

CMR Scotland chart pack 2011

The market in context

Fast facts

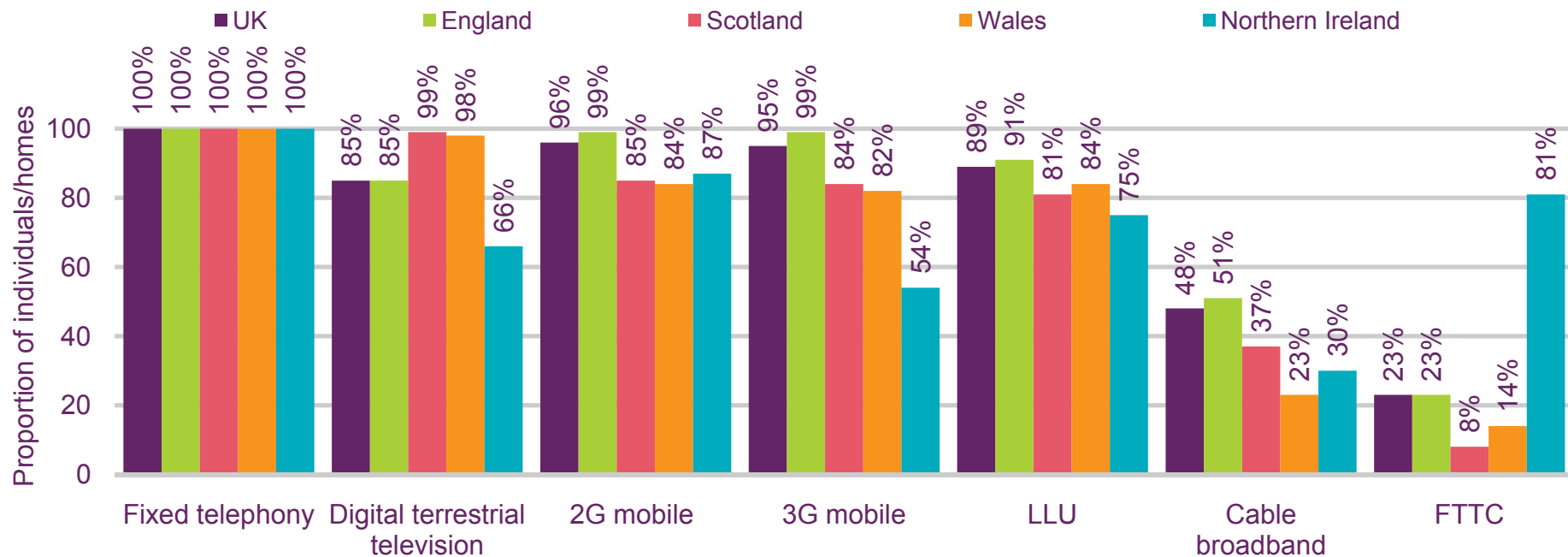
	UK	England	Scotland	Wales	Northern Ireland	Scotland urban	Scotland rural	UK urban	UK Rural
Digital TV take-up among TV homes	96 ↑+4	96 ↑+4	97 ↑+6	99	90	97 ↑+6	98 ↑+11	96 ↑+4	95 ↑+3
Broadband take-up	74 ↑+3	76	61	71 ↑+7	75	60	68	74 ↑+4	80 ↑+5
Mobile broadband	17 ↑+2	18 ↑+3	9	16	13	8	13	17	14
Mobile phone take-up	91 ↑+2	92 ↑+2	86	87	92	85	88	91 ↑+2	92
Use mobile to access internet	32 ↑+9	34 ↑+9	21 ↑+6	25	29 ↑+8	21	25 ↑+10	34 ↑+8	23
Smartphone take-up amongst mobile phone owners	30 ↑+	31 ↑+	21 ↑+	29 ↑+	23 ↑+	20 ↑+	25 ↑+	30 ↑+	30 ↑+
Fixed landline take-up	85	85	80	80	84	78	86	84	90
Households taking bundles	53	54	49	47	46	51	41	54 ↑+3	47
DAB ownership amongst radio listeners	37	39	31	27	28	30	32	37	40

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 2458 UK urban, 1016 UK rural,)

Note: This is the first year we have collected survey data on smartphone use, so we cannot report a precise year on year increase. We are confident that ownership has increased significantly in the last year though.

Communications infrastructure availability across the UK's nations, 2011



Sources: Ofcom and:

1. DTT: Availability of 17 services. Ofcom estimates.

2. Proportion of population living in postal districts where at least one operator reports at least 90% 2G area coverage. Sourced from GSM Association / Europa Technologies (Q2 2011). Note that coverage data has been restated; this means that year-on-year comparisons are not possible.

3. Proportion of population living in postal districts where at least one operator reports at least 90% 3G area coverage. Sourced from GSM Association / Europa Technologies (Q2 2011). Note that coverage data has been restated; this means that year-on-year comparisons are not possible.

5. Proportion of households connected to an LLU-enabled exchange

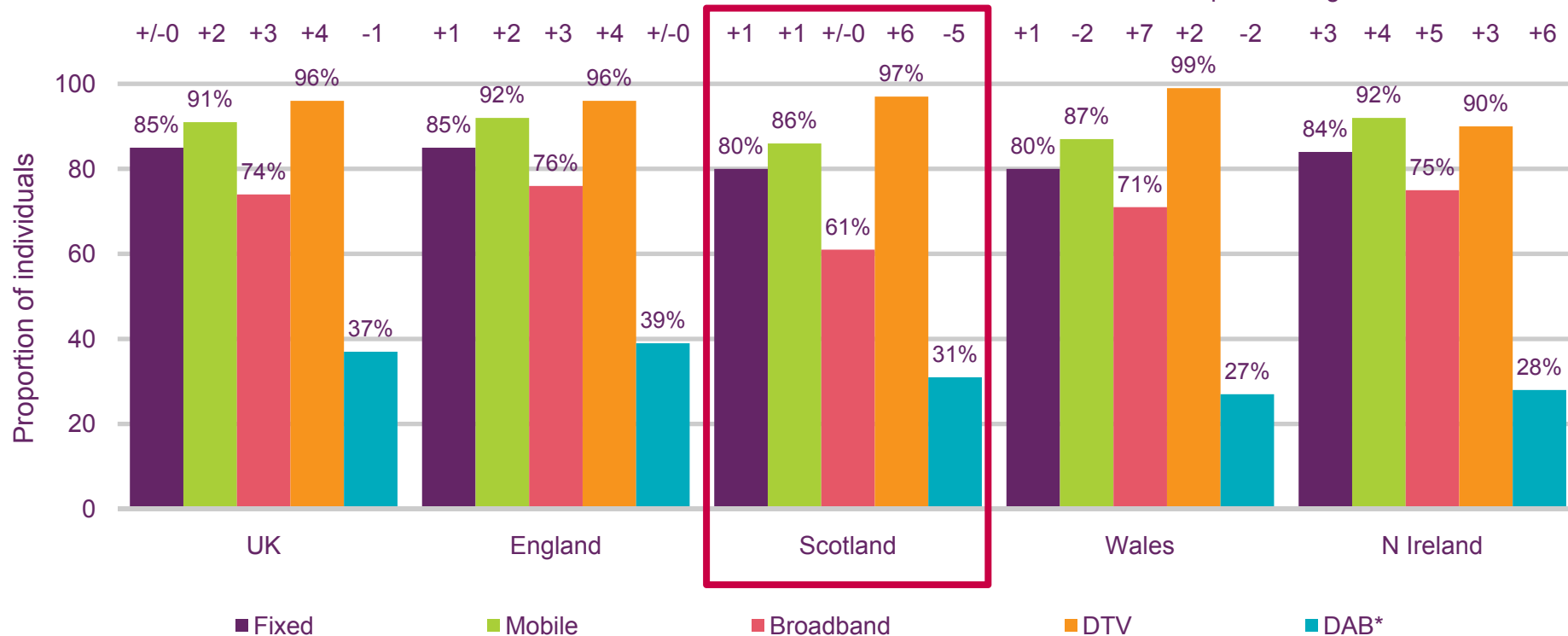
6. Proportion of households passed by Virgin Media's broadband-enabled network

7. Proportion of households connected to an FTTC-enabled exchange, June 2011

Patterns communications service adoption across the nations, 2011



Figure above bar shows % point change from Q1 2010



Source: Ofcom research, Quarter 1 2011

Fixed line base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)

Fixed line question: Is there a landline phone in your home that can be used to make and receive calls?

DTV base: Adults aged 16+ with a TV in the household (n = 3412 UK, 1941 England, 479 Scotland, 483 Wales, 509 Northern Ireland)

DTV question: Which, if any, of these types of television does your household use at the moment?

Broadband base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)

Broadband question: Which of these methods does your household use to connect to the internet at home?

DAB base: Adults aged 16+ with any active radio sets in the household who listen to radio. *NB Data previous to 2011 is based on all who listen to radio (n = 2811 UK, 1629 England, 357 Scotland, 397 Wales, 428 Northern Ireland)

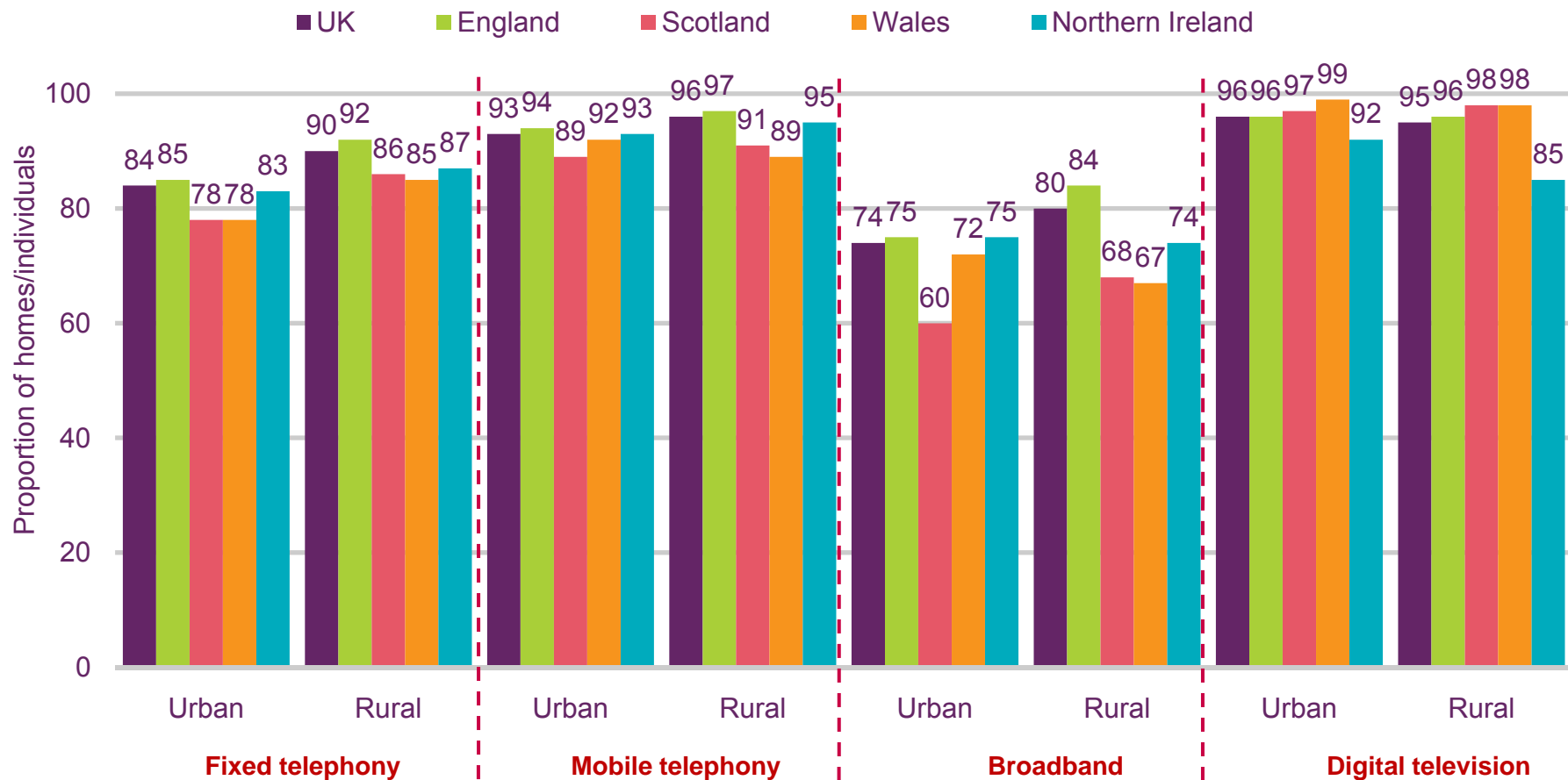
DAB question: How many of these radio sets are digital radios? Response represents those with one or more sets.

Note: Remaining percentages are Don't know responses

Mobile base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)

Mobile question: Do you personally use a mobile phone?

Adoption of communications technology/services in urban and rural locations

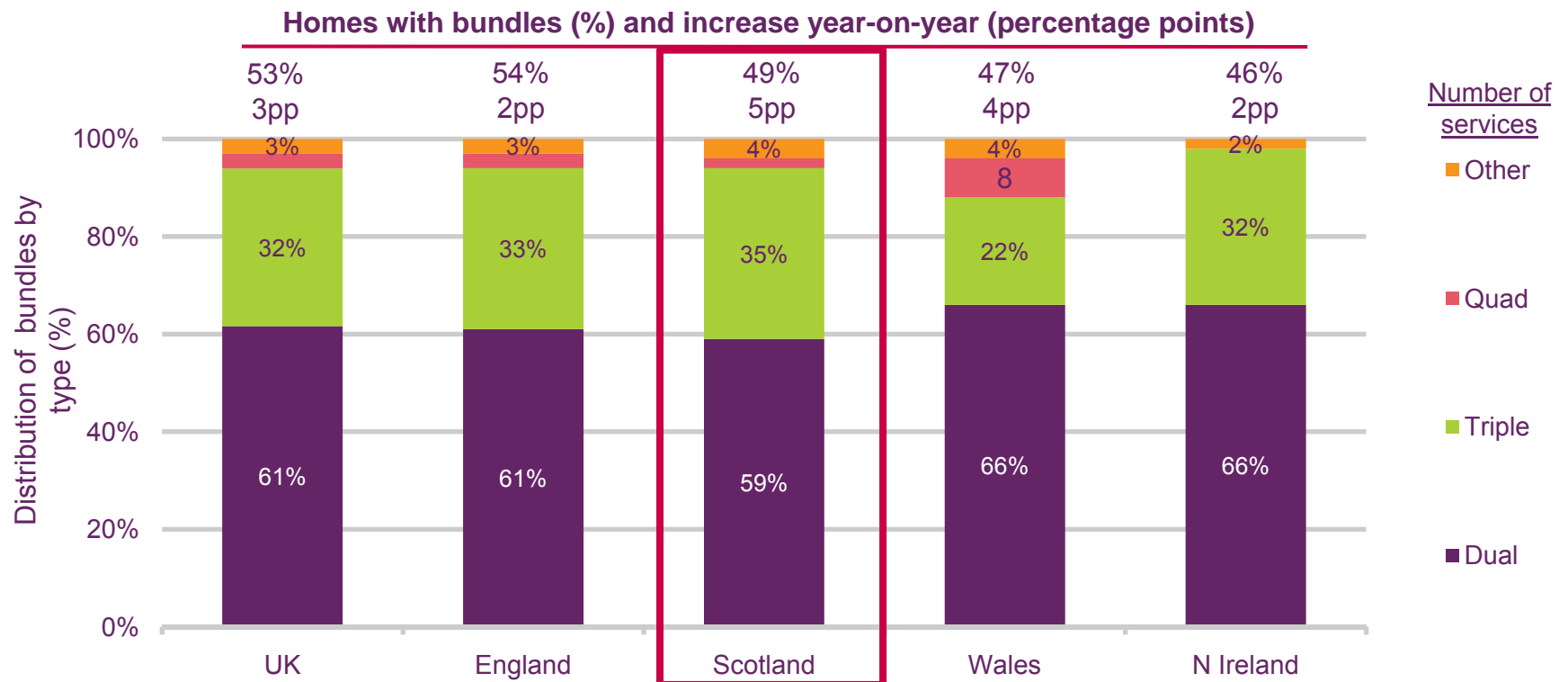


Source: Ofcom research, Quarter 1 2011

Fixed telephony, mobile telephony, broadband base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)

DTV base: Adults aged 16+ with a TV in the household (n= 3412 UK, 1941 England, 479 Scotland, 483 Wales, 509 Northern Ireland)

Take-up of bundles, by nation



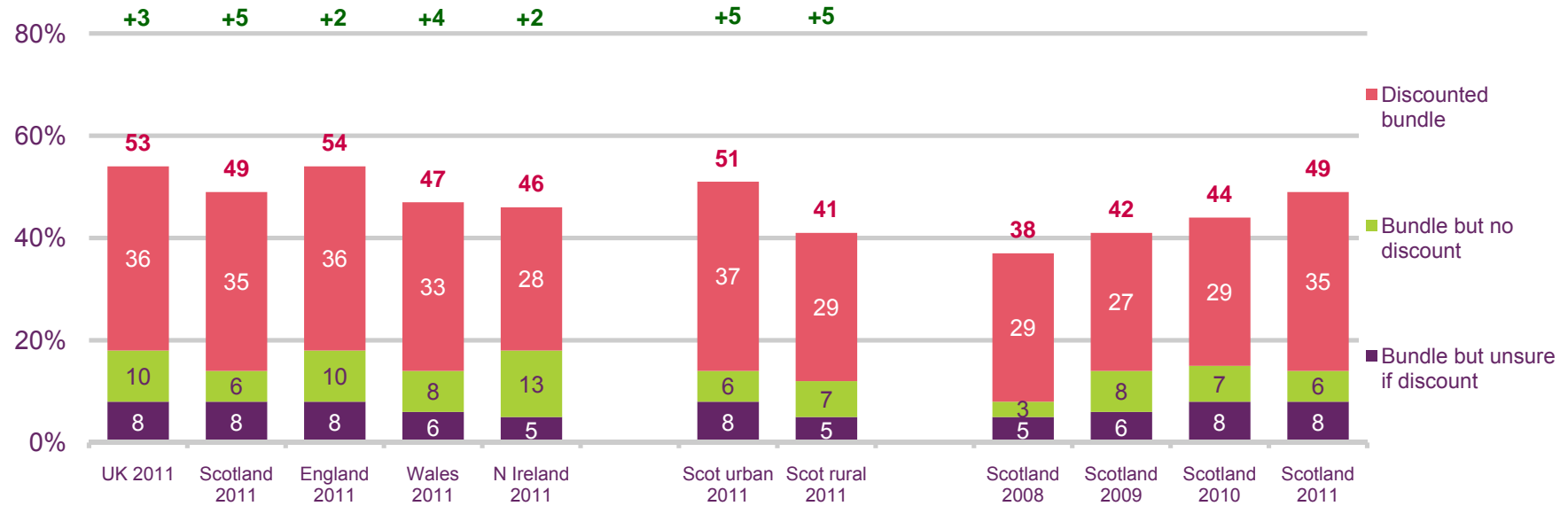
Source: Ofcom research, Q1 2011

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 1680 UK, 1035 England, 226 Scotland, 197 Wales, 222 Northern Ireland)

Note: Remaining percentages are Don't know responses

Percentage of consumers buying bundled services

Figure above bar shows % point change in any bundling from Q1 2010



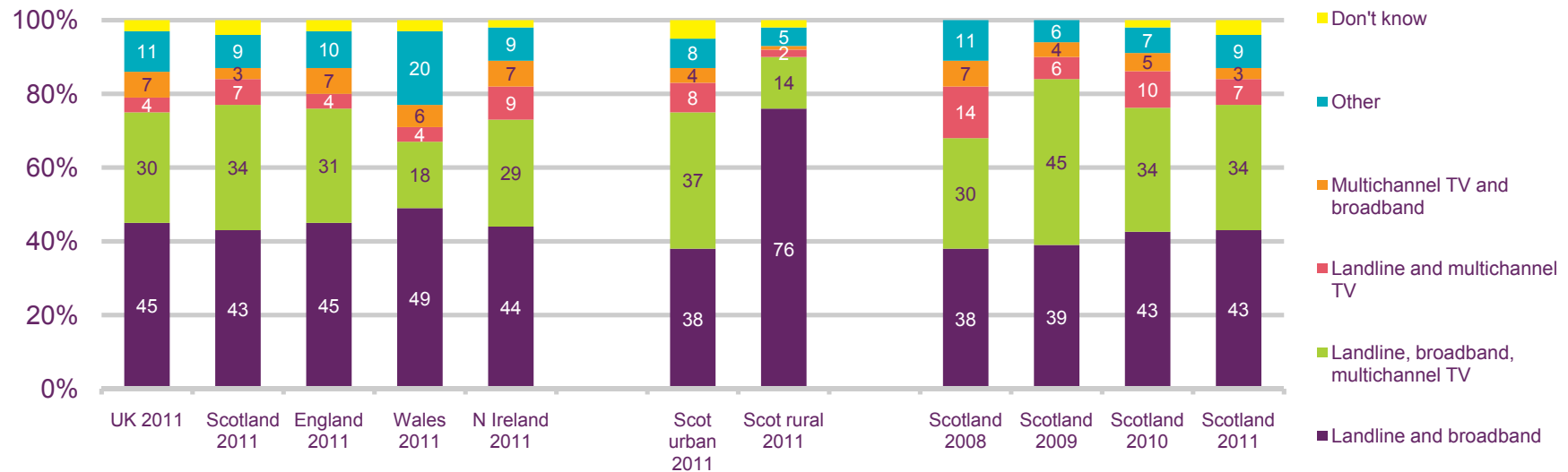
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier? QG3. Do you receive a discount or special deal for subscribing to this package of services?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

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

Trends in purchasing multiple communication services from a single supplier



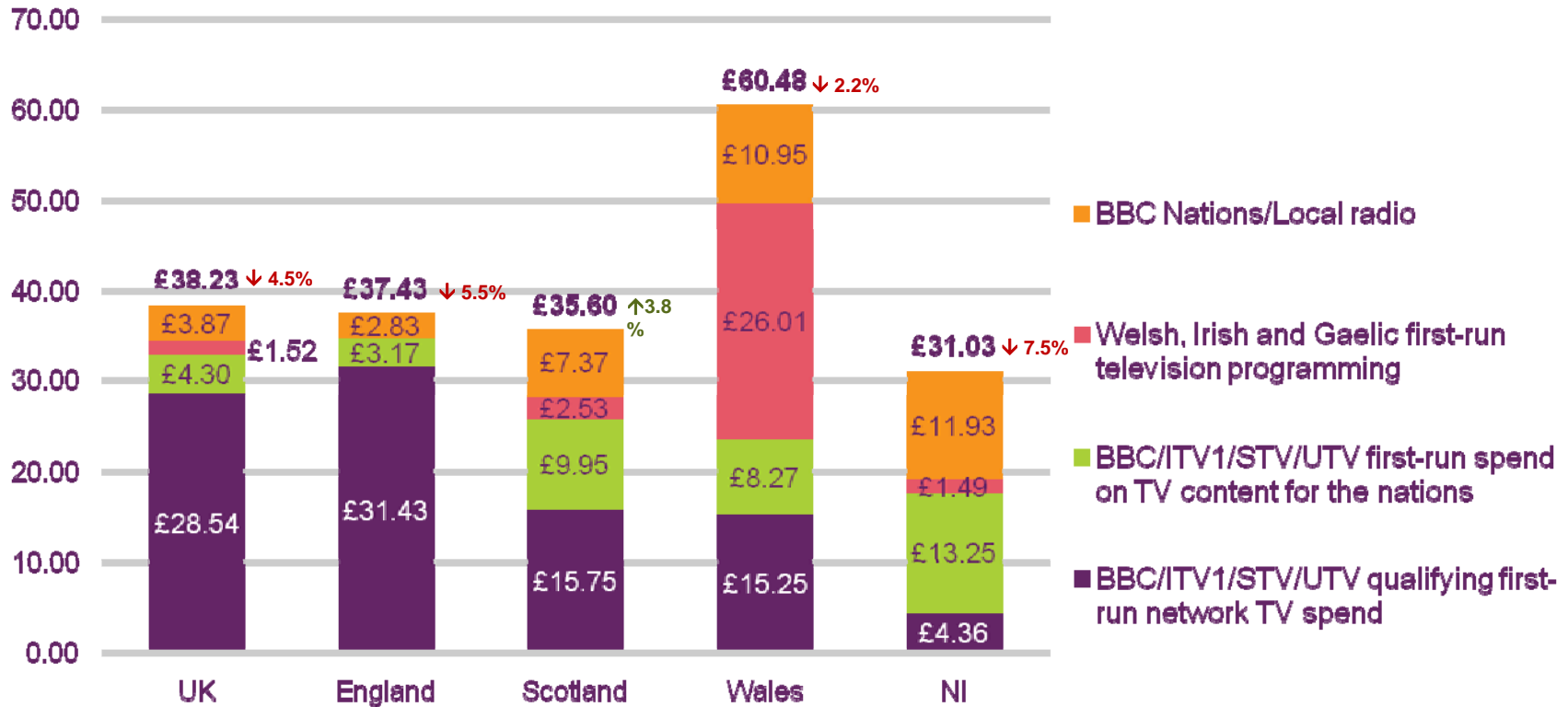
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ QG3. Do you receive a discount or special deal for subscribing to this package of services?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 1680 UK, 226 Scotland, 1035 England, 197 Wales, 222 Northern Ireland, 123 Scotland urban, 103 Scotland rural, 324 Scotland 2008, 351 Scotland 2009, 605 Scotland 2010, 226 Scotland 2011)

