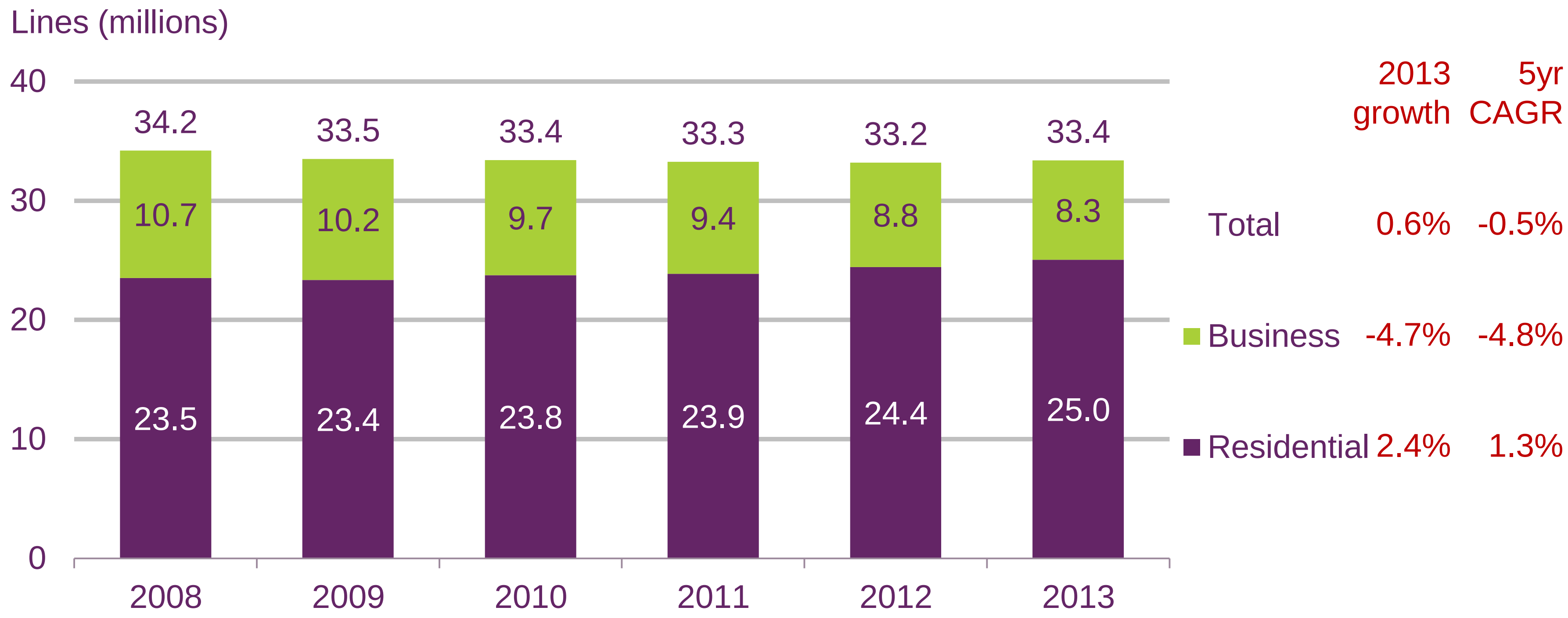
Share of retail fixed voice call volumes



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

Figure 5.36

Number of fixed lines



Source: Ofcom / operators

Fixed data services

Figure 5.37

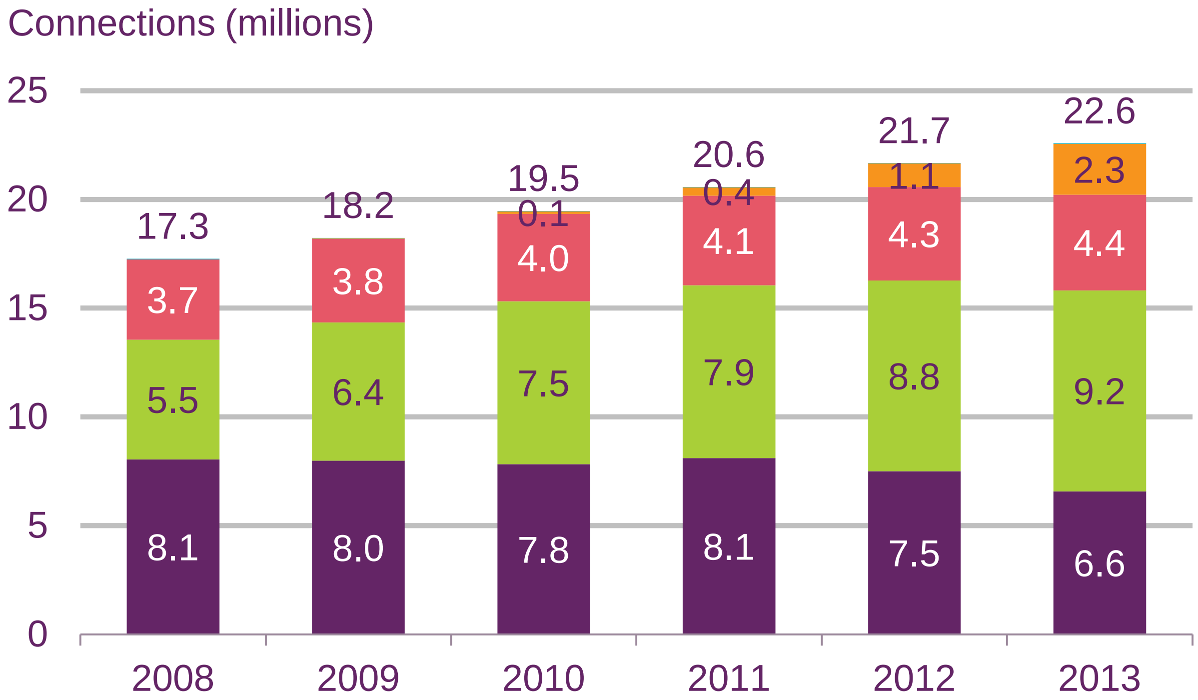
Retail residential and SME fixed internet revenues

	2013 growth	5yr CAGR
Total	8.0%	4.4%
Broadband	8.0%	5.2%
Narrowband	-47.8%	-51.6%

Source: Ofcom / operators

Figure 5.38

Retail residential and SME fixed broadband connections

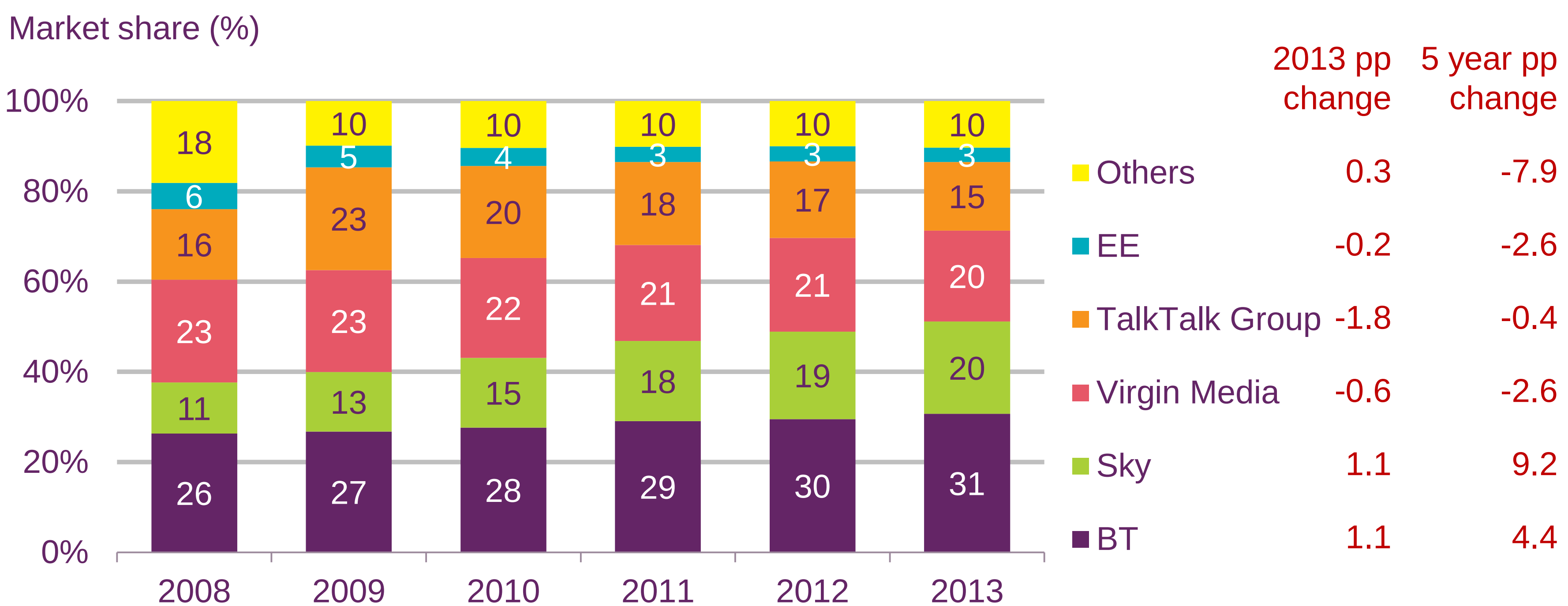


	2013 growth	5yr CAGR
Total	4.2%	5.5%
Others	0.0%	-12.9%
Fibre	116.3%	n/a
Cable	2.4%	3.6%
LLU-ADSL	5.3%	10.9%
Non-LLU ADSL	-12.2%	-4.0%

Source: Ofcom / operators

Figure 5.39

Retail residential and SME fixed broadband market shares

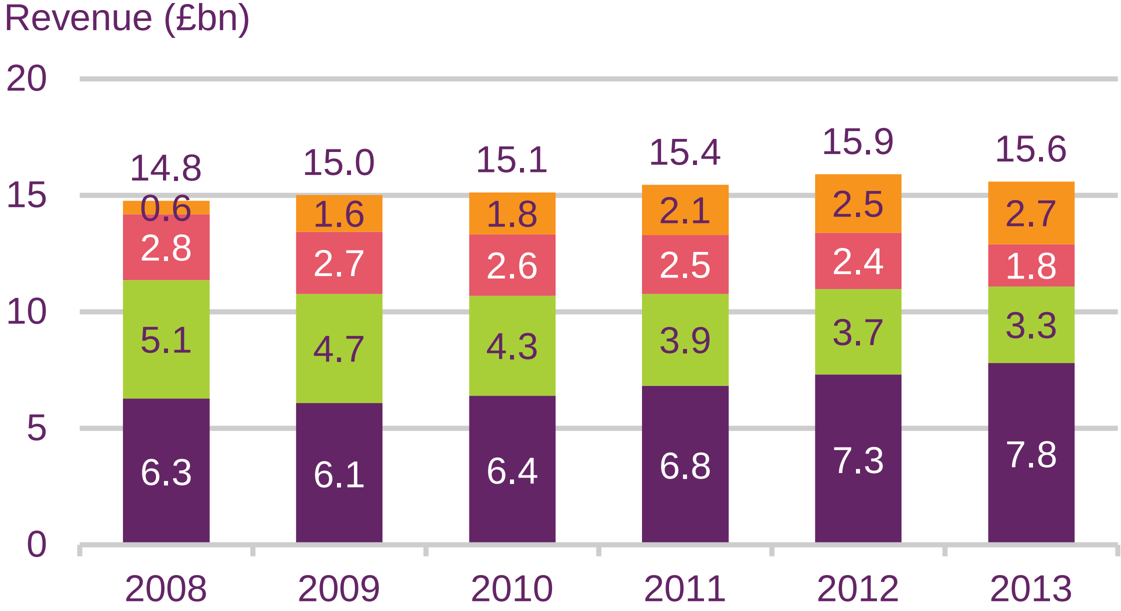


Source: Ofcom / operators

Mobile voice and data services

Figure 5.40

Mobile retail revenue, by service

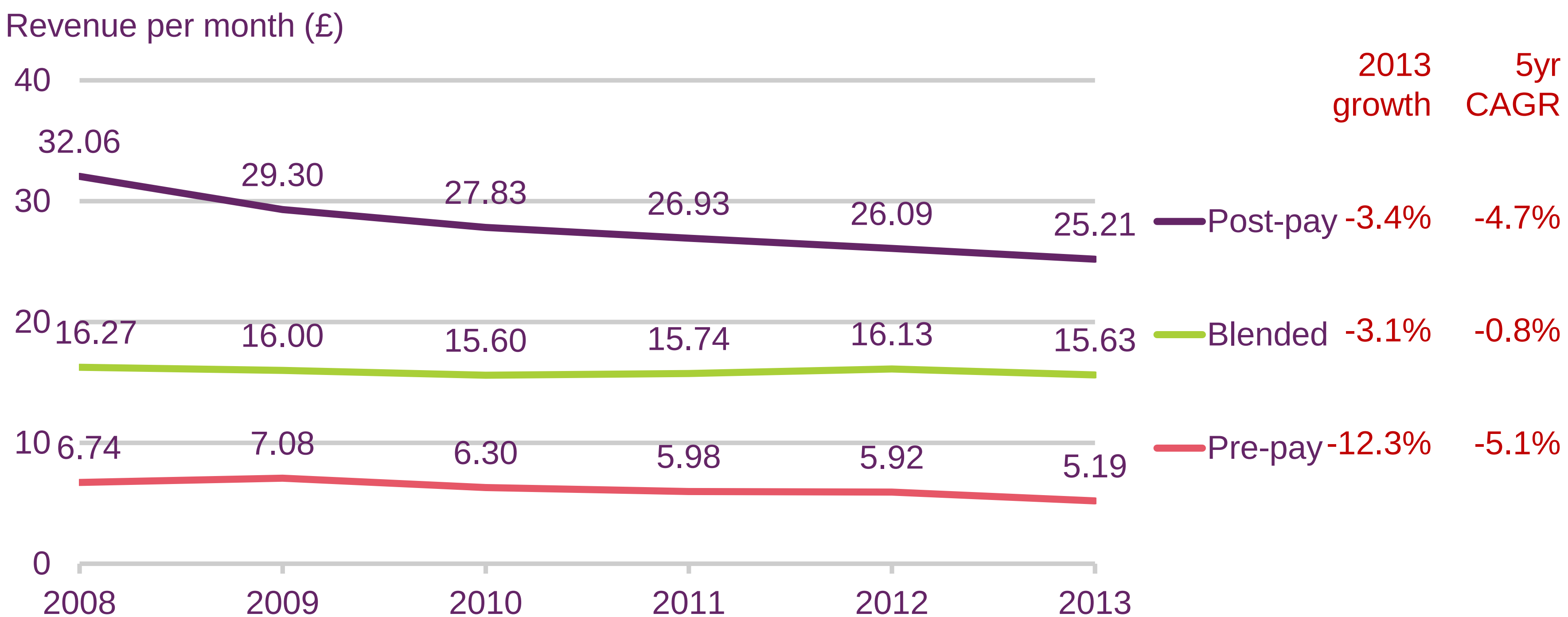


	2013 growth	5yr CAGR
Total	-2.0%	1.1%
Out-of bundle data	6.9%	35.6%
Out-of-bundle messaging	-24.6%	-8.4%
Out-of-bundle calls	-10.9%	-8.4%
Access and bundled services	6.9%	4.5%

Source: Ofcom / operators

Figure 5.41

Average monthly retail revenue per mobile subscriptions

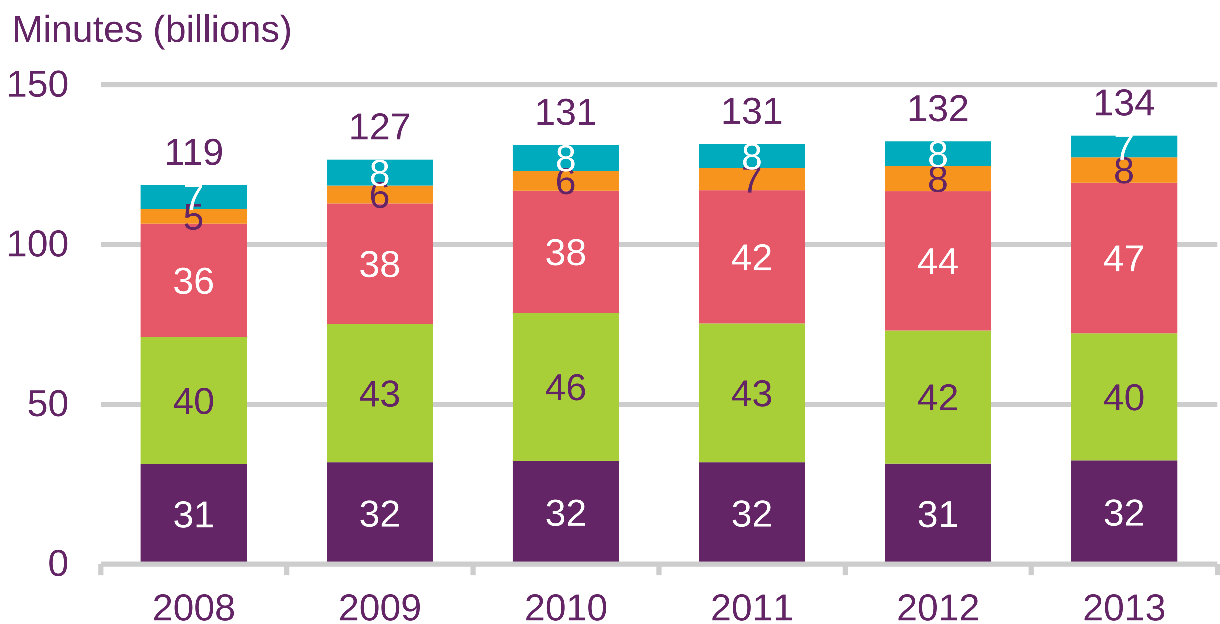


Source: Ofcom / operators

Note: 'Blended' refers to the average across all subscriptions.

Figure 5.42

Outgoing mobile call minutes, by type of call



	2013 growth	5yr CAGR
Total	1.4%	2.5%
Other calls	-12.1%	-1.8%
International	0.9%	11.3%
Off-net mobile	8.2%	5.8%
On-net mobile	-4.5%	0.0%
UK geographic	3.0%	0.7%

Source: Ofcom / operators

Figure 5.43

Outgoing SMS and MMS messages, by pre-pay and post-pay

Source: Ofcom / operators

Figure 5.44

Mobile subscriptions, by type

	2013 growth	5yr CAGR
Total	-0.4%	1.4%
Dedicated mobile broadband	-3.2%	14.0%
Mobile handset	-0.2%	0.8%

Source: Ofcom / operators
Note: Excludes M2M connections.

Figure 5.45

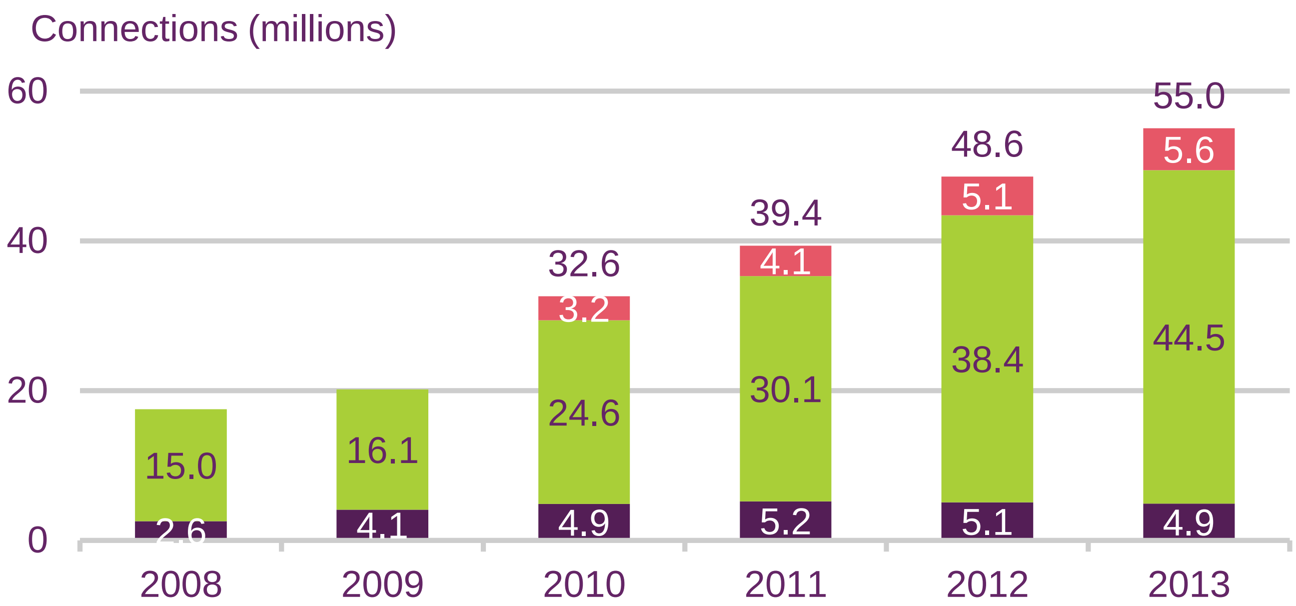
Mobile subscriptions, by pre-pay and post-pay

	2013 growth	5yr CAGR
Total	-0.4%	1.4%
Post-pay	7.8%	9.3%
Pre-pay	-9.3%	-5.3%

Source: Ofcom / operators
Note: Excludes M2M connections.

Figure 5.46

Mobile data connections, by type



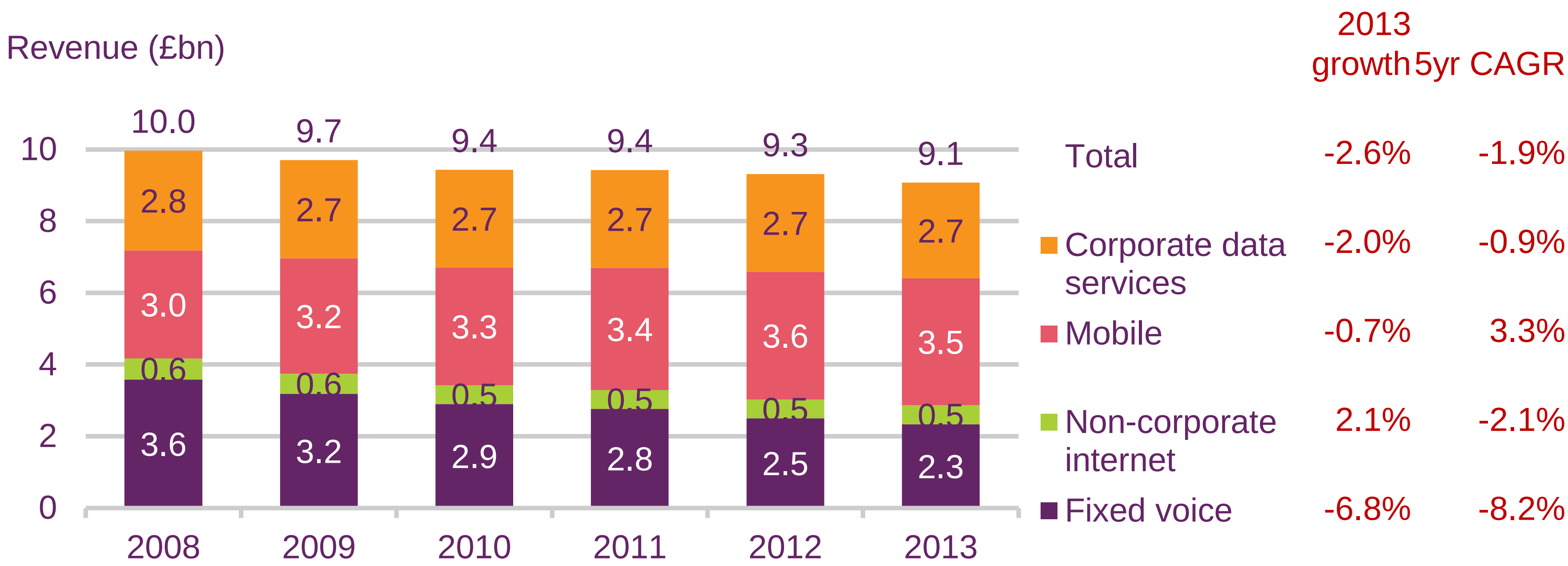
	2013 growth	5yr CAGR
Total	13.3%	25.7%
M2M	9.0%	n/a
Internet on handset	16.1%	24.3%
Dedicated mobile broadband	-3.2%	14.0%

Source: Ofcom / operators and Ofcom market research.
Note: Internet on handset figures are estimates based on Ofcom's market research in Q1 following the year stated.

Business markets

Figure 5.47

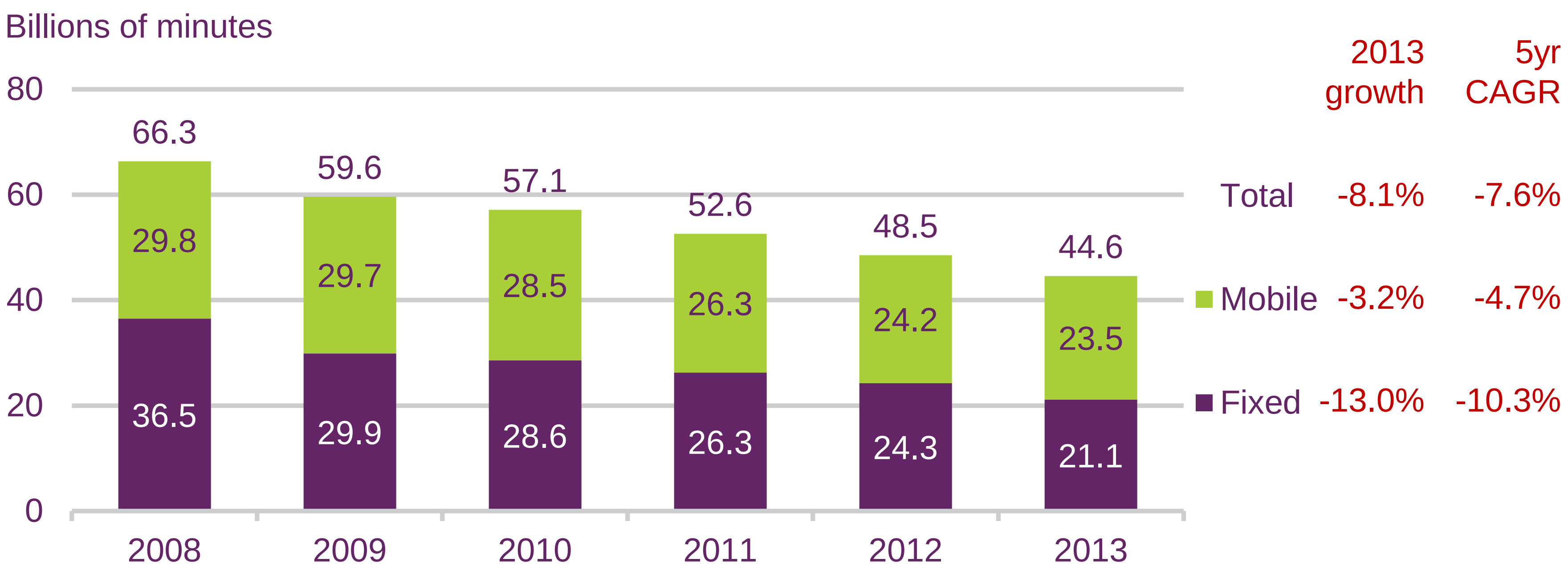
Retail business telecoms revenues, by service



Source: Ofcom / operators with the exception of corporate data services, sourced from IDC
Note: Fixed voice figures exclude revenues from non-geographic voice calls; corporate data services comprises web hosting, Ethernet, IP VPN, digital leased line, corporate VoIP and frame relay/ATM services.

Figure 5.48

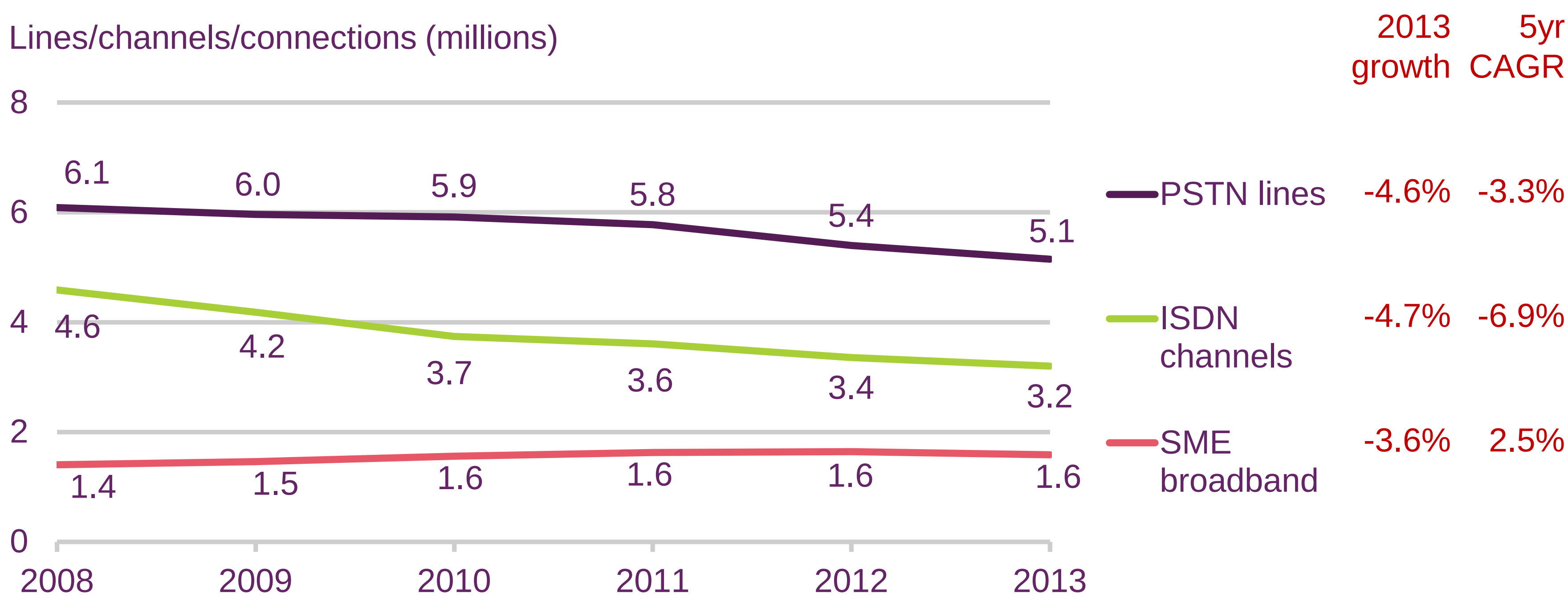
Business voice call minutes



Source: Ofcom / operators
Note: Fixed call volumes exclude non-geographic voice calls.