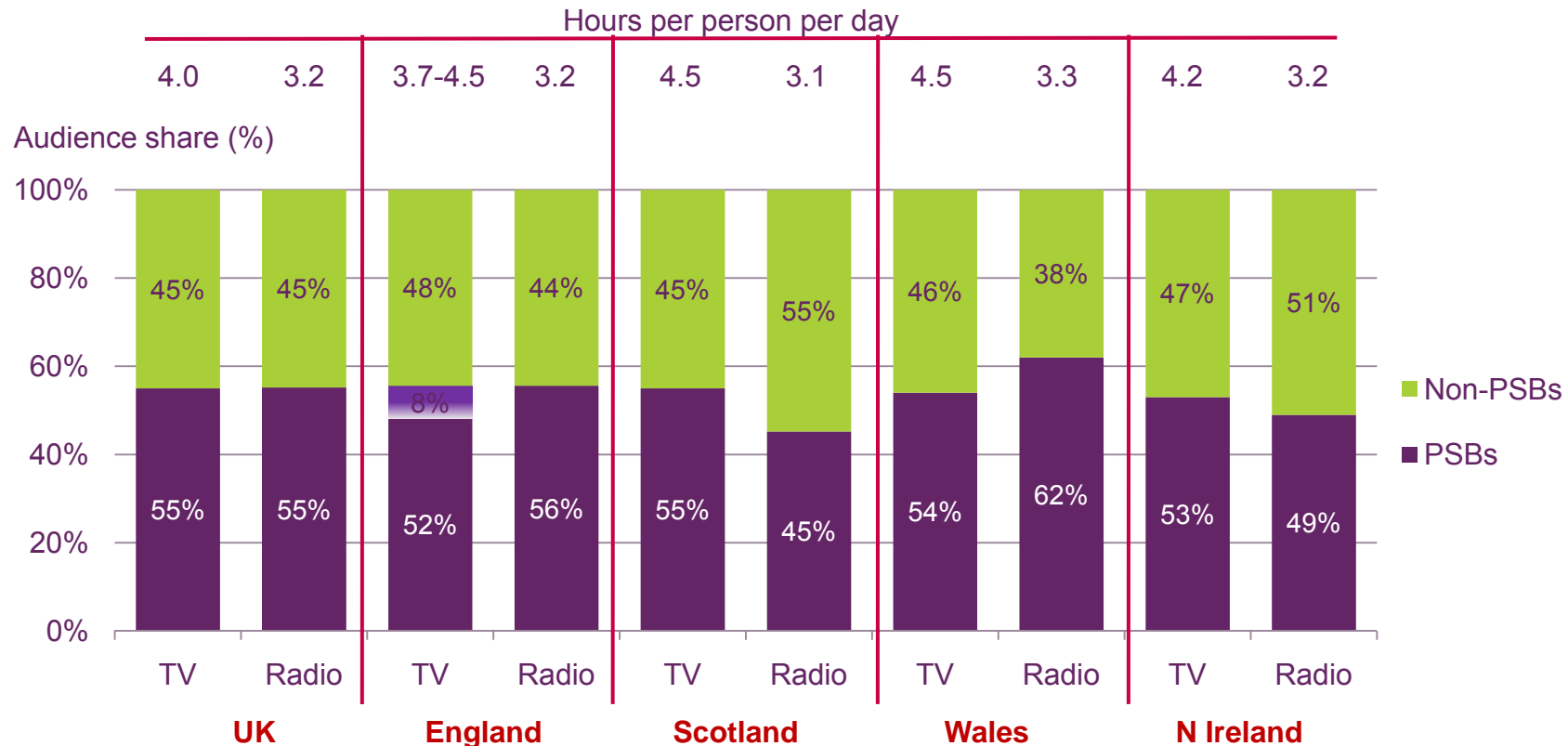
Spend per head on UK-originated content by broadcast by PSBs on TV and radio, 2010

Spend per head (£)



Source: Operators, Annual Reports and Ofcom calculations

Hours of daily TV and radio use, by nation, 2010



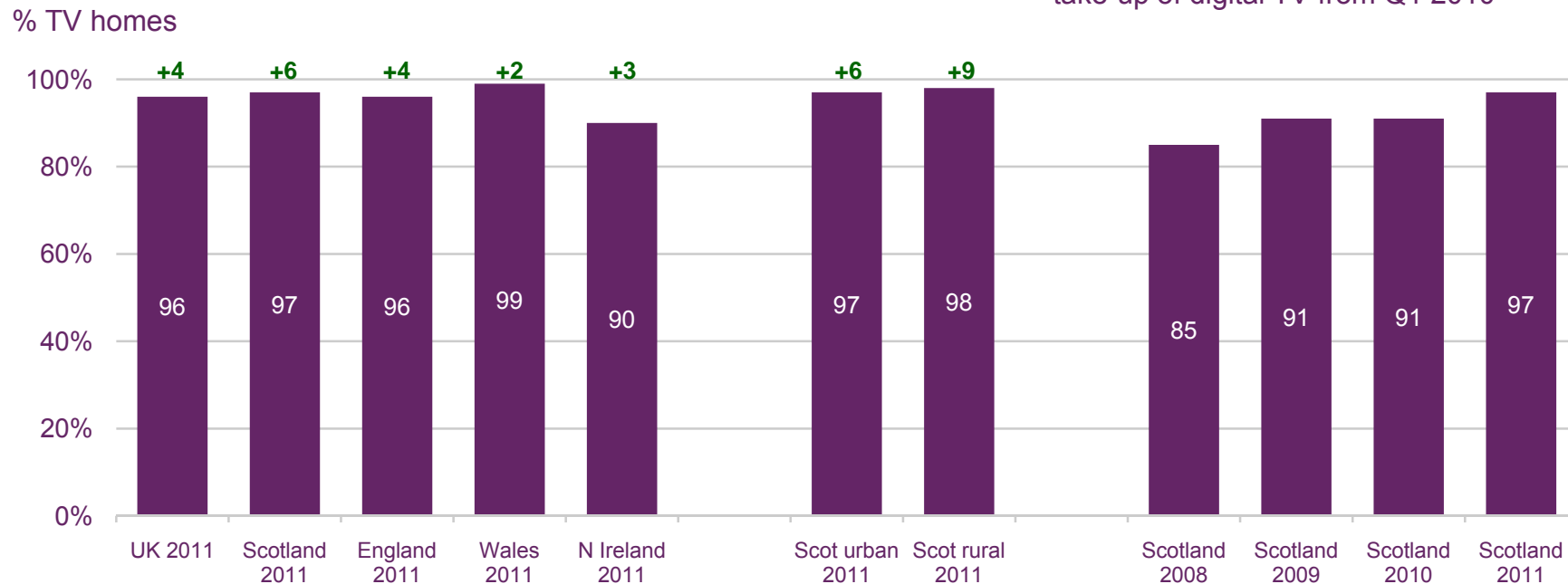
Source: BARB. i) TV: PSBs = BBC One, BBC Two, ITV1, C4+S4C, Five. (ii) Radio : PSBs = all BBC radio stations.

Notes: For England TV, a range is displayed reflecting the regions with the highest and lowest average daily viewing figures respectively. For Wales TV, viewing hours shows an increase of 0.9 hours on 2009 figures. While it is likely that there has been an increase in viewing in Wales due to digital switchover, this increase may also be attributable to the effects of the new BARB panel, introduced at the start of 2010. There are two important changes to note regarding the new BARB panel: 1) The panel is based on completely different viewers to the previous panel, meaning that data comparisons pre- and post-2010 should be viewed with caution. 2) There was a redefining of border boundaries under the new panel change. Previously, viewing of C4 in some areas registered as 'out of area' and so did not count towards the Wales area viewing figures; under the new panel, redefined regions however, viewing of C4 from those regions is now included.

Tv and audio-visual

Take-up digital TV

Figure above bar shows % point change in take-up of digital TV from Q1 2010

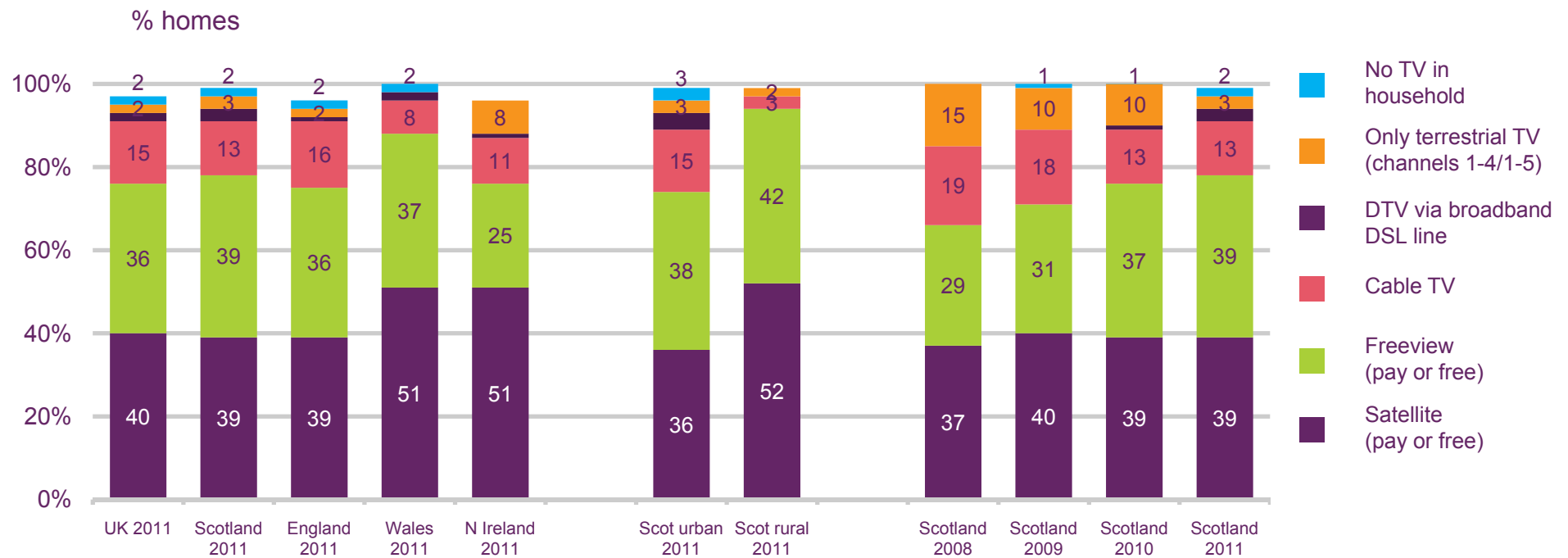


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 479 Scotland, 1941 England, 483 Wales, 509 Northern Ireland, 232 Scotland urban, 247 Scotland rural, 916 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011)

Main TV set share by platform



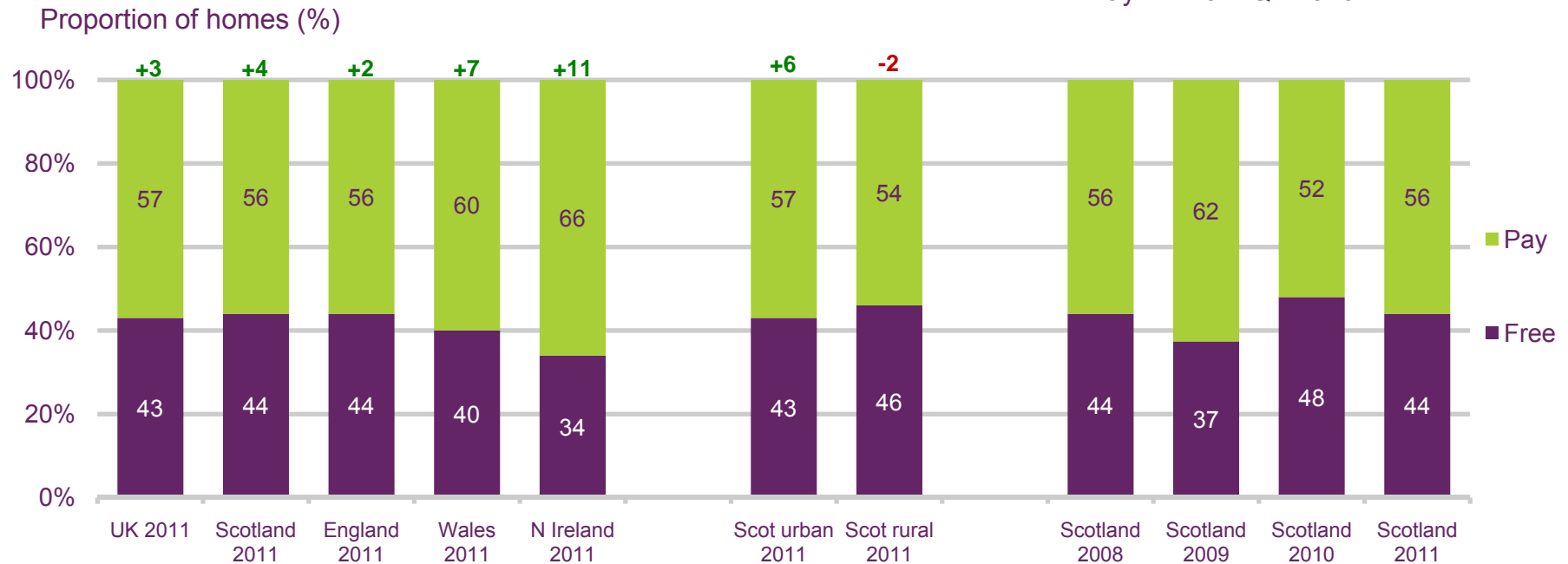
QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Proportion of homes with free and pay television

Figure above bar shows % point change in Pay TV from Q1 2010

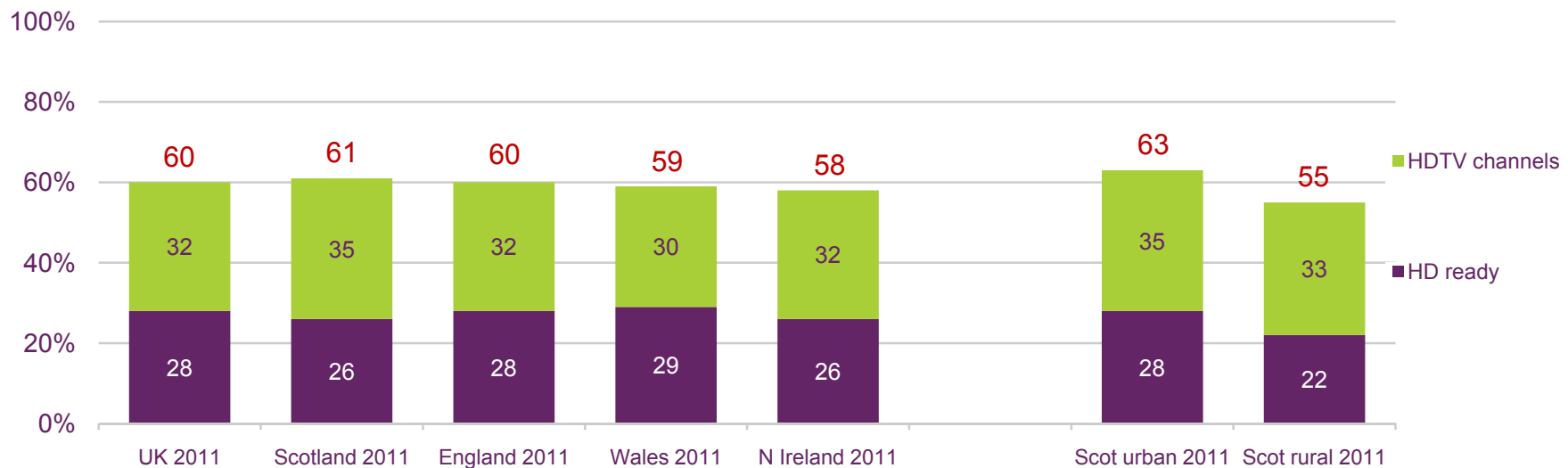


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 479 Scotland, 1941 England, 483 Wales, 509 Northern Ireland, 232 Scotland urban, 247 Scotland rural, 855 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011)

Proportion of homes with HD television

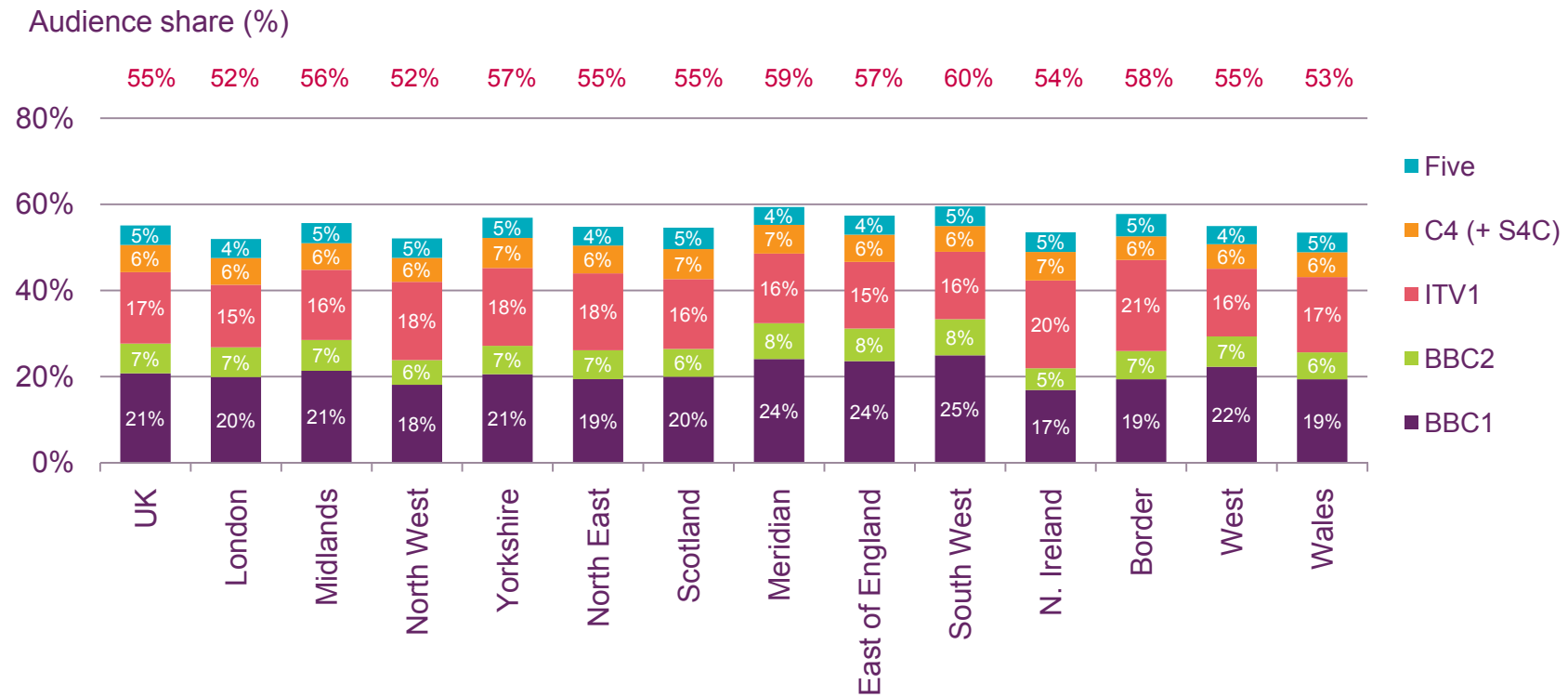


QH53. Is the main TV in your household an HDTV set or HD ready?/ QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

Source: Ofcom research, Quarter 1 2011

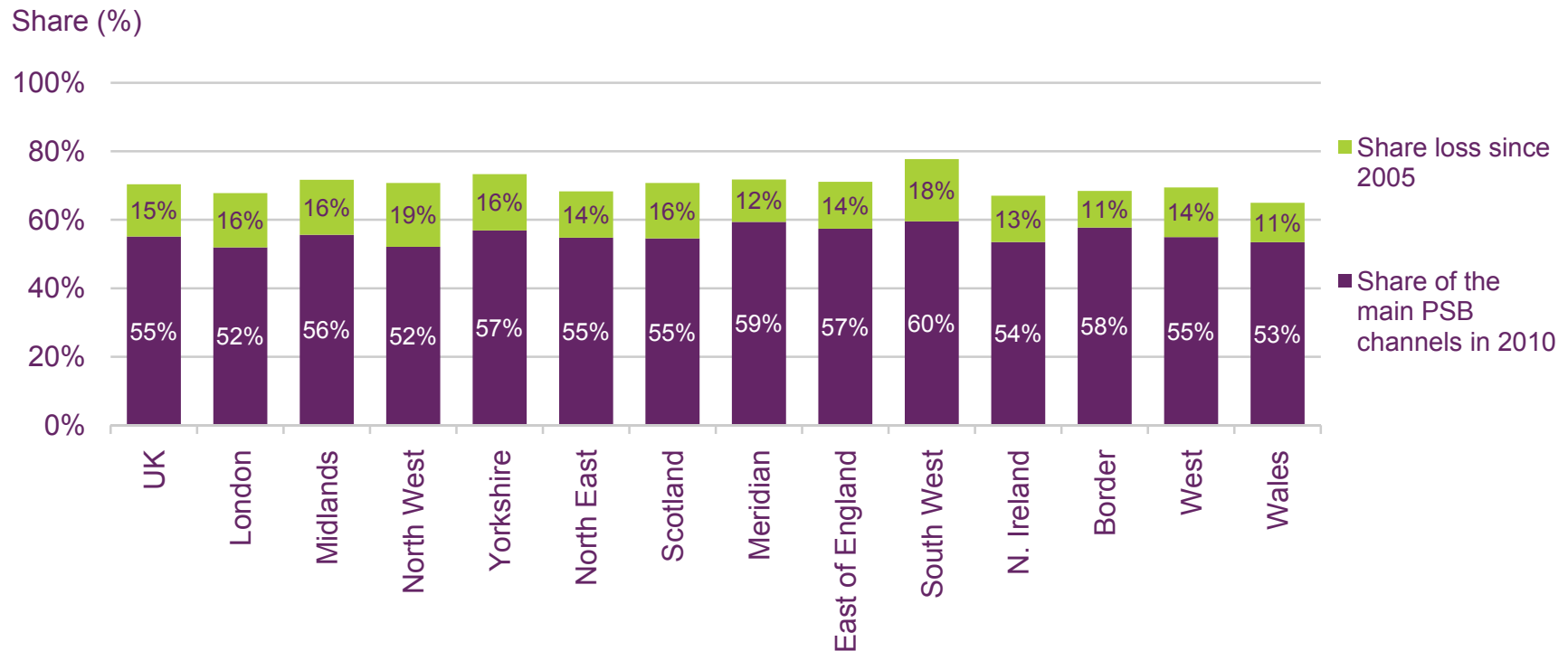
Base: All adults aged 16+ (3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural)

Share of the five terrestrial networks in all homes, 2010



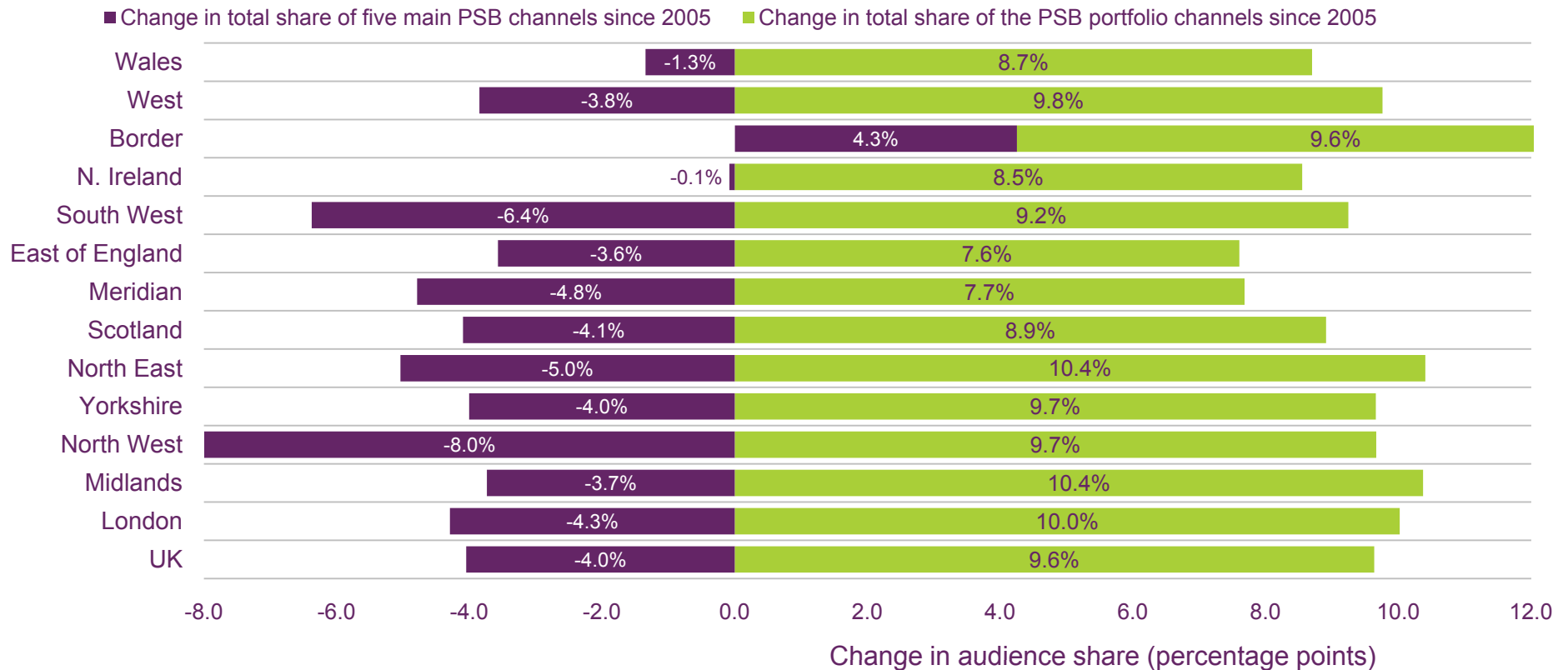
Source: BARB

Reduction in combined share of the five PSB channels, all homes, 2005 & 2010



Source: BARB.

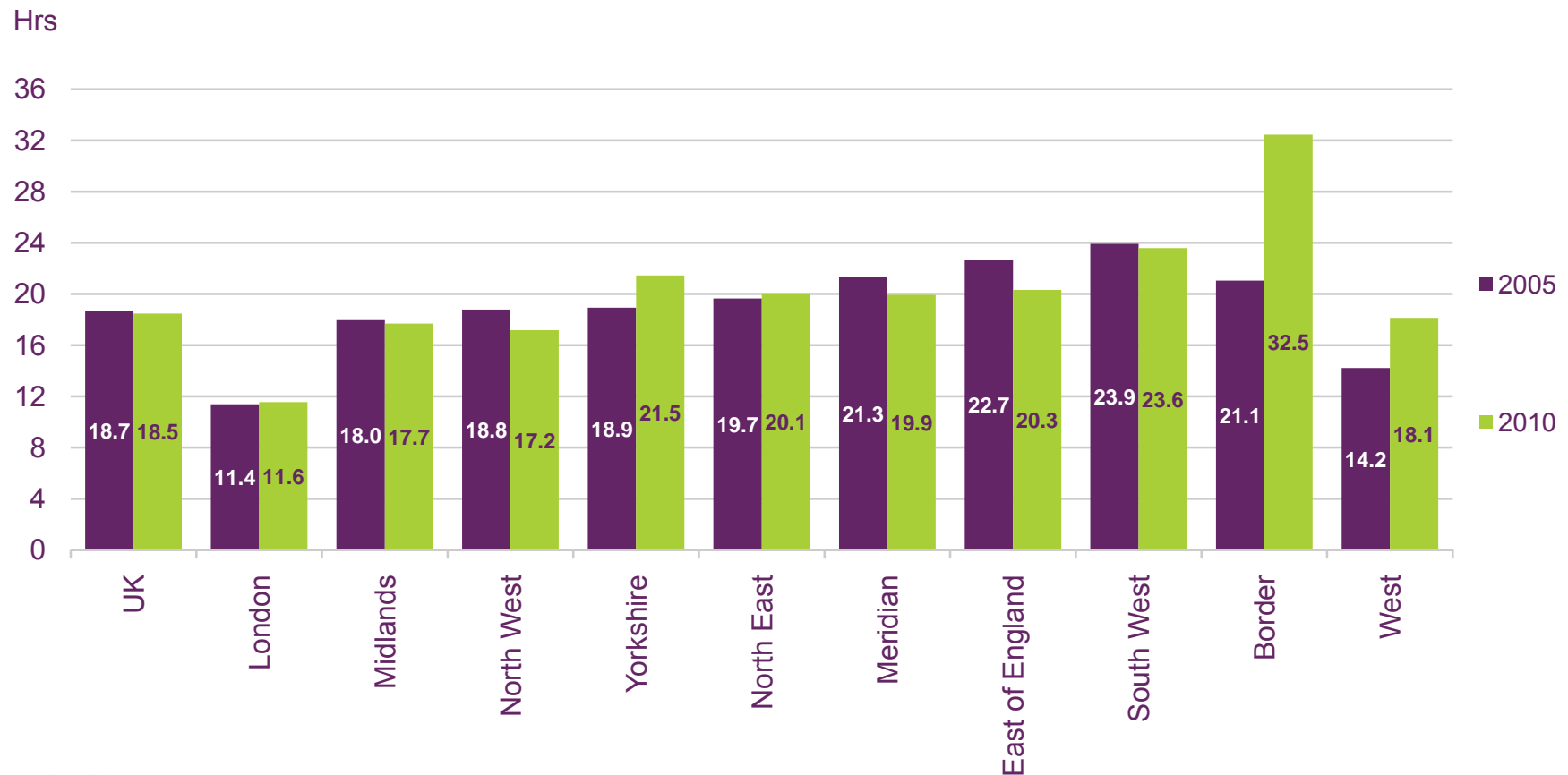
Net change in the audience share of the five main networks and the PSB portfolio channels across multichannel viewers, 2005 - 2010



Source: BARB. All individuals (4+) in multichannel homes.

Note: 'PSB portfolio channels' includes all the main PSB's multichannel channels (except for the five terrestrial channels)

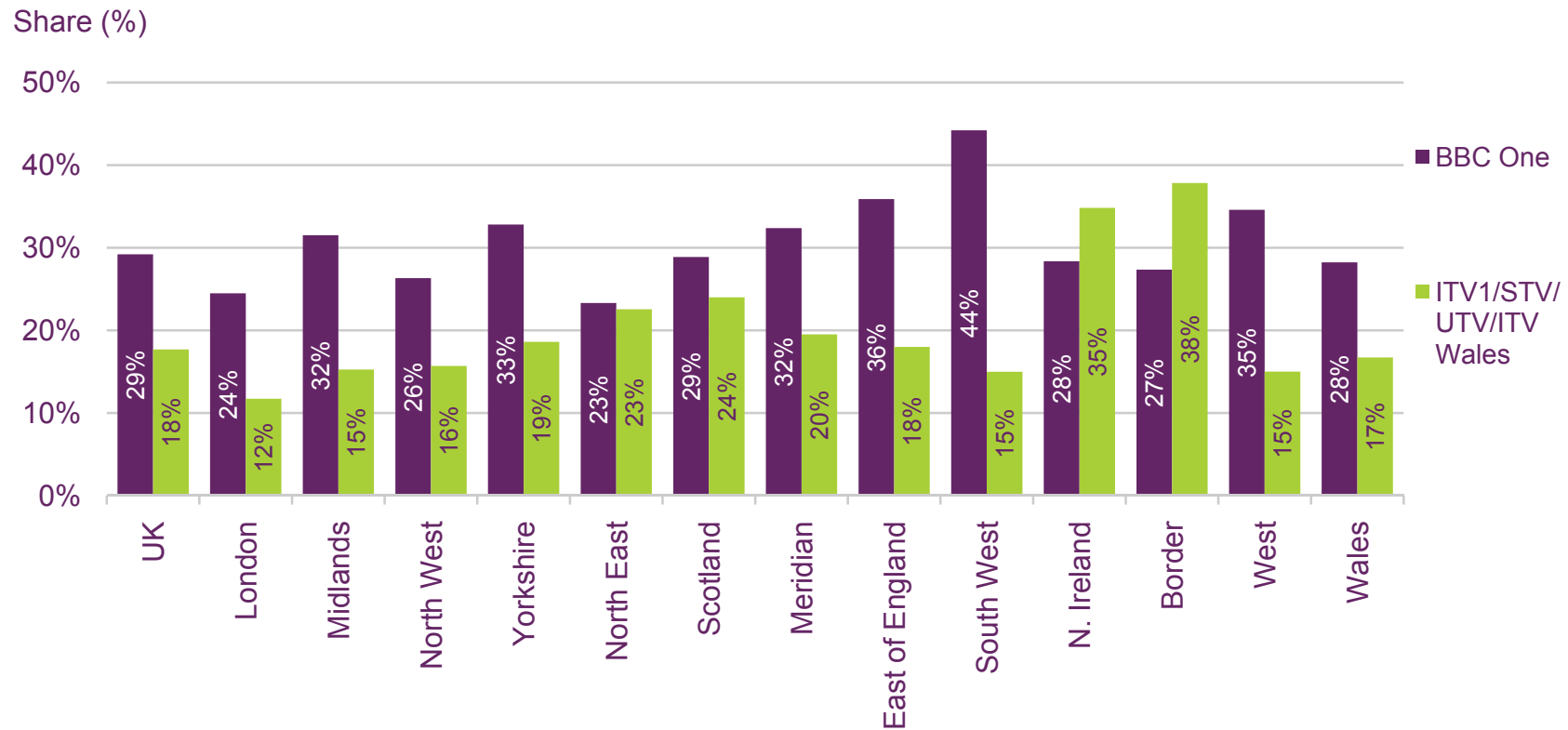
Combined total hours of viewing of early evening regional news bulletins, all homes in 2005-2010, by English region



Source: BARB

Note: Based on total minutes of viewing to Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV1, weekdays

BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, all homes, 2010

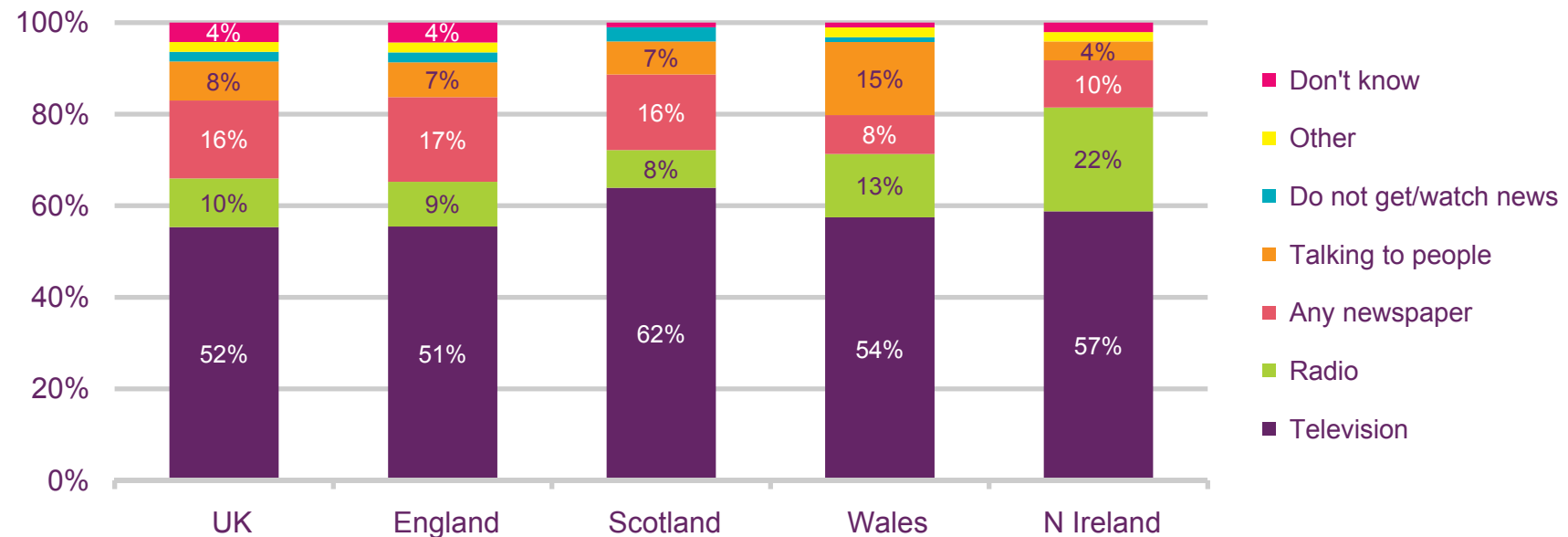


Source: BARB

Note: Based on Regional News prog, start time 17:55-18:35, 10mins+ duration, BBC1 & ITV1, weekdays

Sources of local news for each nation

‘Can you tell me what, if anything, is your main source of news about what is going on in your own local area’



Source: Ofcom Media Tracker Survey 2010

Base: All adults 15+. n = 2,141 (UK), 1,726 (Eng) 194 (Sc), 113 (Wa), 108 (NI)

Only responses ≥ 4% labelled

Online TV/ video viewing

Online TV/ video viewing on PC or mobile

Green figure above bar shows % point change in viewing from Q1 2010
 Proportion of individuals with broadband at home



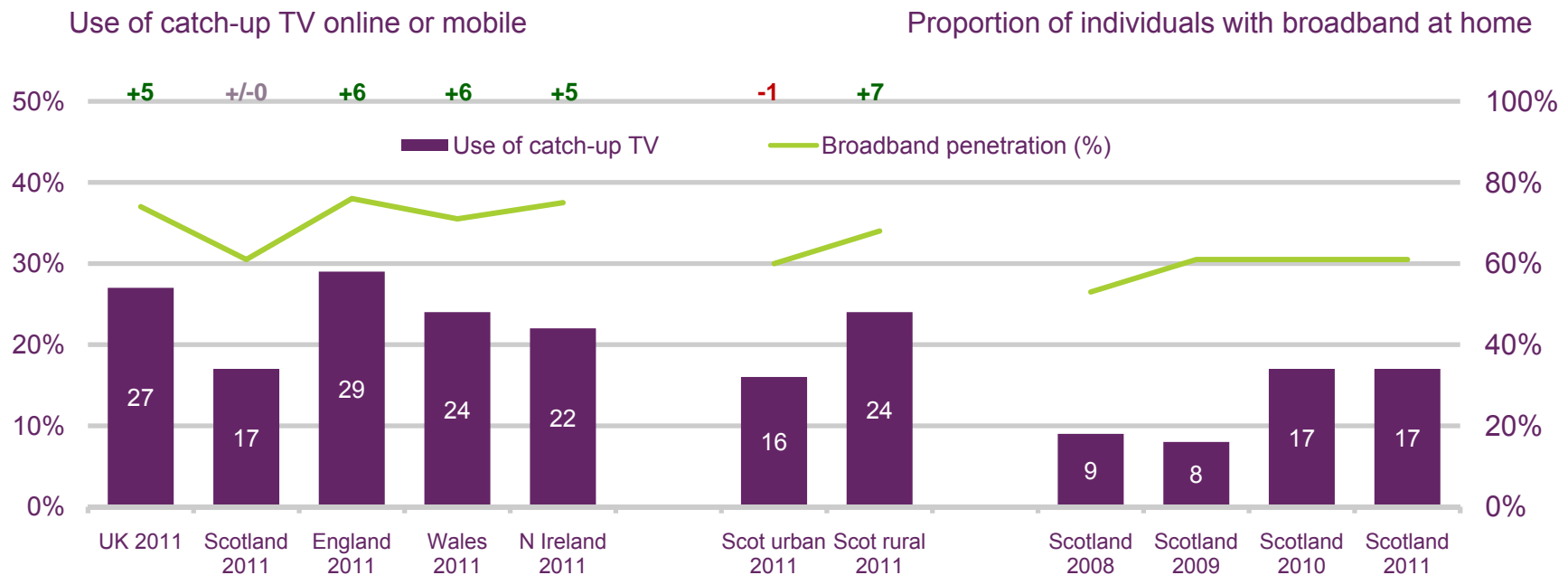
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? / QD28A-B. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? And which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Use of catch-up TV

Figure above bar shows % point change in use of catch-up TV from Q1 2010

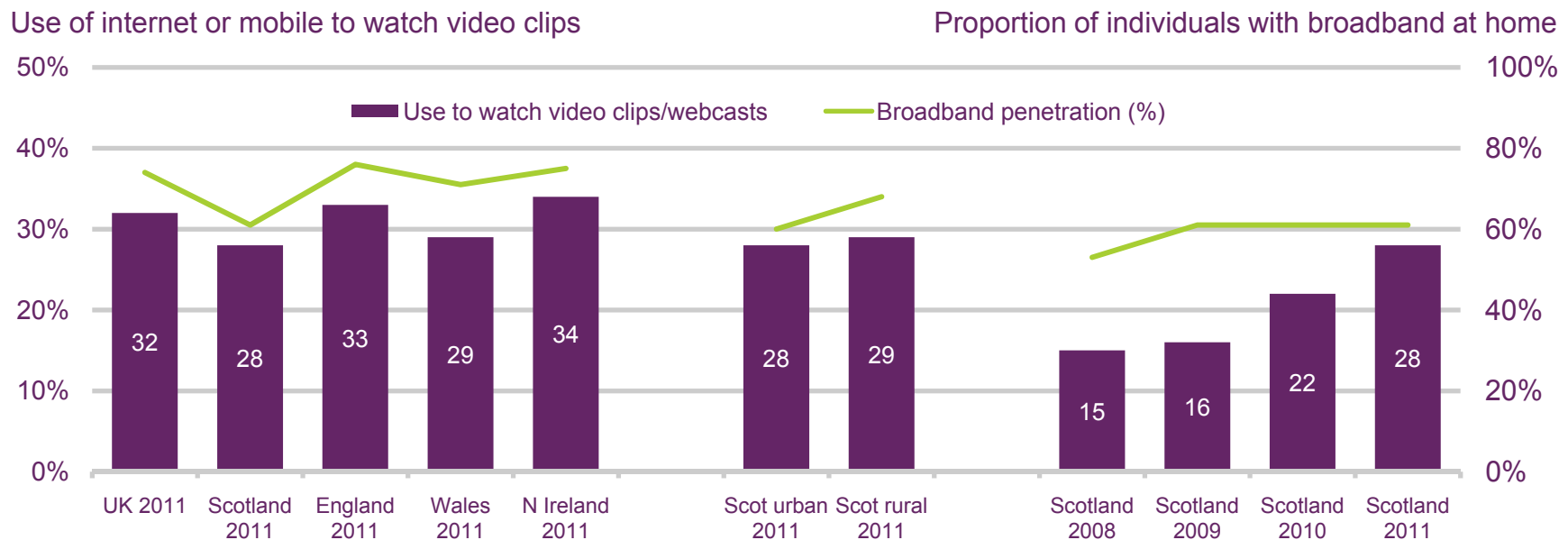


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Use of internet for watching video clips/webcasts (e.g. YouTube & Big Brother)

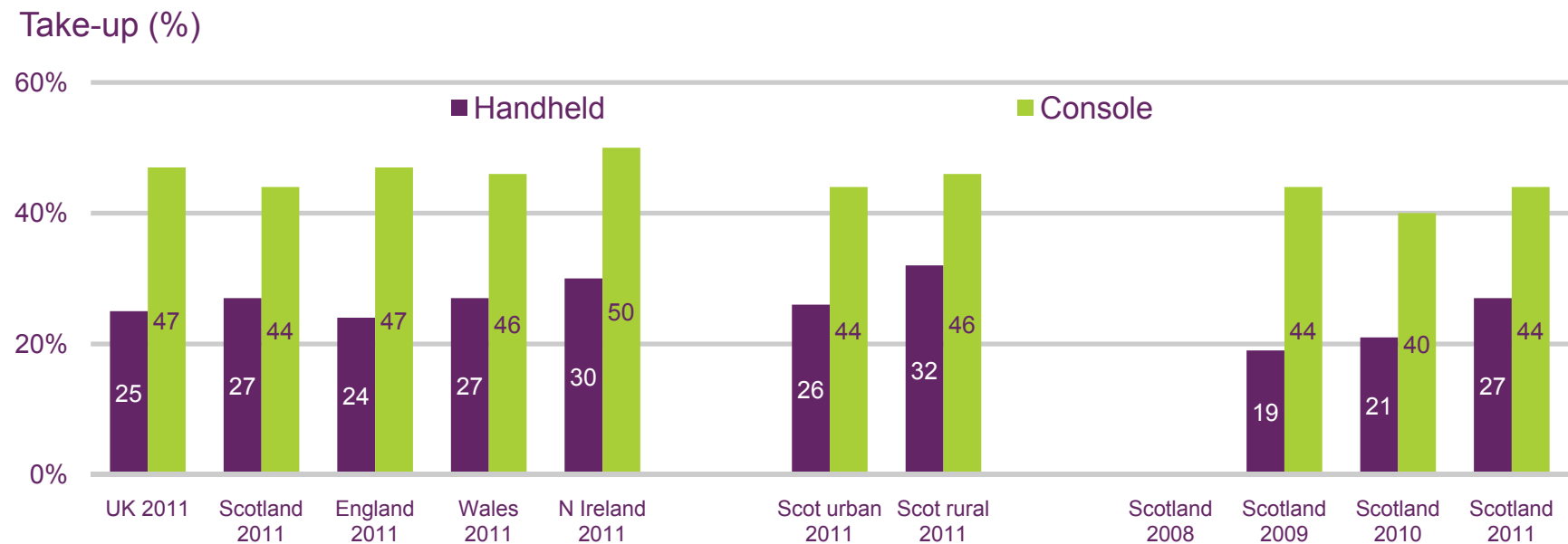


QE10A. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Take up of leading games consoles in Scotland



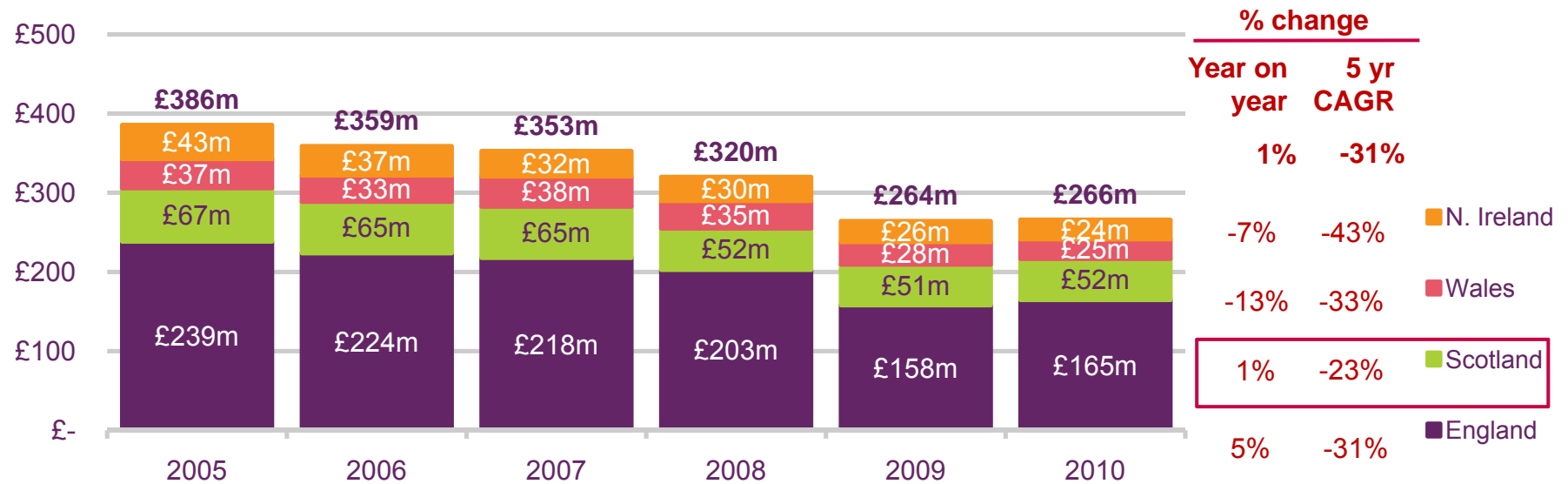
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Spend on originated nations and regions output by the BBC, ITV1/STV/UTV

Spend (£m, 2010 prices)