Figure 5.49

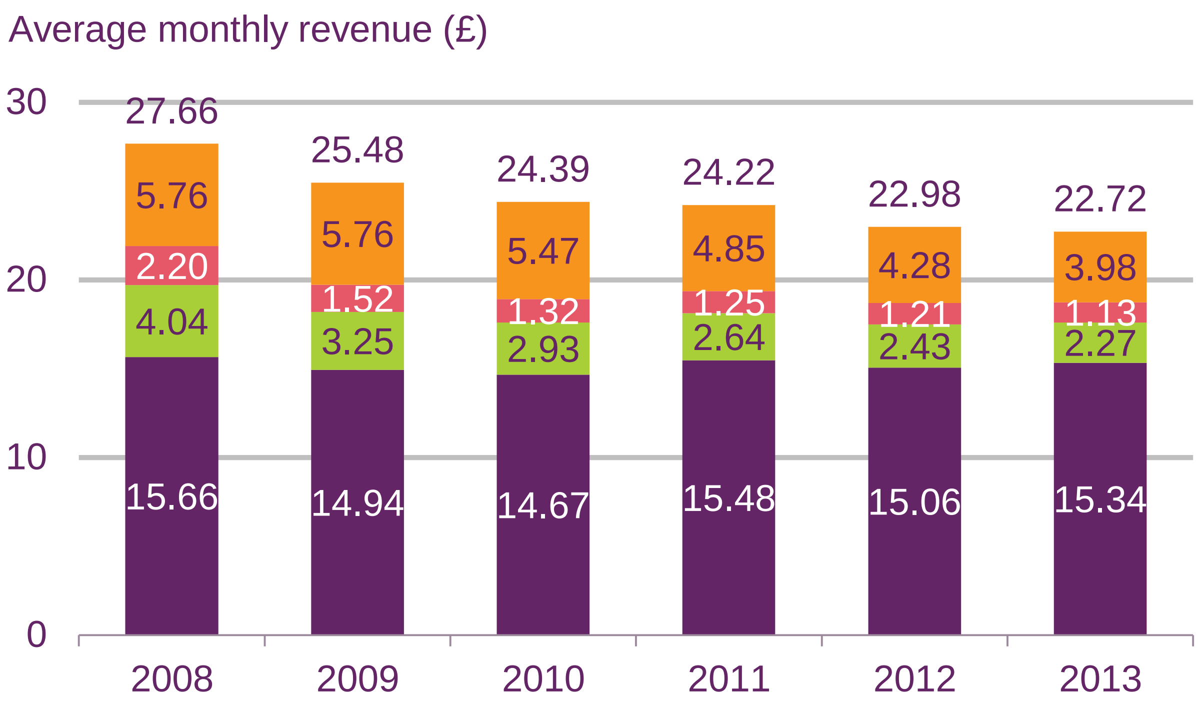
Business fixed voice and SME fixed broadband connections



Source: Ofcom / operators.
Note: PSTN lines include lines classed as 'other'.

Figure 5.50

Average monthly retail revenue per business fixed line



	2013 growth	5yr CAGR
Total	-1.2%	-3.9%
Calls to mobiles	-7.0%	-7.1%
International calls	-6.5%	-12.4%
UK geographic calls	-6.8%	-10.9%
Line rental & bundled calls	1.8%	-0.4%

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

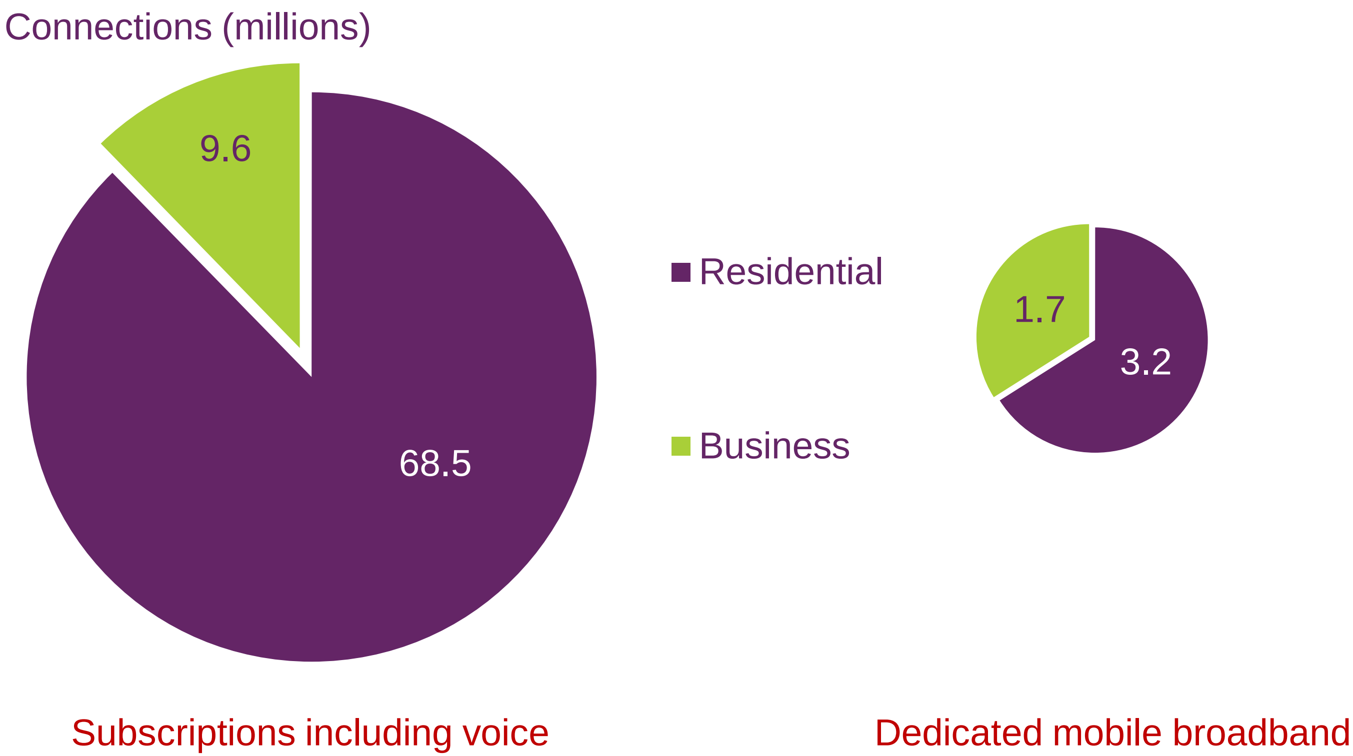
Figure 5.51

Breakdown of business mobile revenues

Source: Ofcom / operators

Figure 5.52

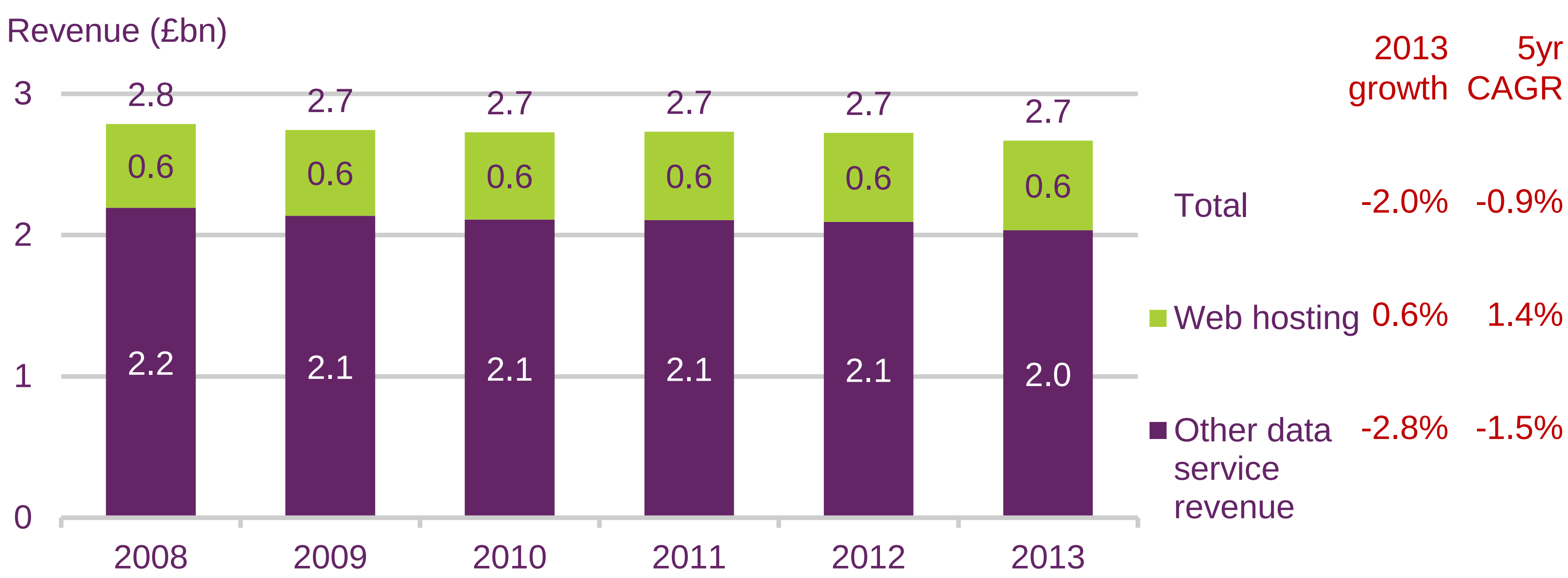
Business mobile and dedicated mobile broadband connections



Source: Ofcom / operators
Note: Mobile broadband excludes smartphone data use.

Figure 5.53

Breakdown of corporate data services' revenues



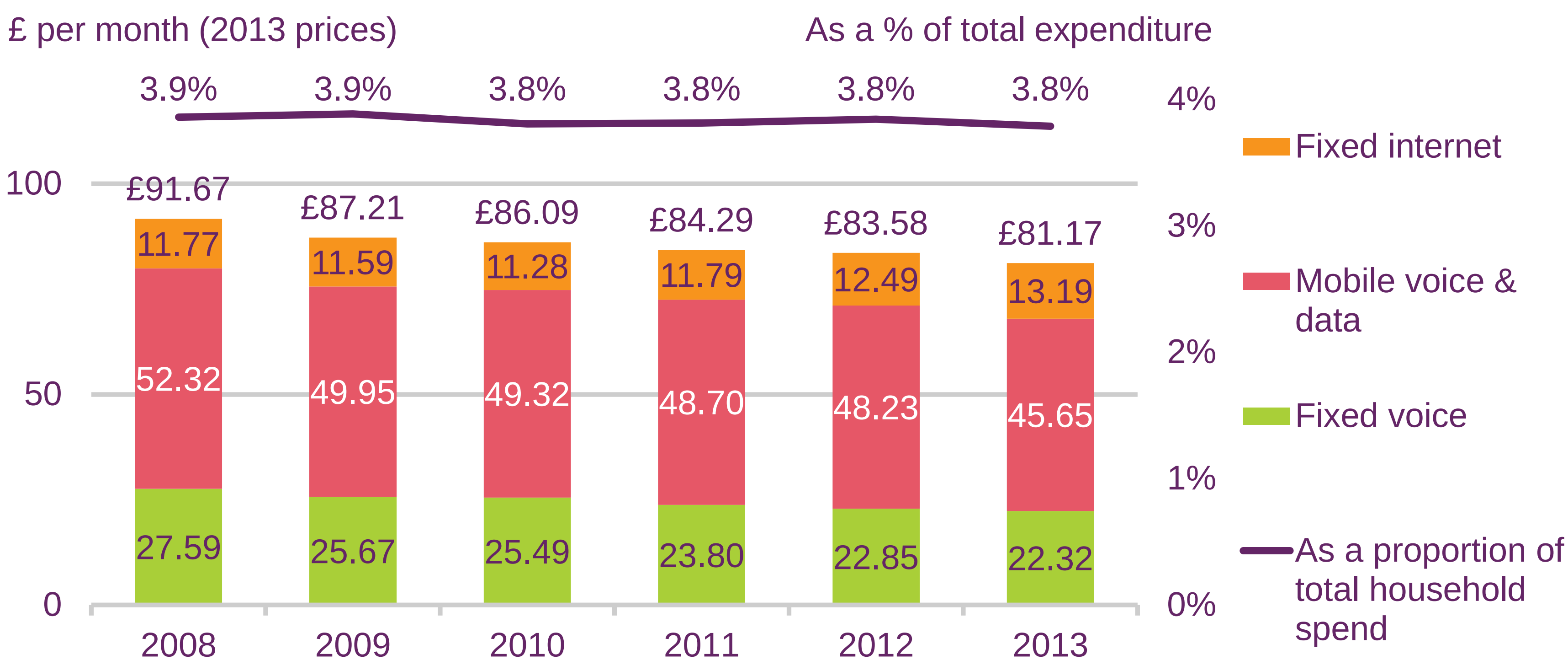
Source: IDC
Note: Remaining data services revenue comprises Ethernet, IP VPN, digital leased line and frame relay/ATM services.

The telecoms user

Market overview

Figure 5.54

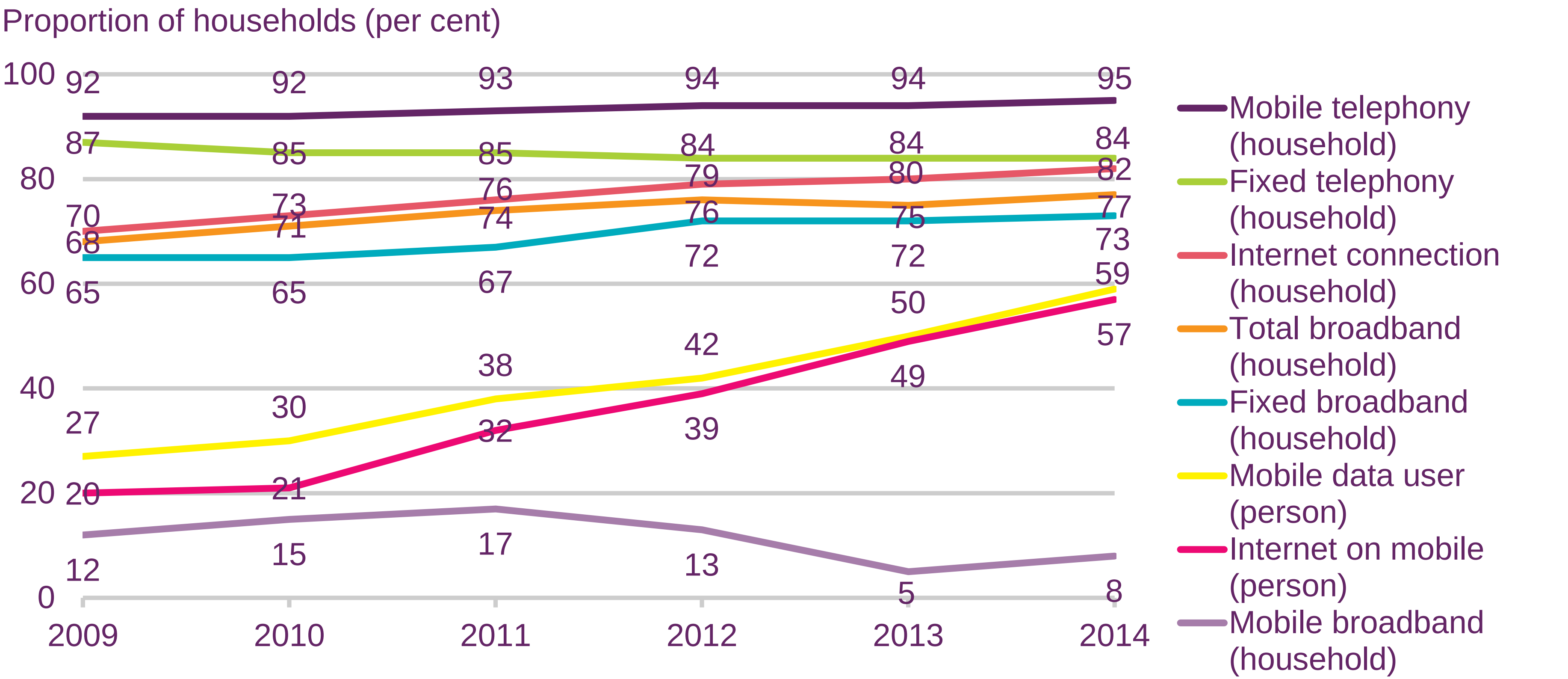
Average household spend on telecoms services



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

Figure 5.55

Household penetration of key telecoms technologies



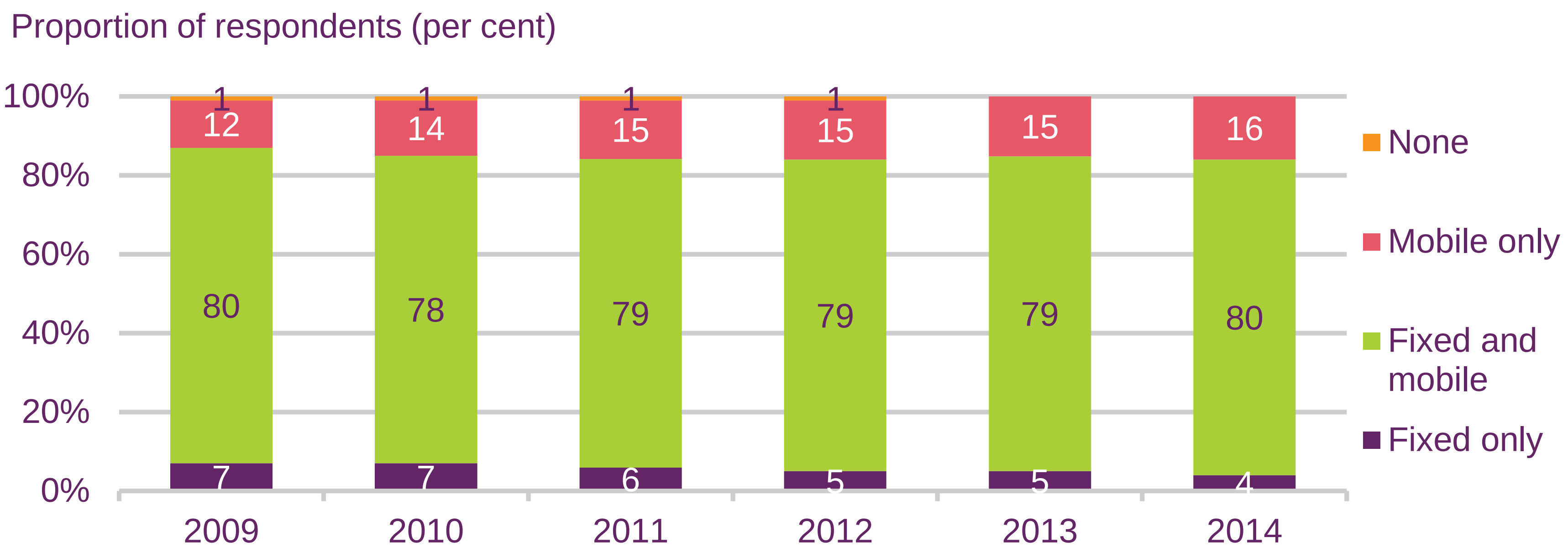
Source: Ofcom research, data as at Q1 of each year

Base: All adults aged 16+

QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the internet/ World Wide Web at home (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the internet at home?

Figure 5.56

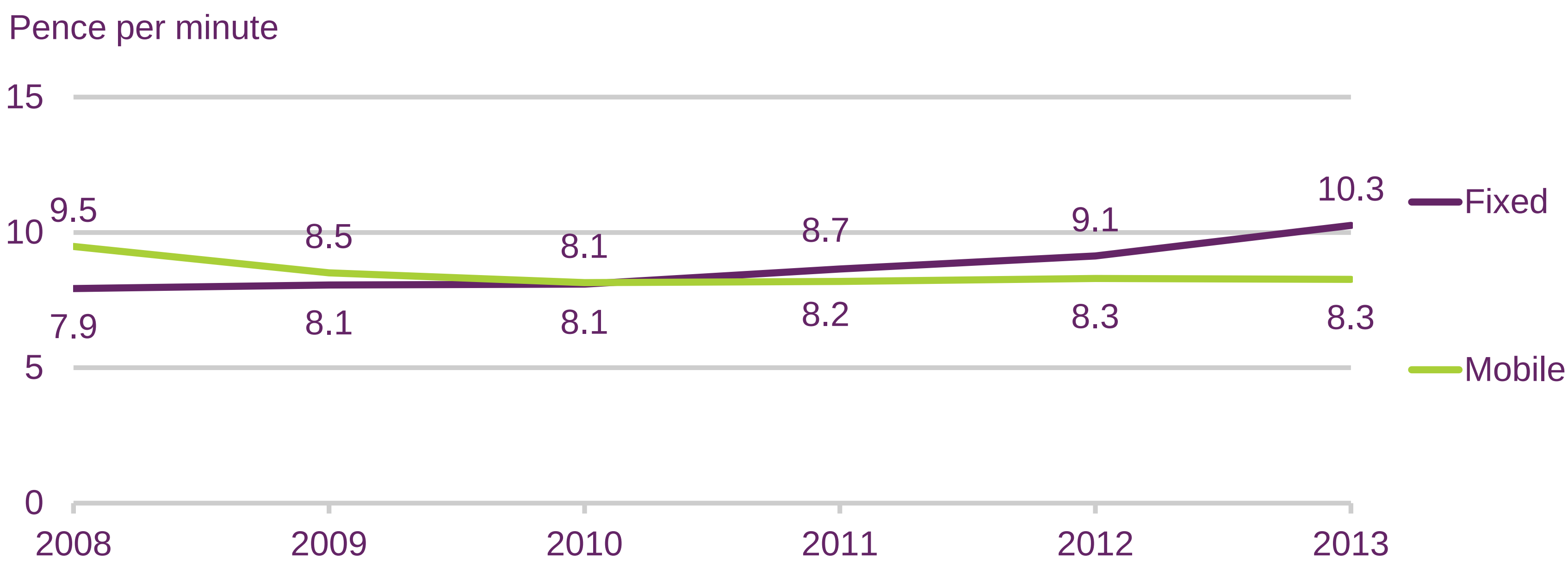
Household penetration of fixed and mobile telephony



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.57

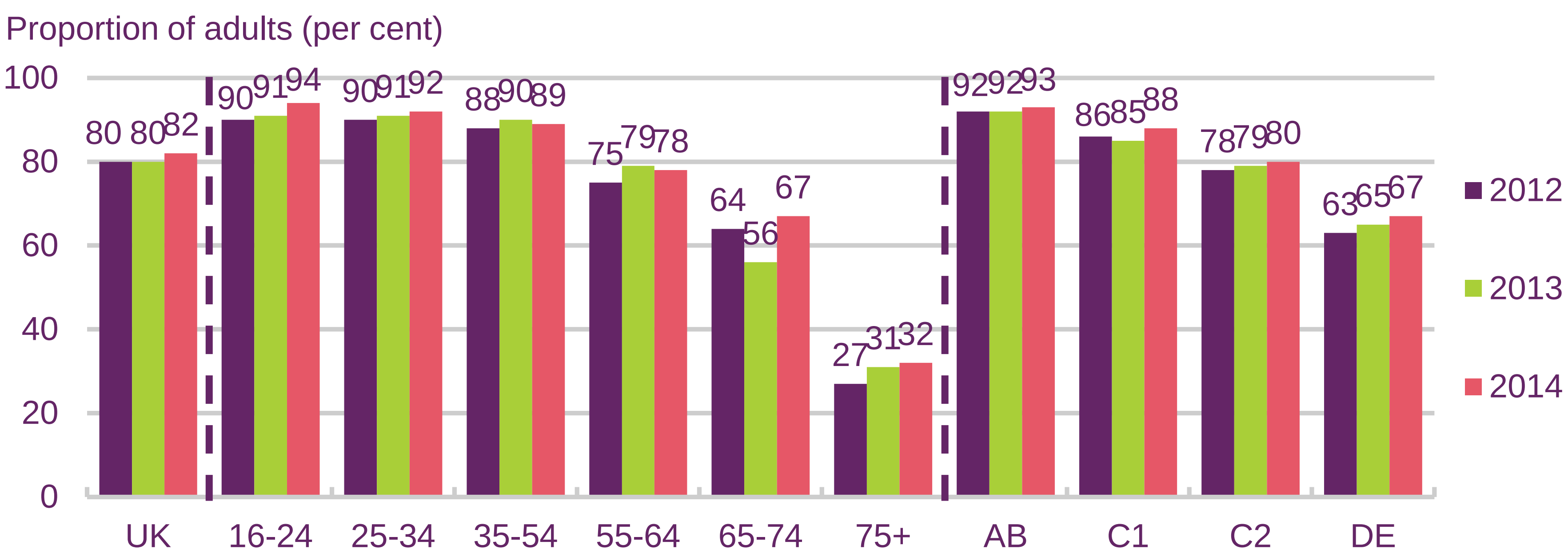
Comparison of average fixed and mobile voice call charges



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

Figure 5.58

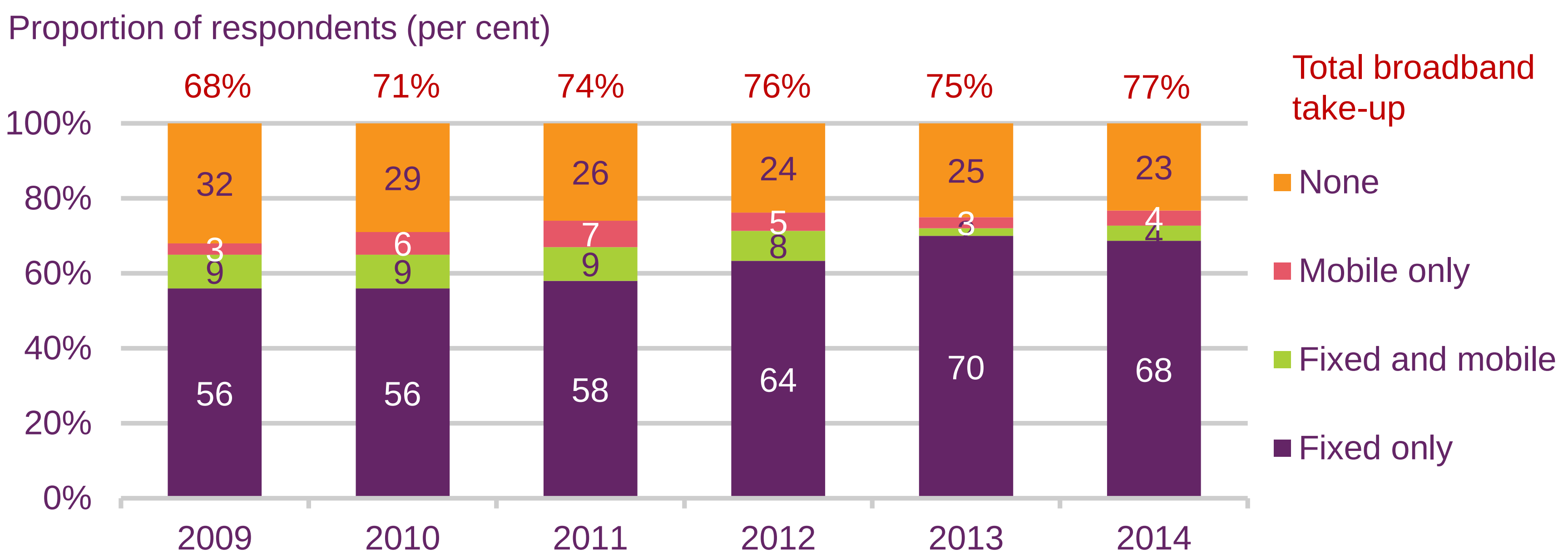
Home internet access, by age and socio-economic group



Source: Ofcom research, data as at Q1 2014
Base: All adults aged 16+
QE2: Do you or does anyone in your household have access to the internet/ World Wide Web at home?