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

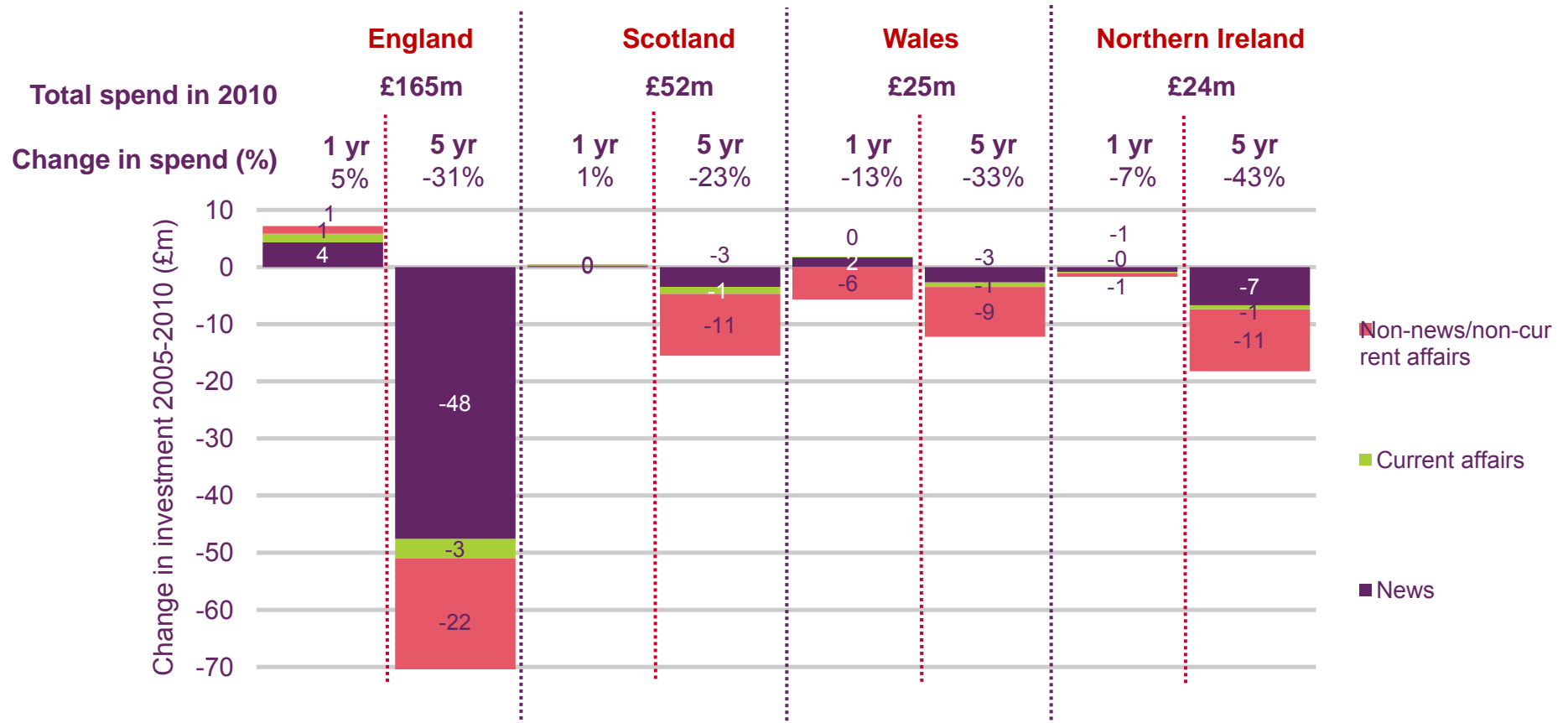
Spend on originated nations and regions output by nation, 2005 and 2010



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Change in investment by genre and nation, 2005 - 2010



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Change in investment by genre and nation, 2005 - 2010

	England		Scotland		Wales		N. Ireland	
	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)
News	4	-48	0	-3	2	-3	-1	-7
Current affairs	1	-3	0	-1	0	-1	-0	-1
Non-news/non-current affairs	1	-22	0	-11	-6	-9	-1	-11
Total Spend in 2010	£165m		£52m		£25m		£24m	

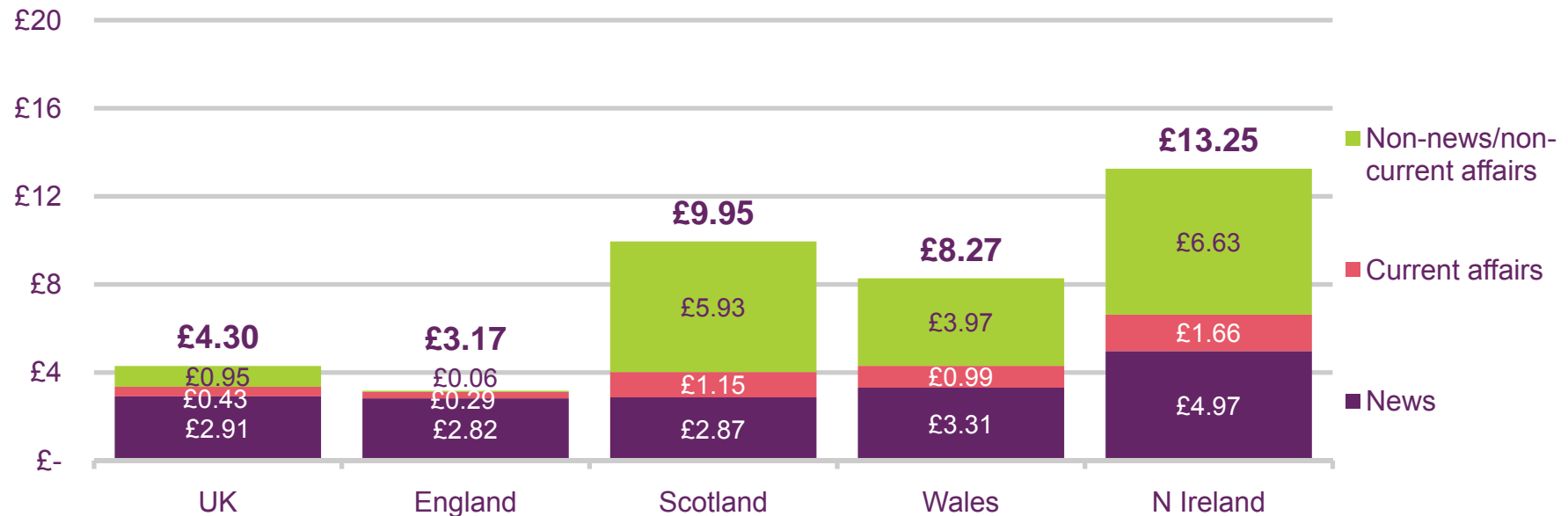
	England		Scotland		Wales		N. Ireland	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	5%	-31%	1%	-23%	-13%	-33%	-7%	-43%

Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Spend per head made by the BBC and ITV1 in national and regional output

Spend per head (£m, 2010 prices)



Source: PSB returns. Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. All figures expressed in 2010 prices.

Hours of regionalised output by genre and broadcaster, 2010

	UK	England	Scotland	Wales	N. Ireland
2010 total hours	11,046 hrs	7,156 hrs	1,881 hrs	1,002 hrs	1,007 hrs
Change since 2009	6%	5%	14%	-3%	4%
Change since 2005	-9%	-10%	13%	-24%	-13%



Source: PSB returns

Note: Hours data for first-run originations only. Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

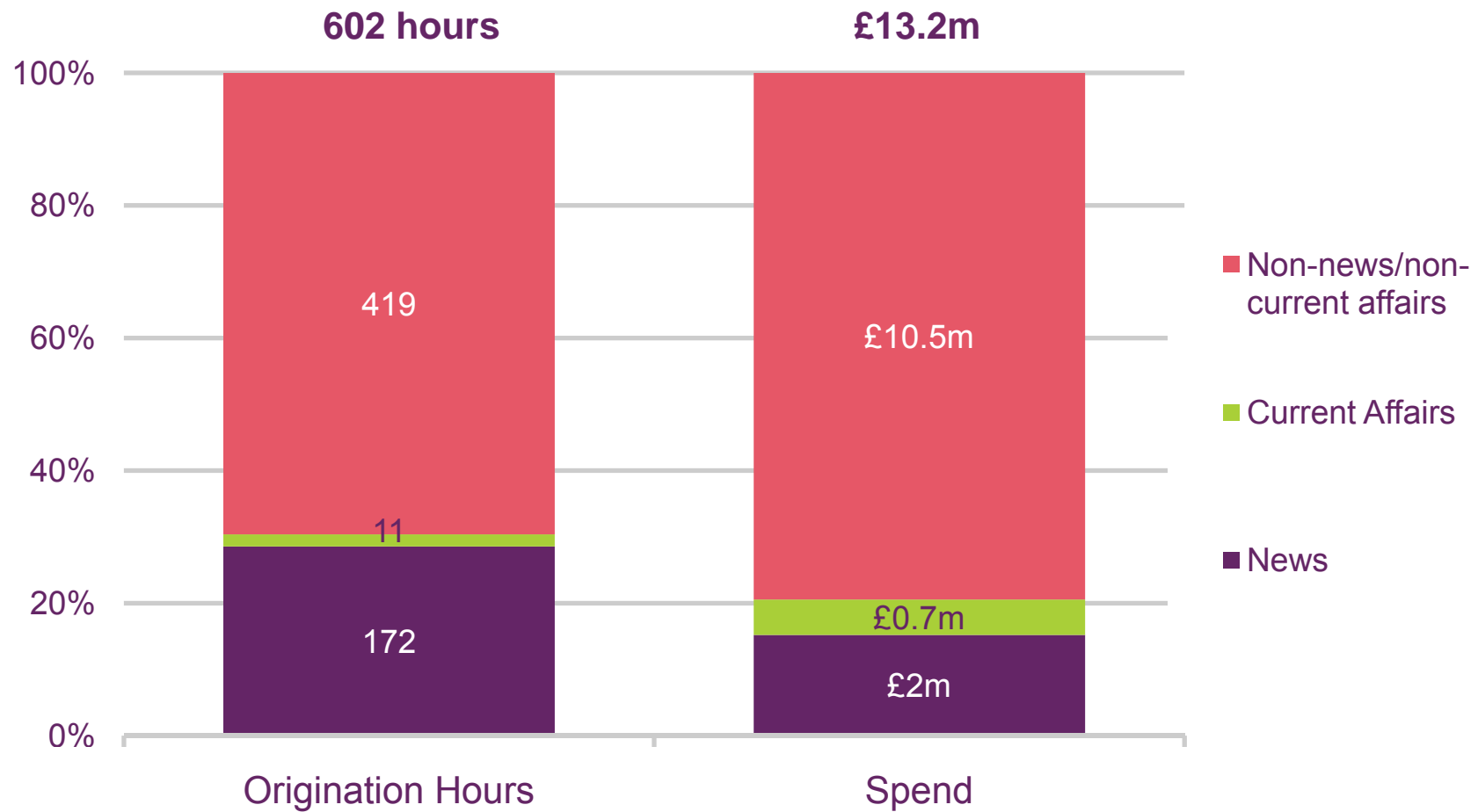
Regionalised output cost per hour by nation 2005 - 2010



Source: Broadcasters. All figures expressed in 2010 prices.

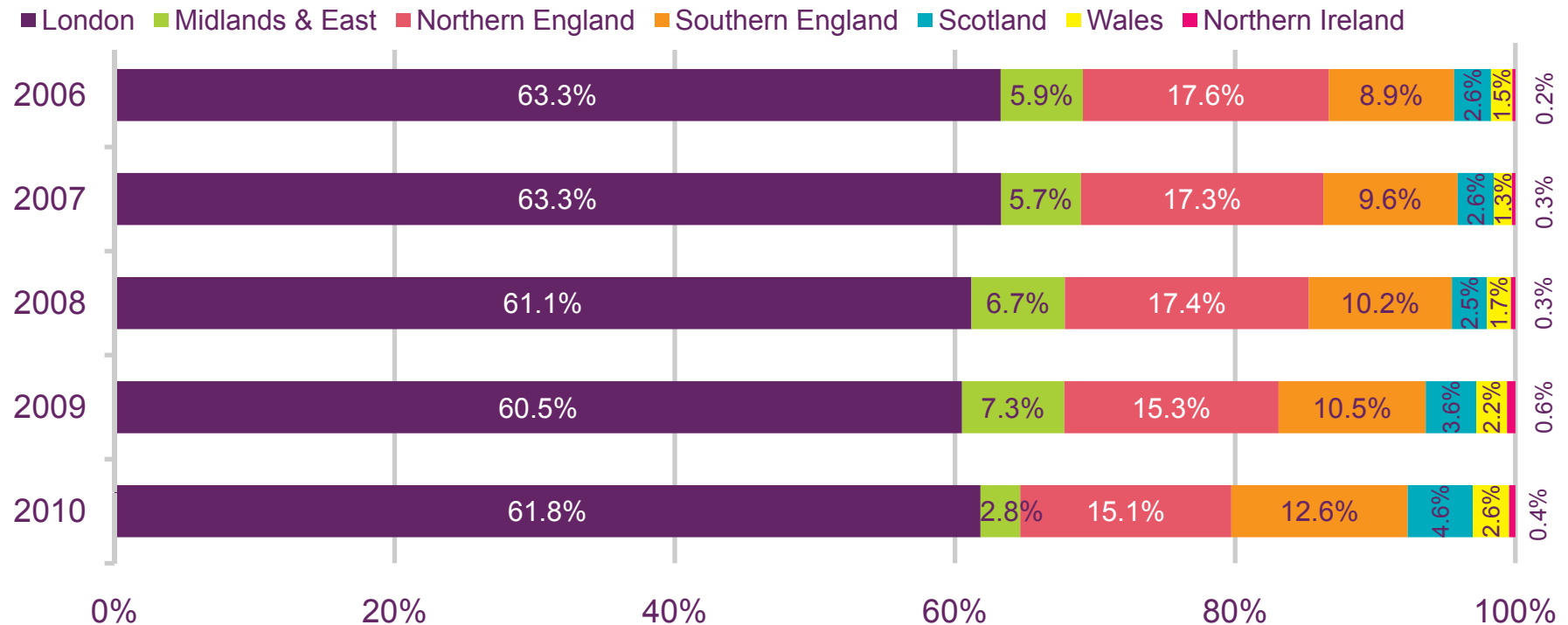
Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

BBC Alba originations, by hours and spend, 2010



Expenditure on out-of-London productions

Percentage of production by value

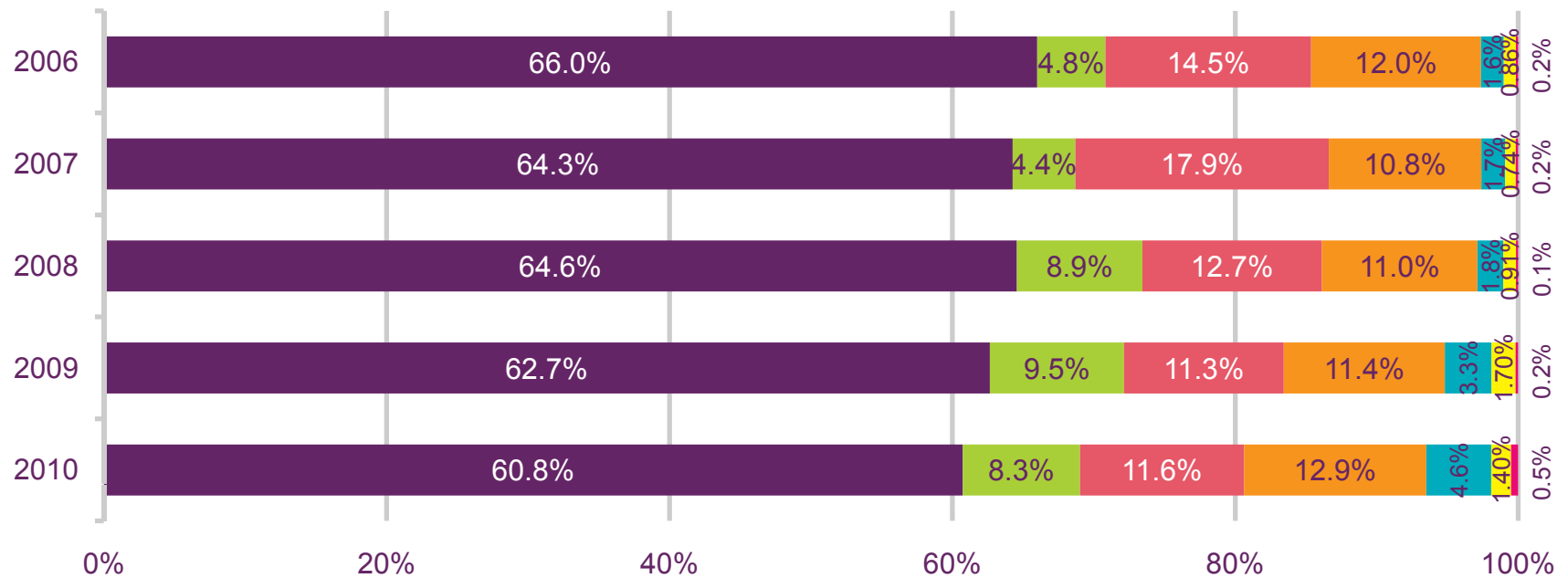


Source: Broadcaster returns

Volume of out-of-London production

Percentage of production by volume

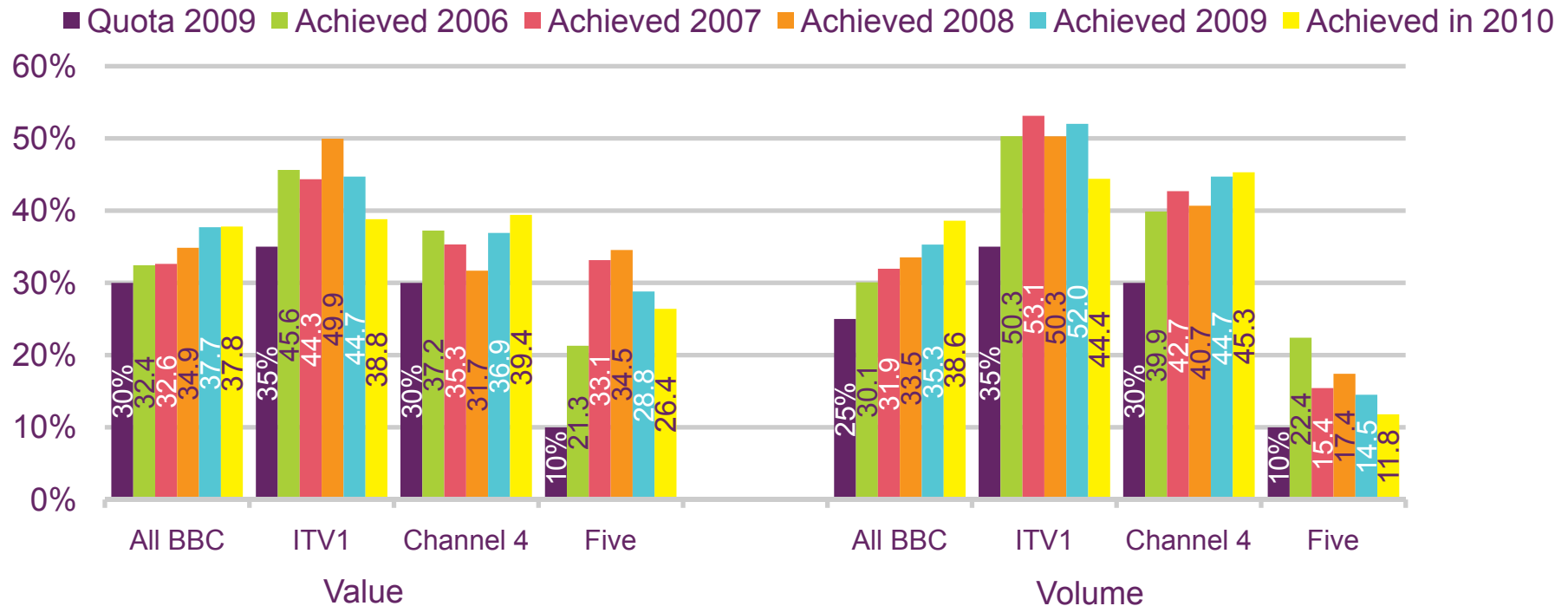
■ London
 ■ Midlands & East
 ■ Northern England
 ■ Southern England
 ■ Scotland
 ■ Wales
 ■ Northern Ireland



Source: Broadcaster returns

Performance against the Out-of-London production quotas

Percentage of network production produced outside London, by value and by volume



Source: Broadcaster returns

Out-of-London productions by channel/macro-region: value

Distribution of spend on qualifying productions by macro region and channel (%)

	BBC				ITV1				Channel 4				Channel 5			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
London	67.4%	65.1%	62.3%	62.2%	55.7%	50.1%	55.3%	61.2%	64.7%	68.3%	63.1%	60.6%	66.9%	65.5%	71.2%	73.6%
Midlands & East	4.1%	3.8%	3.8%	3.9%	9.2%	13.4%	14.4%	1.4%	2.1%	1.0%	2.3%	1.7%	15.4%	17.4%	16.0%	7.2%
Northern England	10.2%	8.9%	8.2%	7.7%	29.4%	31.0%	25.5%	25.4%	18.5%	18.4%	19.4%	19.7%	3.0%	5.1%	1.8%	0.1%
Southern England	12.0%	14.2%	14.0%	13.0%	3.7%	4.0%	4.1%	11.4%	12.8%	10.8%	12.4%	13.5%	12.1%	8.7%	9.0%	12.1%
Scotland	3.3%	3.7%	6.1%	7.4%	1.9%	1.4%	0.6%	0.4%	1.7%	1.4%	2.5%	4.1%	2.3%	2.9%	1.9%	6.2%
Wales	2.6%	3.5%	4.4%	5.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.0%	0.2%	0.2%	0.5%	0.5%	0.1%	0.8%
Northern Ireland	0.4%	0.6%	1.2%	0.8%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
Total Regional	32.6%	34.9%	37.7%	37.8%	44.3%	49.9%	44.7%	38.8%	35.3%	31.7%	36.9%	39.4%	33.1%	34.5%	28.8%	26.4%

Source: Broadcaster returns

Out-of-London productions by channel/macro-region: volume

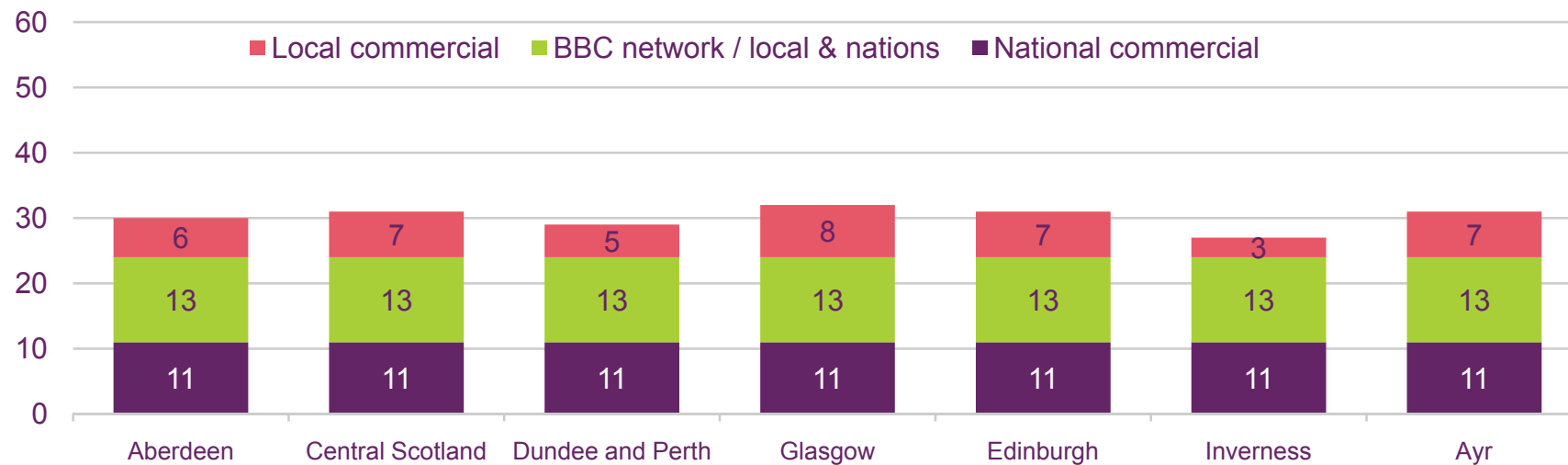
Distribution of hours of qualifying productions by macro region and channel (%)

	BBC				ITV				Channel 4				Channel 5			
	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010	2007	2008	2009	2010
London	68.1%	66.5%	64.7%	61.4%	46.9%	49.7%	48.0%	55.6%	57.3%	59.3%	55.3%	54.7%	84.6%	82.6%	85.5%	88.2%
Midlands & East	5.8%	5.6%	5.5%	5.7%	2.9%	21.0%	25.5%	19.8%	0.5%	1.2%	1.9%	2.3%	7.1%	8.7%	6.5%	5.1%
Northern England	6.6%	5.7%	5.1%	5.0%	43.7%	24.3%	20.5%	19.3%	23.5%	22.2%	23.7%	23.3%	3.3%	4.9%	1.5%	0.1%
Southern England	14.6%	17.0%	15.7%	17.6%	6.0%	4.3%	5.7%	5.0%	16.3%	14.6%	15.3%	14.0%	4.6%	3.1%	3.3%	4.4%
Scotland	3.2%	3.4%	6.5%	7.5%	0.4%	0.3%	0.2%	0.2%	1.5%	1.4%	2.0%	3.7%	0.2%	0.6%	0.4%	1.8%
Wales	1.5%	1.5%	2.2%	2.0%	0.0%	0.2%	0.2%	0.1%	0.8%	1.3%	1.6%	1.6%	0.2%	0.2%	2.8%	0.5%
Northern Ireland	0.3%	0.3%	0.4%	0.8%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Total Regional	31.9%	33.5%	35.3%	38.6%	53.1%	50.3%	52.0%	44.4%	42.7%	40.7%	44.7%	45.3%	15.4%	17.4%	14.5%	11.8%

Source: Broadcaster returns

Radio and audio content

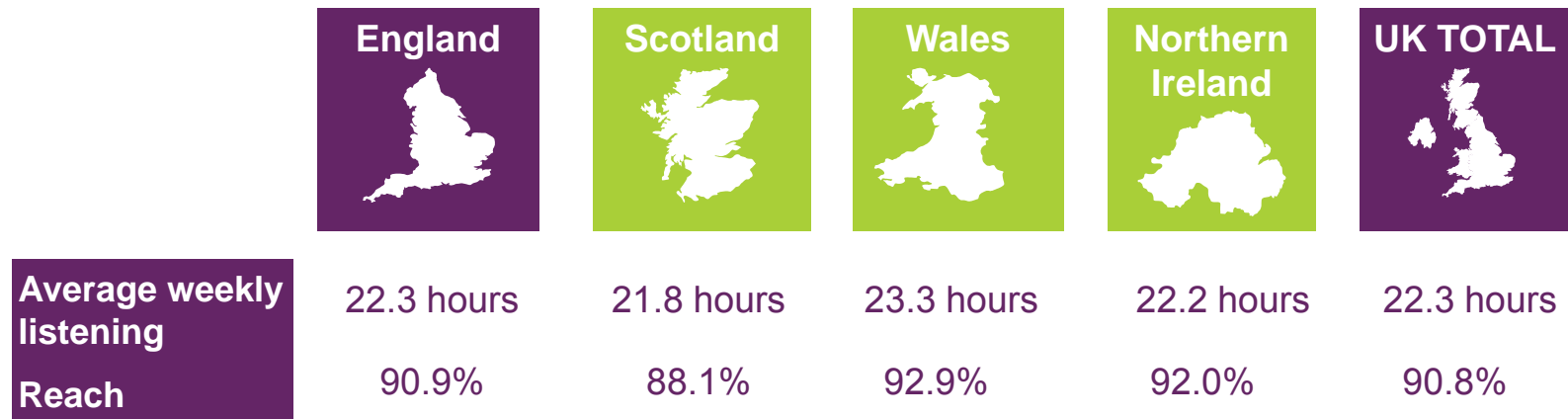
Availability of DAB stations, by area



Source: Ofcom, June 2011

Note: This chart shows the maximum number of stations available in each area; local variations along with reception issues mean that listeners may not be able to access all of these

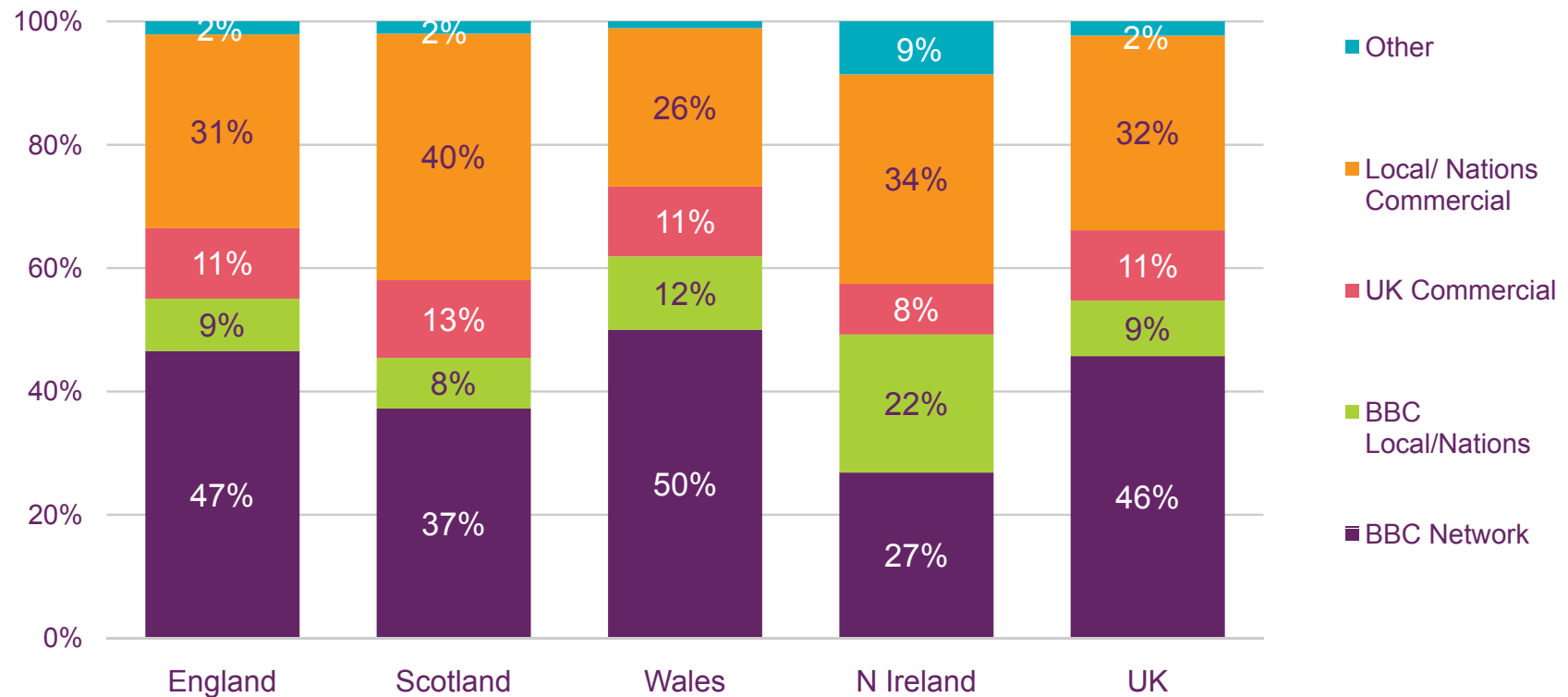
Average weekly reach and listening hours – year to Q1 2011



Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the respective adult population who listened to at least five consecutive minutes in the average week.

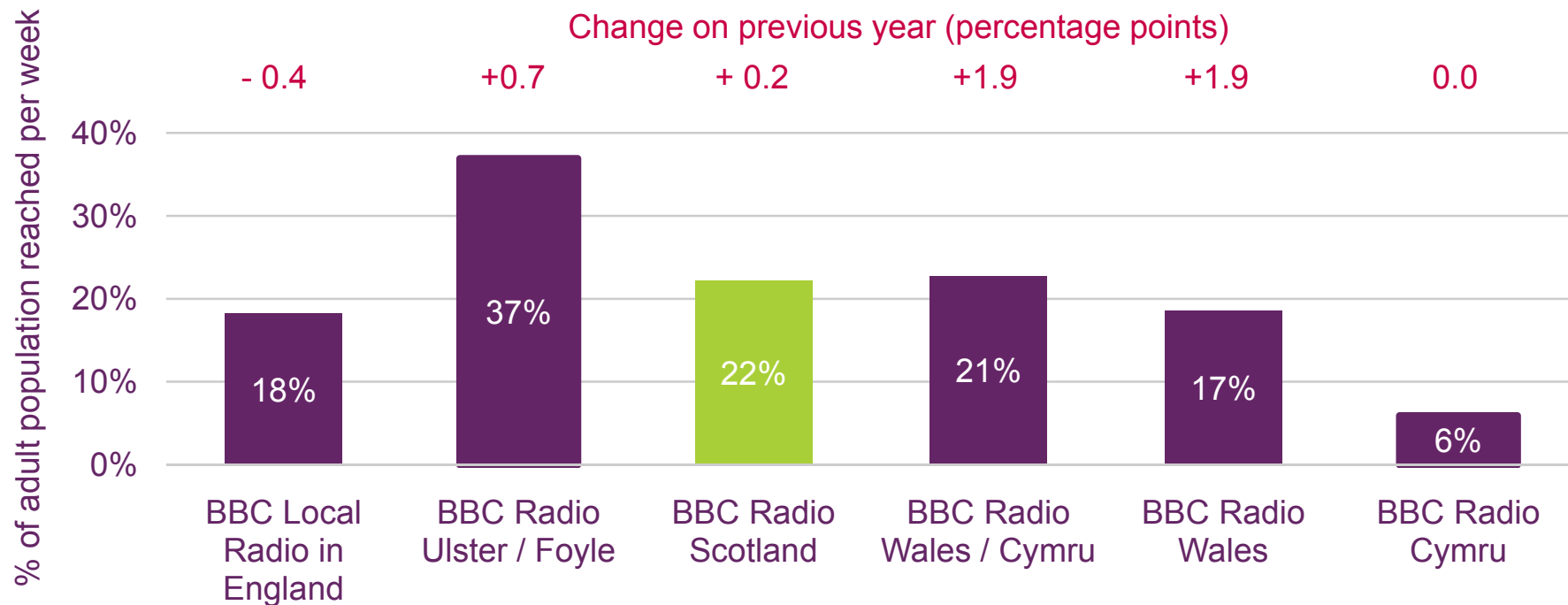
Share of listening hours, by nation– year to Q1 2011 (Audience share for BBC and commercial stations, local /national)

Audience share for BBC and commercial stations, local/national



Source: RAJAR, All adults (15+), year ended Q1 2011
 BBC Local/National includes both BBC Scotland and Radio Nan Gaidheal

Weekly reach for national/ local BBC radio, year to Q1 2011

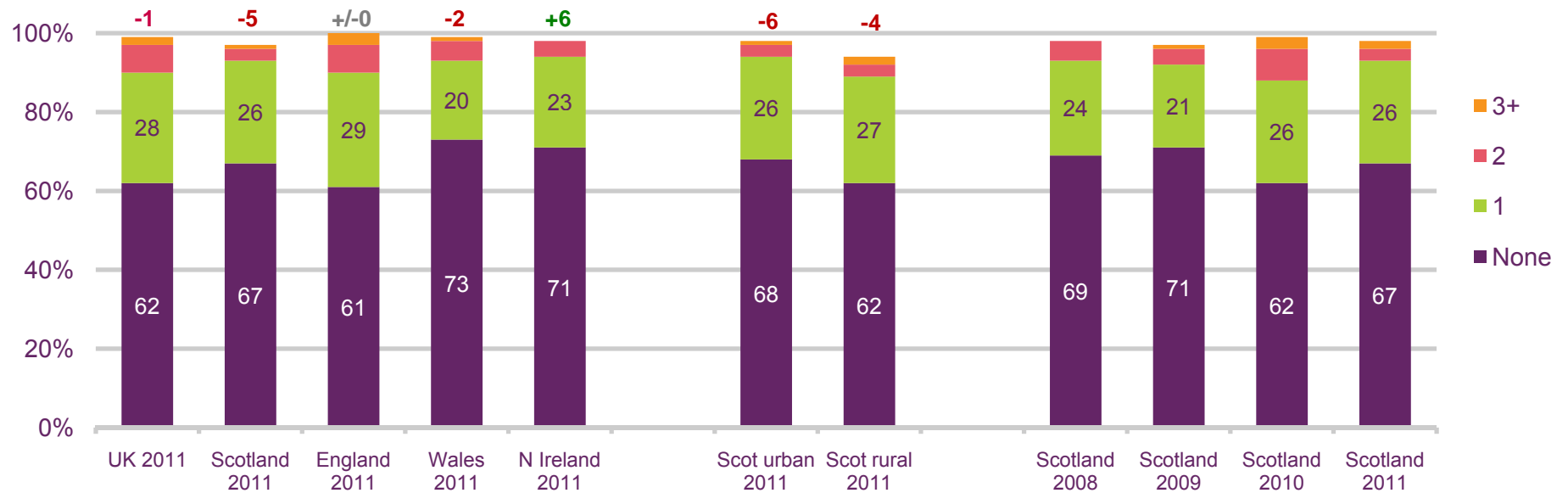


Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the adult population within each respective TSA who listened to at least five consecutive minutes in the average week.

Ownership of DAB digital radios

Percentage of respondents

Figure above bar shows % point change in DAB sets in household from Q1 2010



Own DAB	37%	31%	39%	27%	28%	30%	32%	29%	26%	37%	31%
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Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

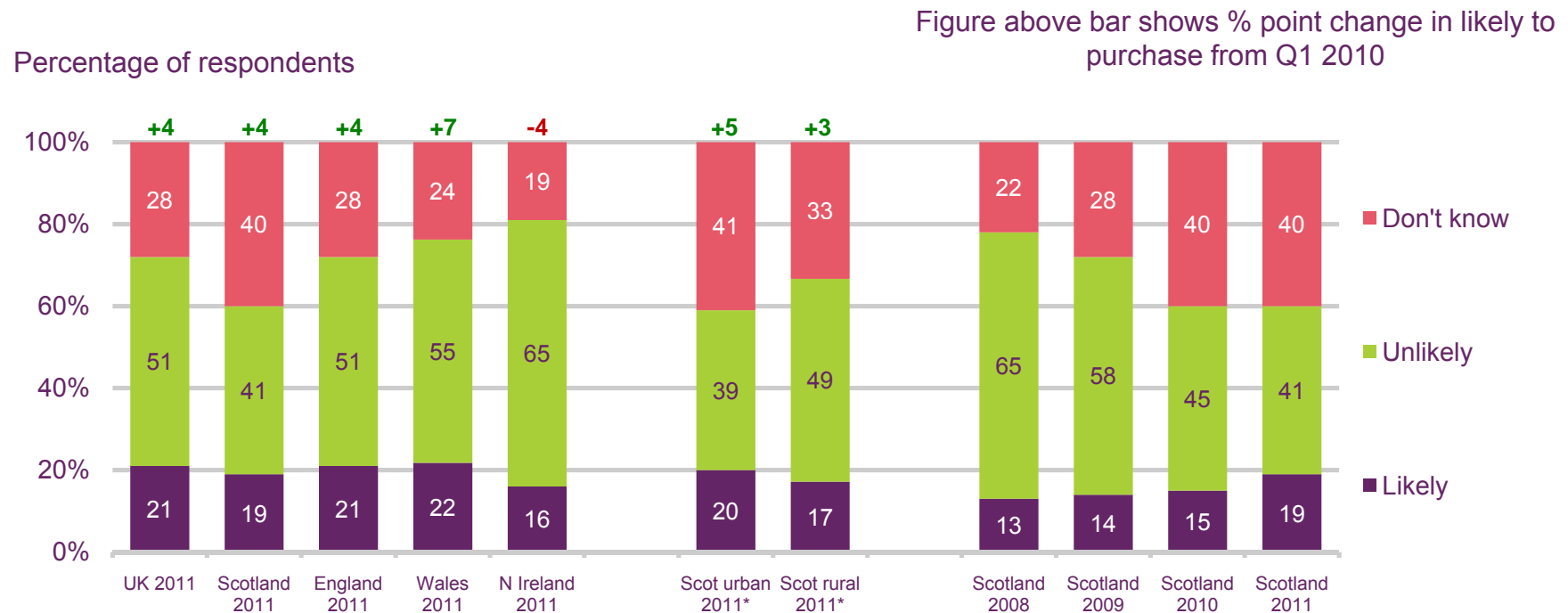
Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who listen to radio and have any active radio sets in the household that someone listens to in most weeks (n = 2811 UK, 357 Scotland, 1629 England, 397 Wales, 428 Northern Ireland, 174 Scotland urban, 183 Scotland rural, 766 Scotland 2008, 780 Scotland 2009, 1034 Scotland 2010, 357 Scotland 2011)

Note: Remaining percentages are Don't know responses.

NB. Data previous to 2011 is based on all who listen to radio. Data in 2011 is based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

Likelihood of purchasing a DAB radio within the next year



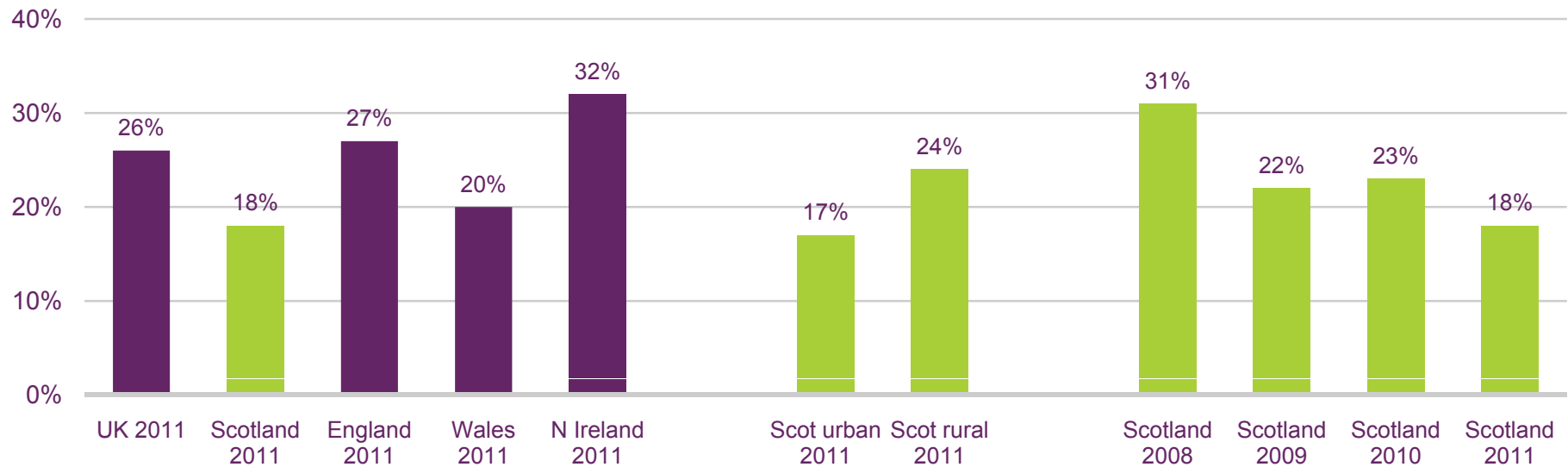
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1304 UK, 156 Scotland, 703 England, 207 Wales, 238 Northern Ireland, 70 Scotland urban, 86 Scotland rural, 550 Scotland 2008, 558 Scotland 2009, 661 Scotland 2010, 156 Scotland 2011). NB. Data previous to 2011 is based on all who listen to radio and do not have a DAB set. Data in 2011 is based on those who listen to radio, do not have a DAB set and have any radio sets in the household that someone listens to in most weeks. *Caution: Low base

Use of either an MP3 player or an iPod

Use of either an MP3 player or an iPod (% adults)



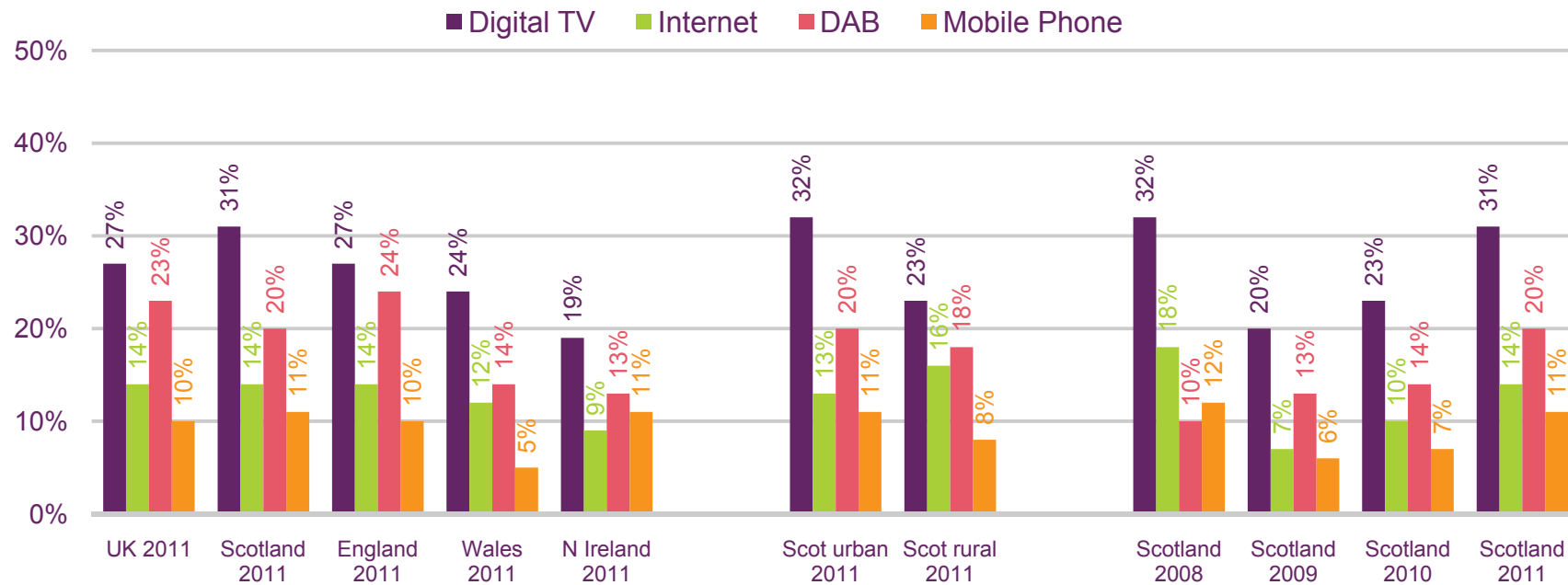
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural , 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011).

Listening to radio via internet, DTV, mobile phone

Proportion of respondents (%) who have listened to radio via DTV, internet or mobile phone



QP11. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio, mobile phone?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011).

Share of radio listening hours via digital and analogue platforms, year to Q1 2011

Digital increase

year on year +1.0

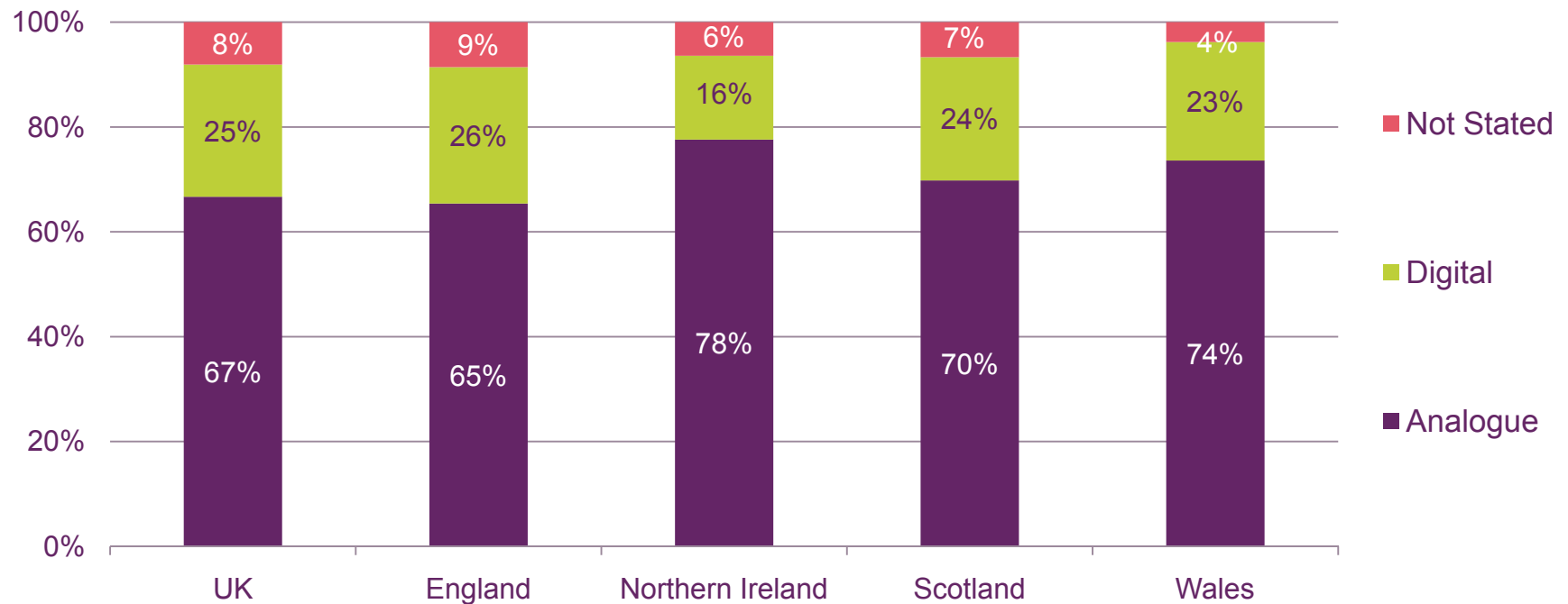
+1.0

+2.0

+2.0

+ 1.0

% listening hours



Source: RAJAR, All adults (15+), year ended Q1 2011.