Figure 5.59

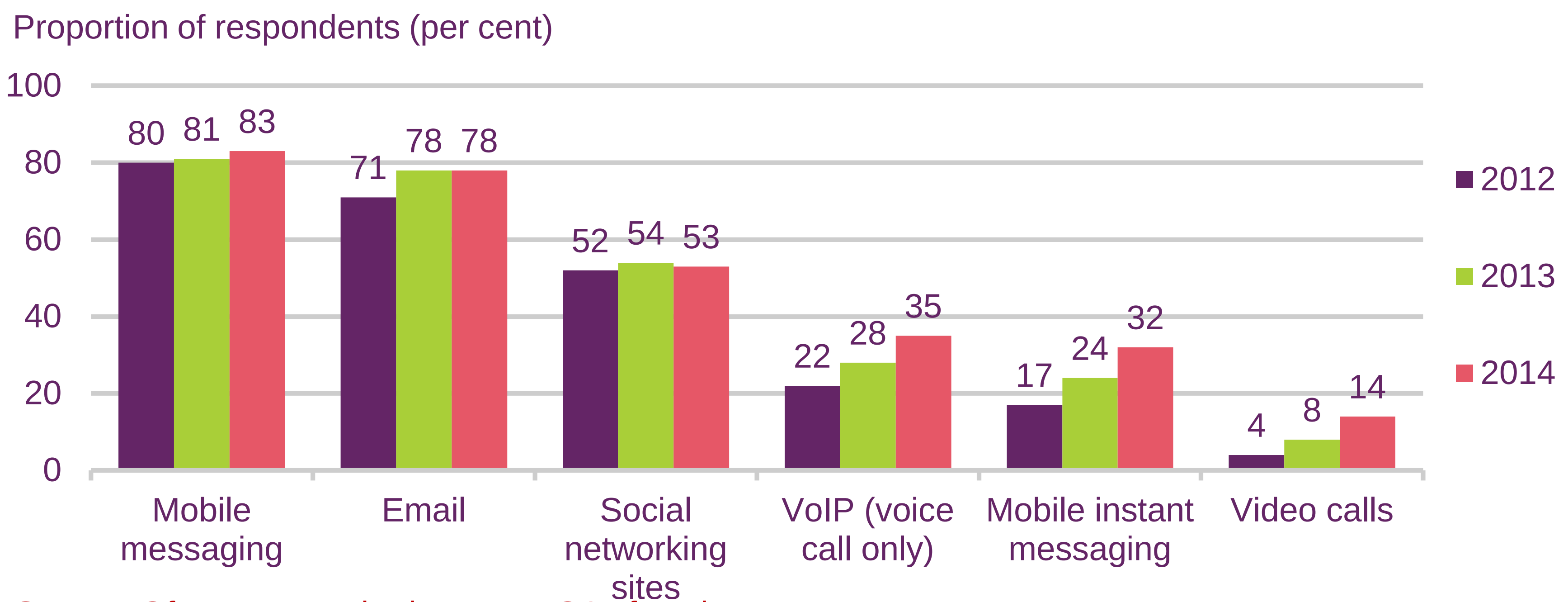
Household penetration of fixed and mobile broadband



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.60

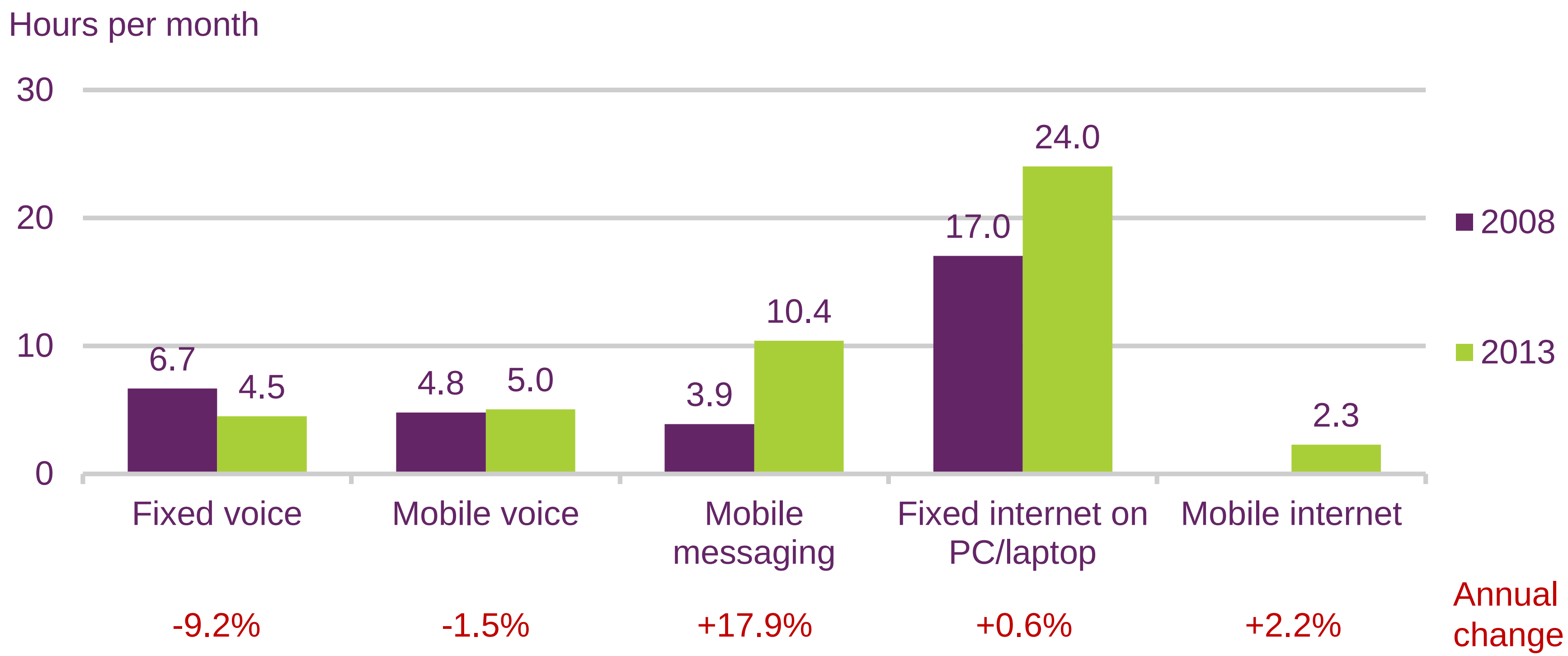
Use of methods of communication other than traditional voice telephony



Source: Ofcom research, data as at Q1 of each year
Base: All adults 16+
Note: VoIP data for 2013 are not comparable to those from previous years they have been compiled on a different basis.
QD28A Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? QE5A Which, if any, of these do you use the internet for? QE30 Have you or anyone in your household ever used one of these services to make voice calls using the internet at home? (answers used relate to current use)

Figure 5.61

Average monthly time per person spent using telecoms services



Source: Ofcom / operators / ComScore MMX, UK, home and work panel, January to December 2008 and January to December 2013 / US Census Bureau / ComScore GSMA MMM, UK, browser access only, on-network, December 2012 and December 2013
Note: Includes estimates where Ofcom does not receive data from operators; voice calls include incoming and outgoing calls; fixed voice call figures include NTS voice calls; mobile messaging figures assume an average of two minutes per SMS and MMS message and one minute per IM message; IM messaging data was not included in 2008 figures, Ofcom's estimates of fixed and mobile internet use per person are based on comScore data and exclude time spent watching online video and listening to streamed music; Mobile internet use includes on-network traffic only, and excludes time spent using internet connected mobile applications or streaming.

Fixed voice services

Figure 5.62

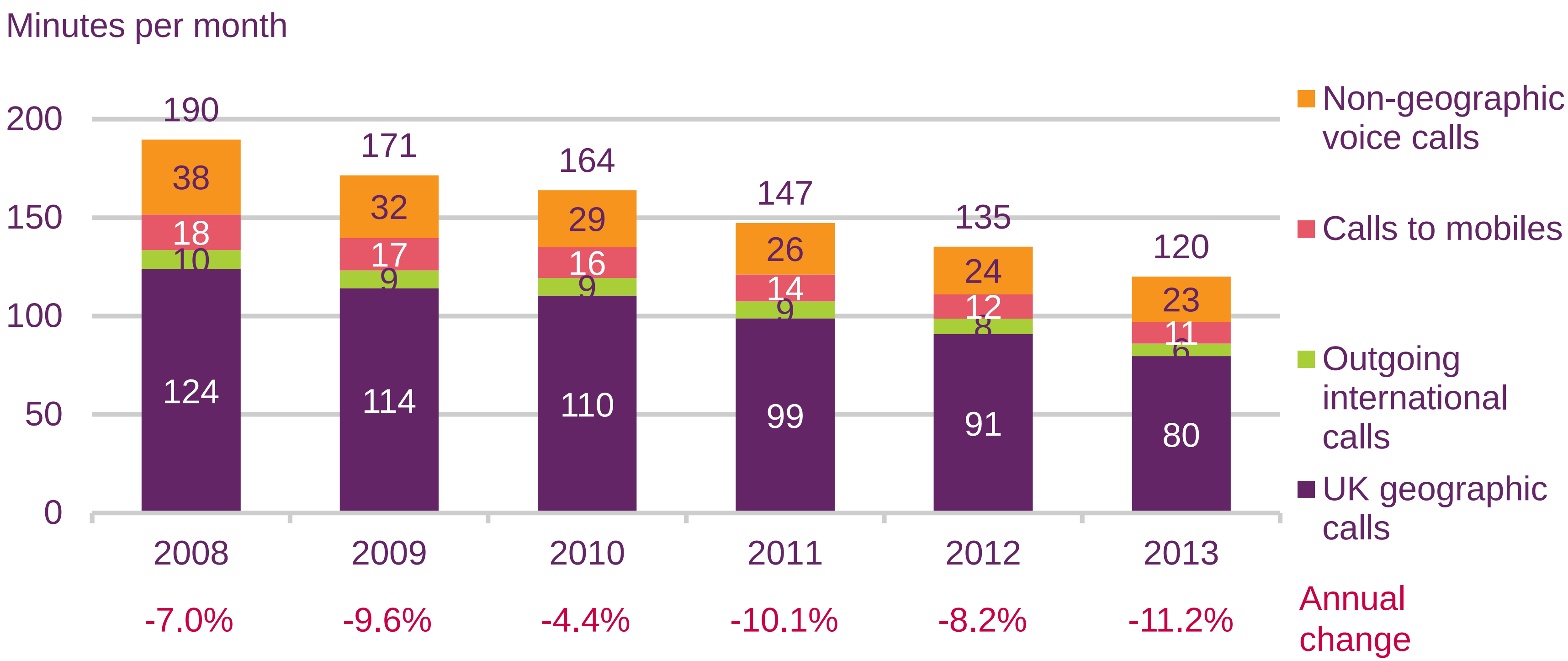
Real price of a basket of residential fixed voice services

	2008	2009	2010	2011	2012	2013
Annual change	-0.7%	-4.8%	2.0%	-0.9%	0.8%	1.1%

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

Figure 5.63

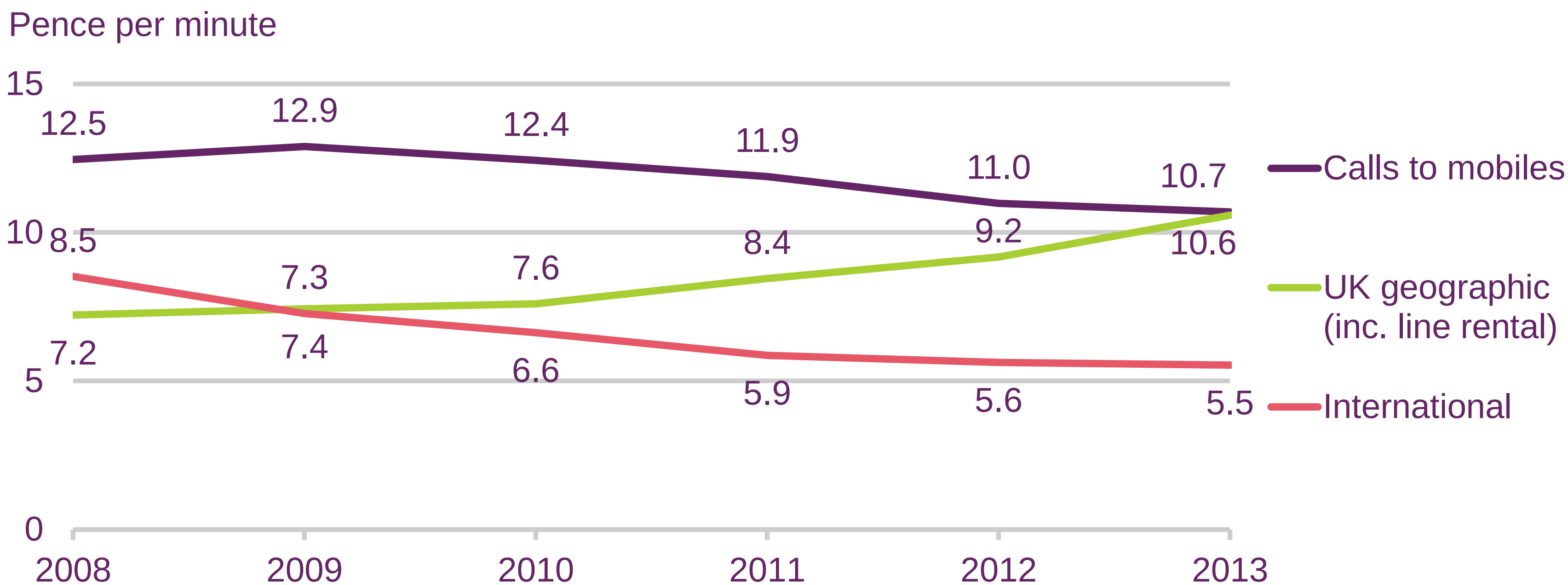
Average monthly outbound fixed voice call volumes per person



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

Figure 5.64

Average revenue per fixed-voice call minute



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; UK geographic calculation includes line rental revenues; excludes VAT.

Figure 5.65

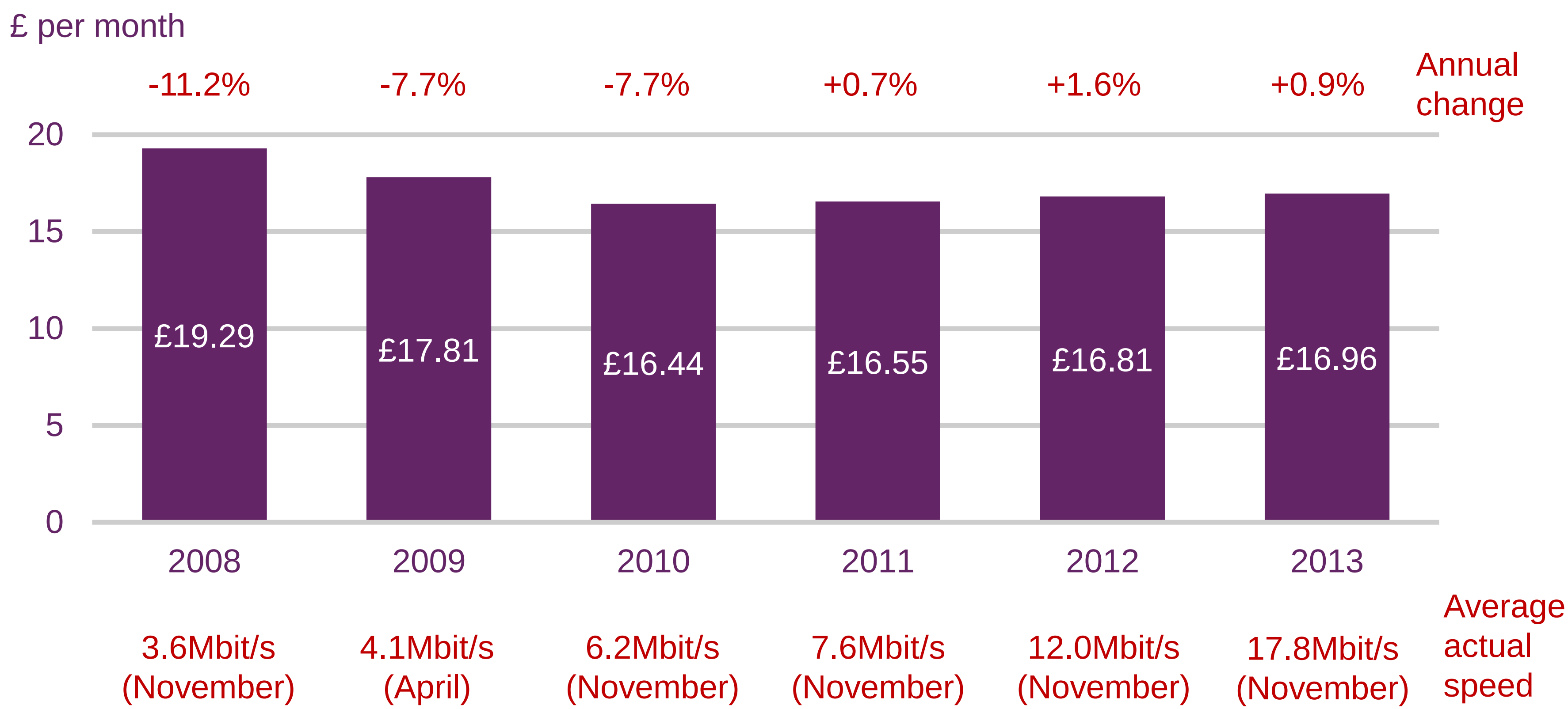
Residential consumer satisfaction with fixed line services overall

Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+ with a fixed line phone
Note: Only includes those who expressed an opinion.

Fixed broadband services

Figure 5.66

Real average monthly price of a residential fixed broadband connection (in 2013 prices)



Source: Ofcom / operators
Note: Includes estimates where Ofcom does not receive data from operators; includes VAT; adjusted for CPI.

Figure 5.67

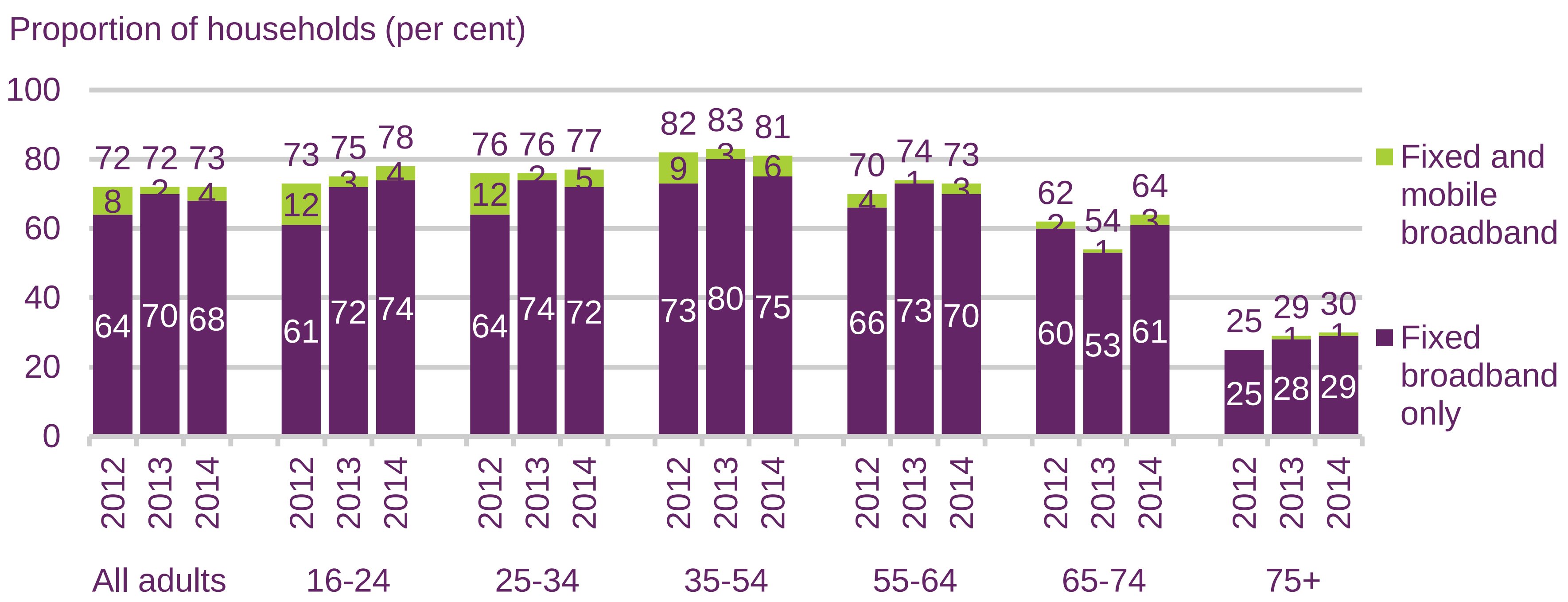
Lowest-cost fixed broadband options from major ISPs

Provider	Fixed broadband only	Fixed broadband and fixed line	Fixed broadband and mobile	Fixed broadband, fixed line and mobile	Fixed broadband, fixed line and pay-TV
BT	-	£25.99 (£21.75)	-	-	£32.99 (£28.75)
EE	-	£31.40 (£27.00)	-	£21.40[1] (£17.00)[1]	-
Plusnet	-	£20.49	-	-	-
Sky	-	£25.40	-	-	£35.39[3]
TalkTalk	-	£19.45 (£14.00)	-	-	£24.45 (£19.00)
Virgin Media	£25.00	£31.49 (£26.17)	£25.00[2]	-	£35.99 (£30.67)

Source: Pure Pricing UK Broadband Pricing Briefing, April 2014
Note: 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; figures in brackets require pre-payment of twelve months' line rental; [1] plus cost of mobile tariff; [2] with SIM-only mobile plan incl. 250 minutes, unlimited texts and 1GB, [3] with NOW TV (streamed).

Figure 5.68

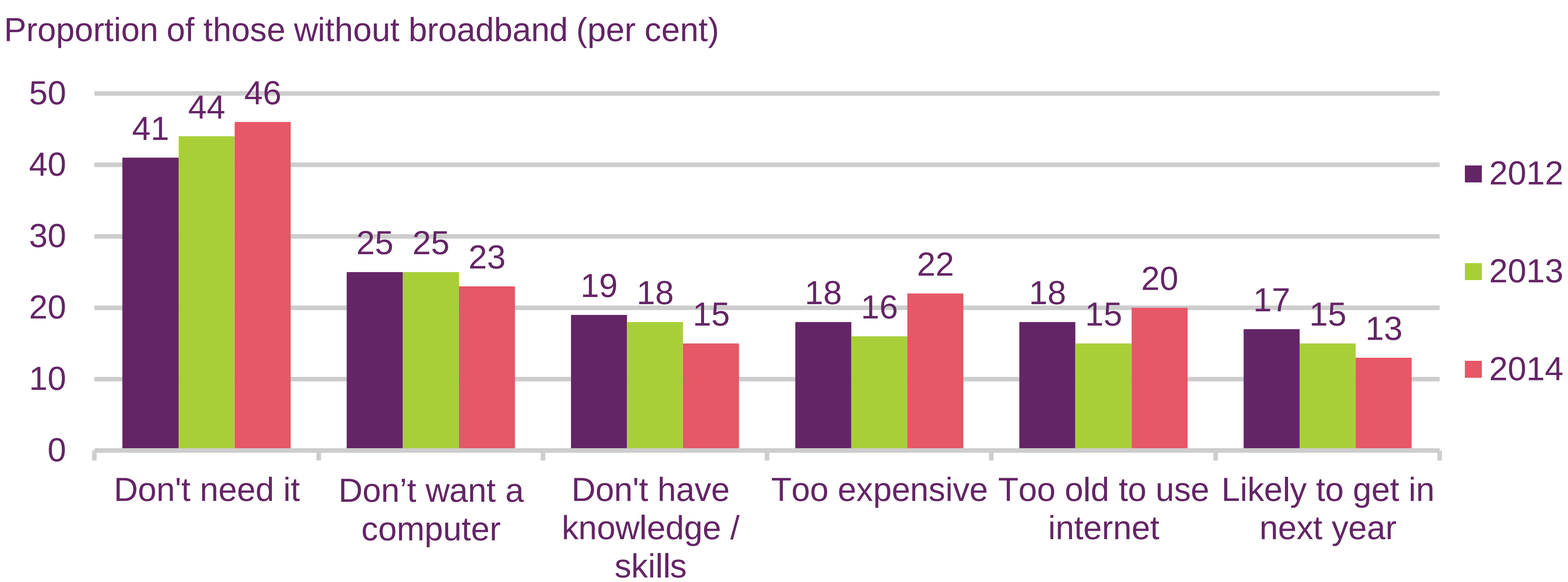
Take-up of fixed broadband, by age



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.69

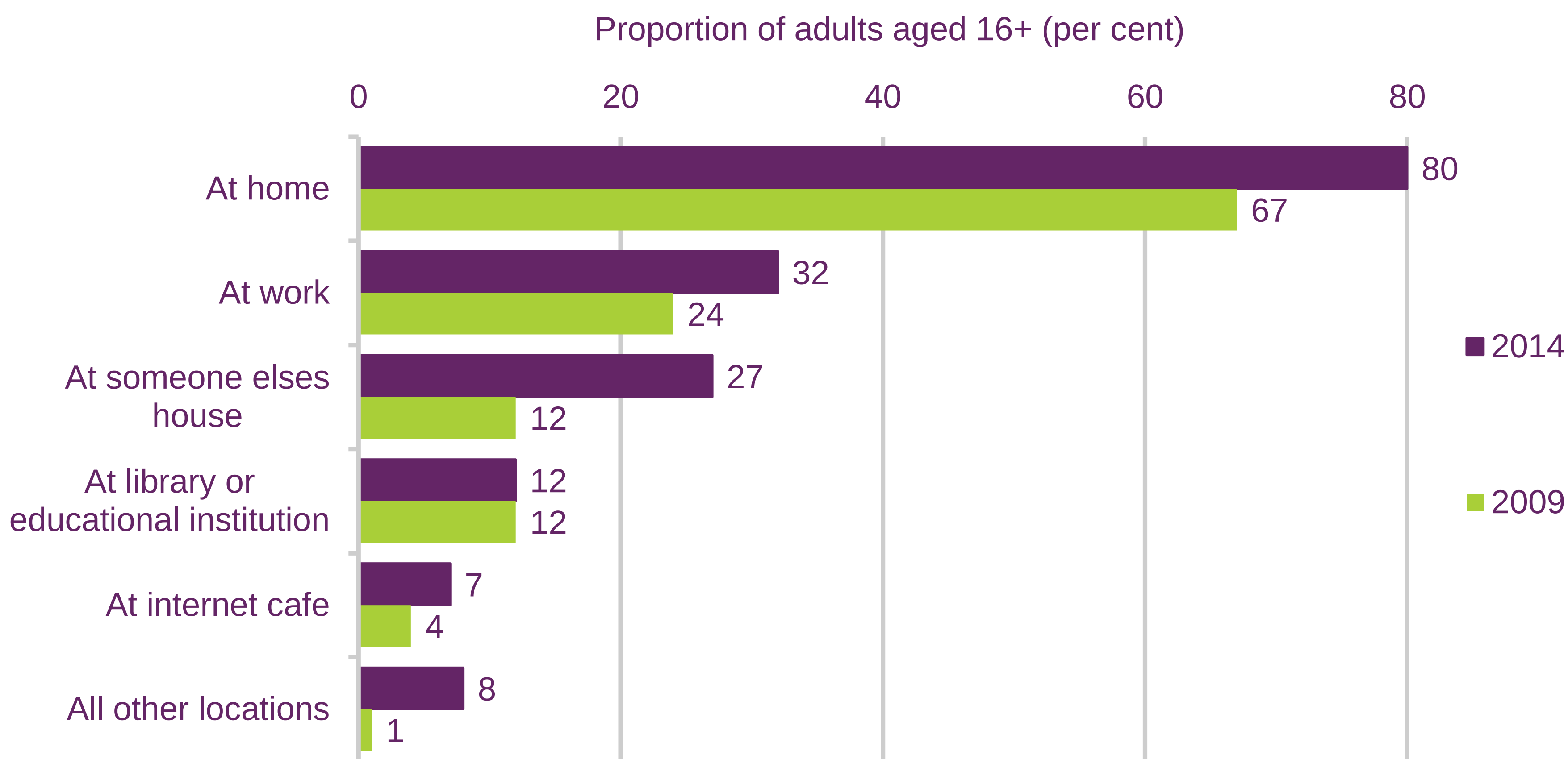
Main reasons for not having a home broadband connection



Source: Ofcom research, data as at Q1 of each year
Base: All adults without the internet aged 16+
Note: 4% of people without the internet in Q1 2014 did not know what their main reason was or provided an ‘other’ reason.