Listening to audio content on mobile phone

Proportion of respondents (%) who have used their mobile to listen to audio content

Figure above bar shows % point change in listening to audio content from Q1 2010

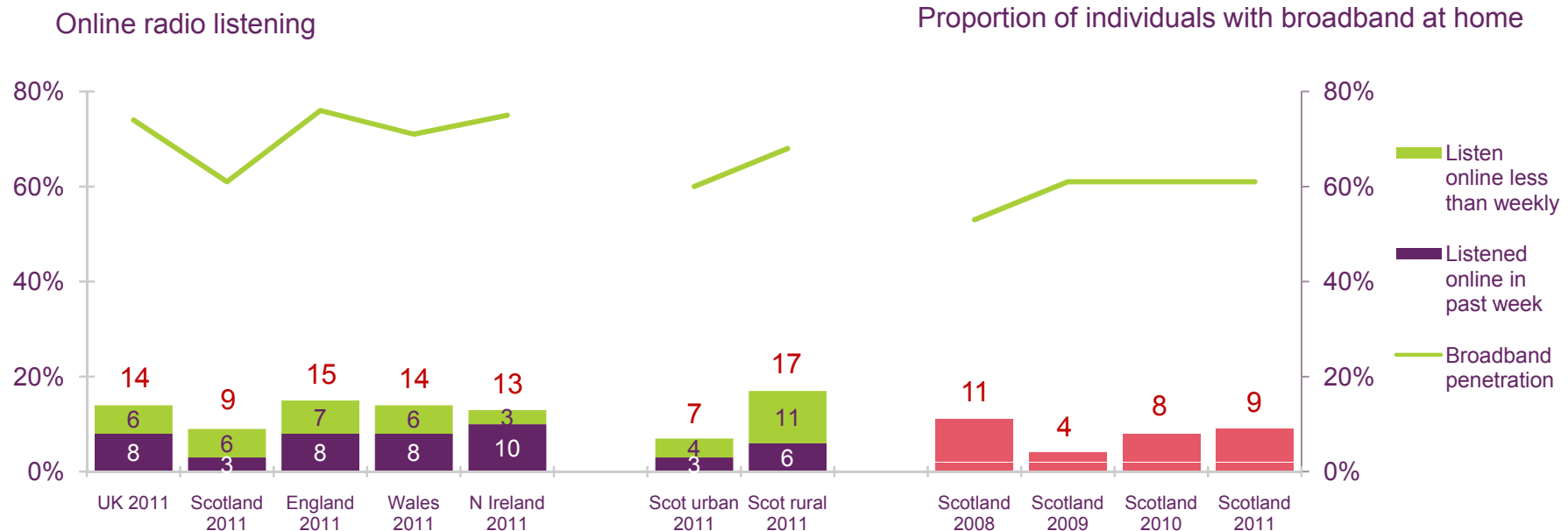


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Proportion of adults living in a household that has used the internet to listen to radio

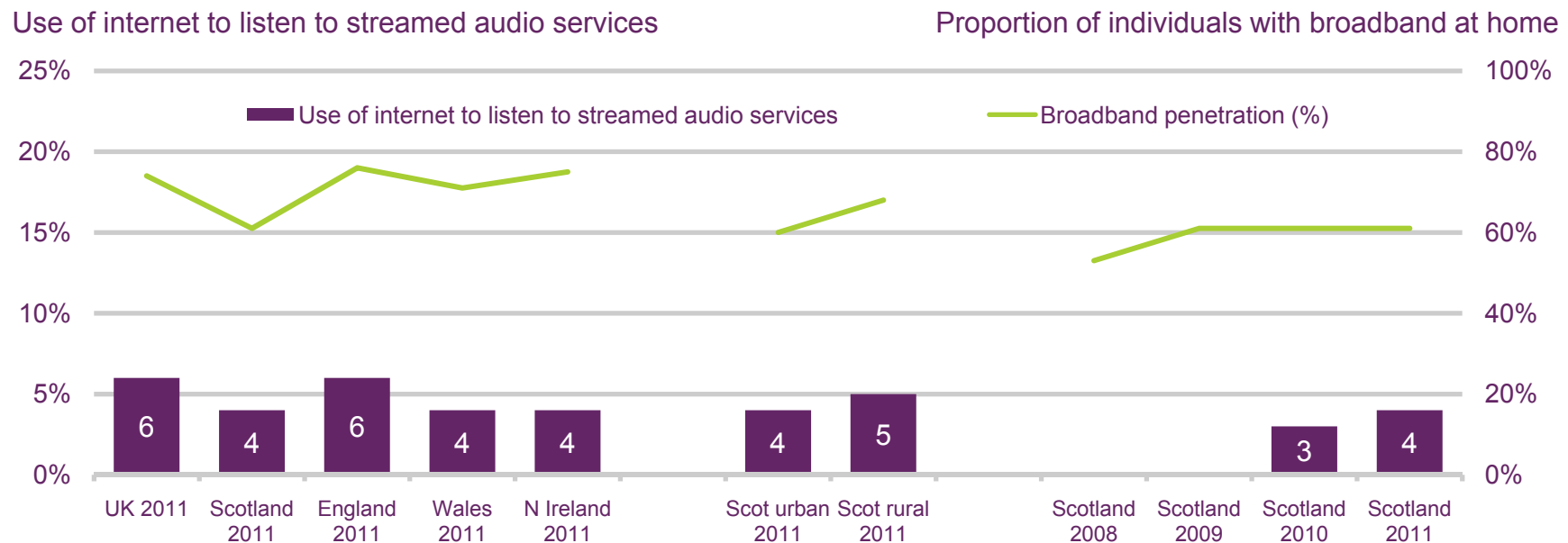


QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Use of internet for listening to streamed audio services

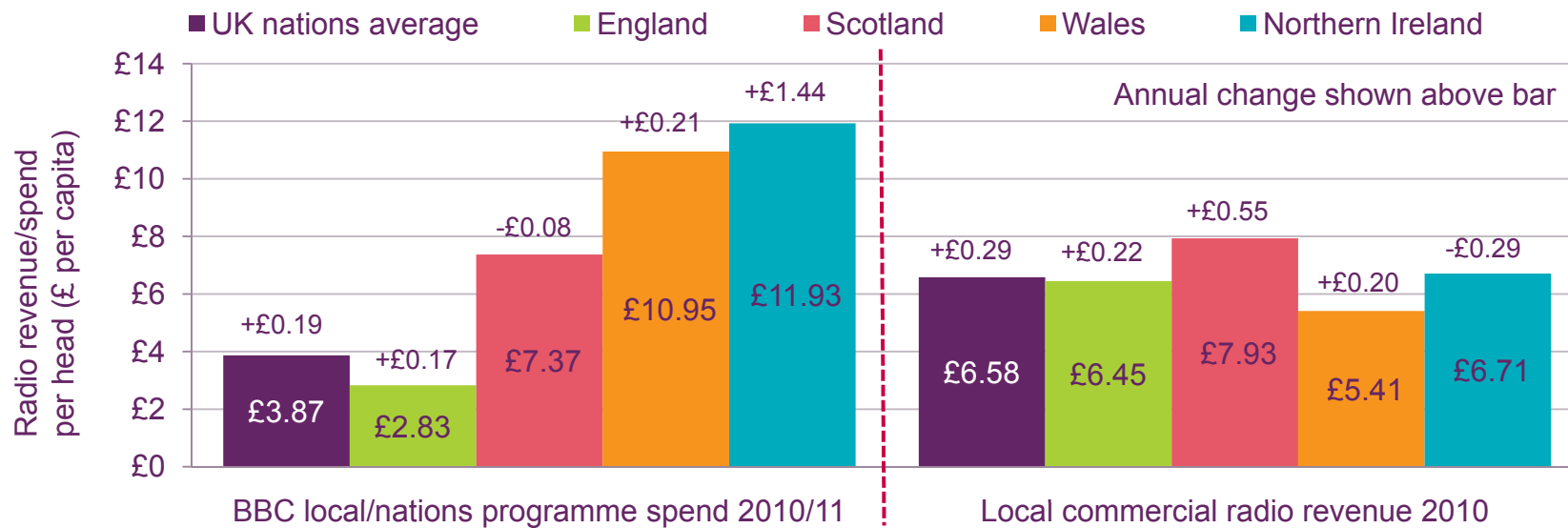


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011)

Local/nations radio spend and revenue per head of population 2010/11



Source: Broadcasters, 2010

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT, and Absolute. These figures supersede all others and are not directly comparable with historical data.

Community radio stations in Scotland



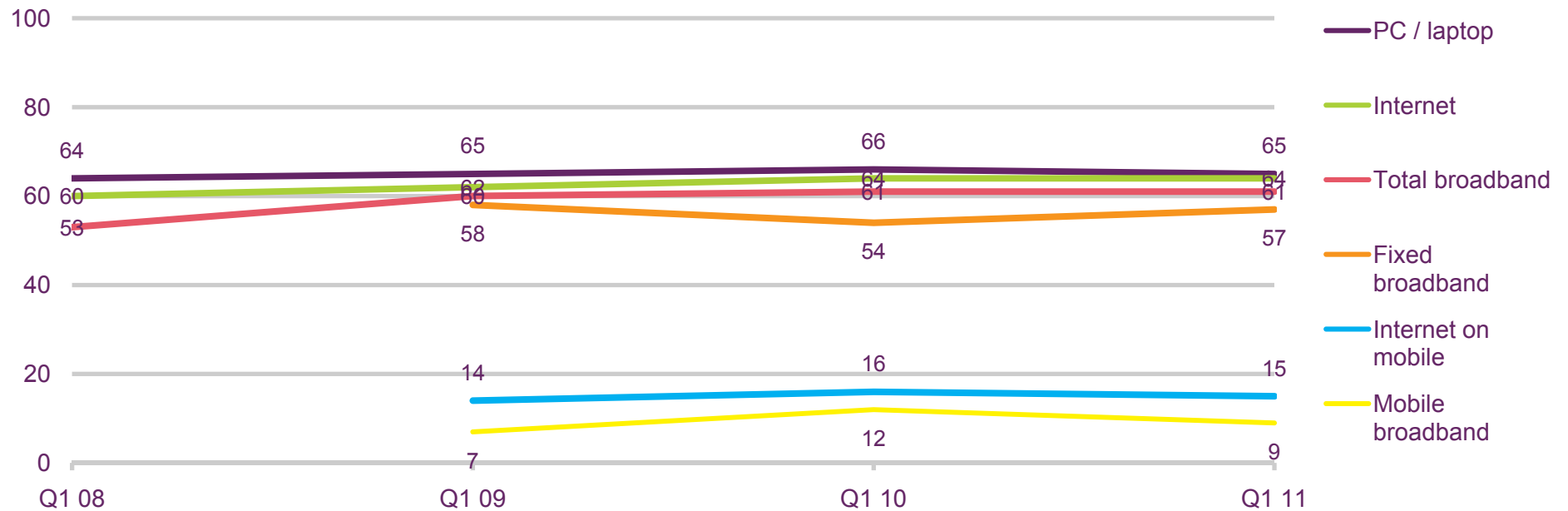
Source: Ofcom

Community station	Location	On-air date
shmuFM	Aberdeen	20/10/2007
Speysound Radio	Badenoch & Strathspey	06/12/2009
Pulse FM	Barrhead	28/07/2009
Revival Radio	Cumbernauld	03/09/2006
Alive Radio	Dumfries	01/09/2009
Dunoon Community Radio	Dunoon, Argyll	01/12/2009
Edinburgh Garrison FM	Edinburgh	14/08/2006
Celtic Music AM	Glasgow	16/01/2008
Awaz FM	Glasgow - Central	01/01/2006
Insight Radio, RNIB Scotland	Glasgow - West	30/03/2007
Sunny Govan Radio	Govan	23/03/2007
Leith FM	Leith	24/03/2007
Black Diamond FM	Midlothian	29/03/2007
Super Station Orkney	Orkney	14/01/2008
Bute FM	Rothesay, Isle of Bute	15/07/2009
3TFM	Saltcoats & Adrossan, N Ayrshire	19/04/2008
Brick FM	St Boswells, Borders	22/01/2008
Mearns FM	Stonehaven & the Mearns	06/06/2009

Internet and web-based content

Household PC and internet take-up, Scotland 2008-2011

Proportion of households (%)



Source: Ofcom technology tracker

Base: All adults aged 16+ (n = 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Residential PC ownership

PC ownership

Figure above bar shows % point change in PC ownership from Q1 2010

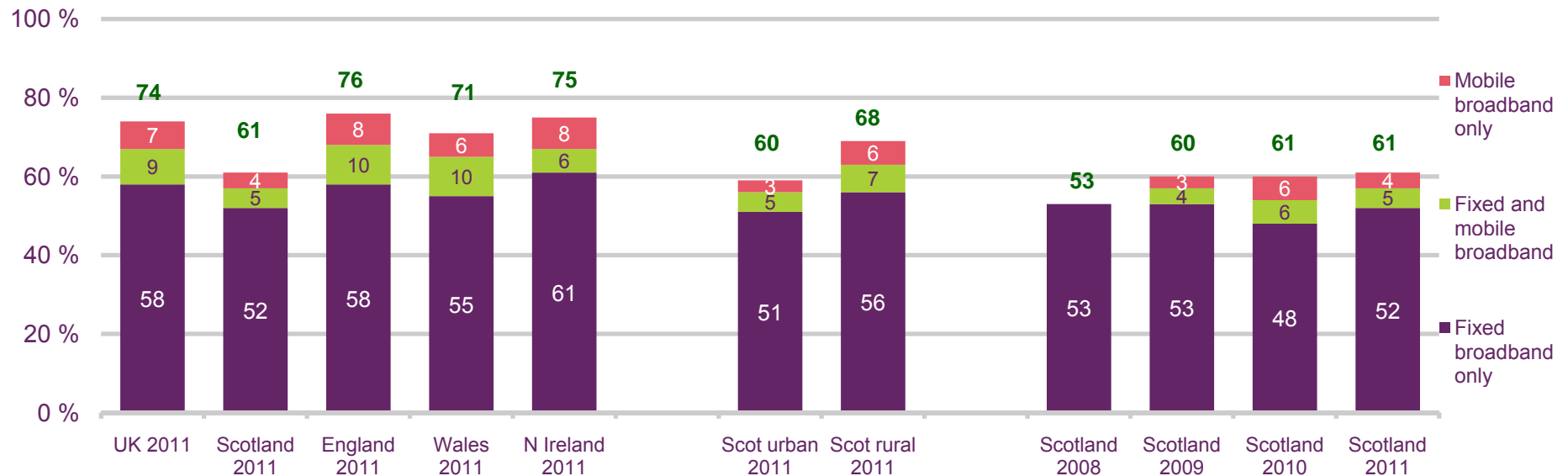


QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Consumer broadband take-up (by connection type)



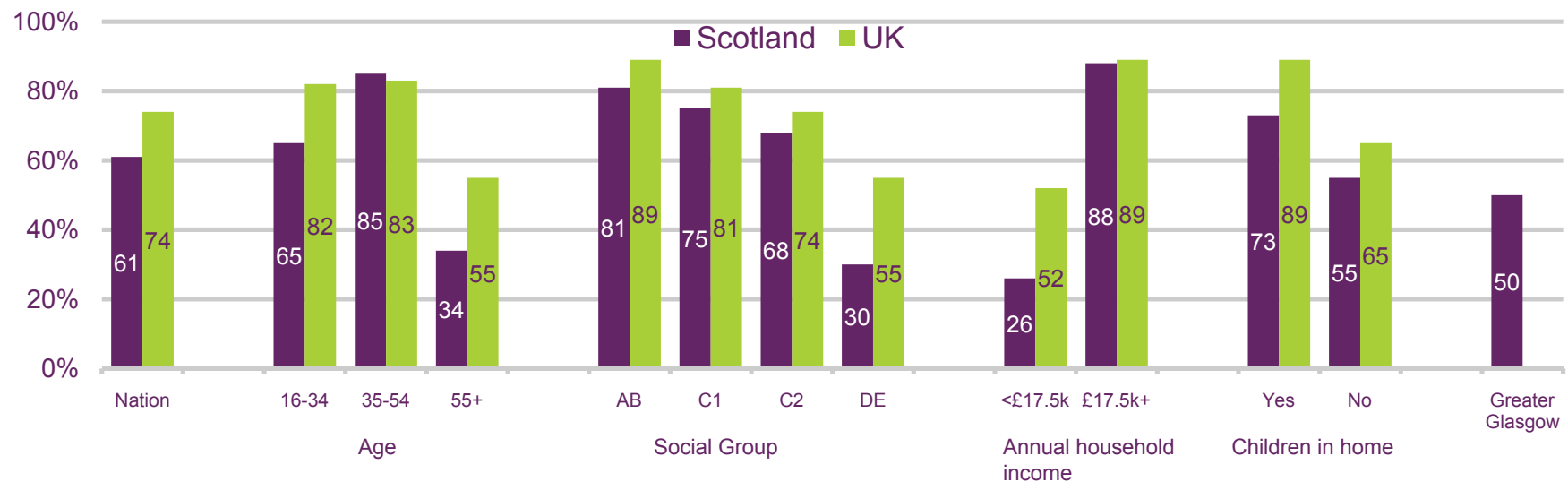
QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband.

2008 measure shows any broadband)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Consumer broadband take-up in Scotland compared to UK (by demographic)



QE9. Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 487 Scotland, 145 16-34s, 178 35-54s, 164 55+, 109 AB, 141 C1, 95 C2, 142 DE, 127 <£17.5k income, 90 £17.5k+, 159 children in home, 328 no children in home, 120 Greater Glasgow)

Note: "Greater Glasgow" includes Greater Glasgow and Clyde Health Board area + other parts of Lanarkshire.

Take-up of mobile broadband

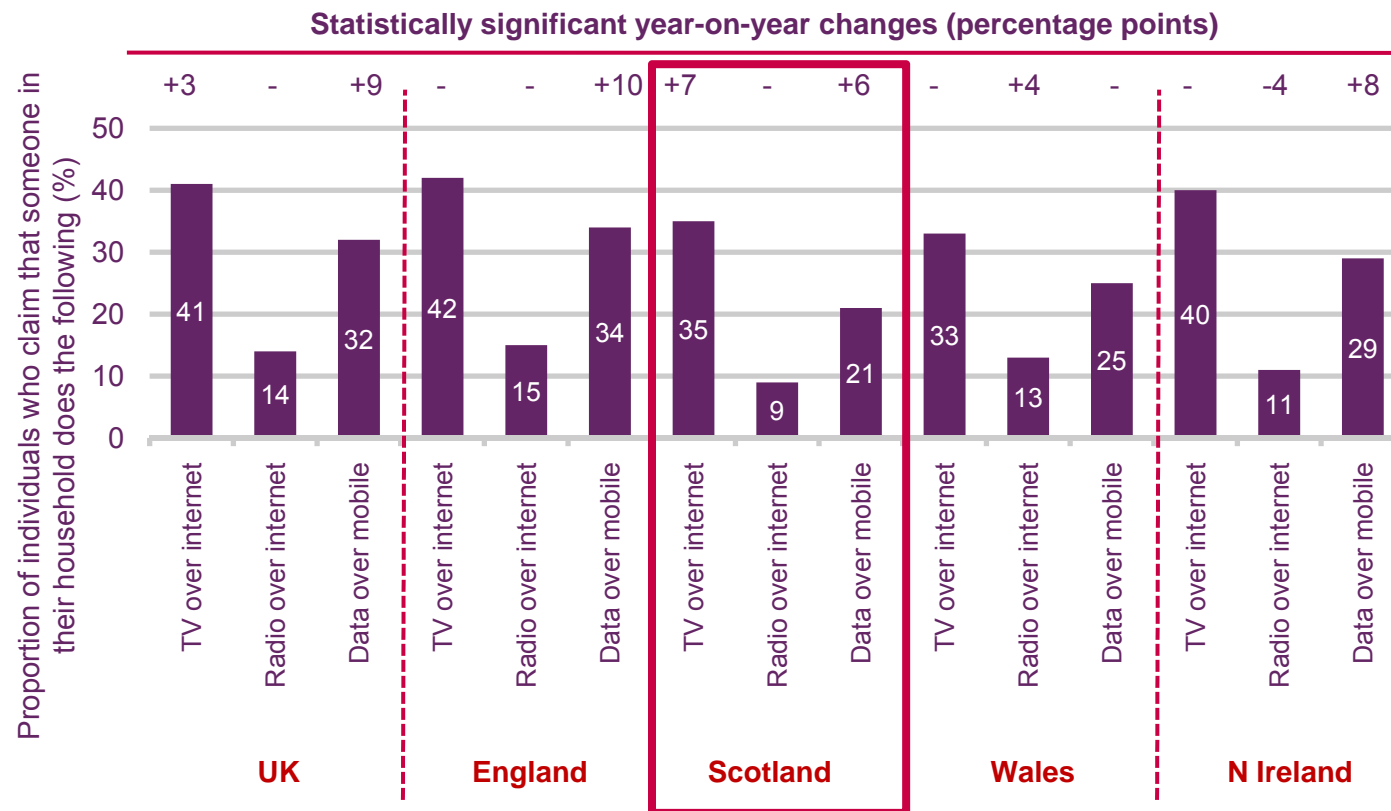


QE9. Which of these methods does your household use to connect to the Internet at home? (NB 2008 survey did not cover mobile broadband)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Consumers' use of converging platforms, 2011



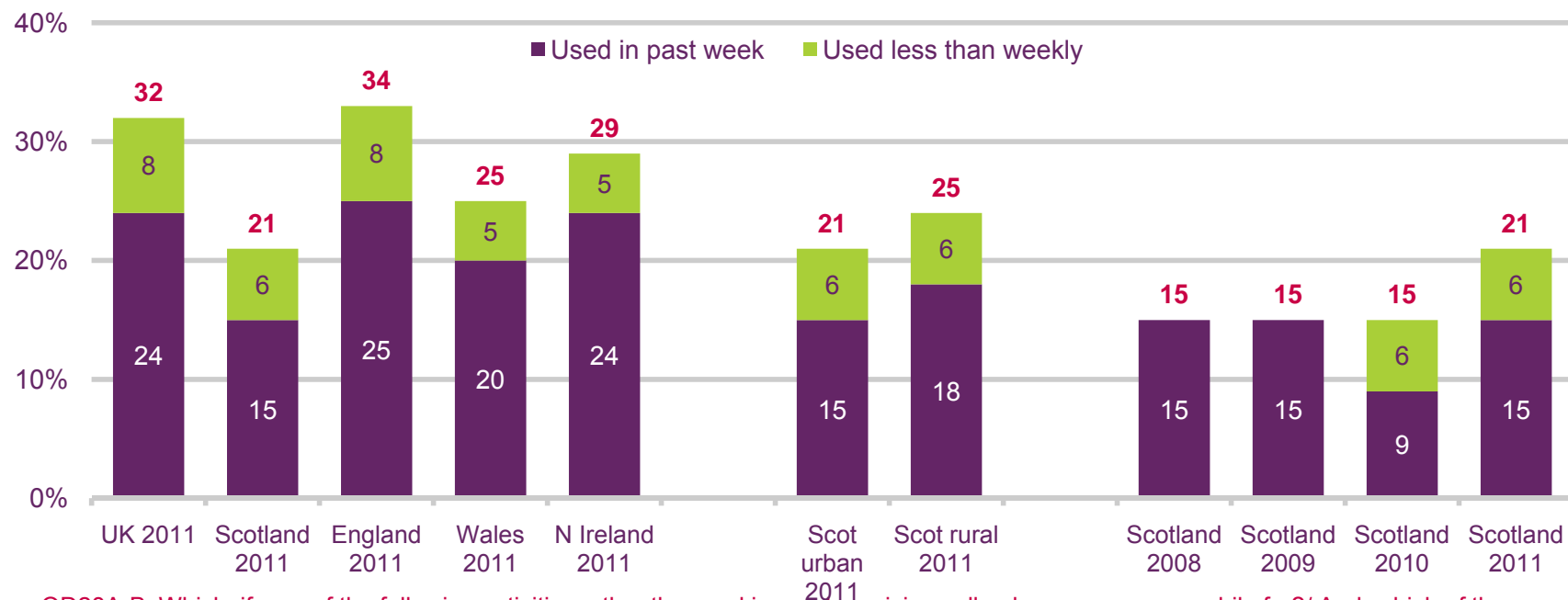
Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 1983 England, 487 Scotland, 493 Wales, 511 Northern Ireland)

QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ Includes download free applications, download paid for applications, send/ receive emails, accessing the internet, connecting to the internet using Wi-Fi, using VoIP service, download a new video clip, video streaming, TV streaming, accessing/ receiving, sports/ team news/ scores, accessing/ receiving news, use IM/ Instant messaging

Proportion of adults who have used a mobile phone to access the internet

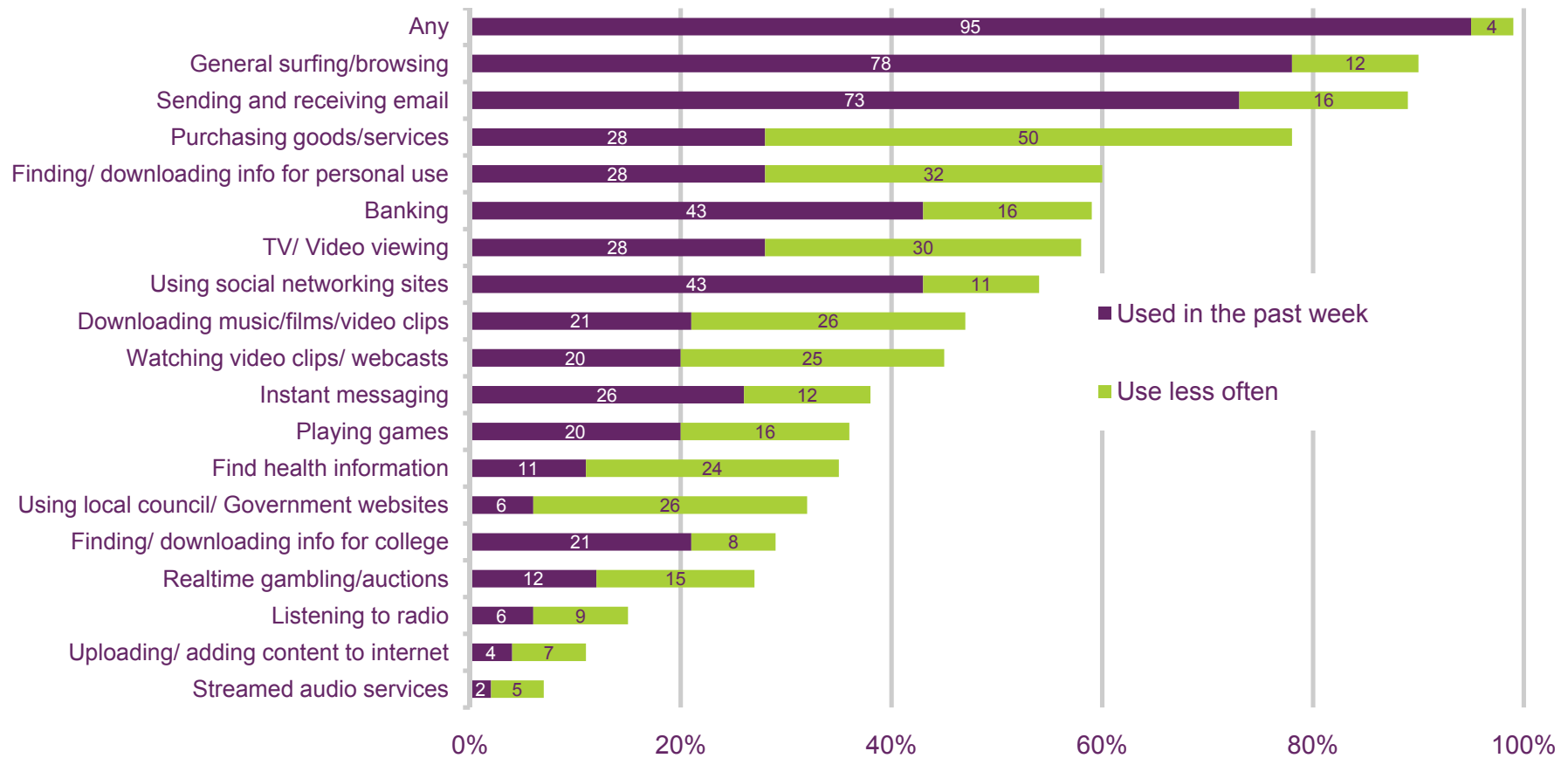


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Use of online applications among broadband users



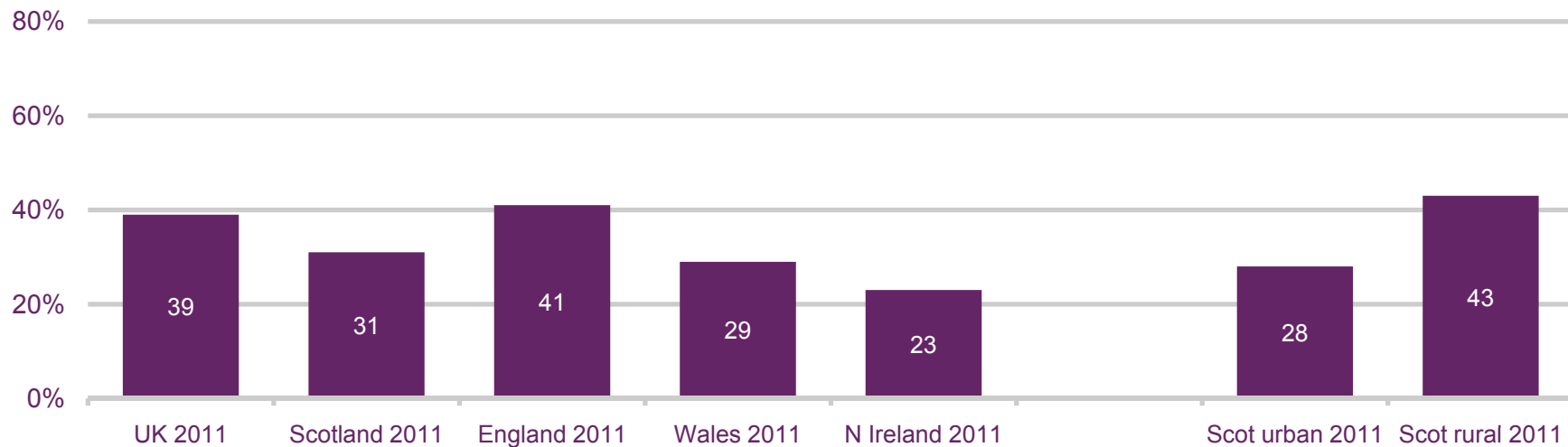
QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a broadband connection at home (n= 317 Scotland 2011)

Use of the internet to access local council/government websites

Use of internet for local council/government websites (%)

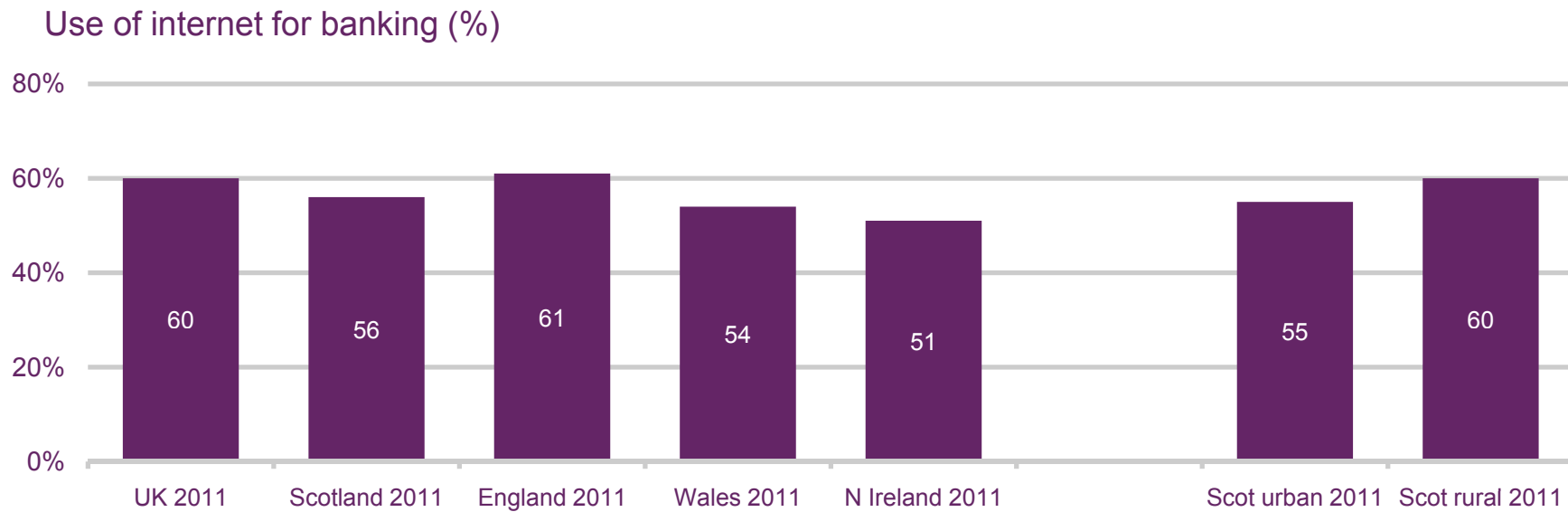


QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with access to the internet at home (n = 2534 UK, 329 Scotland, 1493 England, 334 Wales, 378 Northern Ireland, 154 Scotland urban, 175 Scotland rural)

Use of the internet to access banking websites



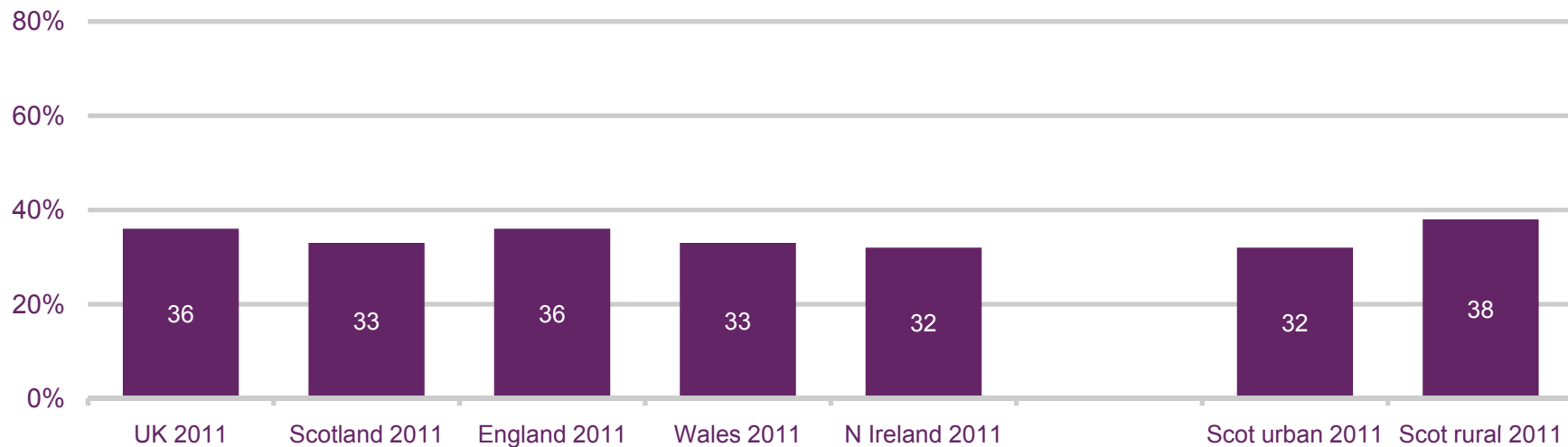
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with access to the internet at home (n = 2534 UK, 329 Scotland, 1493 England, 334 Wales, 378 Northern Ireland, 154 Scotland urban, 175 Scotland rural)

Use of the internet to access information on health-related issues

Use of internet for finding information on health-related issues (%)



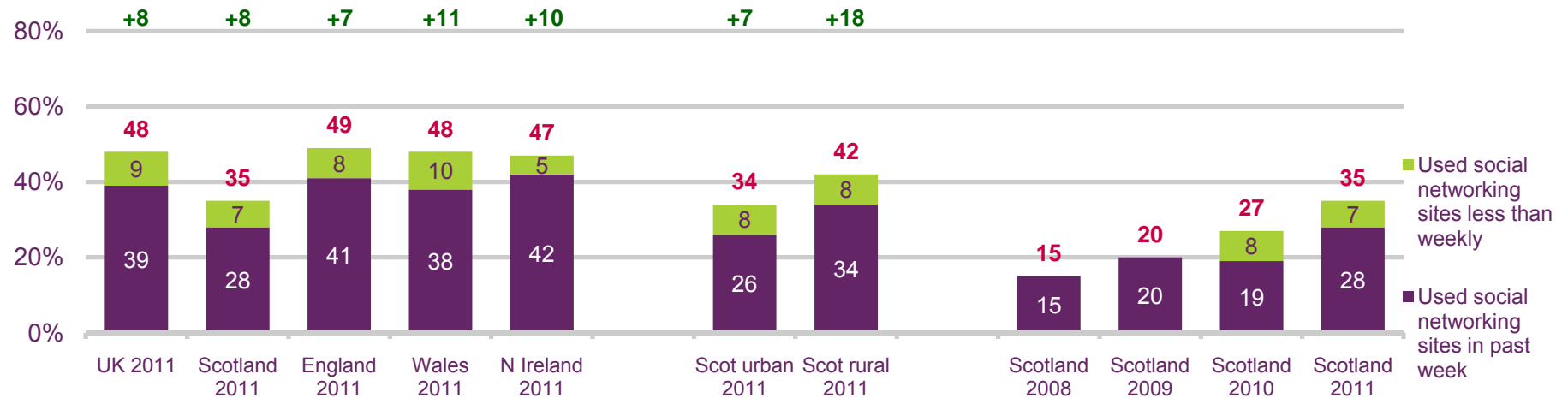
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with access to the internet at home (n = 2534 UK, 329 Scotland, 1493 England, 334 Wales, 378 Northern Ireland, 154 Scotland urban, 175 Scotland rural)

Use of social networking sites

Use of social networking sites (%)



QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week?/ QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use. 2008, 2009 and 2010 surveys did not ask about using mobile to visit social networking sites)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