Figure 5.70

Location of internet access

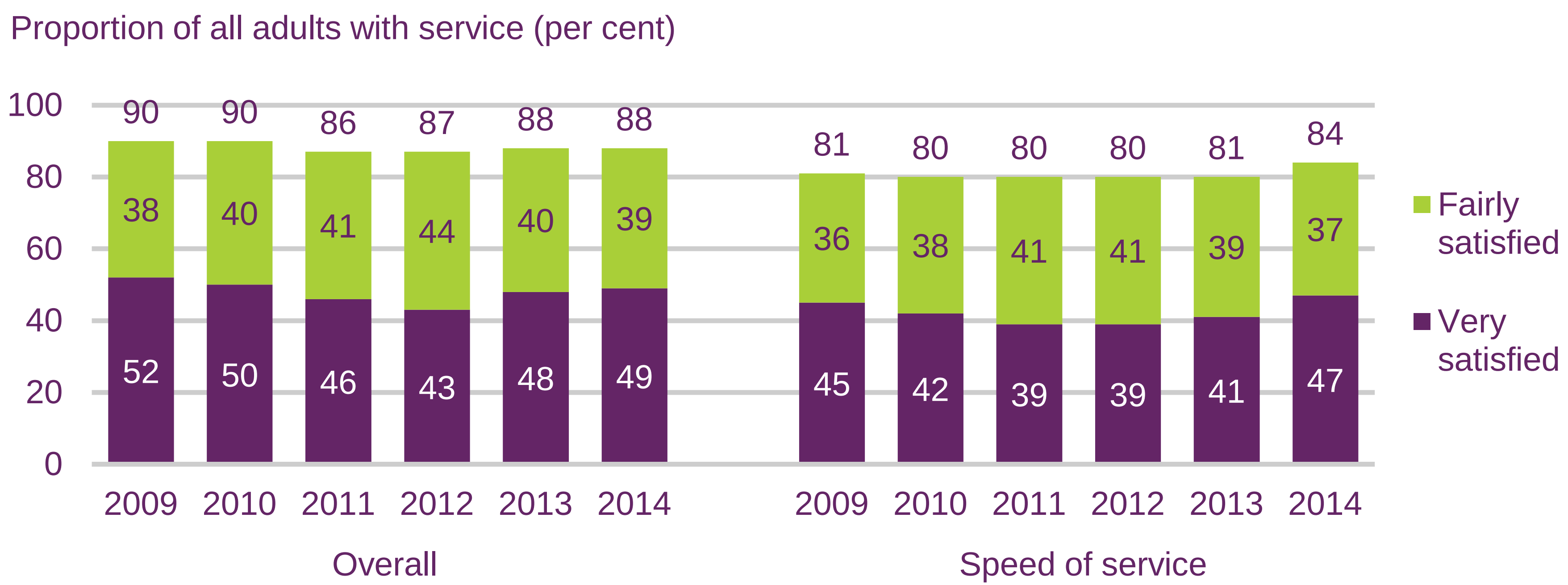


In total 84% of UK adults used the internet in Q1 2014

Source: Ofcom research , data as at Q1 of each year
Base: All internet users aged 16+

Figure 5.71

Satisfaction with aspects of fixed broadband service

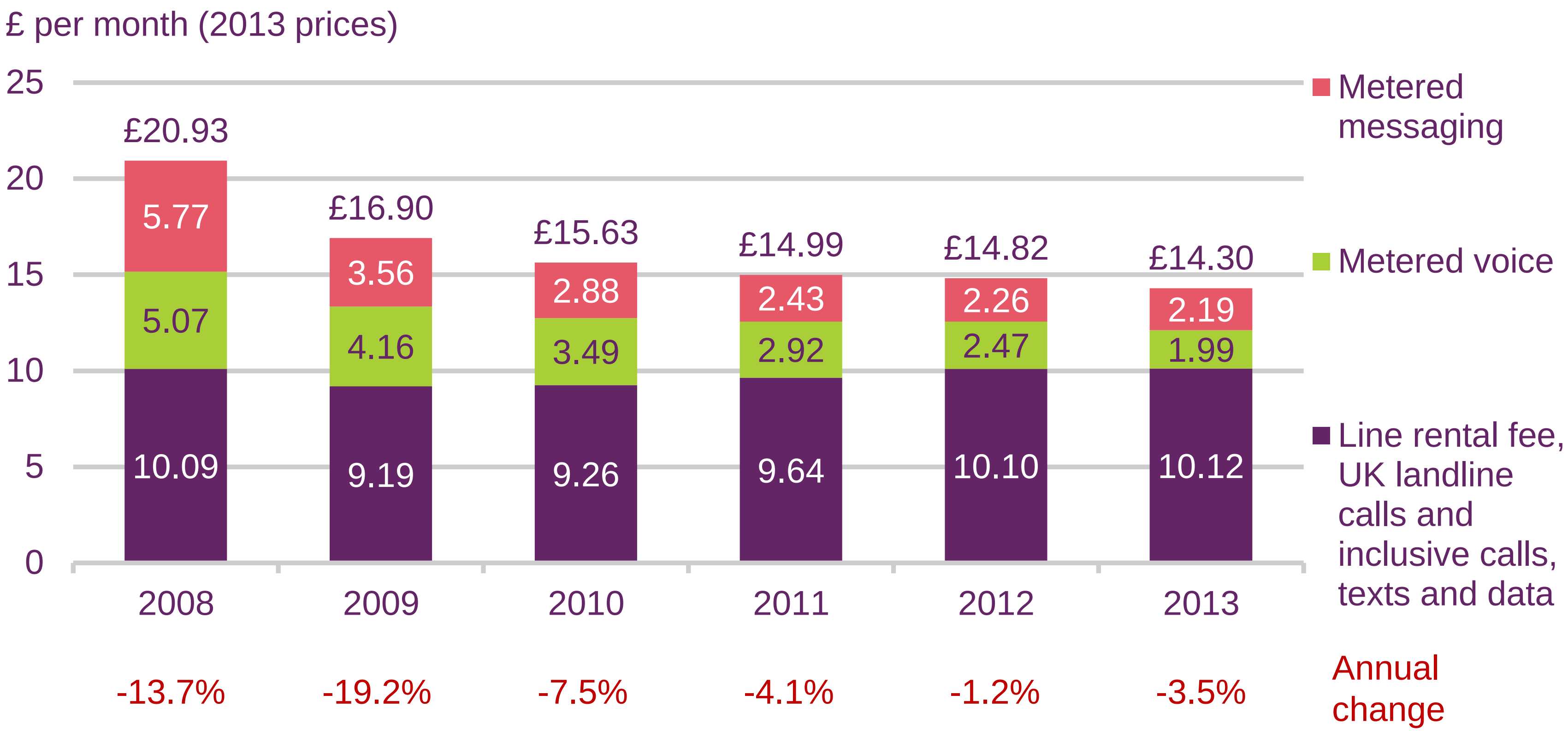


Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+ with a fixed broadband connection
Note: Includes only those who expressed an opinion.

Mobile voice services

Figure 5.72

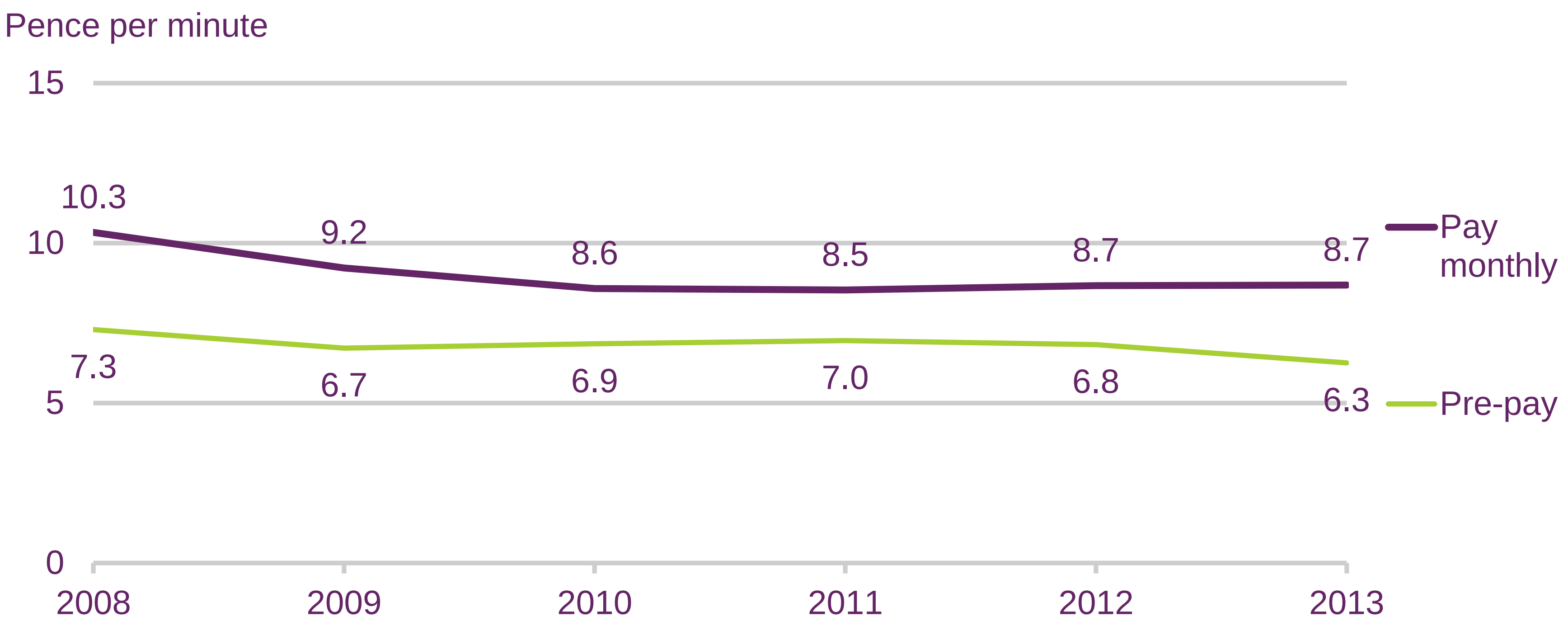
Real price of a basket of mobile services



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

Figure 5.73

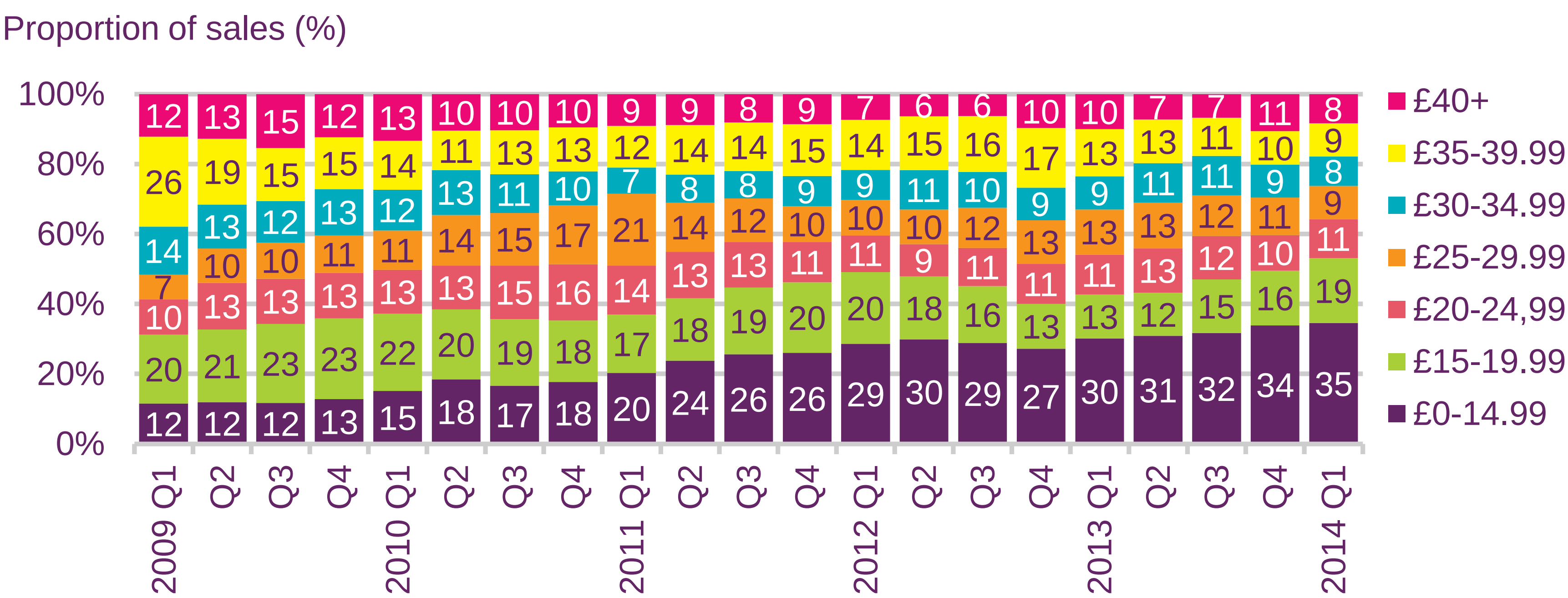
Average per-minute mobile call charges, by customer type



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

Figure 5.74

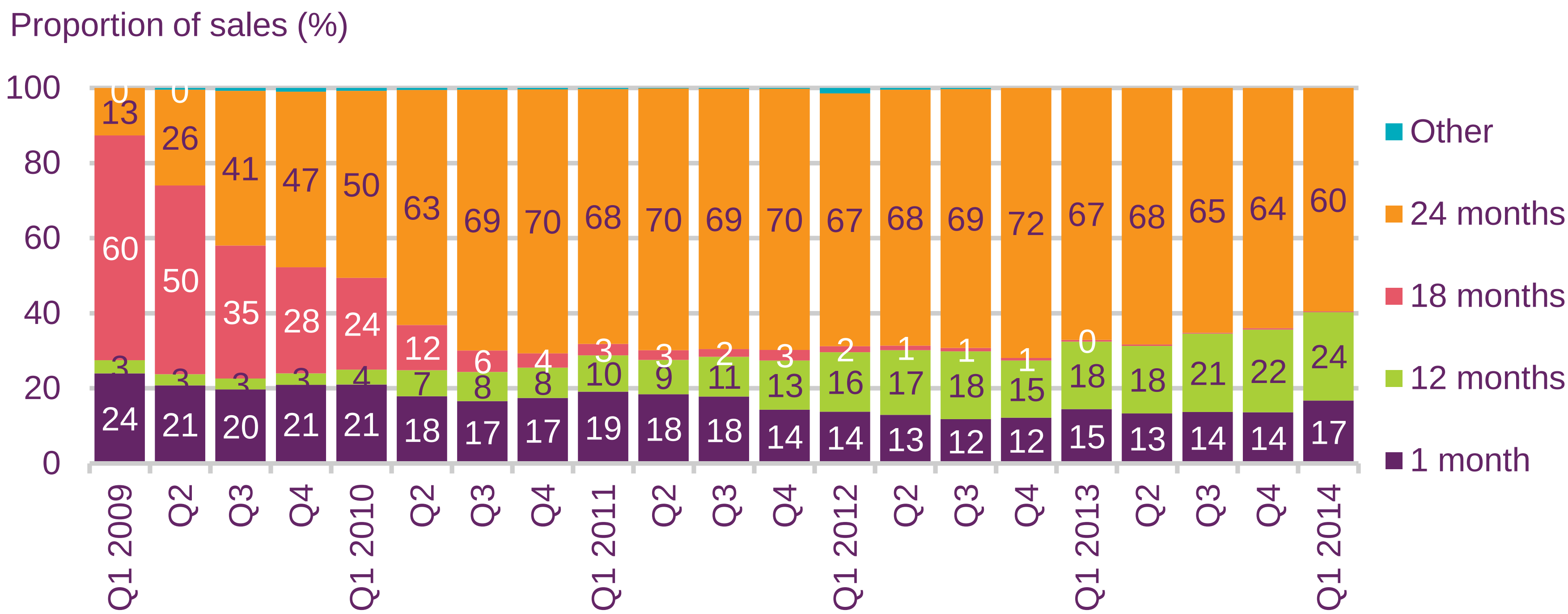
Monthly contract prices for new post-pay mobile connections



Source: GfK Retail and Technology UK Ltd, Contract Handset Acquisitions: price segments.
Notes: England, Scotland and Wales only (excludes Northern Ireland); based on GfK's coverage of 95% of the consumer market; based on new post-pay connections; excludes contract renewals; only represents sales through consumer channels (excluding Apple Store and eBay).

Figure 5.75

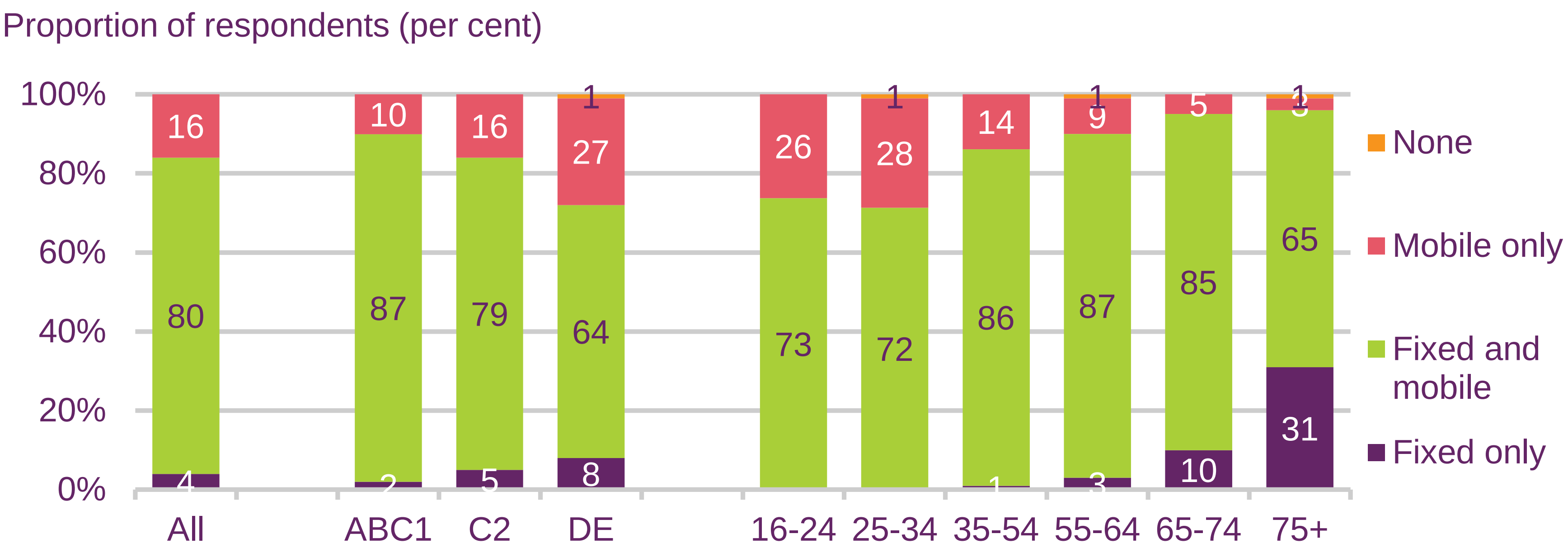
Contract lengths for new post-pay mobile connections



Source: GfK Retail and Technology UK Ltd, Contract Length Sales of new Mobile Connections
Notes: England, Scotland and Wales only (excludes Northern Ireland); based on GfK's coverage of 95% of the consumer market; based on new post-pay connections; excludes contract renewals; only represents sales through consumer channels (excluding Apple Store and eBay).

Figure 5.76

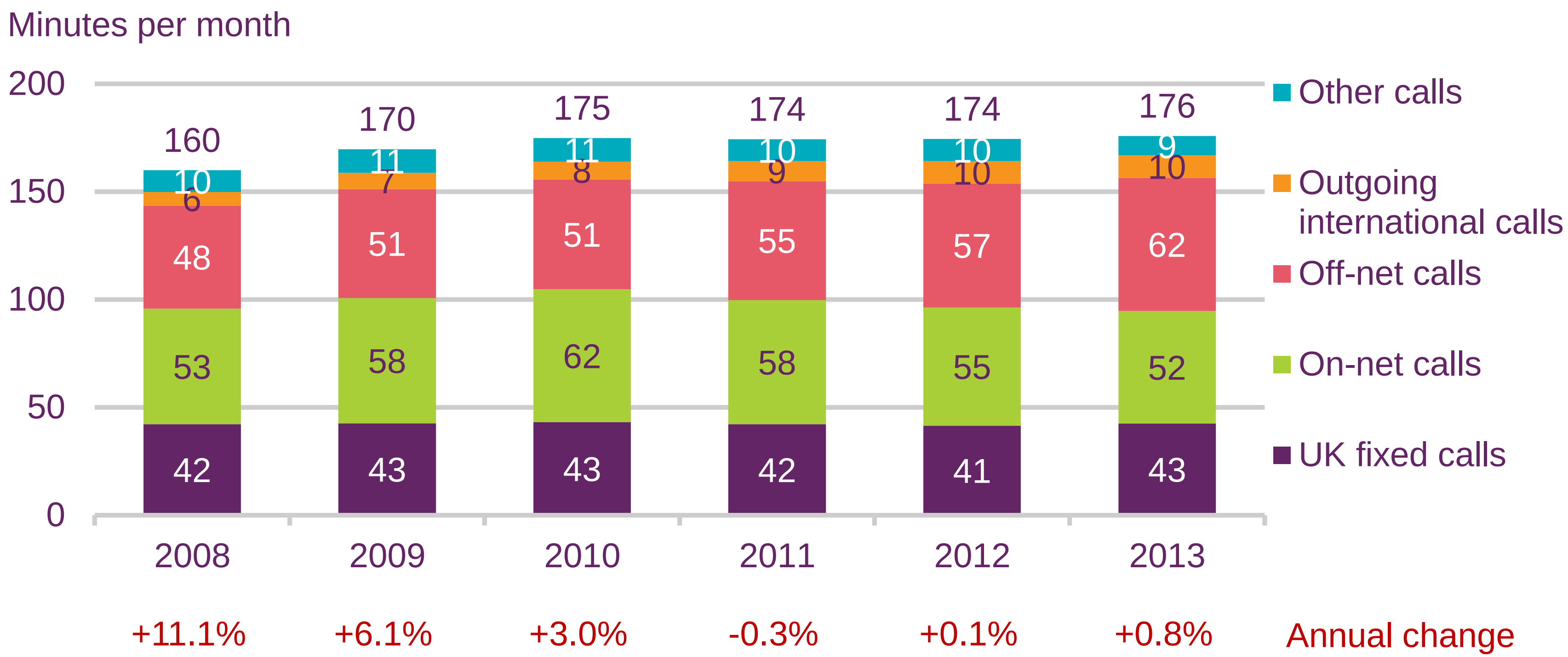
Household penetration of fixed and mobile telephony, by socio-economic group and age



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 5.77

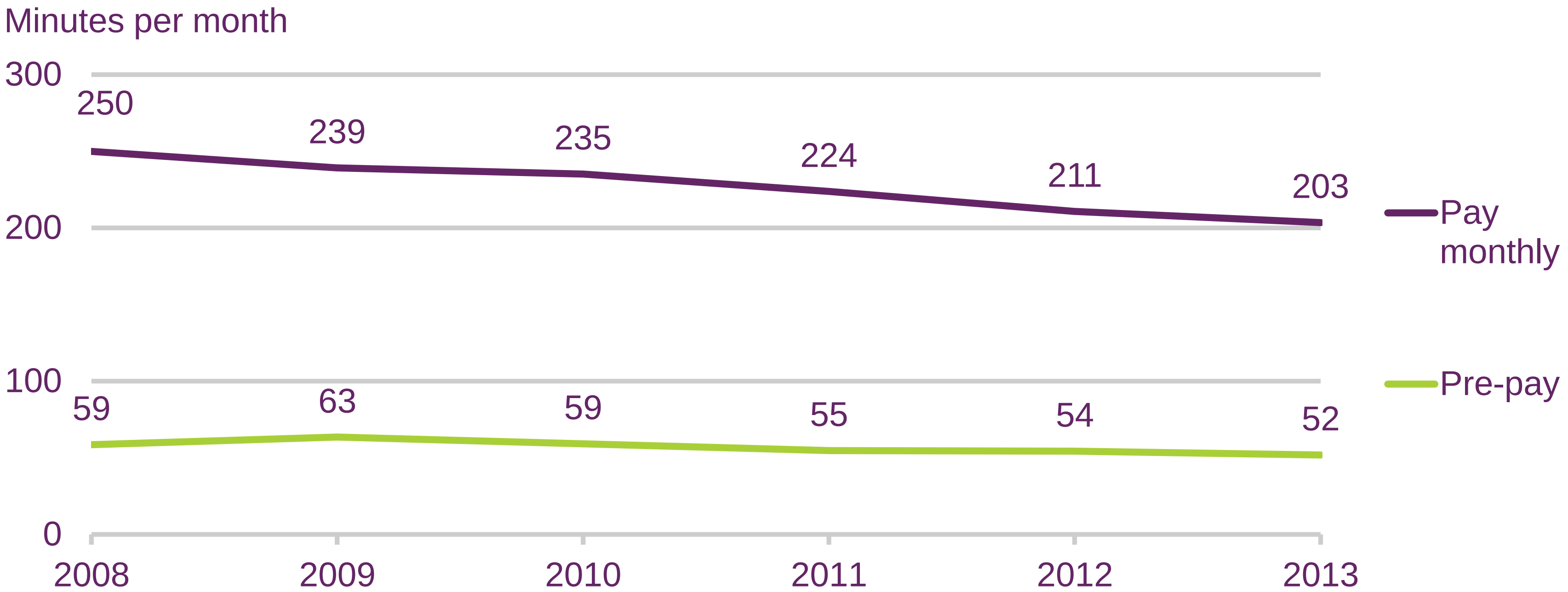
Average monthly outbound mobile voice minutes per person



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

Figure 5.78

Average monthly outbound mobile call minutes, by subscription type



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

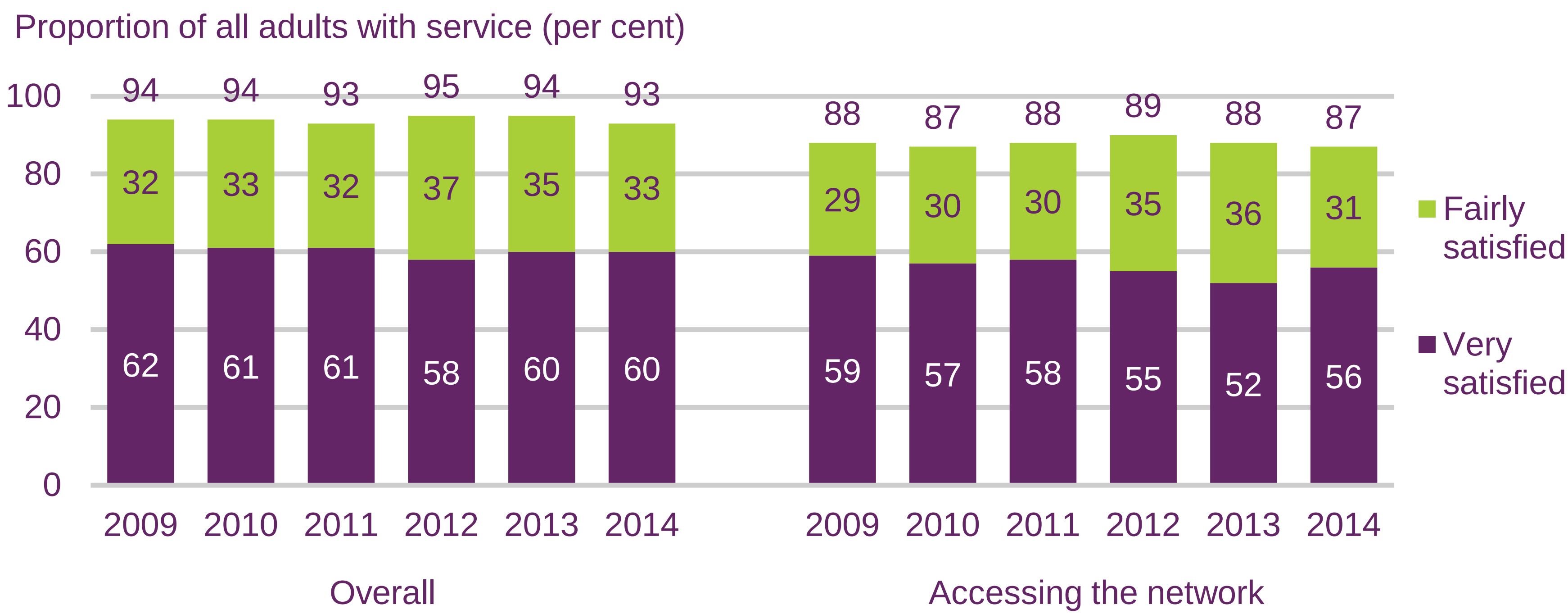
Figure 5.79

Average monthly mobile messaging volumes per person

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

Figure 5.80

Satisfaction with aspects of mobile service

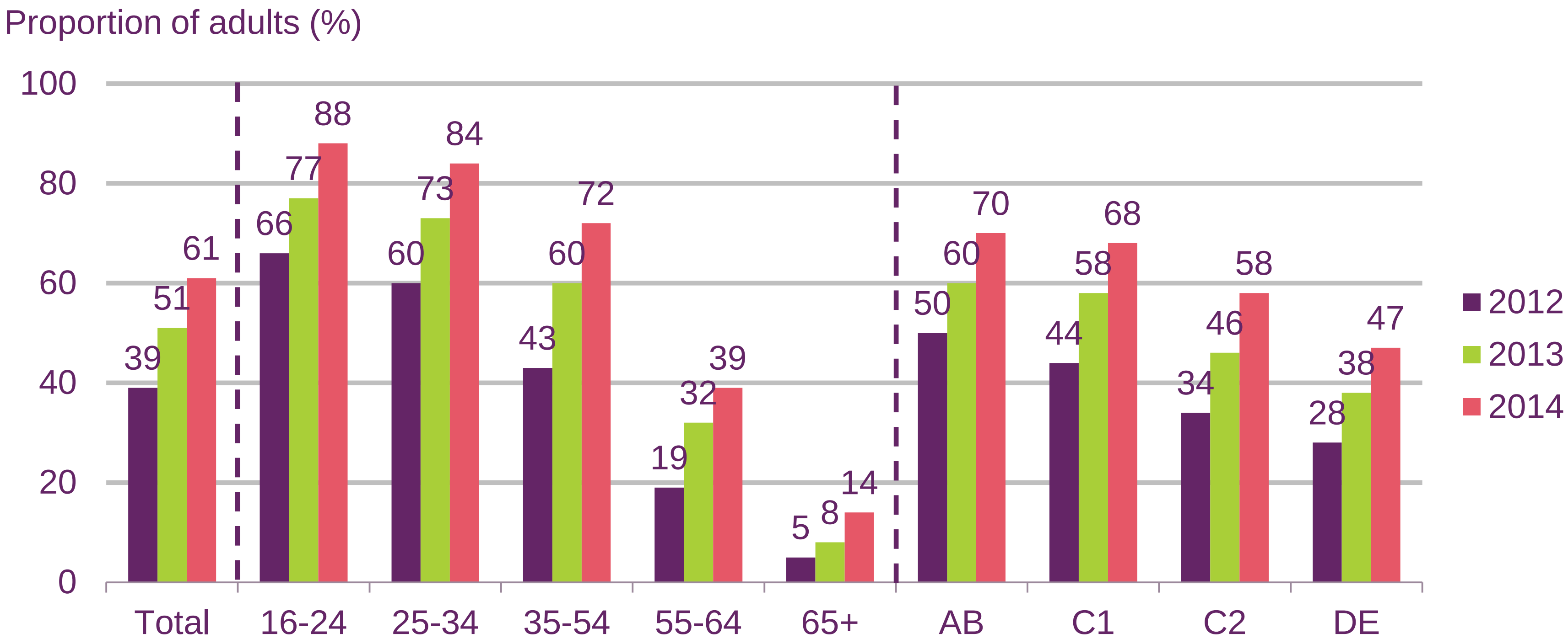


Source: Ofcom research
Base: All adults aged 16+ with a mobile phone
Note: Includes only those who expressed an opinion.

Mobile data services

Figure 5.81

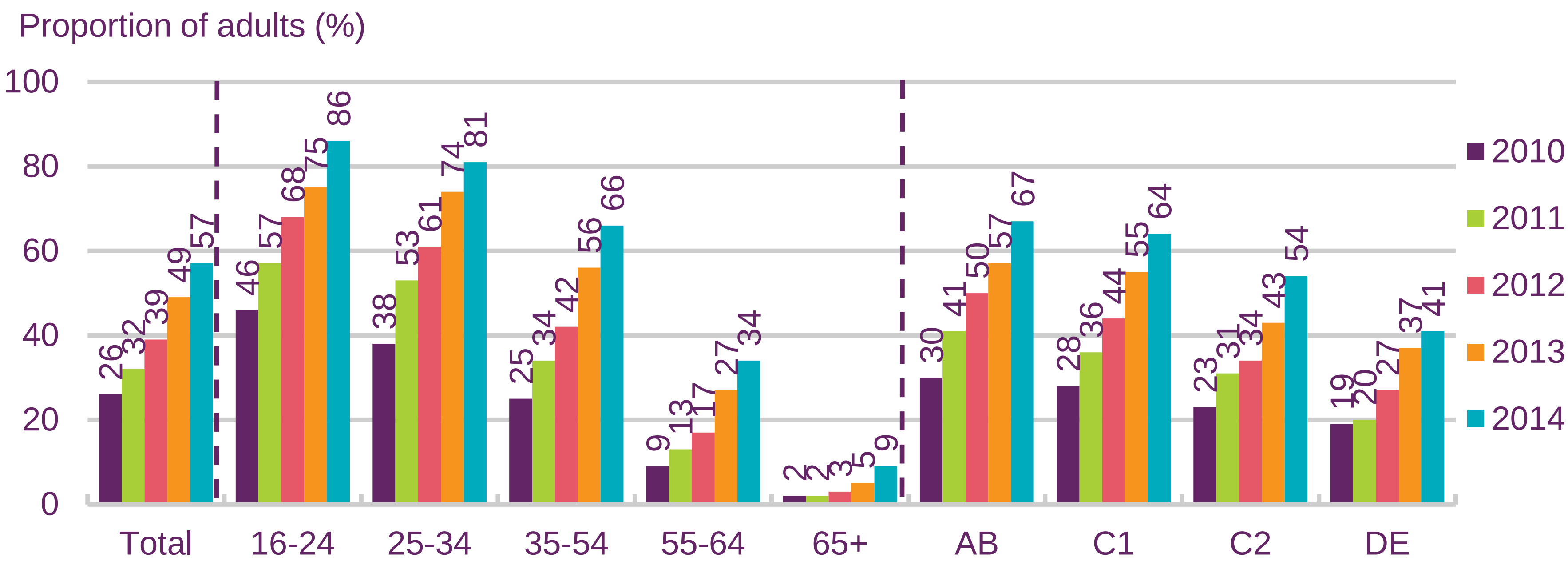
Smartphone take-up, by age and socio-economic group



Source: Ofcom research, data as at Q1 of each year
Base: All adults 16+

Figure 5.82

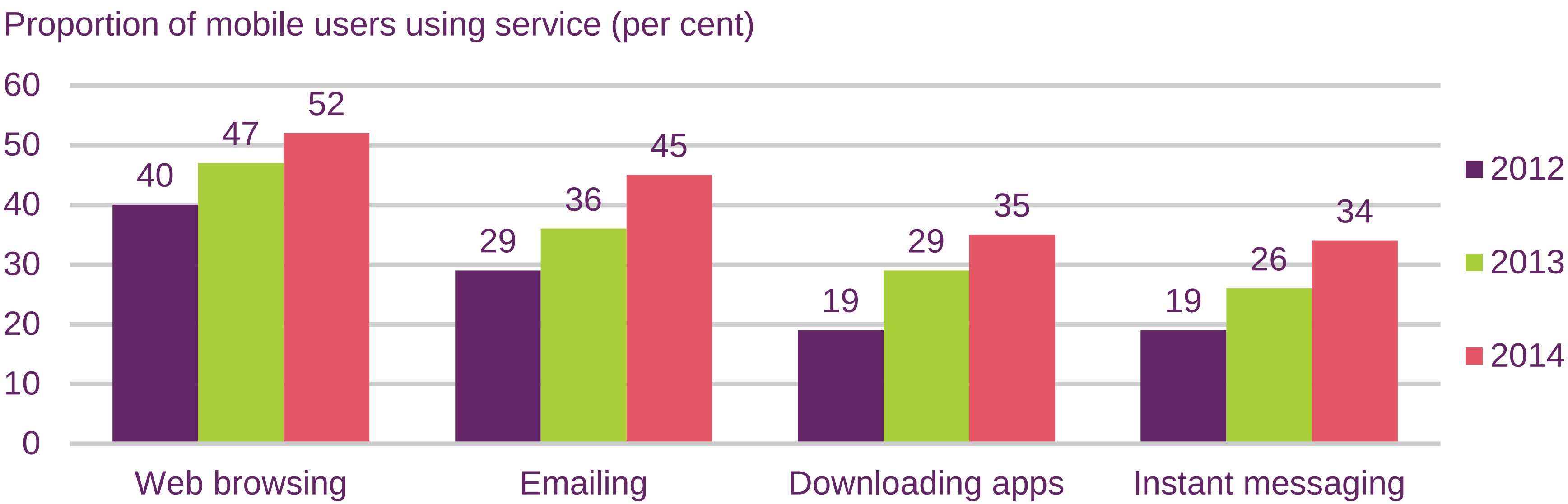
Use of data services on mobile phones, by age and socio-economic group



Source: Ofcom research, data as at Q1 of each year
Base: All adults 16+
Note: Internet use includes accessing the internet, downloading and streaming content, connecting using WiFi and using VoIP.
QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Figure 5.83

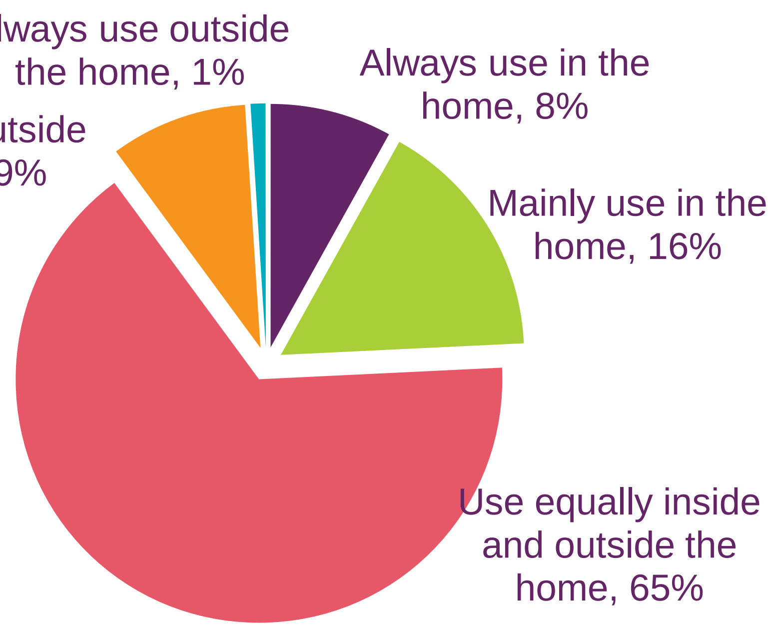
Use of mobile data services among mobile users



Source: Ofcom research, data as at Q1 of each year
Base: All mobile users aged 16+
QD9A: Which if any of the following activities, other than making and receiving voice calls, do you use your mobile for?

Figure 5.84

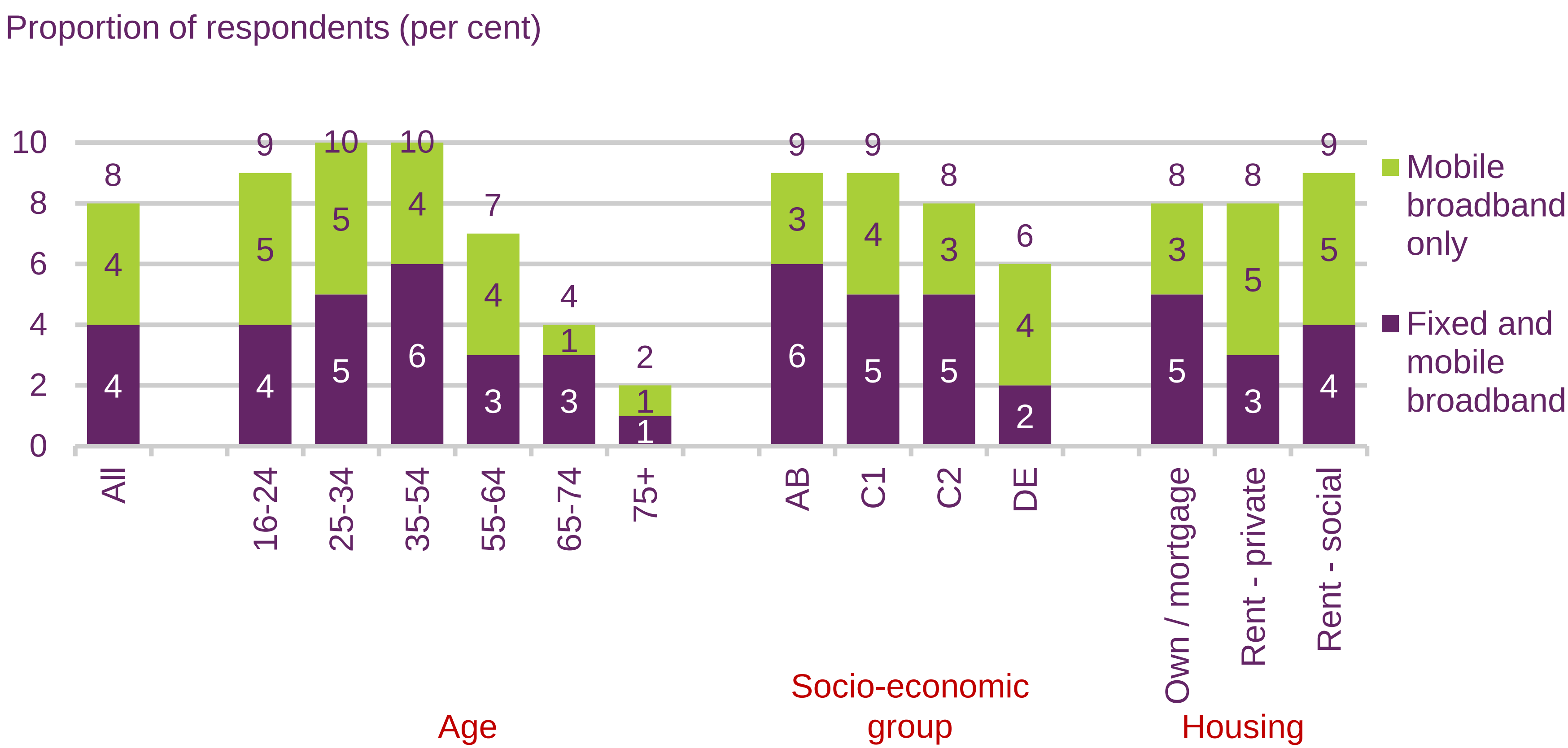
Location of internet access using a mobile handset



Source: Ofcom research, Q1 2014
Base: All adults aged 16+ who access the internet on their mobile phone

Figure 5.85

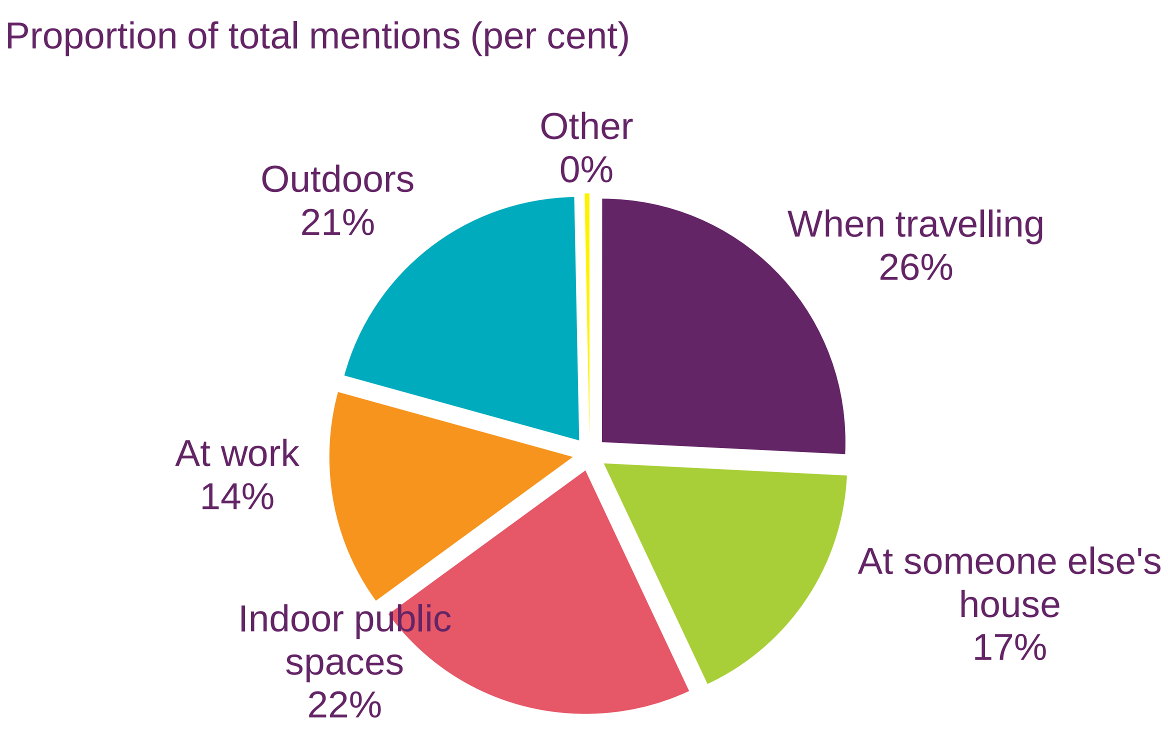
Take-up of dedicated mobile broadband, by age, socio-economic group and housing type



Source: Ofcom research, data as at Q1 2014
Base: All adults aged 16+

Figure 5.86

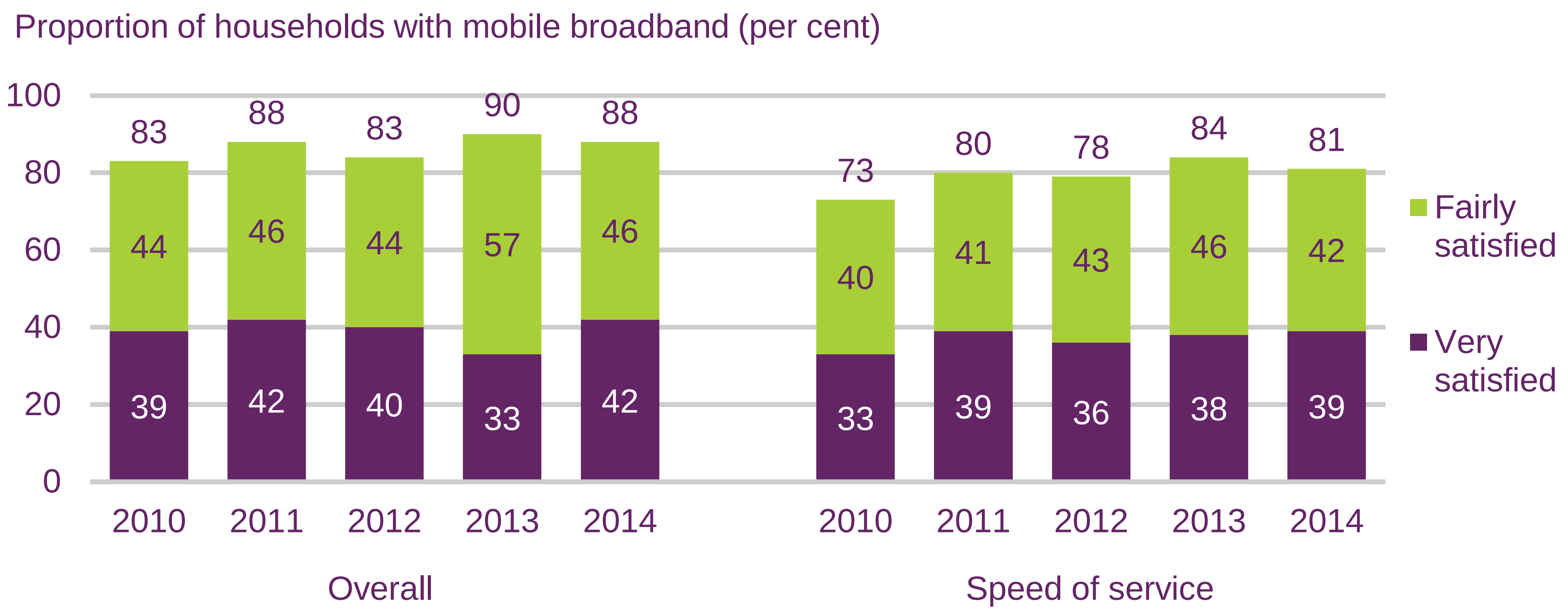
Location of mobile broadband use outside the home



Source: Ofcom research, data as at Q1 2014
Base: All adults aged 16+ who use mobile broadband outside the home

Figure 5.87

Satisfaction with aspects of mobile broadband services



Source: Ofcom research
Base: Those in a household with mobile broadband
Note: Includes only those who expressed an opinion.

6 - Post

Figure 6.1

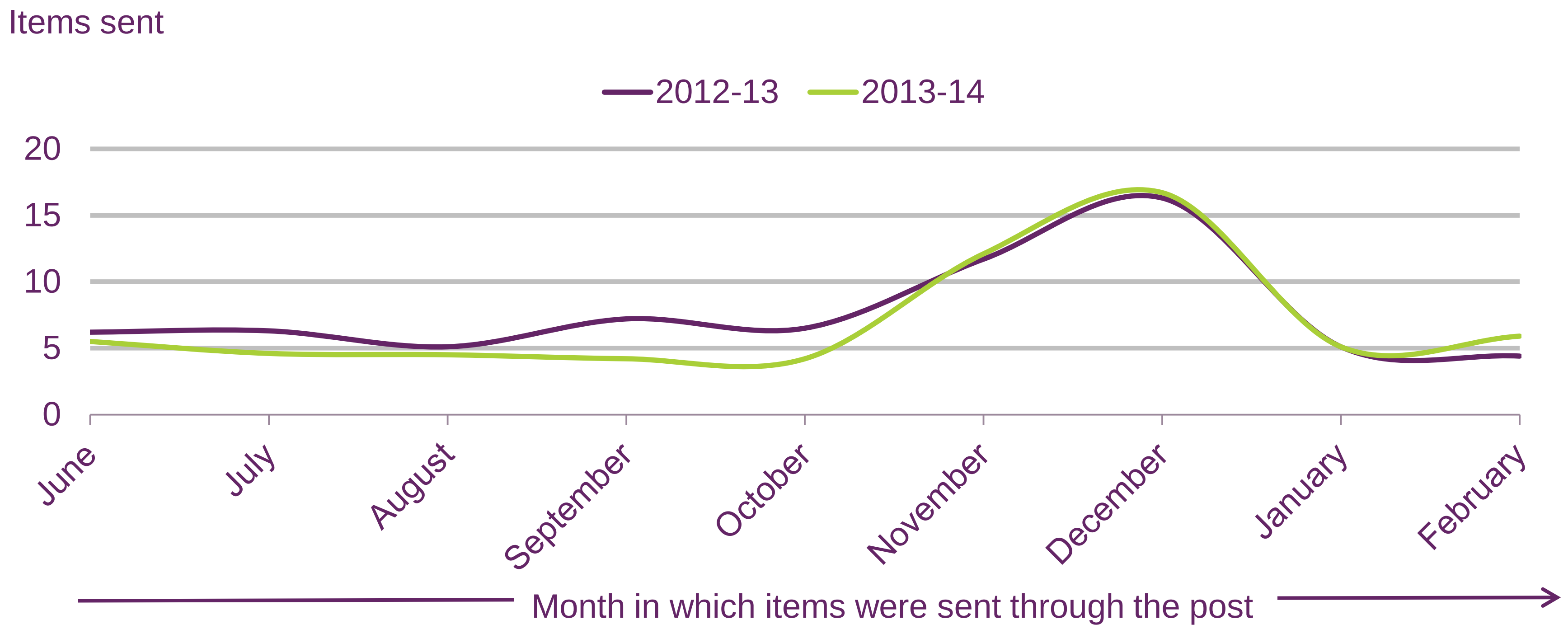
UK postal services industry key metrics

UK postal services industry	2008	2009	2010	2011	2012	2013
Addressed mail volumes	20.6bn	18.7bn	17.5bn	16.7bn	15.5bn	14.8bn
Addressed mail revenues	£7.0bn	£6.8bn	£6.7bn	£6.9bn	£7.3bn	£7.5bn
Proportion of access mail in total mail	25%	33%	40%	43%	46%	49%
Letter volumes delivered by operators other than Royal Mail	n/a	11.8m	11.3m	8.5m	18.0m	56.1m
Direct mail share of total advertising spend	n/a	17.8%	15.9%	14.9%	14.5%	14.1%

Source: Royal Mail Regulatory Financial Statements, Royal Mail Wholesale, Royal Mail Group Annual Reports, AA/Warc, Nielsen. Revenue figures are nominal. Note: Royal Mail calendar year volume figures are derived from Ofcom calculations based on financial year figures in Royal Mail's Regulatory Statements and unaudited submissions to Ofcom, and are therefore not directly comparable with Royal Mail's published accounts. Royal Mail figures relate to the "Reported Business". Other operators' end-to-end included in 'Total mail' since 2009. Prior data are not comparable. Figures are nominal.

Figure 6.2

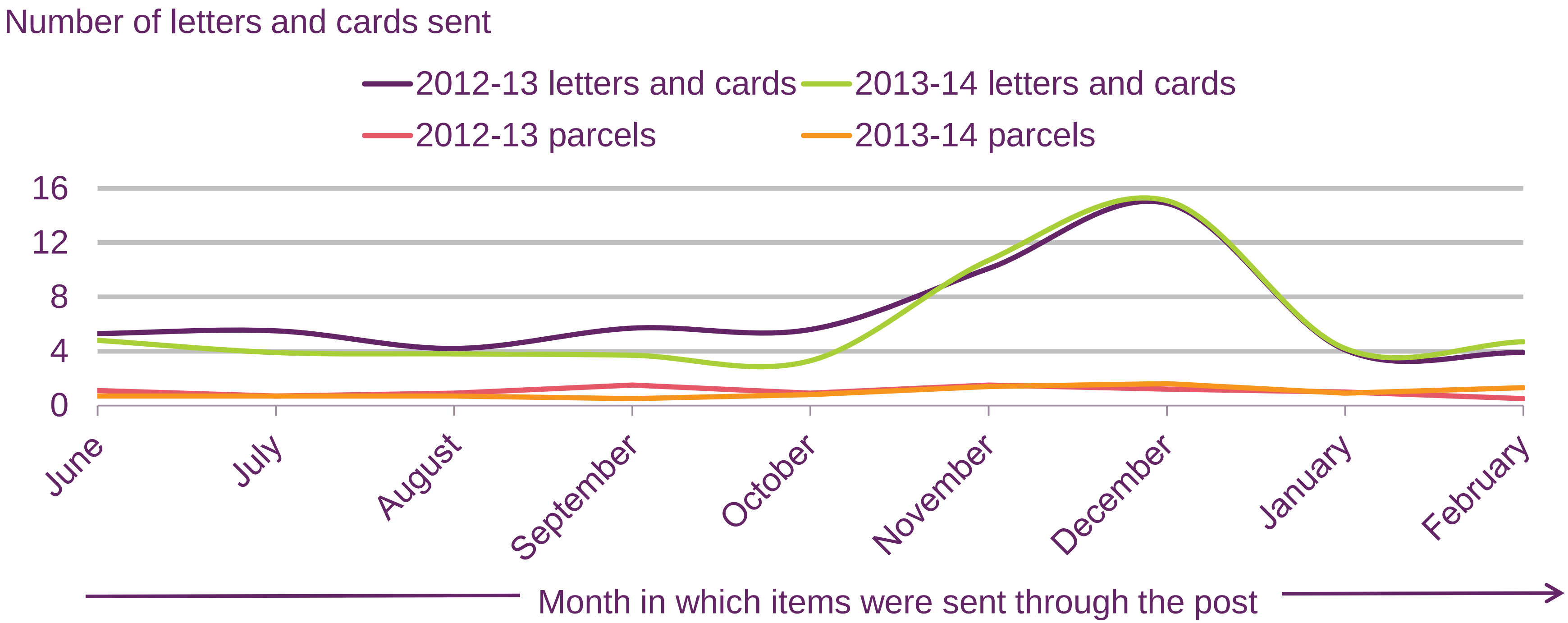
Total items of post sent per month: June 2012 to February 2014



Source: Ofcom research, Q2 2013-Q1 2014
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the past month?

Figure 6.3

Letters, cards and parcels sent per month: June 2012 to February 2014

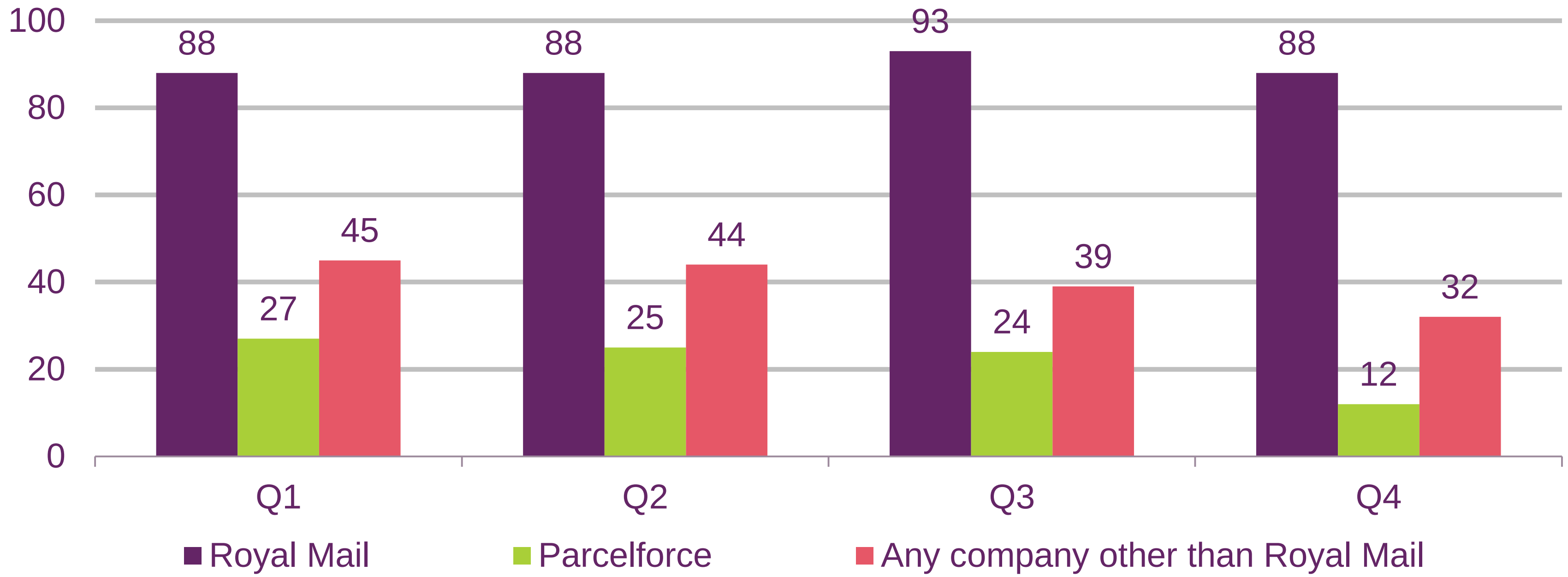


Source: Ofcom research, Q2 2013-Q1 2014
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the past month?
QC2. And how many of these items sent in the past month were parcels rather than letters or cards?

Figure 6.4

Companies used by residential consumers to send post

Proportion of consumers (%)

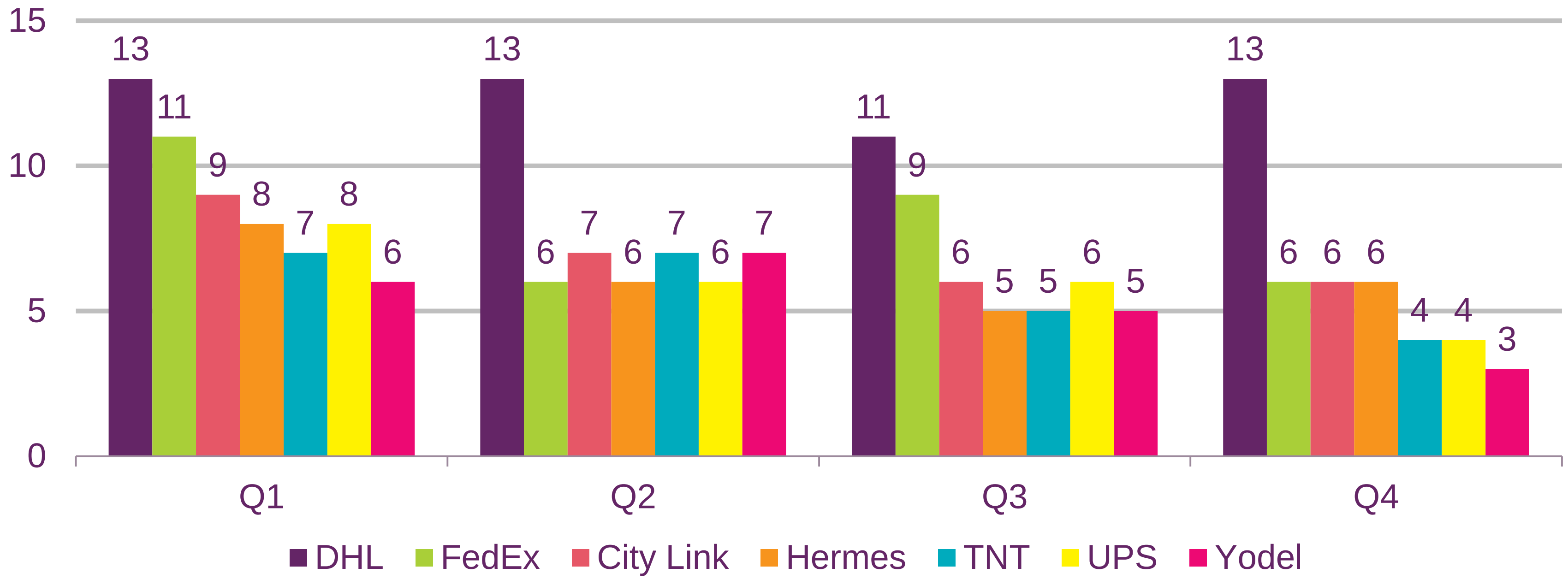


Source: Ofcom research, 2013
Q:Which, if any, of these companies have you used to send a packet, parcel or letter? Please think about your personal use rather than any use as part of a business.
Base: all respondents

Figure 6.5

Companies other than Royal Mail used by residential consumers to send post

Proportion of consumers (%)



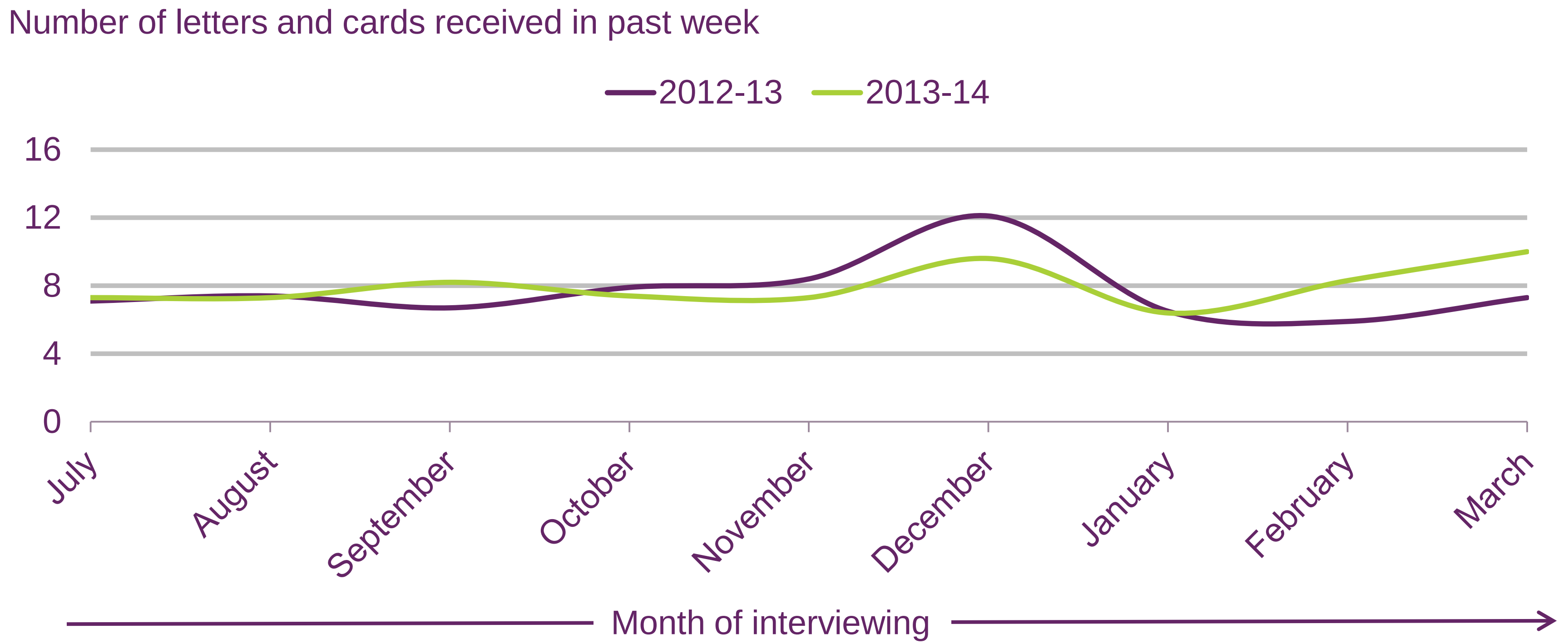
Source: Ofcom research, 2013

Q:Which, if any, of these companies have you used to send a packet, parcel or letter? Please think about your personal use rather than any use as part of a business.

Base: all respondents

Figure 6.6

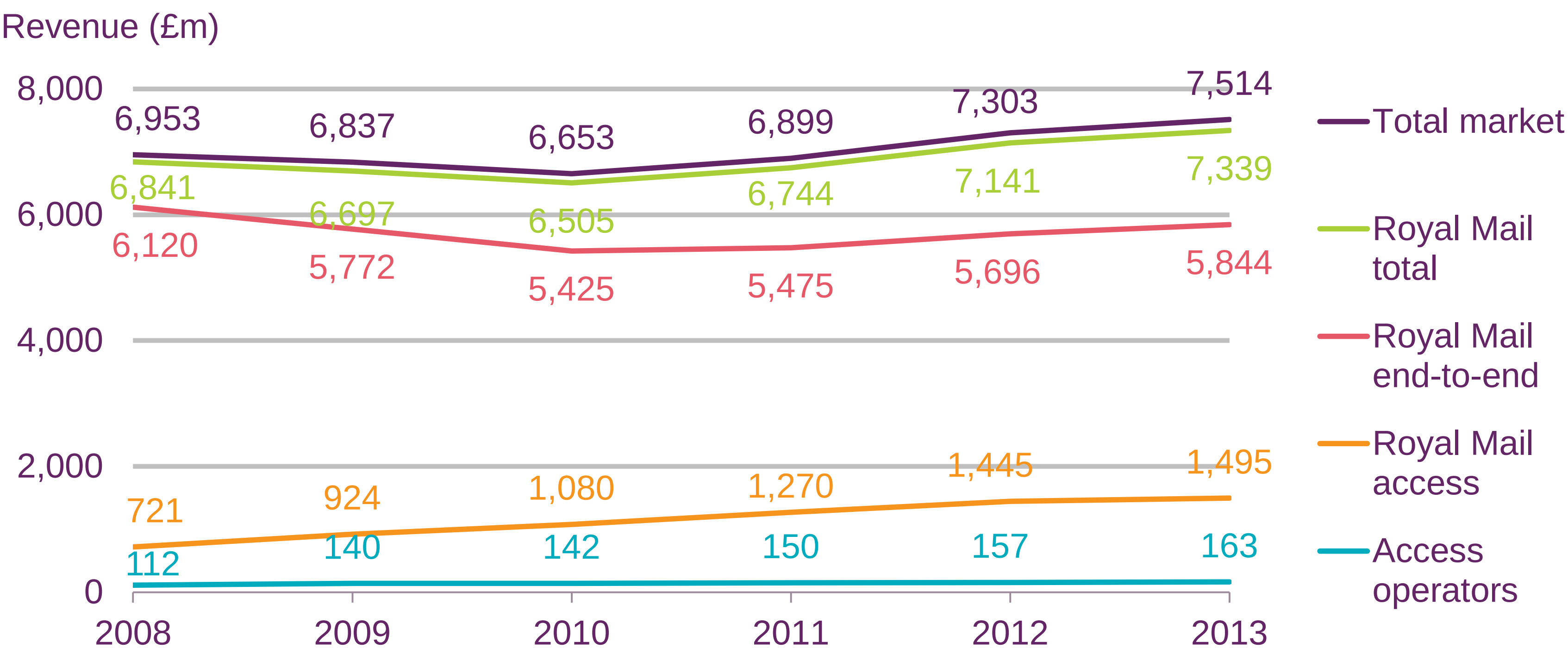
Letters and cards received per week: July 2012 to March 2014



Source: Ofcom research, Q2 2013-Q1 2014
QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the past week?
QD2. And how many of these items received in the past week were parcels?

Figure 6.7

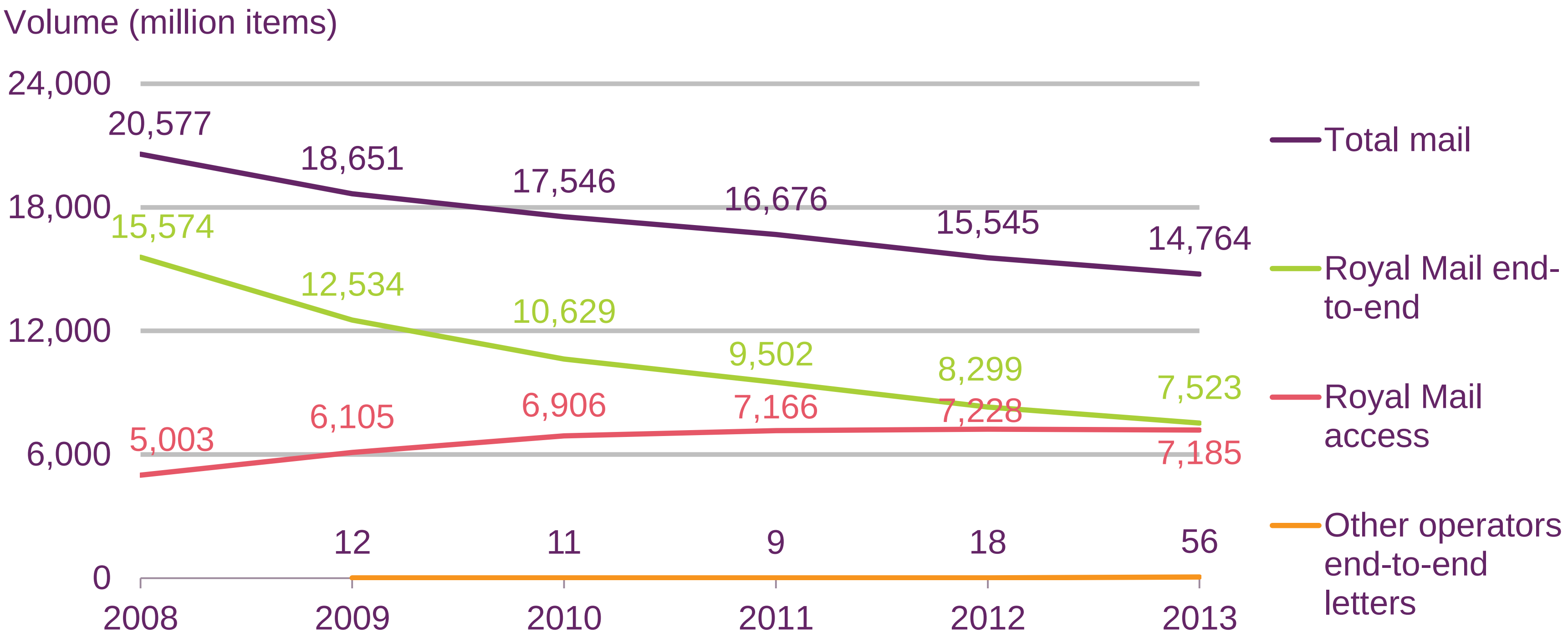
Mail revenue: 2008-2013



Source: Royal Mail Regulatory Financial Statements, Royal Mail Wholesale, operator returns to Ofcom, Ofcom estimates. Royal Mail calendar year volume figures are derived from Ofcom calculations based on financial year figures in Royal Mail's Regulatory Statements and unaudited submissions to Ofcom, and are therefore not directly comparable with Royal Mail's published accounts. Royal Mail figures relate to the "Reported Business". Royal Mail end-to-end refers to Royal Mail total mail volumes excepting access. Other operators' end-to-end included in 'Total mail' since 2009. Prior data are not comparable. Figures are nominal.

Figure 6.8

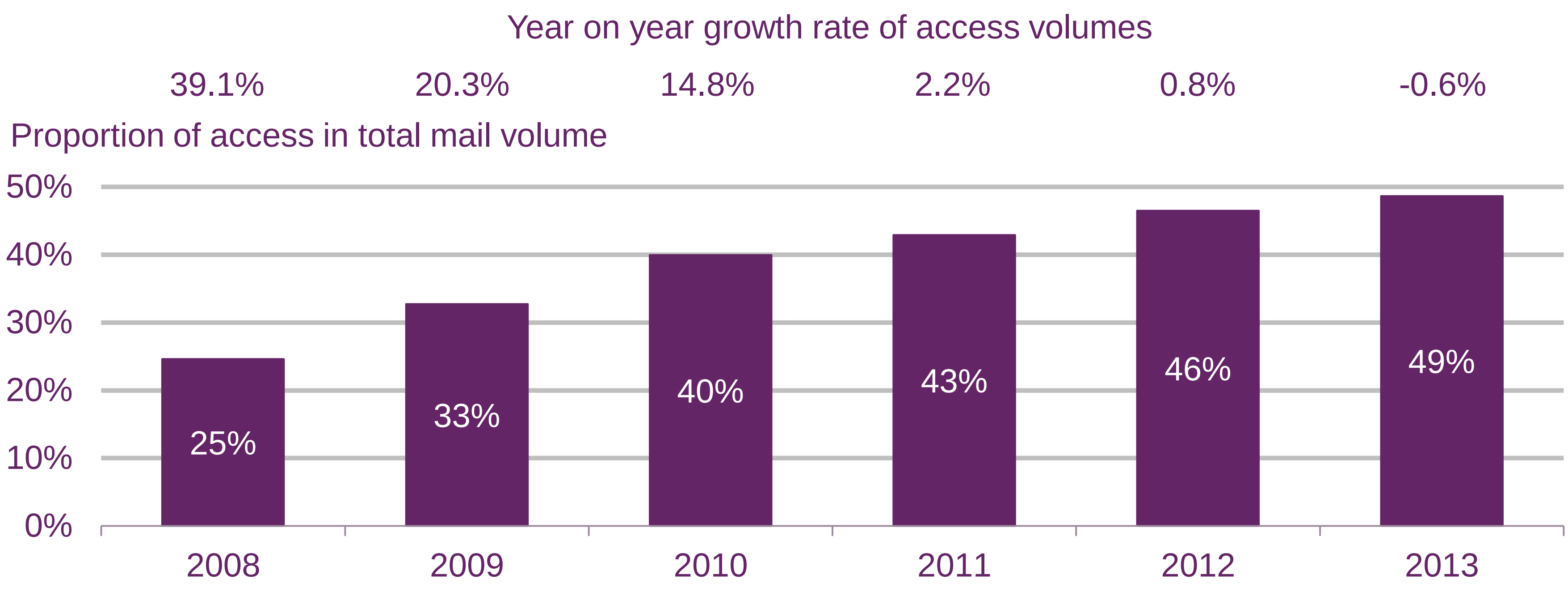
Mail volumes: 2008 to 2013



Source: Royal Mail Regulatory Financial Statements, Royal Mail Wholesale, operator returns to Ofcom, Ofcom estimates. Royal Mail calendar year volume figures are derived from Ofcom calculations based on financial year figures in Royal Mail's Regulatory Statements and unaudited submissions to Ofcom, and are therefore not directly comparable with Royal Mail's published accounts. Royal Mail figures relate to the "Reported Business". Royal Mail end-to-end refers to Royal Mail total mail volumes, excepting access. Other operators' end-to-end letters included in 'Total mail' since 2009. Prior data are not comparable.

Figure 6.9

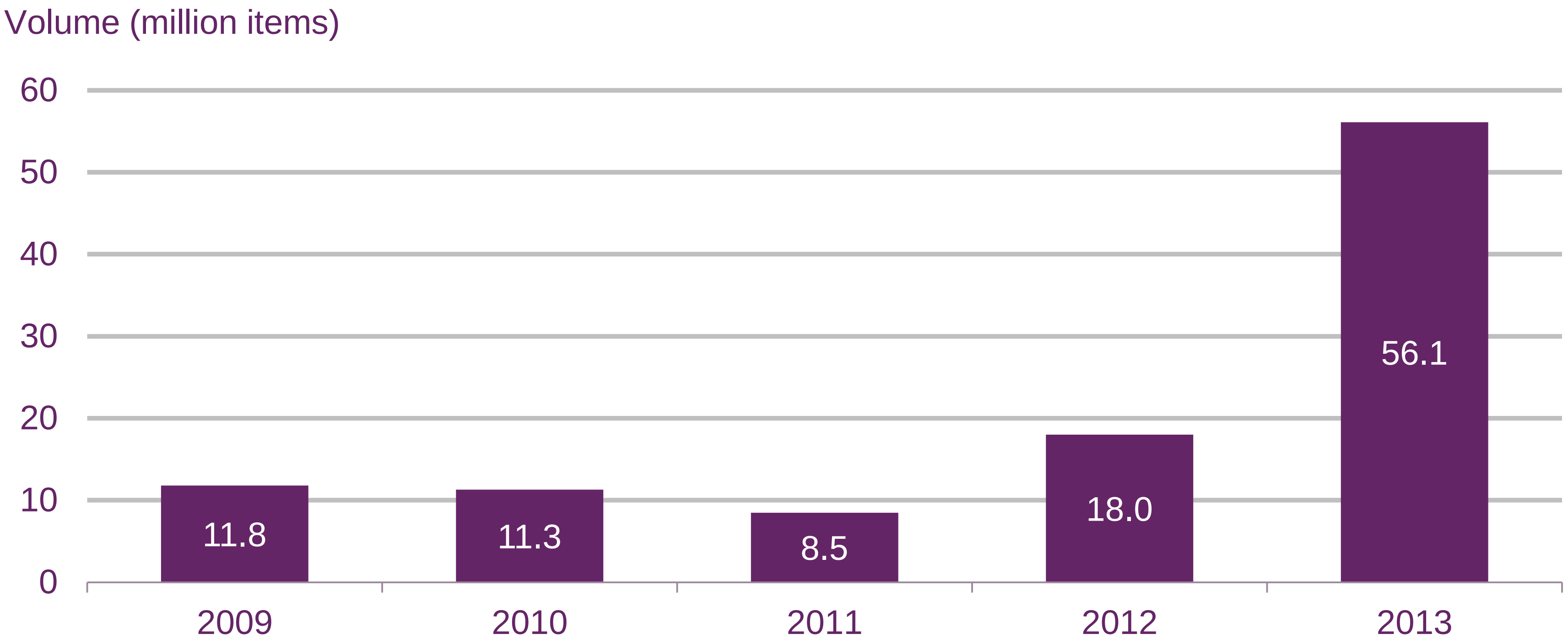
Proportion of access in total mail: 2008-2013



Source: Royal Mail Wholesale, Royal Mail Regulatory Financial Statements, Operators' returns, Ofcom estimates

Figure 6.10

Other operators' end-to-end letter volumes: 2009-2013

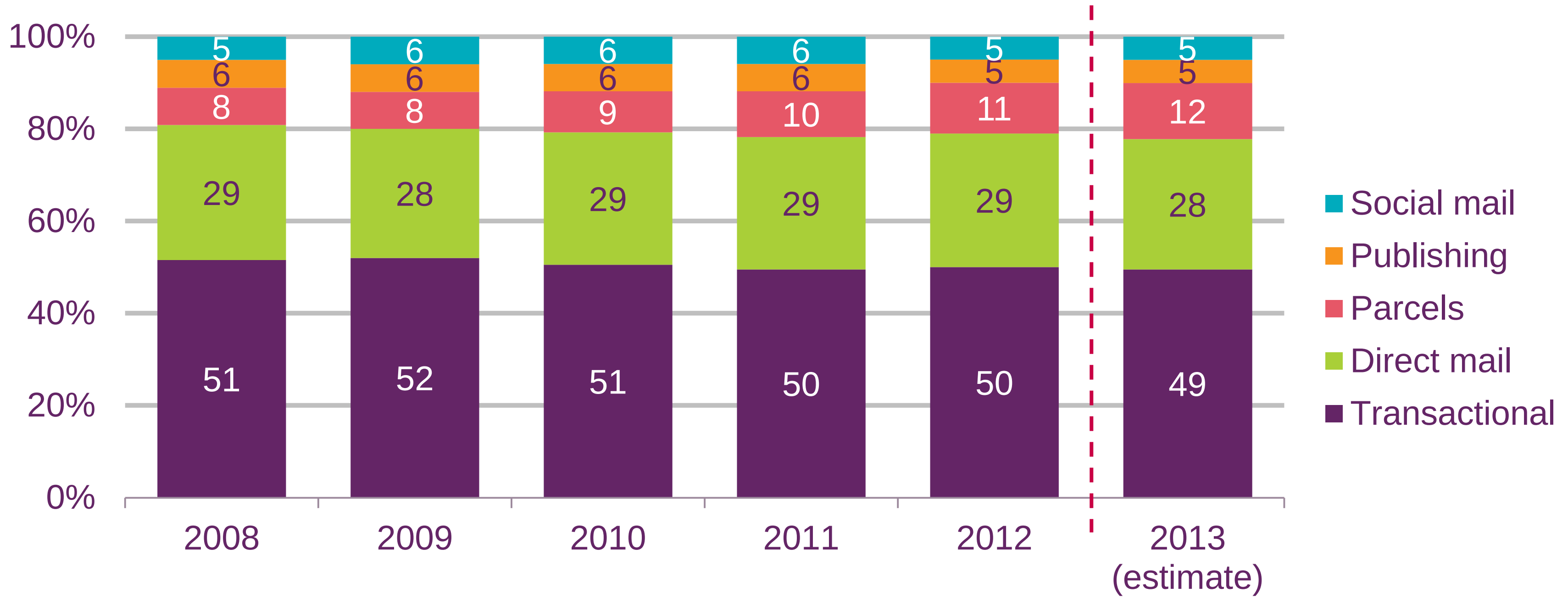


Source: Ofcom analysis of operators' returns

Figure 6.11

Mail volumes by type: 2008 – 2013

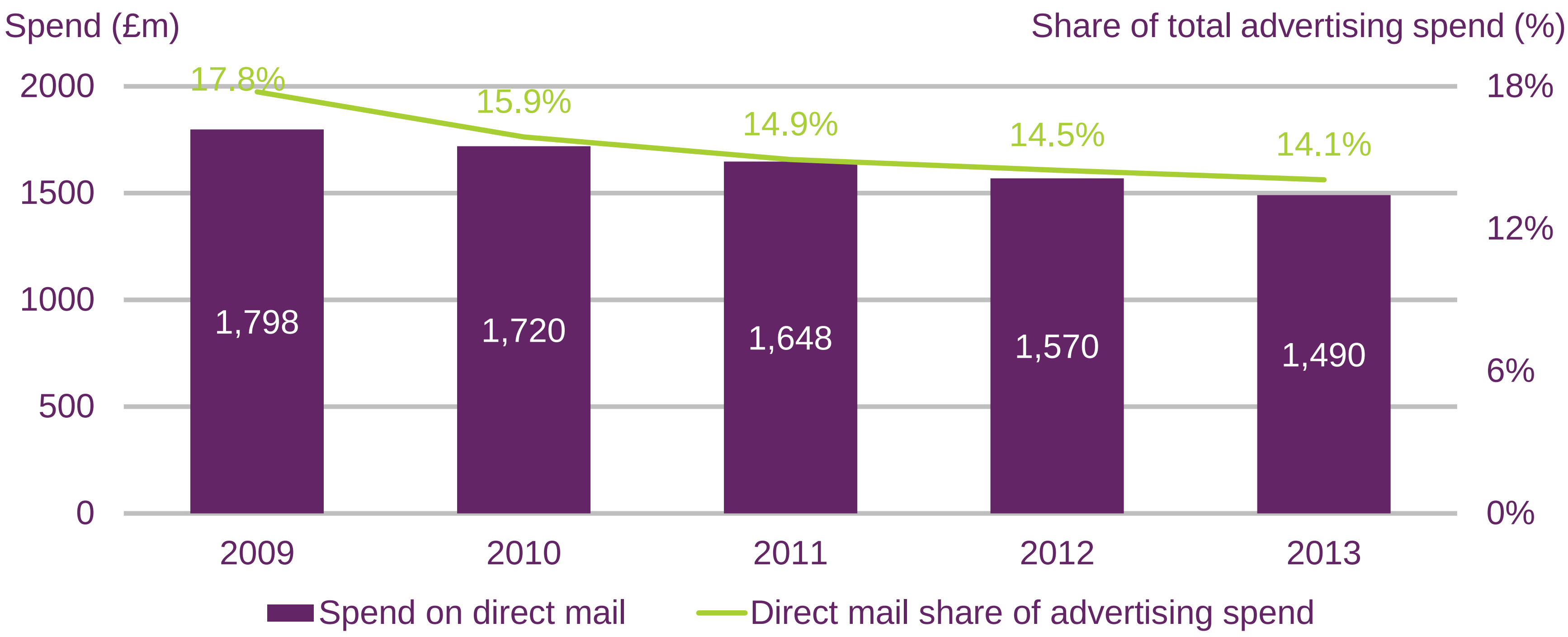
Proportion of type of mail in total volume (%)



Source: PricewaterhouseCoopers, The Outlook for UK Mail Volumes to 2023, July 2013
Note: 2013 is PwC estimate.

Figure 6.12

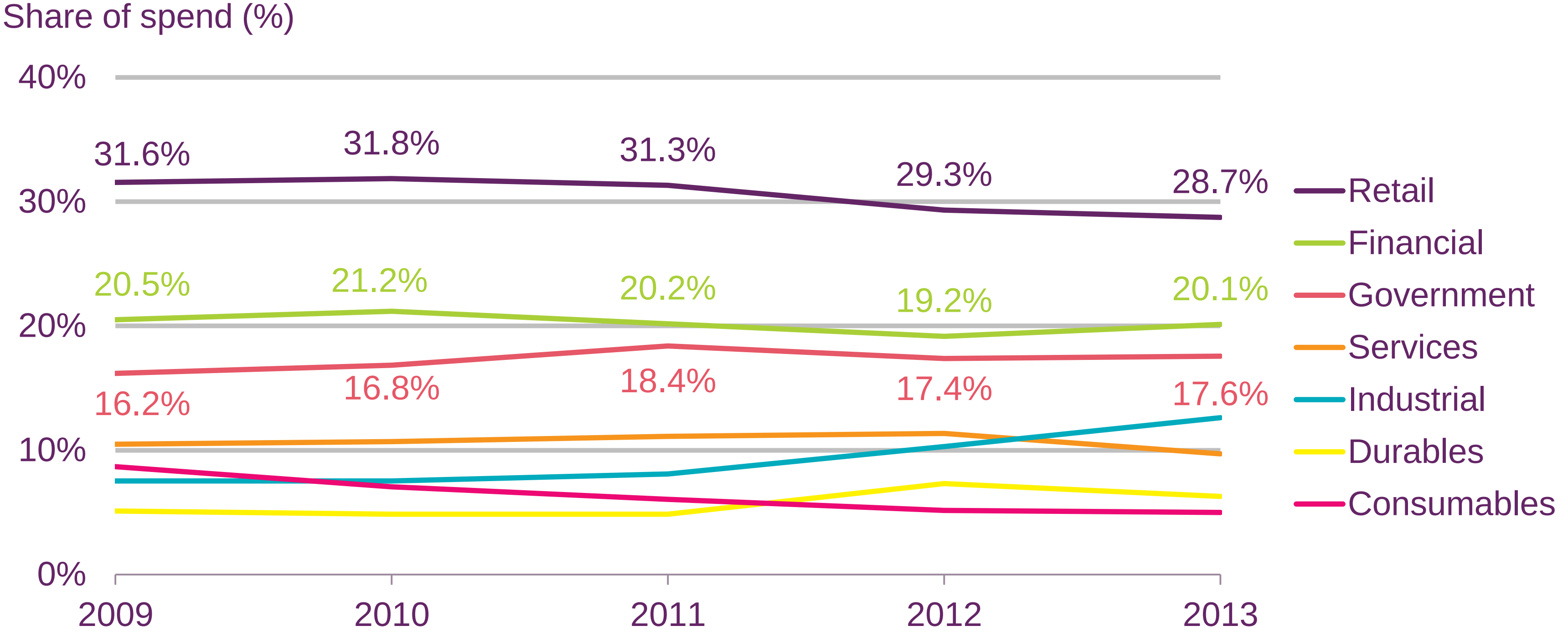
UK direct mail advertising spend and share of total advertising: 2009 - 2013



Source: AA/Warc Advertising Expenditure report / Nielsen. Figures are nominal.

Figure 6.13

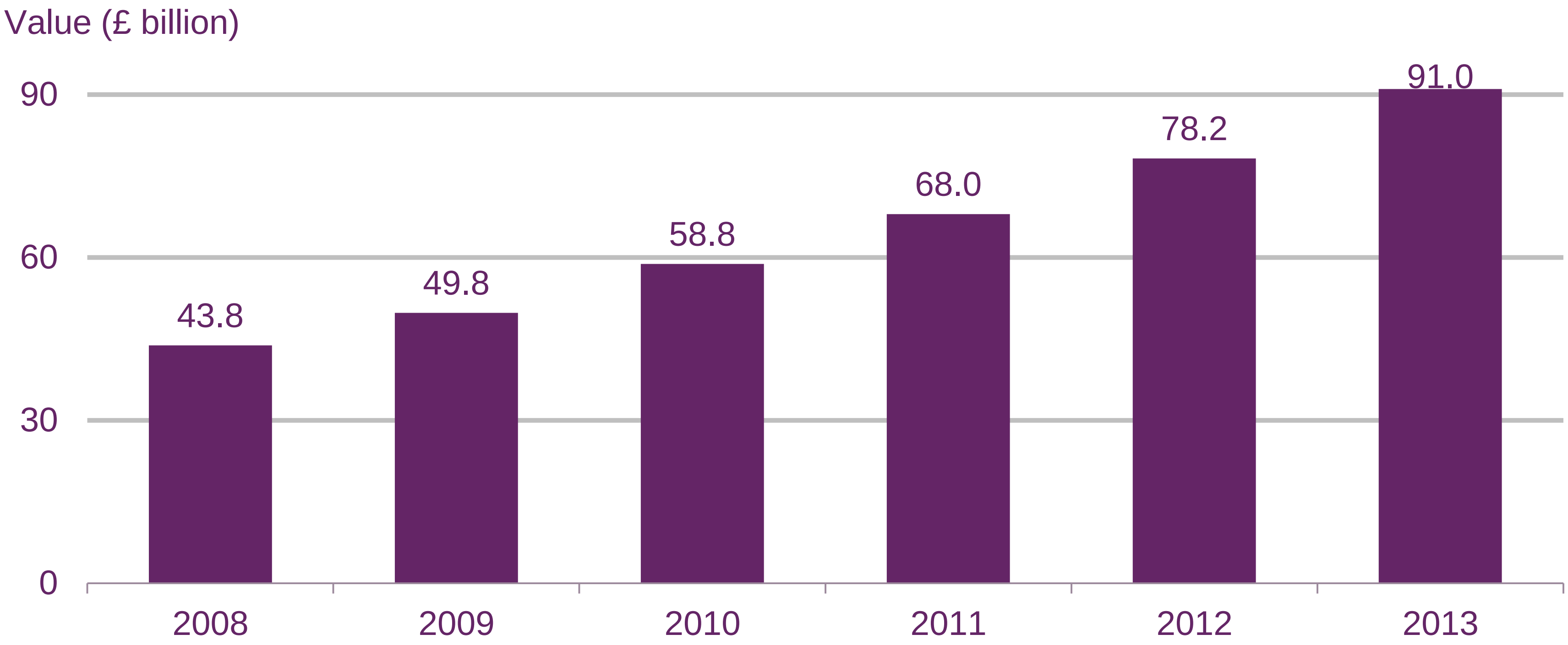
Share of direct mail expenditure, by sector: 2009-2013



Source: AA/Warc Expenditure report / Nielsen

Figure 6.14

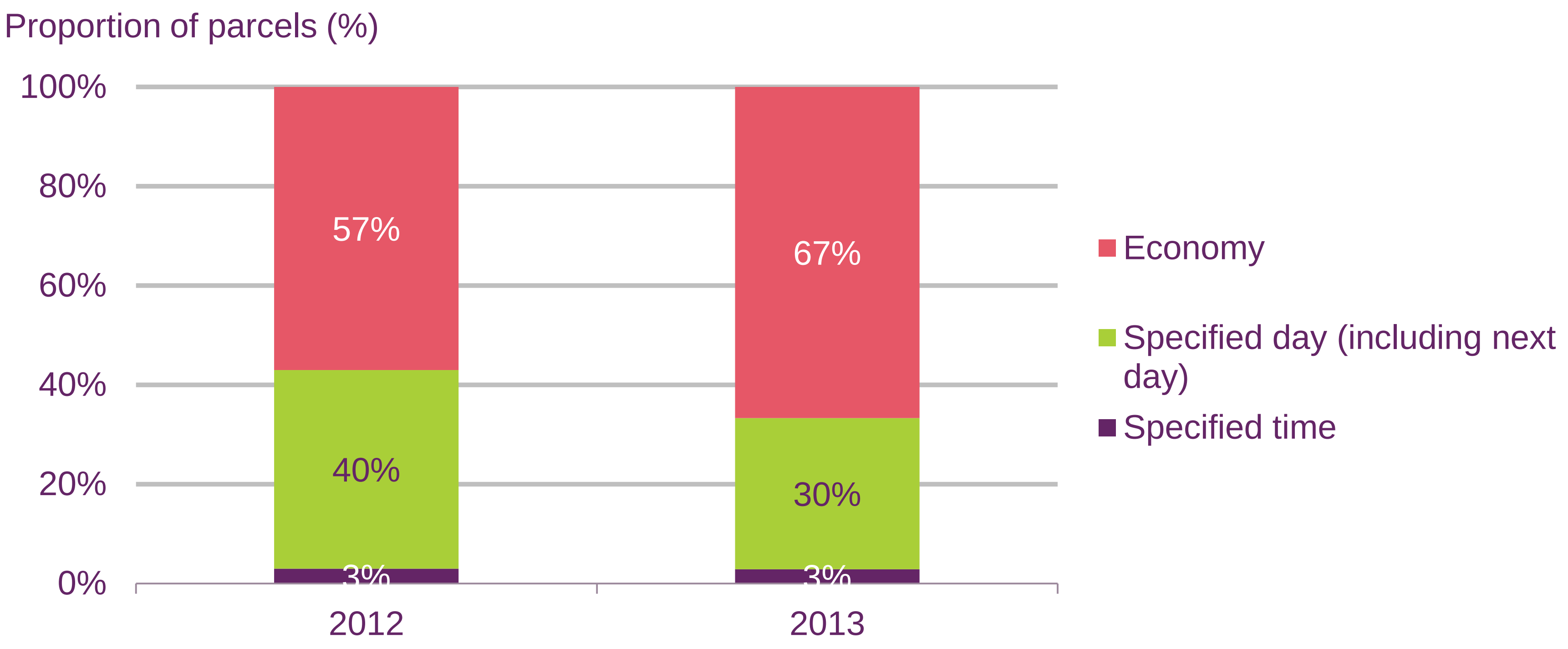
Value of UK e-commerce sales, 2008-2013



Source: Interactive Media in Retail Group, January 2014

Figure 6.15

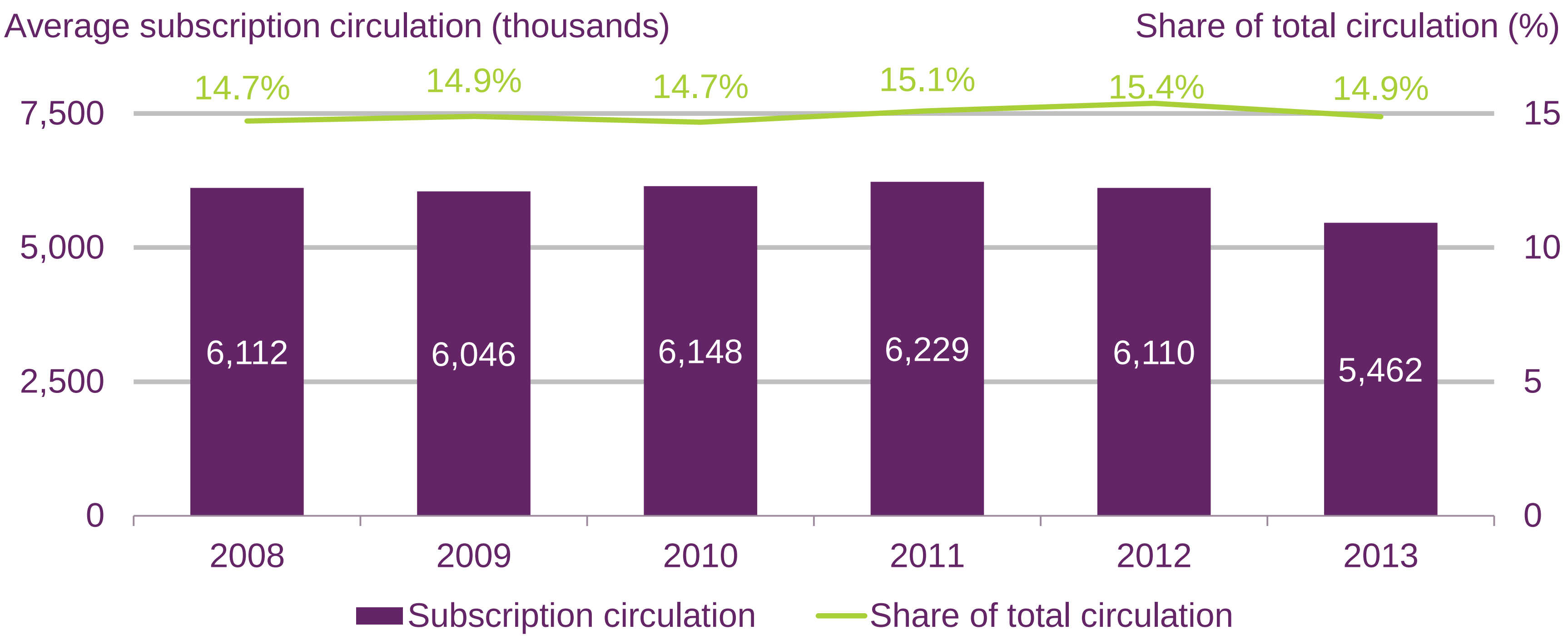
Service types used for the fulfilment of e-retail: 2012 and 2013



Source: Ofcom analysis of IMRG / Metapack Delivery Index, January 2012-December 2013.
Note: Specified time includes: AM, PM, before 10am, evening and school run. Specified day includes same day and next day. Proportions rebased to exclude international.

Figure 6.16

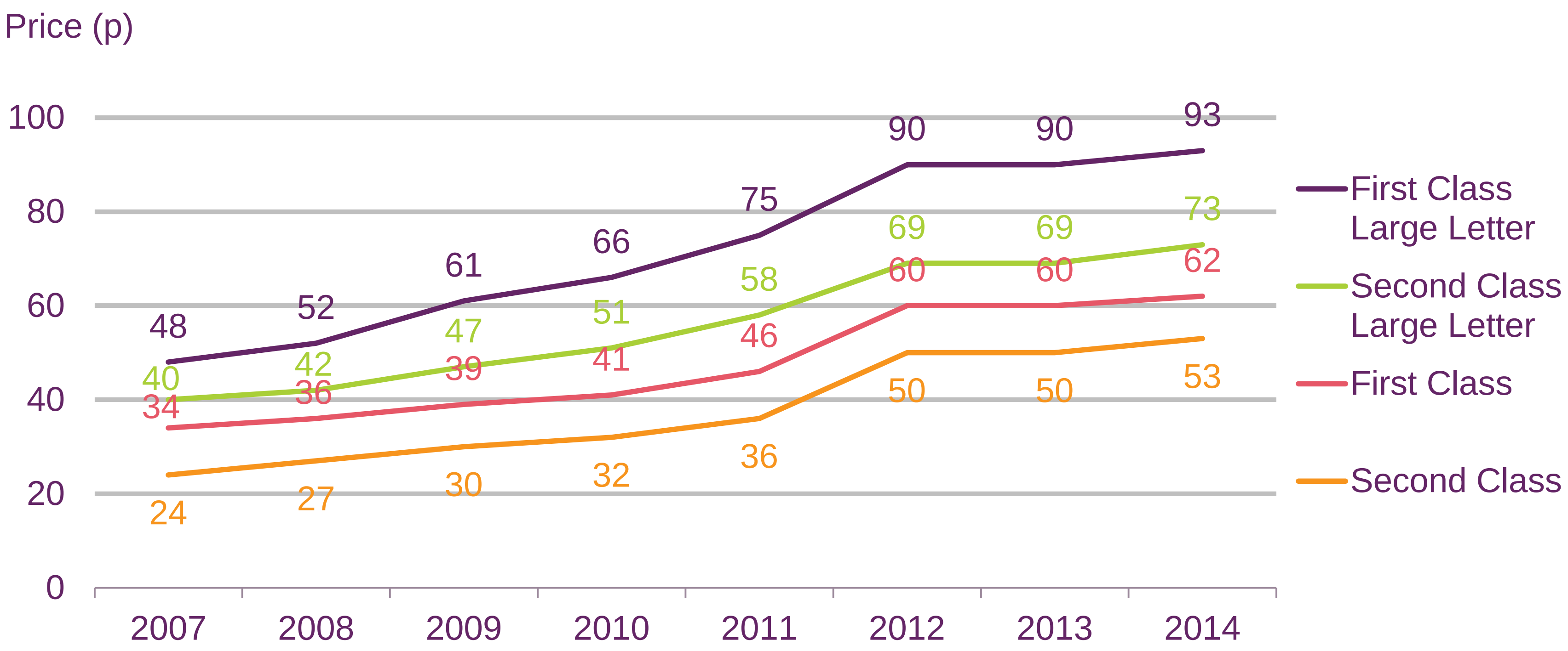
Magazine subscription circulation: 2008-2012



Source: Mediatel/ABC, 6-monthly net average circulation and subscription sales

Figure 6.17

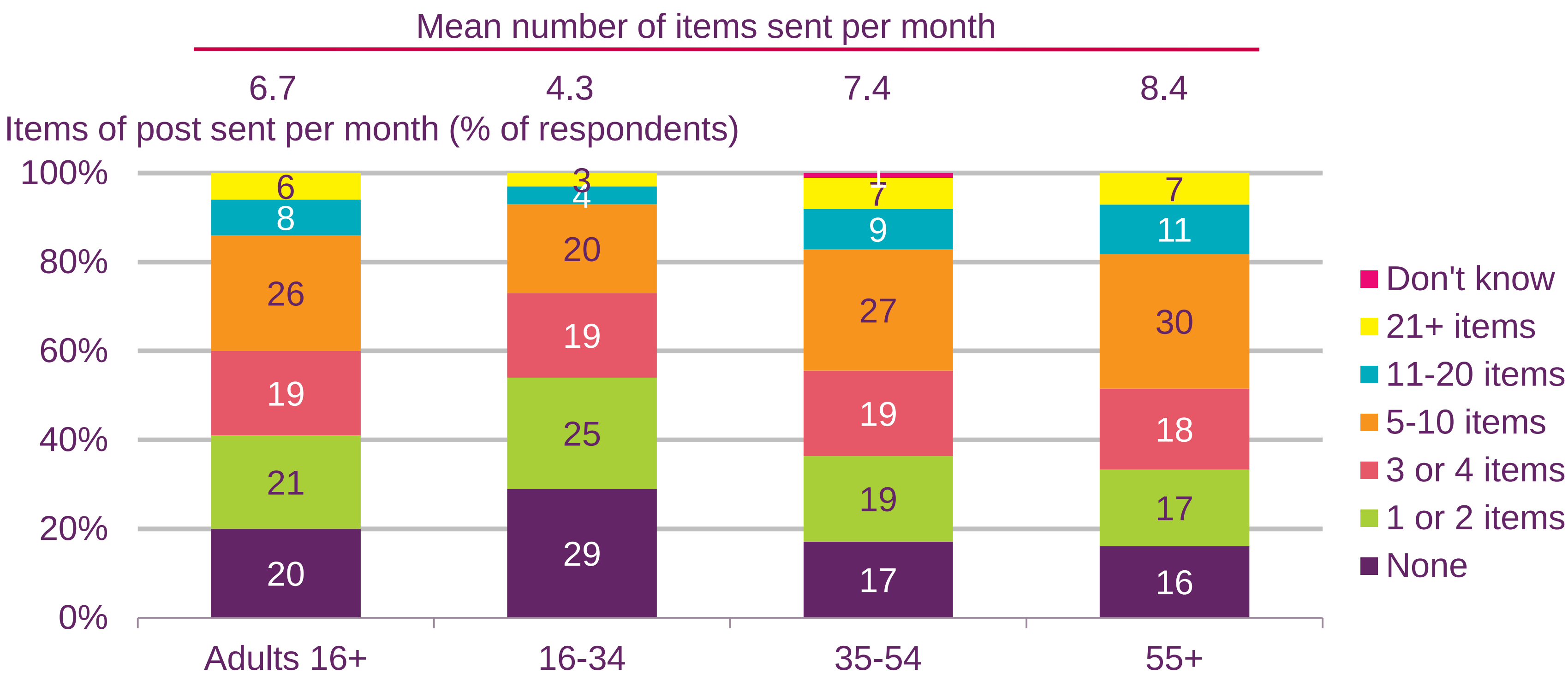
First and Second Class stamp prices



Source: Royal Mail. Figures are nominal. Prices refer to Royal Mail First and Second Class Standard and Large Letter list prices for letters up to 100g,

Figure 6.18

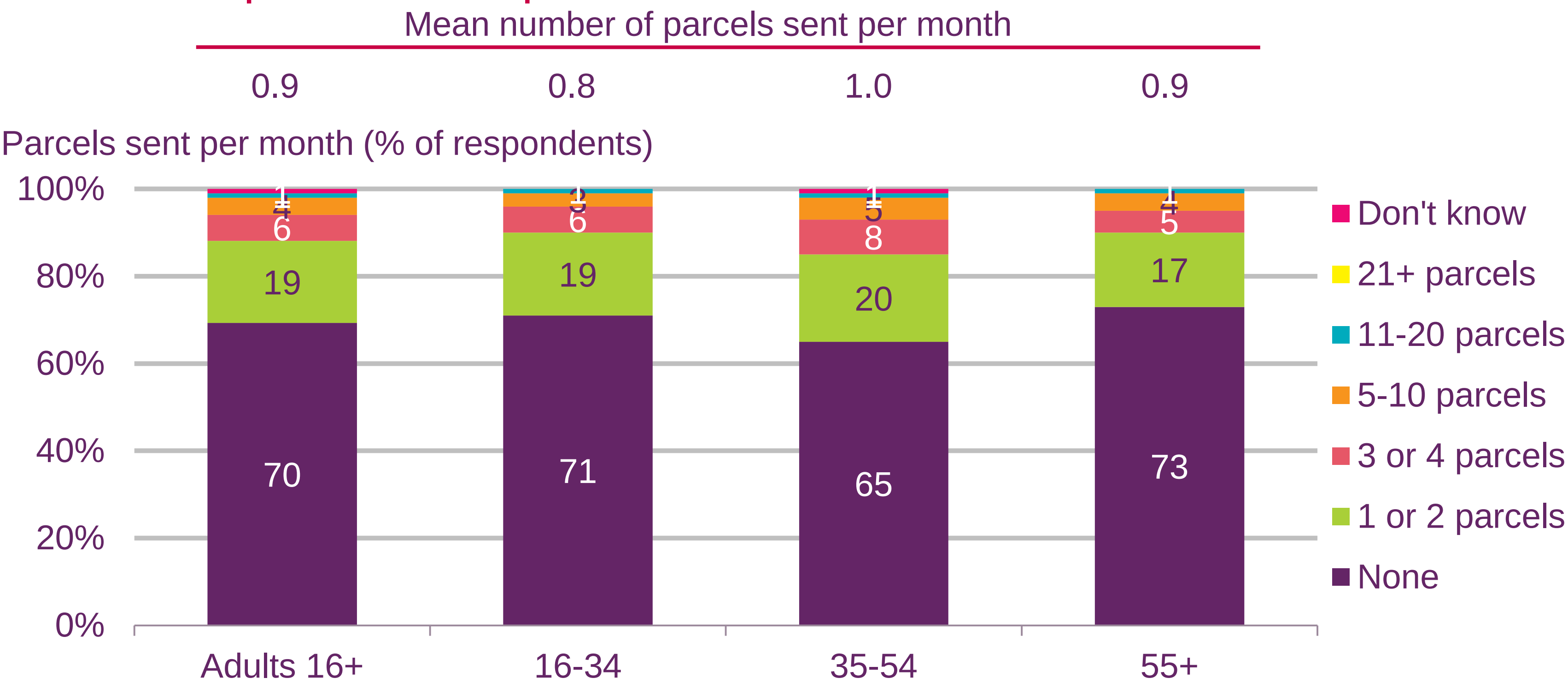
Number of items sent per month



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?

Figure 6.19

Number of parcels sent per month

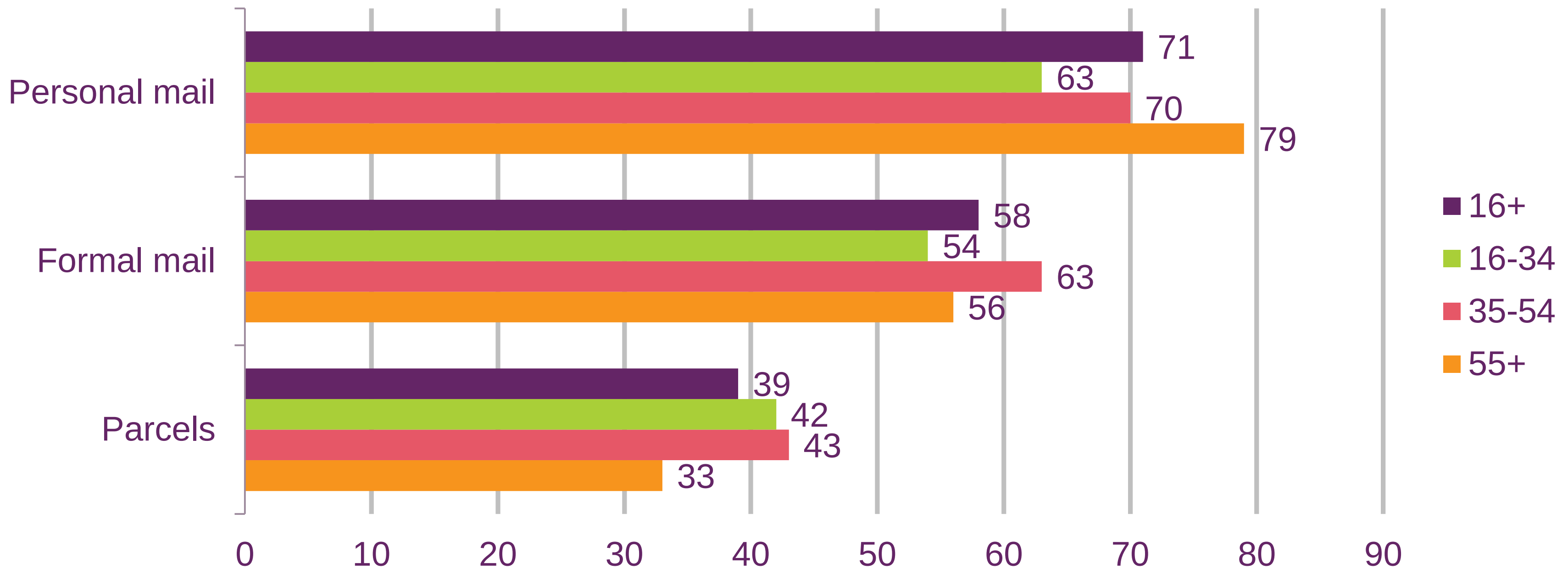


Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QC2. And how many of these items sent in the last month were parcels rather than letters or cards?

Figure 6.20

Types of mail sent in the past month

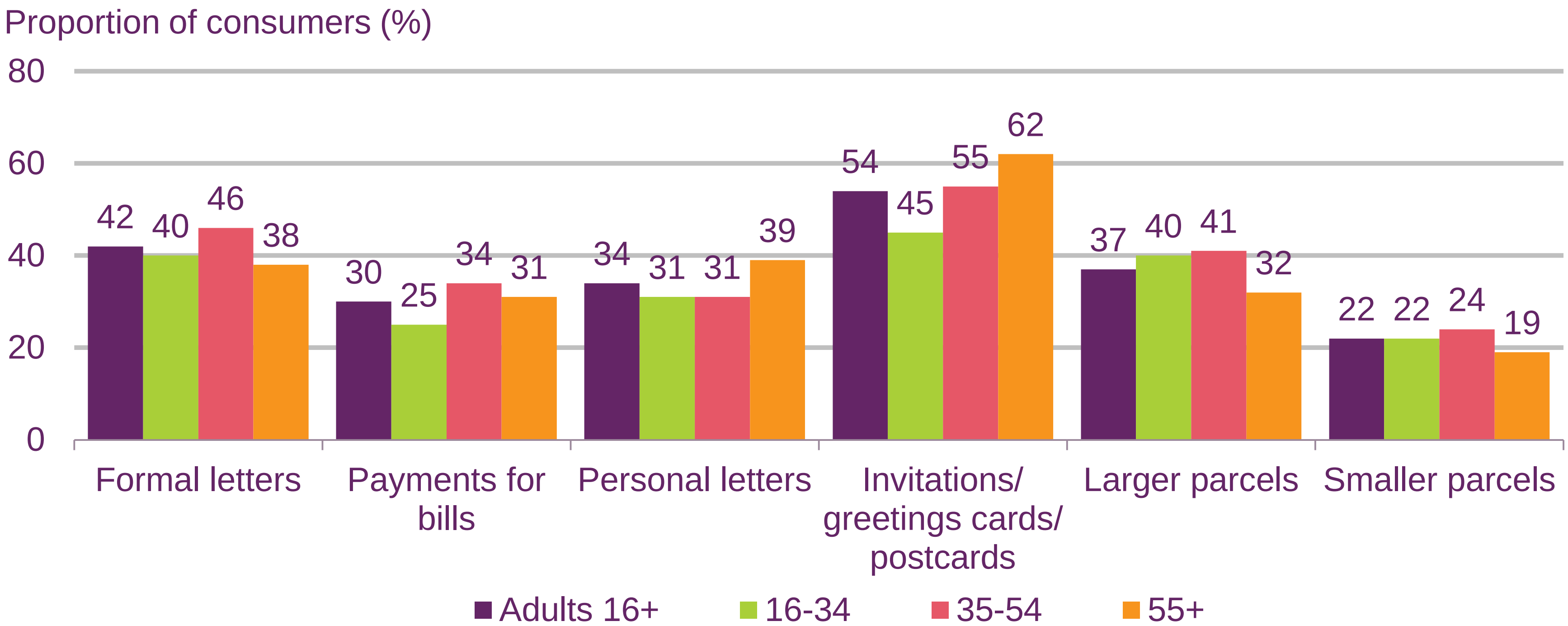
Proportion of consumers (%)



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All who have personally sent any items of post in the last month (n = 3817 adults 16+, 899 16-34, 1357 35-54, 1561 55+) QC5. Which of these types of mail would you say you have personally sent in the last month by post? (MULTICODE)

Figure 6.21

Types of mail sent in the past month

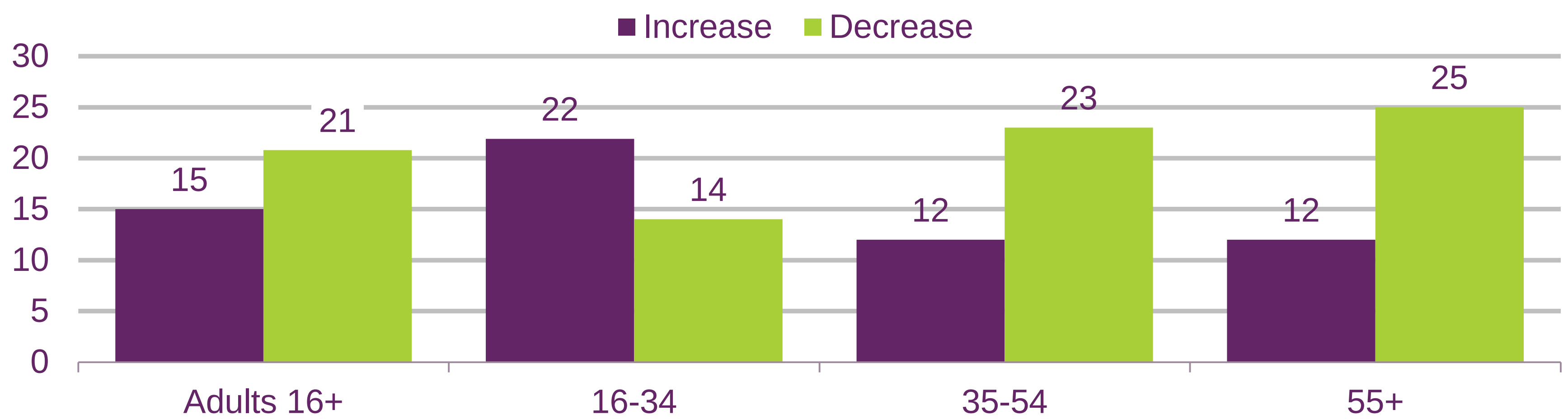


Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All who have personally sent any items of post in the last month (n = 3817 adults 16+, 899 16-34, 1357 35-54, 1561 55+) QC5. Which of these types of mail would you say you have personally sent in the last month by post? (MULTICODE)

Figure 6.22

Percentage of respondents reporting an increasing or decreasing amount of post sent in the past two years

Proportion of consumers (%)



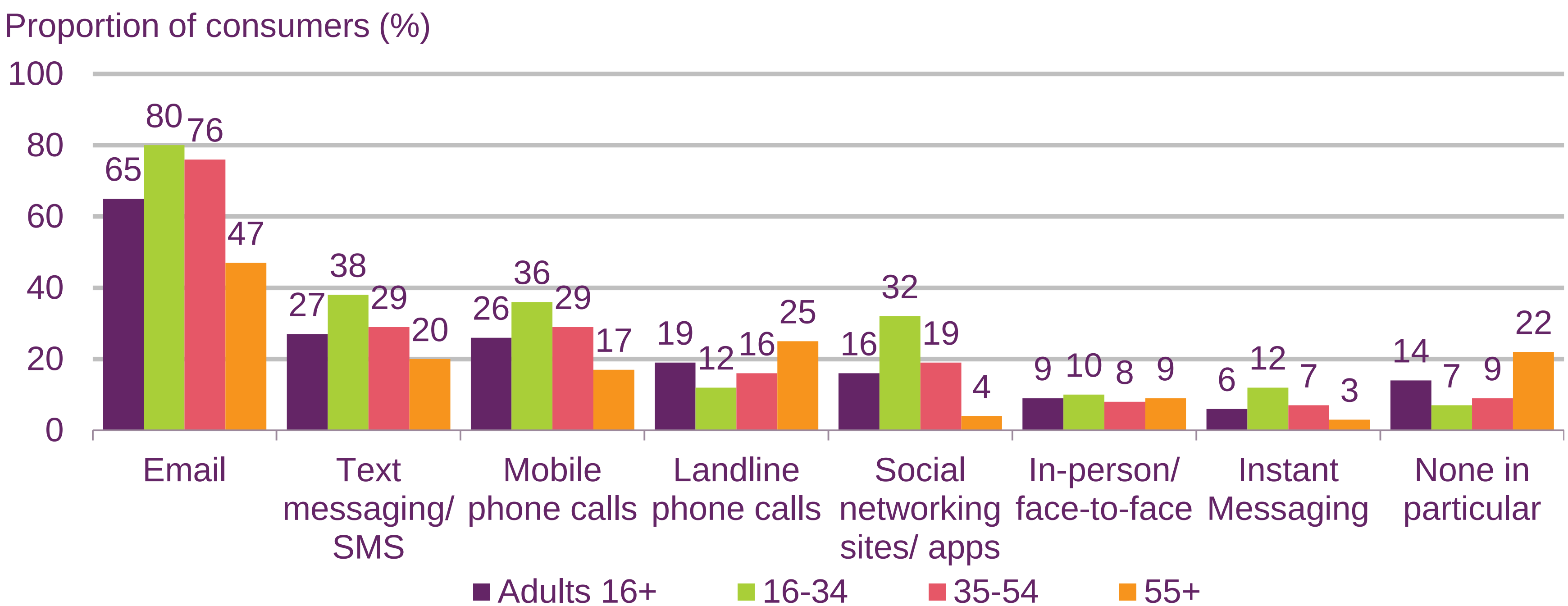
Net increase:

Adults 16+	16-34	35-54	55+
6pp	-8pp	-11pp	-13pp

Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QC10. Compared with two years ago, would you say that the number of items you send through the post has... increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly?

Figure 6.23

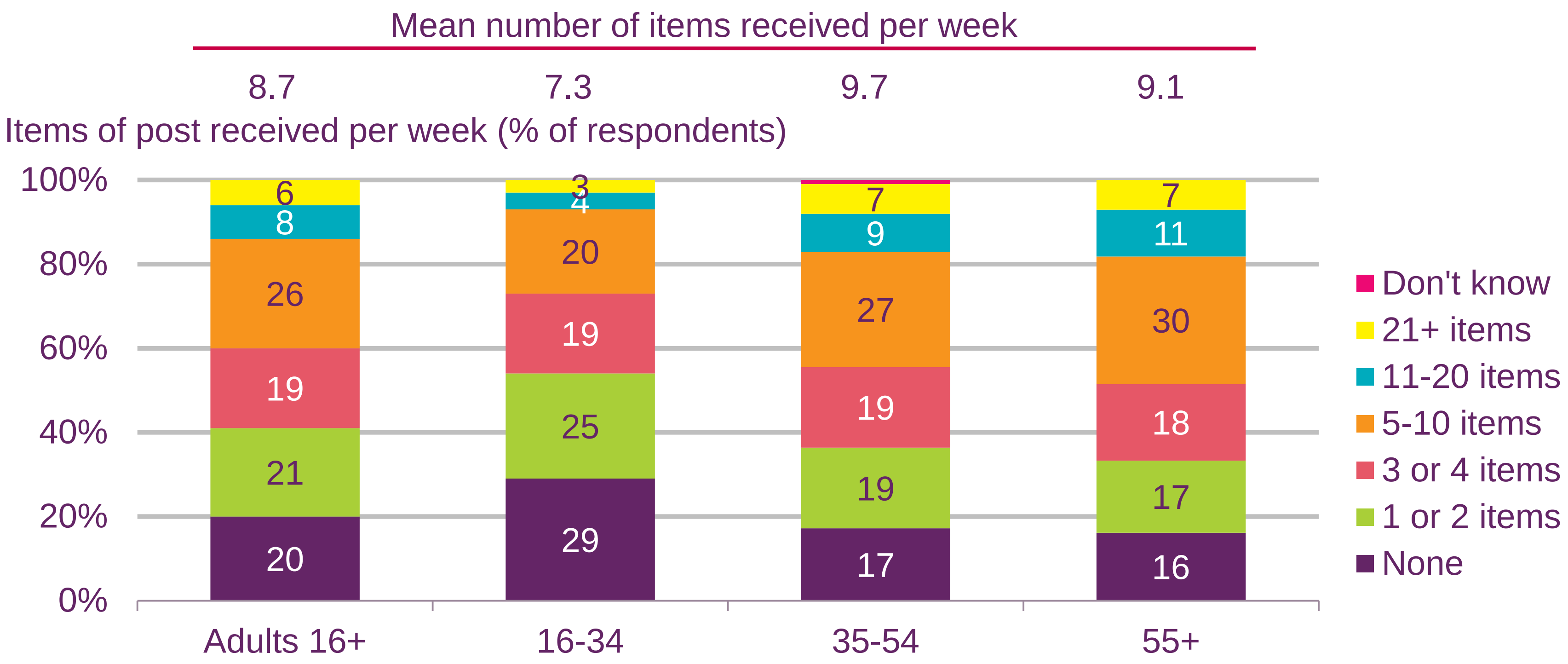
Methods of communication being used instead of post



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All who say that the number of items sent by post has decreased, compared to two years ago (n = 1030 adults 16+, 180 16-34, 368 35-54, 482 55+)
QC13. As your use of post has decreased compared with two years ago, which, if any, of these other forms of communication are you using more instead of post? (MULTICODE)

Figure 6.24

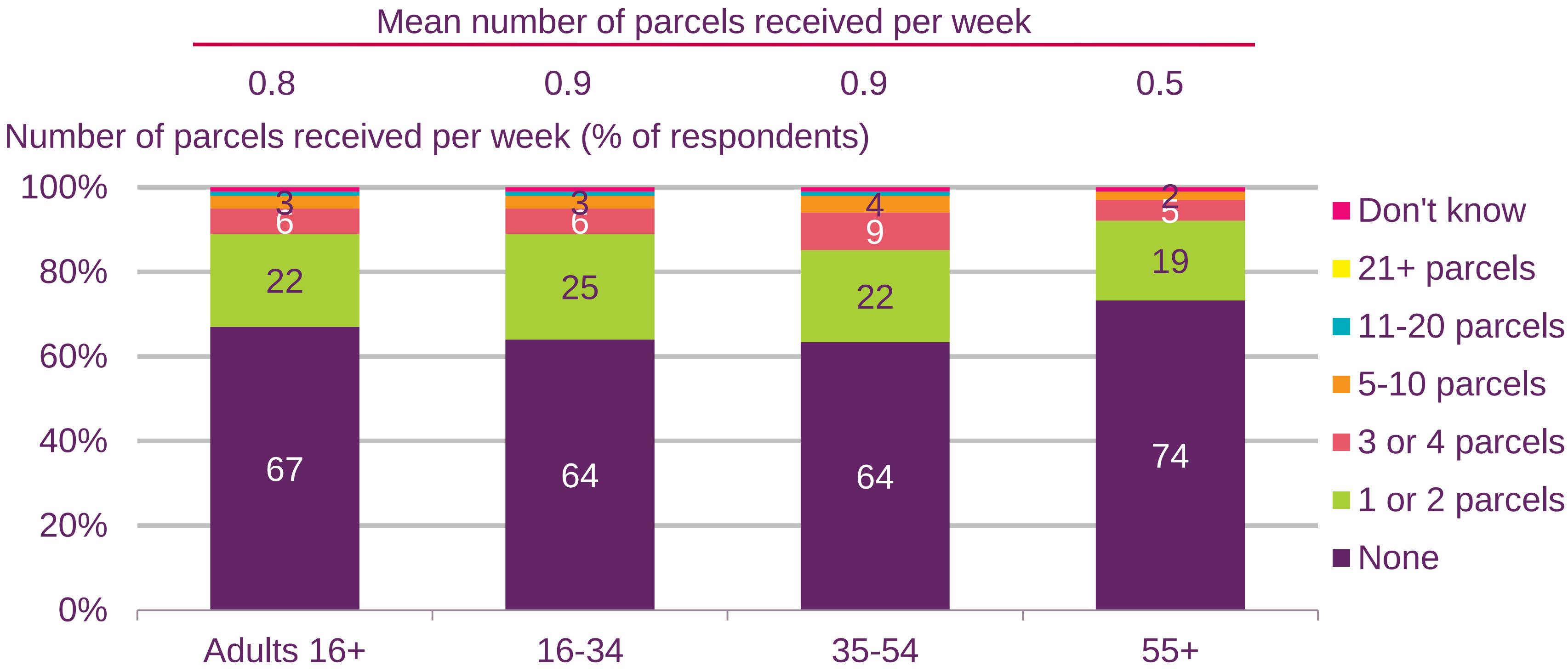
Number of items received per week



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

Figure 6.25

Number of parcels received per week

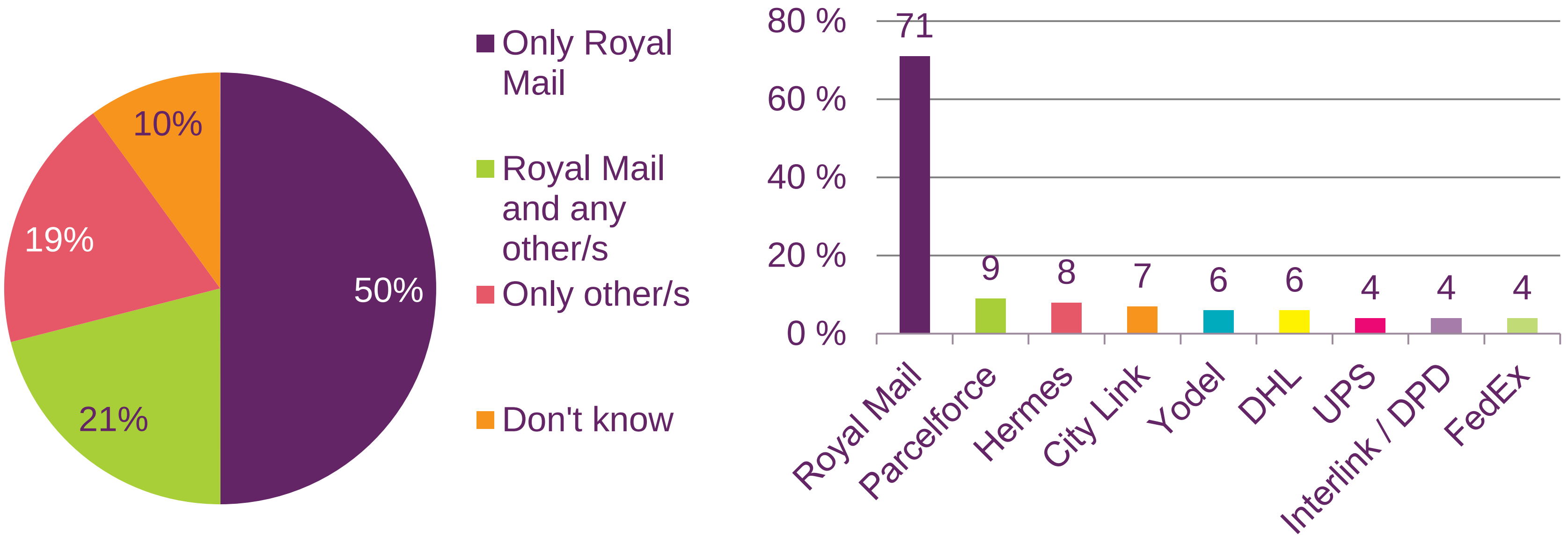


Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QD2. And how many of these items received in the last week were parcels rather than letters or cards?

Figure 6.26

Proportion of consumers reporting delivery of parcels, by company

Company parcels delivered by (% of all who have received a parcel in the past week)

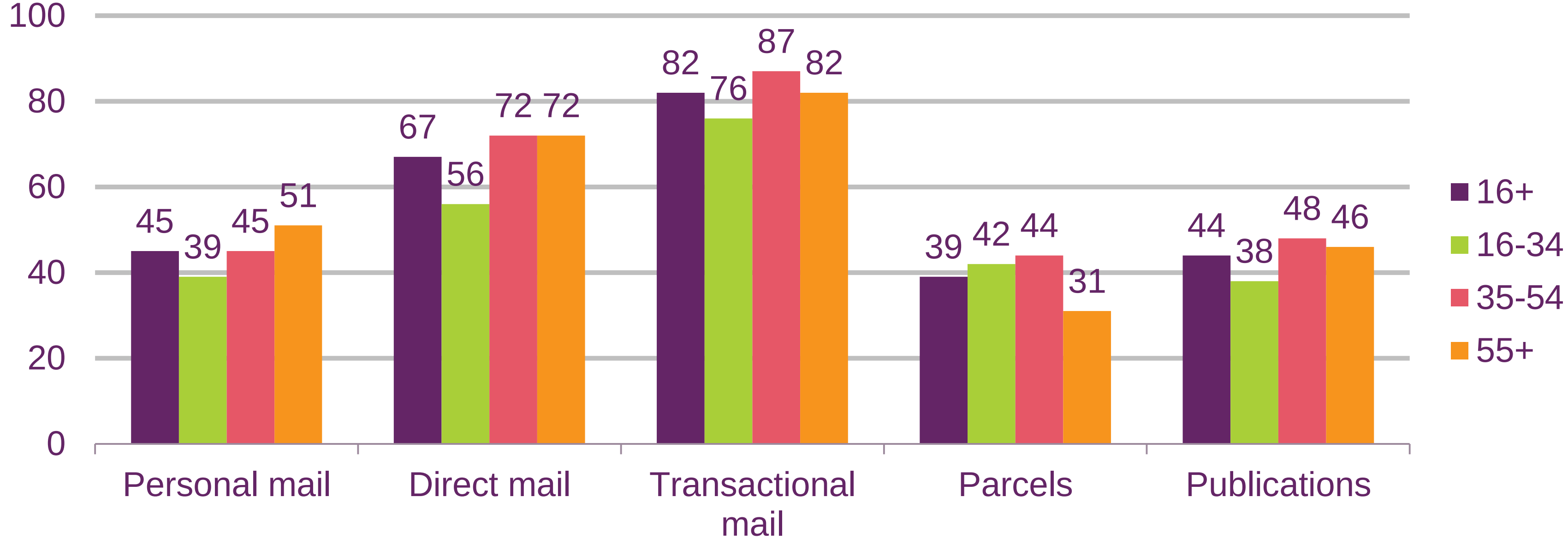


Source: Ofcom Residential Postal Tracker, Q4 2013-Q1 2014
Base: All who have received a parcel in the last week (n = 796 adults 16+)
QD17. Thinking of the parcels that you have received in the last week, which of these companies delivered the parcels? (MULTICODE)
Chart shows companies mentioned by more than 1% of those receiving any parcels in the past week

Figure 6.27

Categories of mail received in the past week

Proportion of consumers receiving each type of mail (%)



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QD4. Please think about items that are addressed to you personally rather than leaflets or charity collection envelopes or bags that may come through your letterbox. Which of these types of items would you say you have personally received through the post in the last month? (MULTICODE)

Figure 6.28

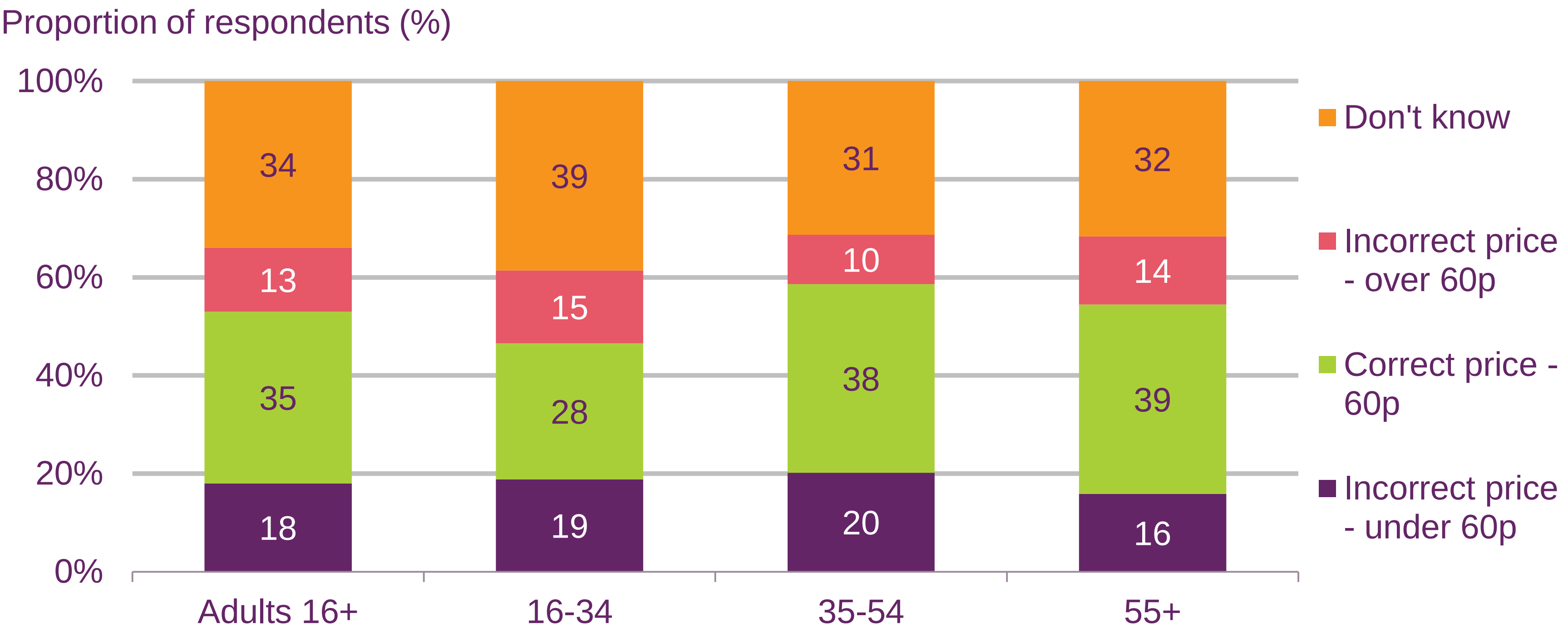
Types of mail received in the past week

Proportion of respondents who have received each type of mail (%)

Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QD4. Please think about items that are addressed to you personally rather than leaflets or charity collection envelopes or bags that may come through your letterbox. Which of these types of items would you say you have personally received through the post in the last month? (MULTICODE)

Figure 6.29

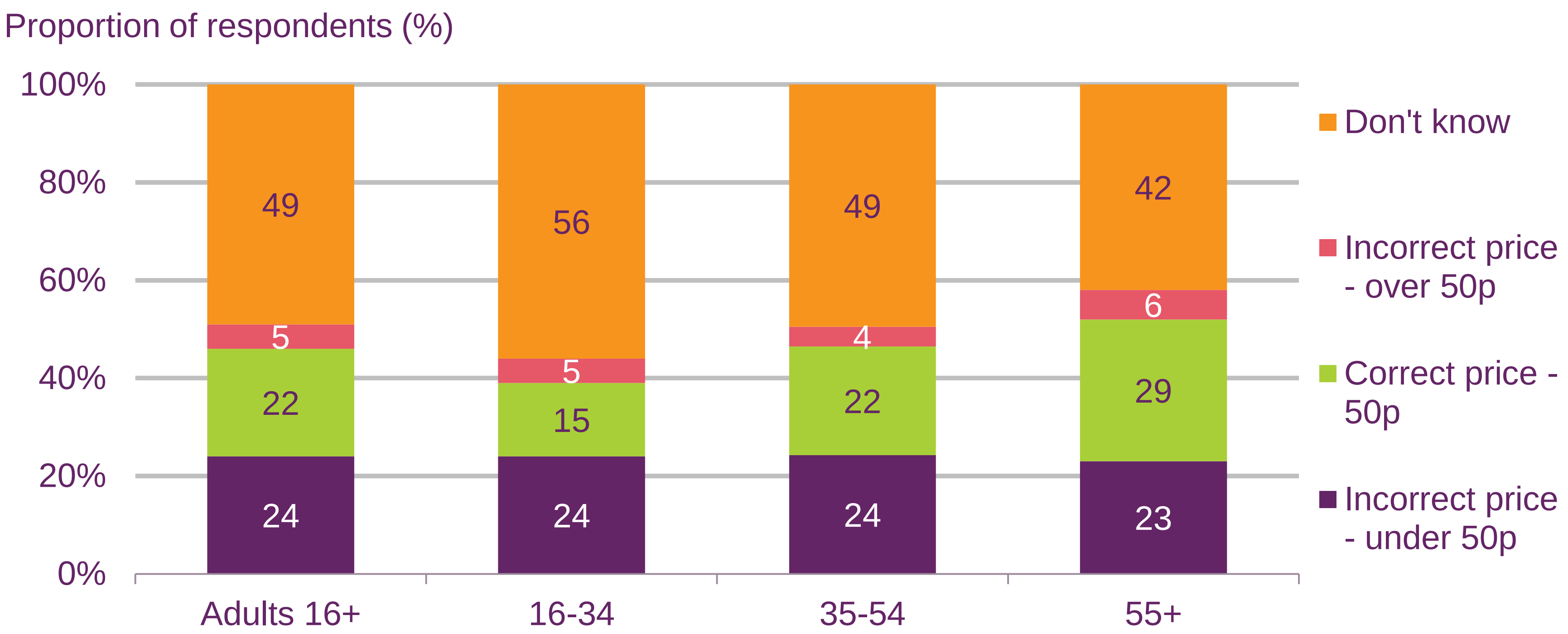
Awareness of the price of a First Class stamp



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QF1. As far as you know, how much does it currently cost to send a standard letter by first class using a stamp? (SINGLE CODE)

Figure 6.30

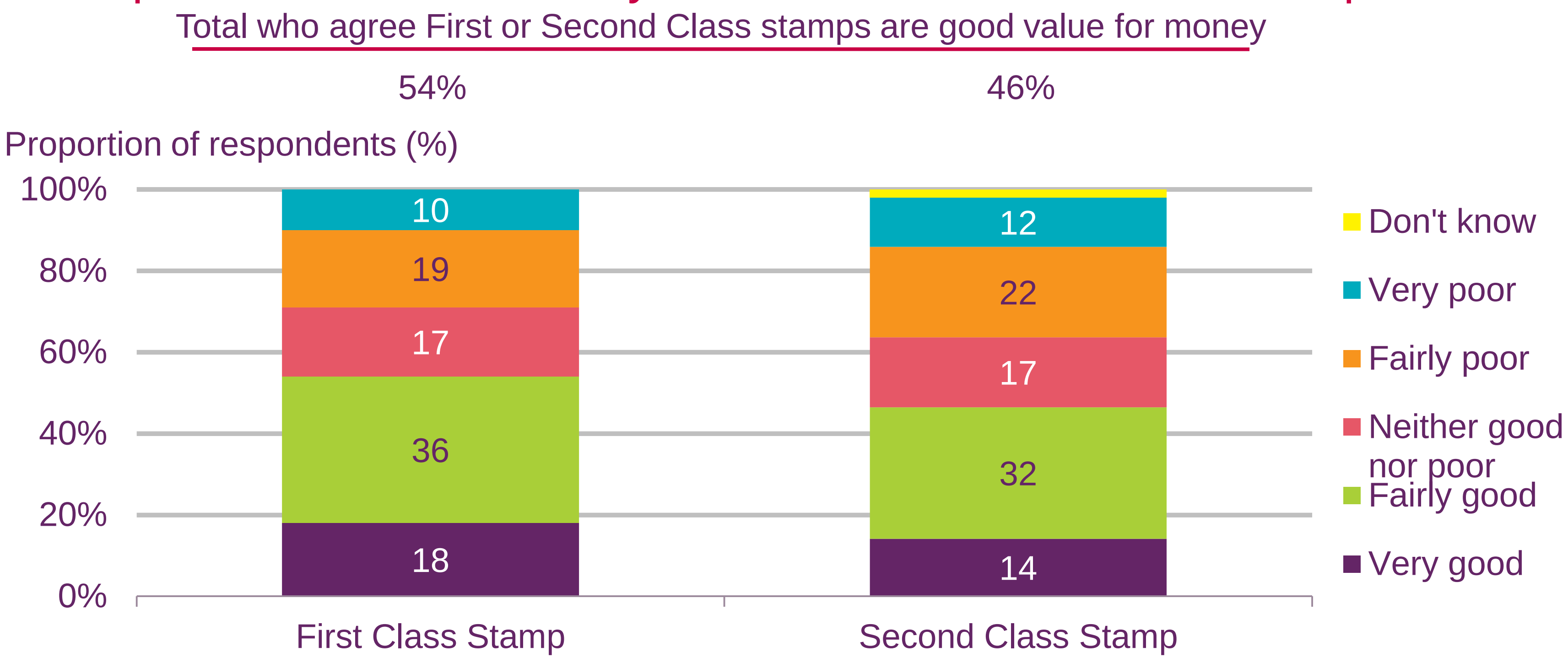
Awareness of the price of a Second Class stamp



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QF1. As far as you know, how much does it currently cost to send a standard letter by second class using a stamp? (SINGLE CODE)

Figure 6.31

Perception of value for money of First and Second Class stamps



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+)
QF3/4. It currently costs 60p/50p to send a standard letter First/ Second Class within the UK. How would you rate the Royal Mail's First/ Second Class service in terms of value for money? (SINGLE CODE)

Figure 6.32

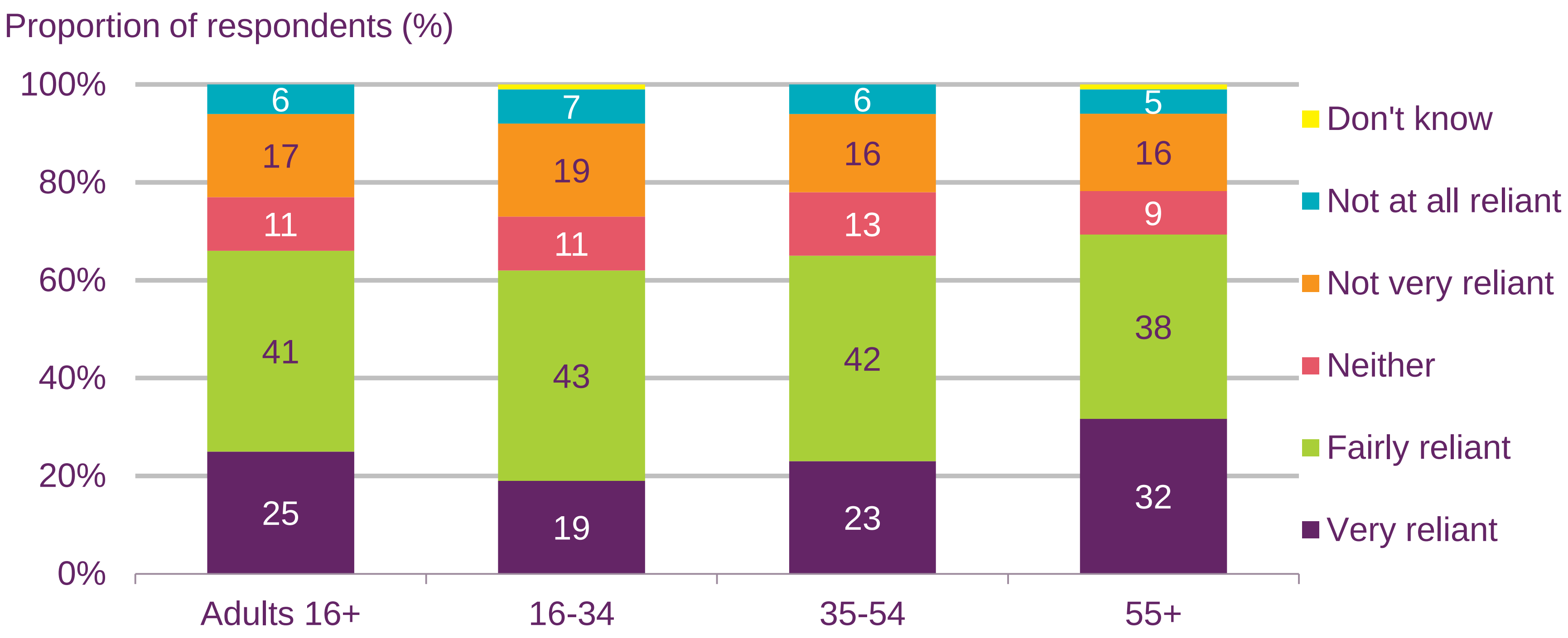
Attitudes to post: proportion of consumers agreeing with each statement

	Adults 16+	16-34	35-54	55+
I love to send and receive letters and cards	60	53	59	69
I prefer to send letters or emails to companies rather than make a phone call, so that I have a written record	61	63	65	56
I prefer to send emails rather than letters whenever possible	55	71	61	33
I only use post if there is no alternative	40	49	41	31
I send fewer letters by post now due to the cost	27	24	28	29
I would feel cut off from society if I can't send or don't receive post	53	45	51	64
I only send my mail First Class if it needs to get there the next day	48	44	44	56
I trust Second Class post to get there in a reasonable timeframe	62	61	58	69

Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QH2A-H. Agreement with statements about sending/ receiving post

Figure 6.33

Reliance on post as a way of communicating



Source: Ofcom Residential Postal Tracker, Q2 2013-Q1 2014
Base: All respondents (n = 4823 adults 16+, 1294 16-34, 1617 35-54, 1912 55+)
QE1. How reliant would you say you are on post as a way of communicating? (SINGLE CODE)