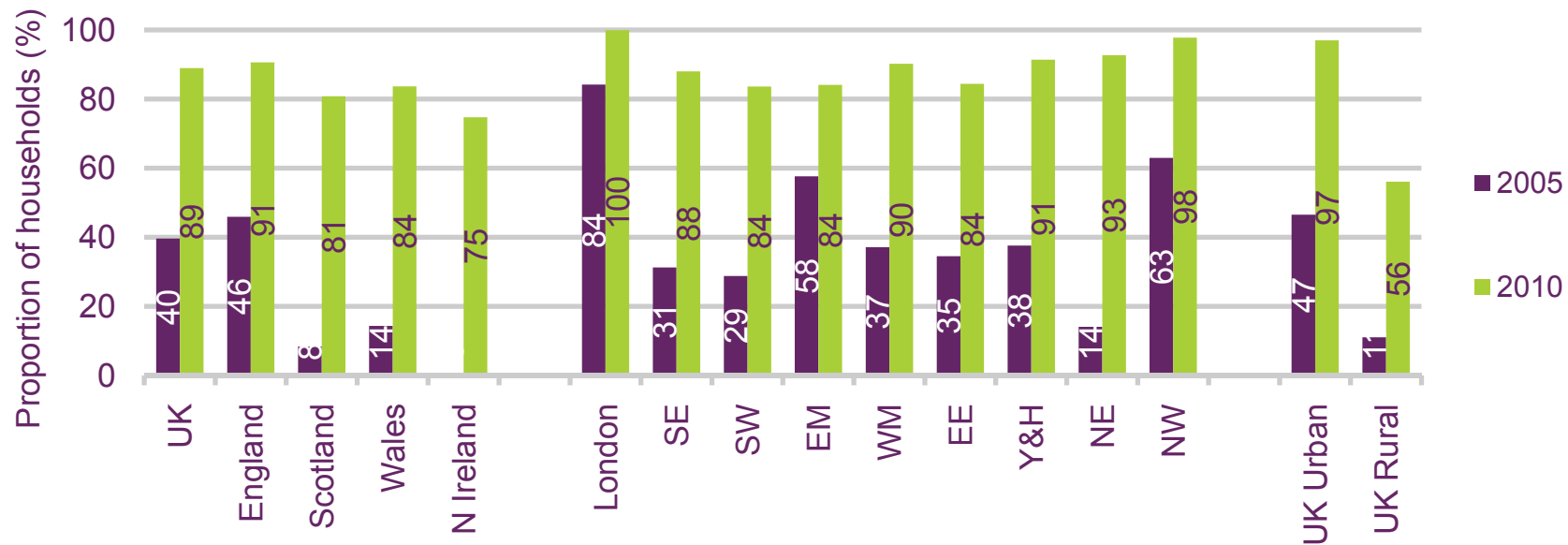
Telecoms and networks

Proportion of households connected to an ADSL-enabled BT exchange



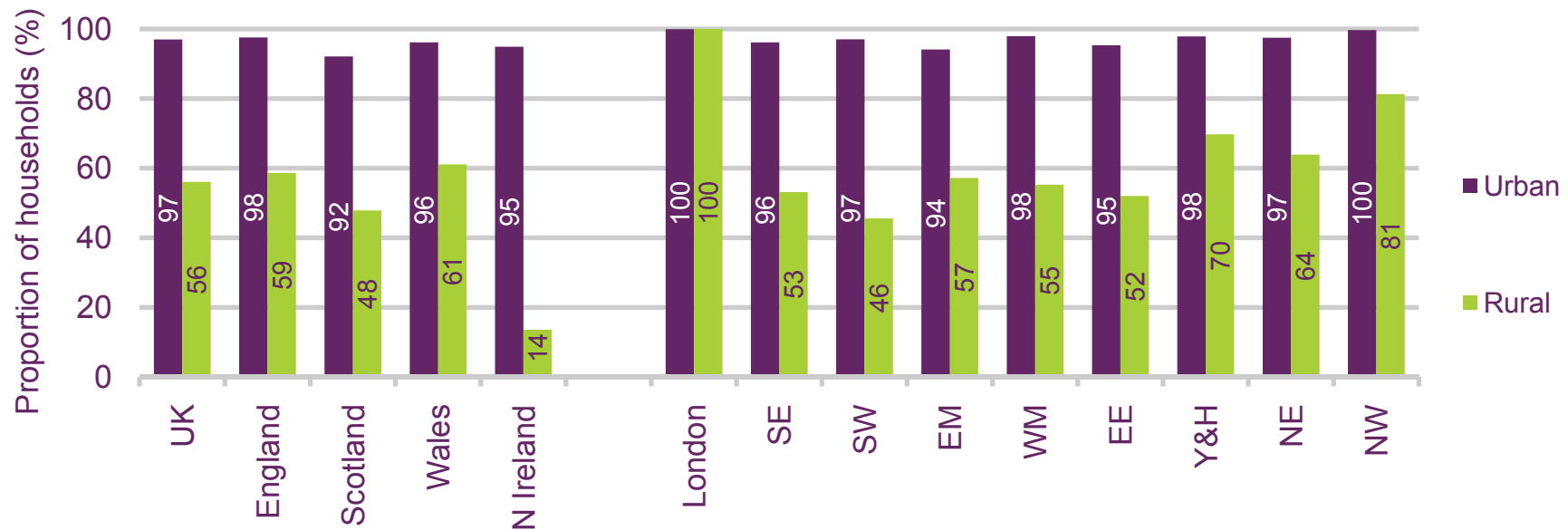
Source: Ofcom / BT, December 2010 data

Proportion of households in connected to an unbundled local exchange



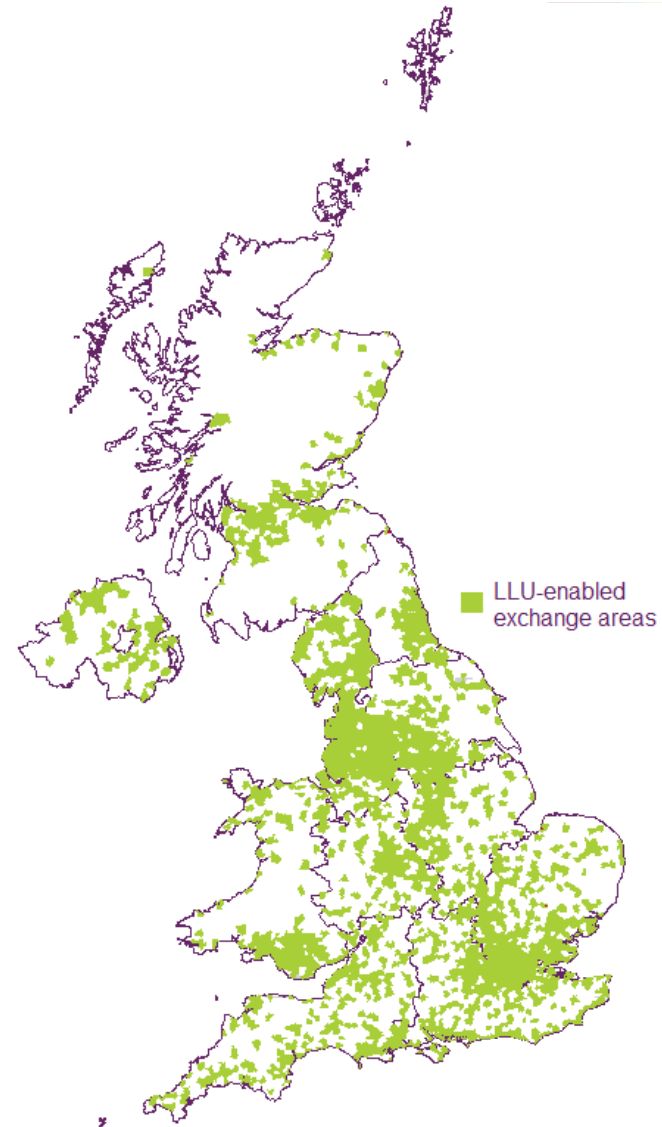
Source: Ofcom / BT, December 2010 data

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



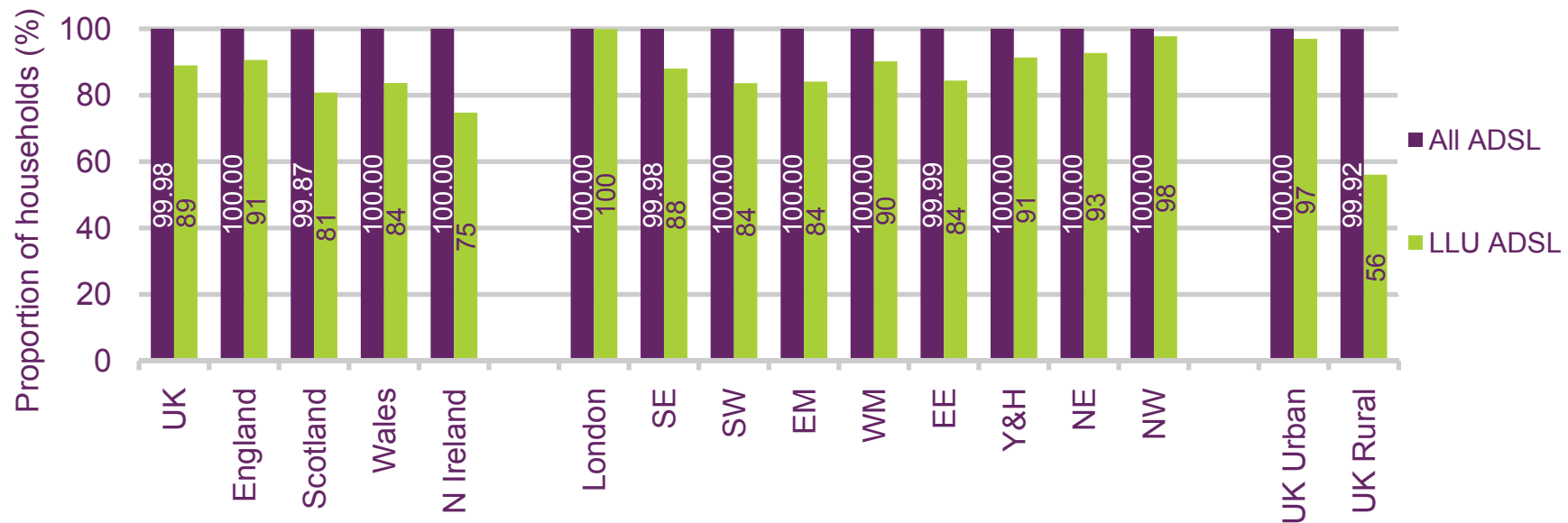
Source: Ofcom / BT, December 2010 data

Map showing areas served by unbundled local exchanges



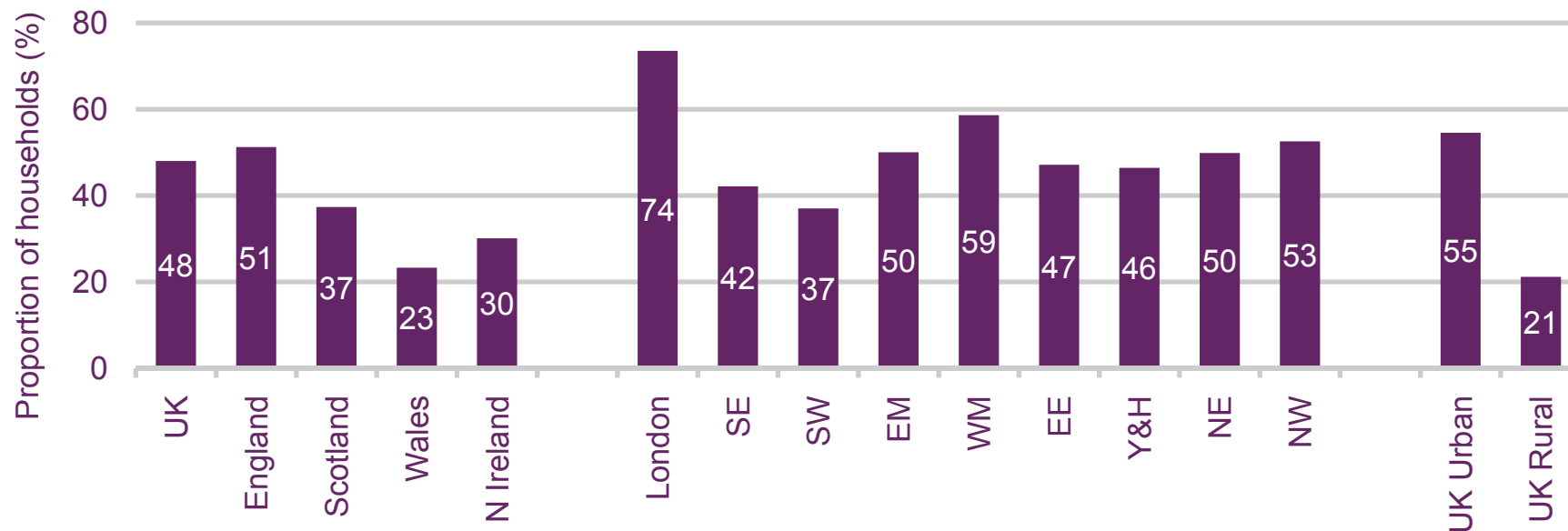
Source: Ofcom/BT, December 2010 data

Proportion of homes connected to ADSL-enabled and unbundled exchanges



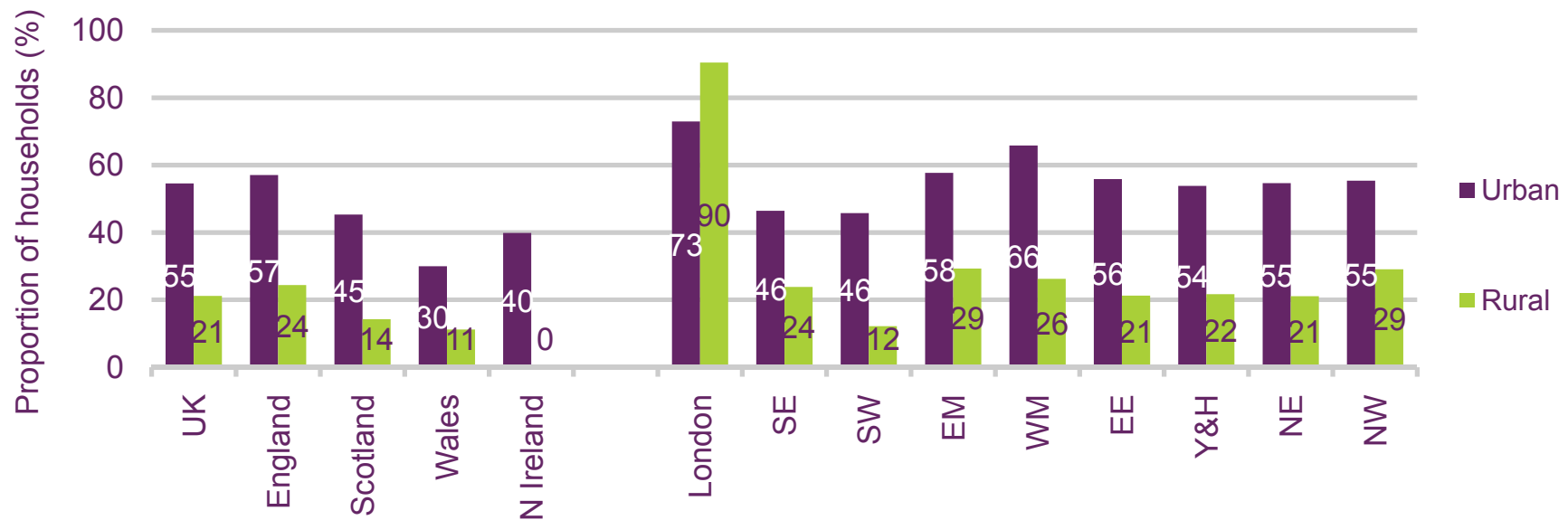
Source: Ofcom / BT, December 2010 data

Proportion of households passed by Virgin Media broadband



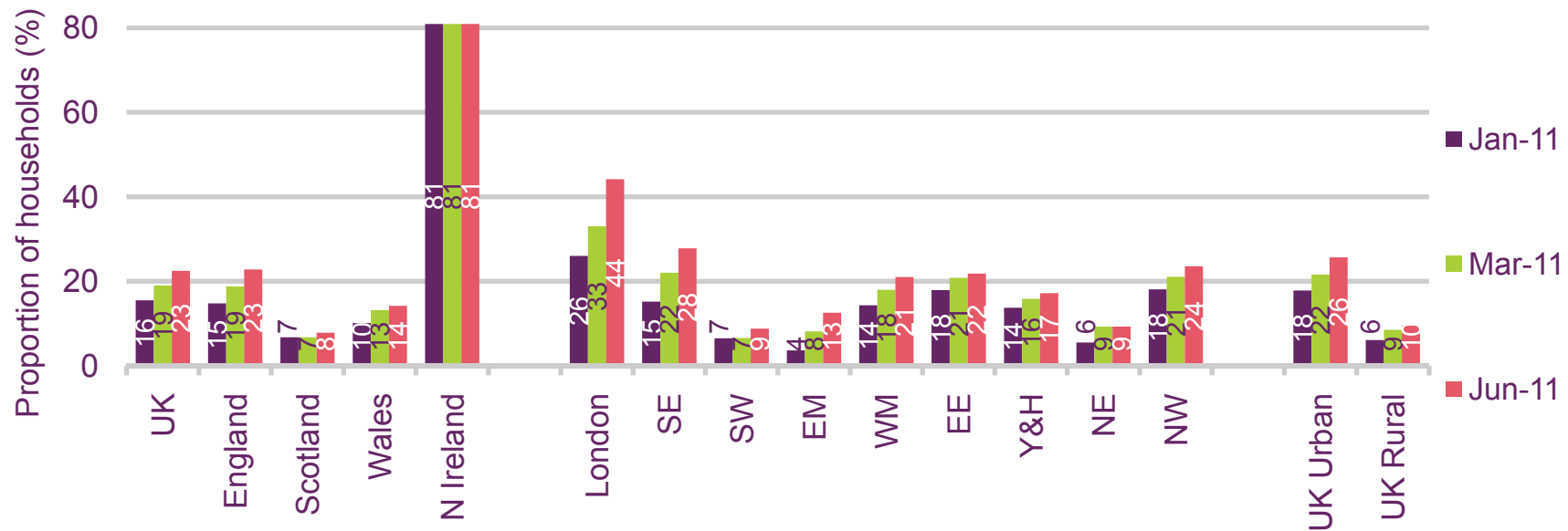
Source: Ofcom / Virgin Media, June 2010 data

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



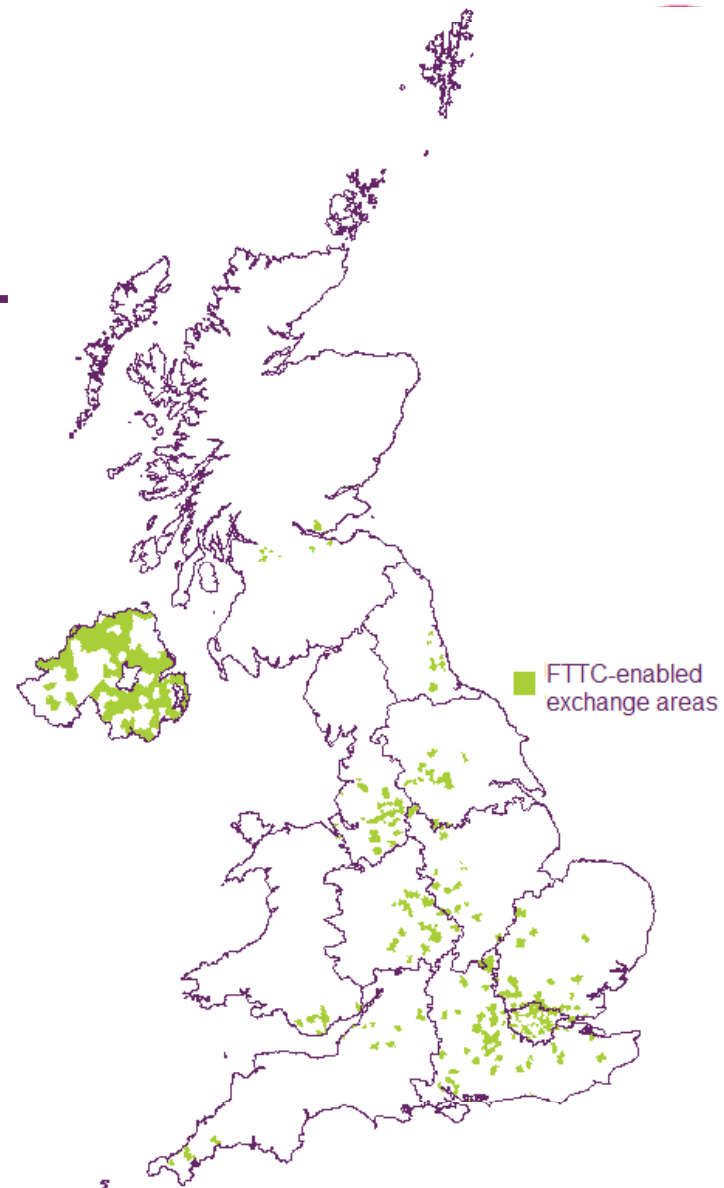
Source: Ofcom/Virgin Media, June 2010 data

Proportion of households connected to an FTTC-enabled exchange



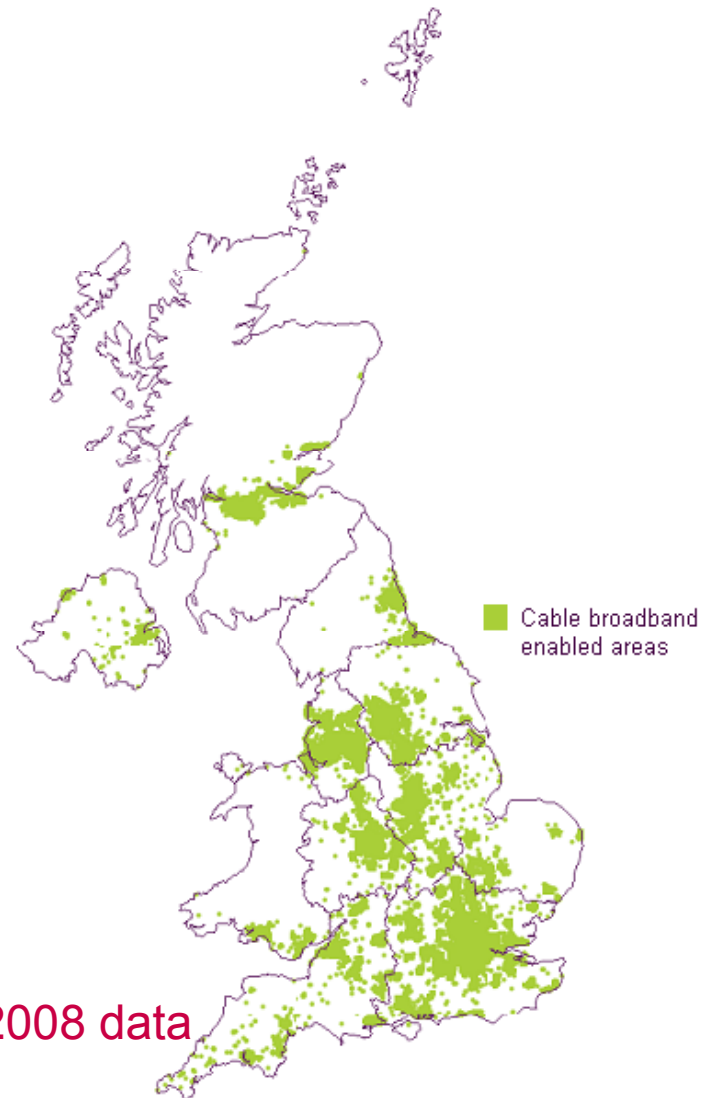
Source: Ofcom / BT

Map of FTTC-enabled BT exchange areas



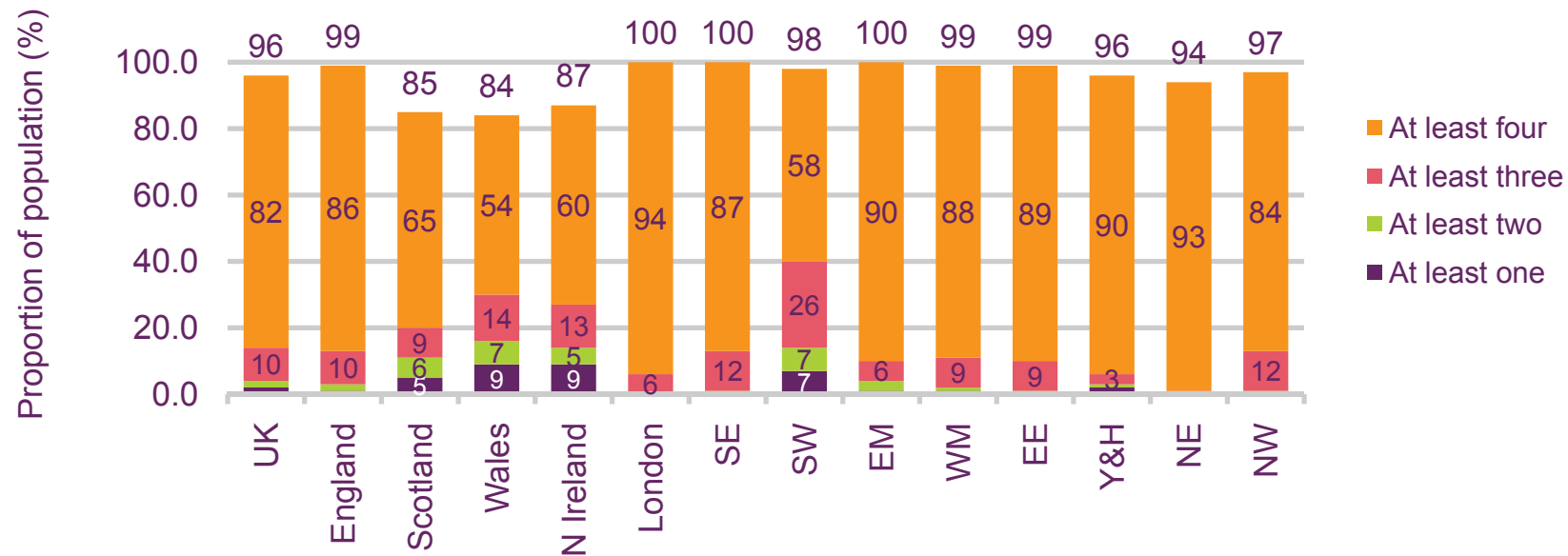
Source: Ofcom / BT, June 2011 data

Map of the availability of Virgin Media cable broadband



Source: Ofcom/Virgin Media, September 2008 data

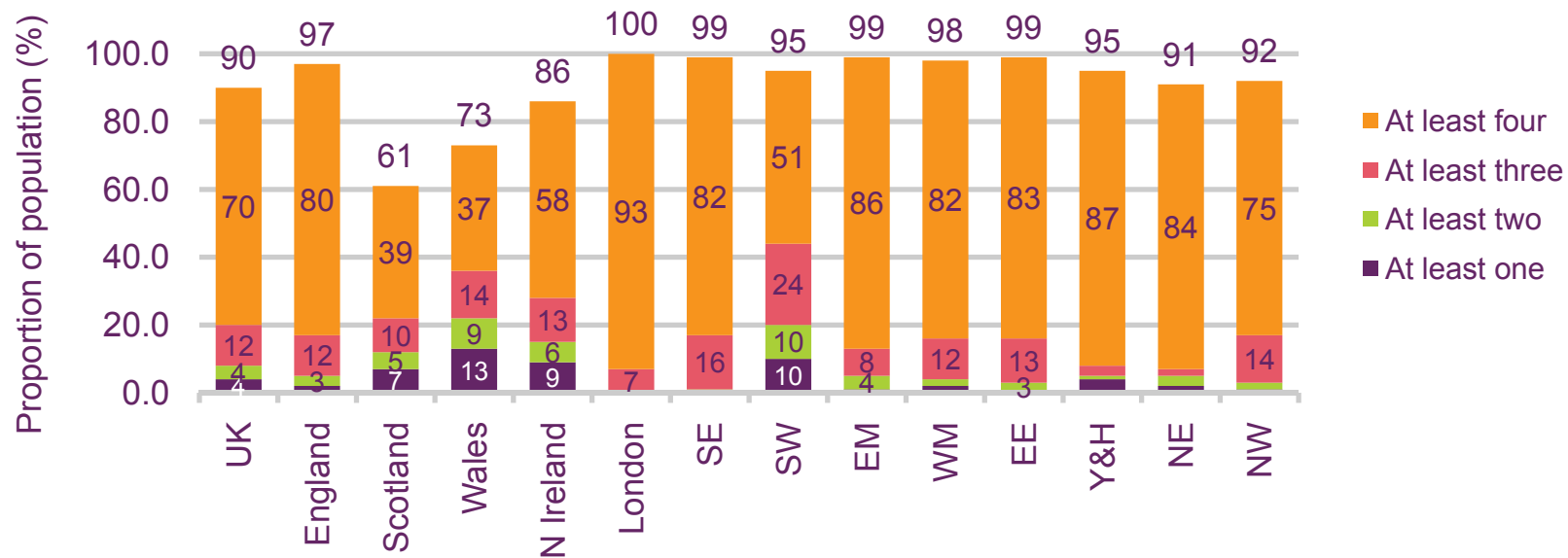
2G mobile phone population coverage (90%) – by number of operators



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

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 2G area coverage; data not directly comparable to that published in the 2010 report.

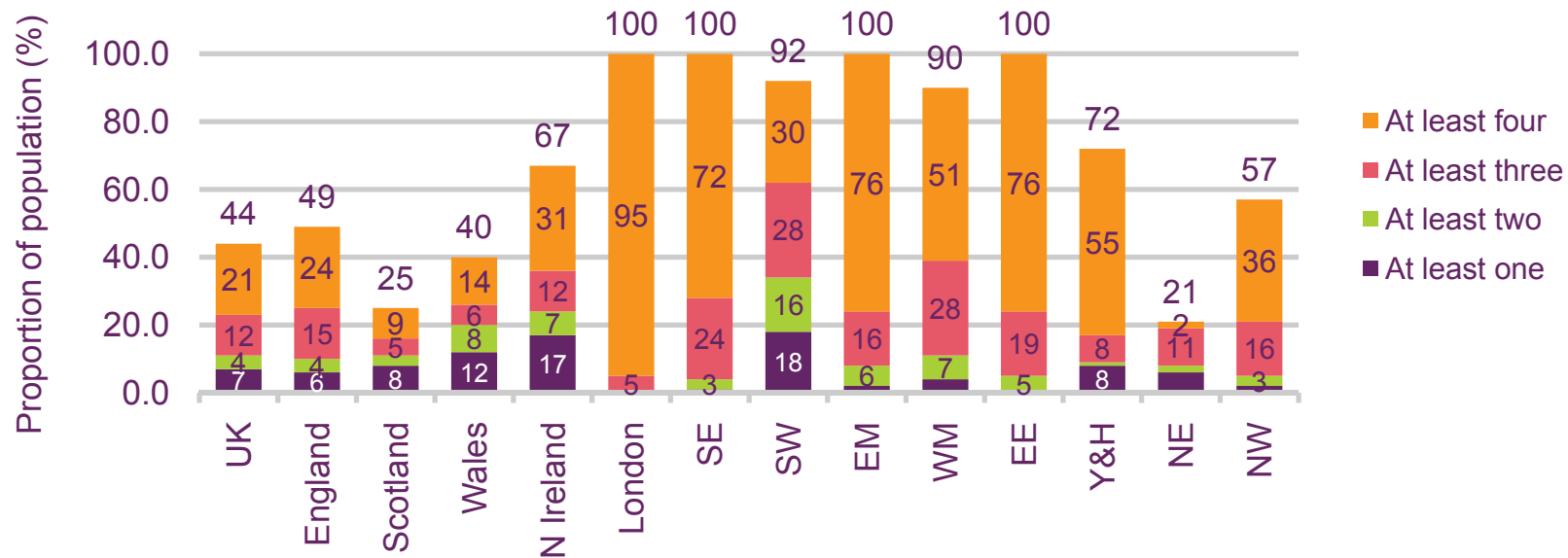
2G mobile phone geographic coverage by postcode (90%) – by number of operators



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

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 2G area coverage; data not directly comparable to that published in the 2010 report.

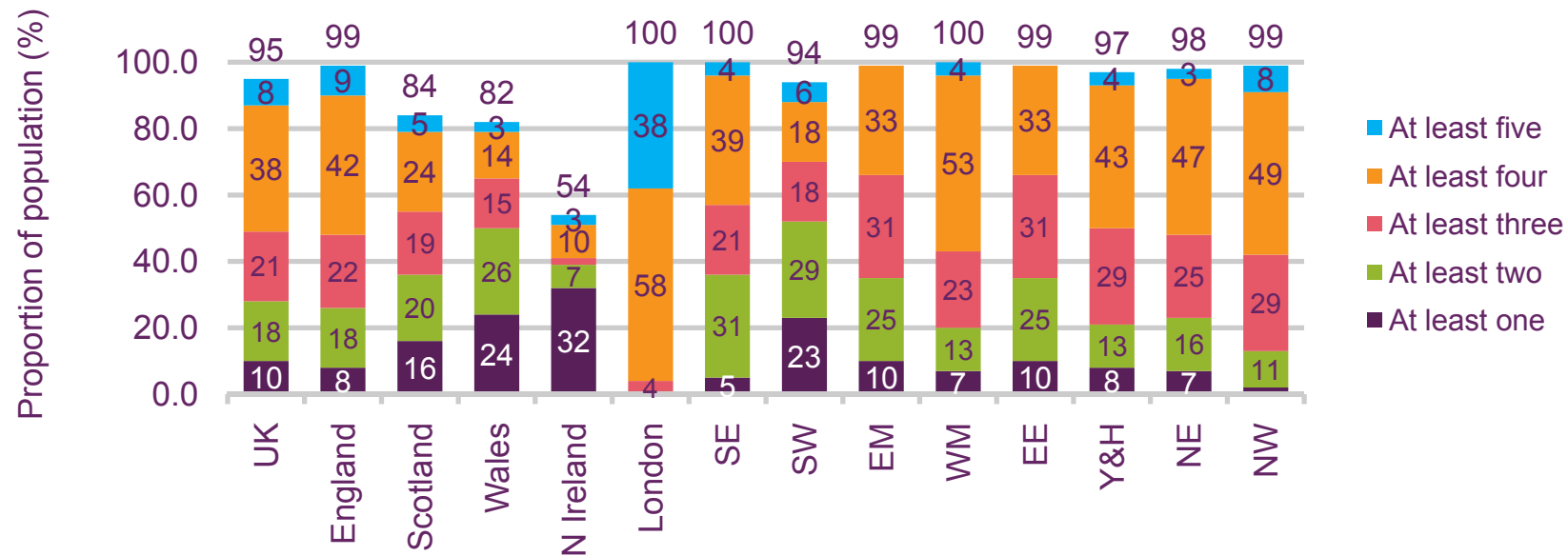
2G mobile phone geographic coverage by land mass (90%) – by number of operators



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

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

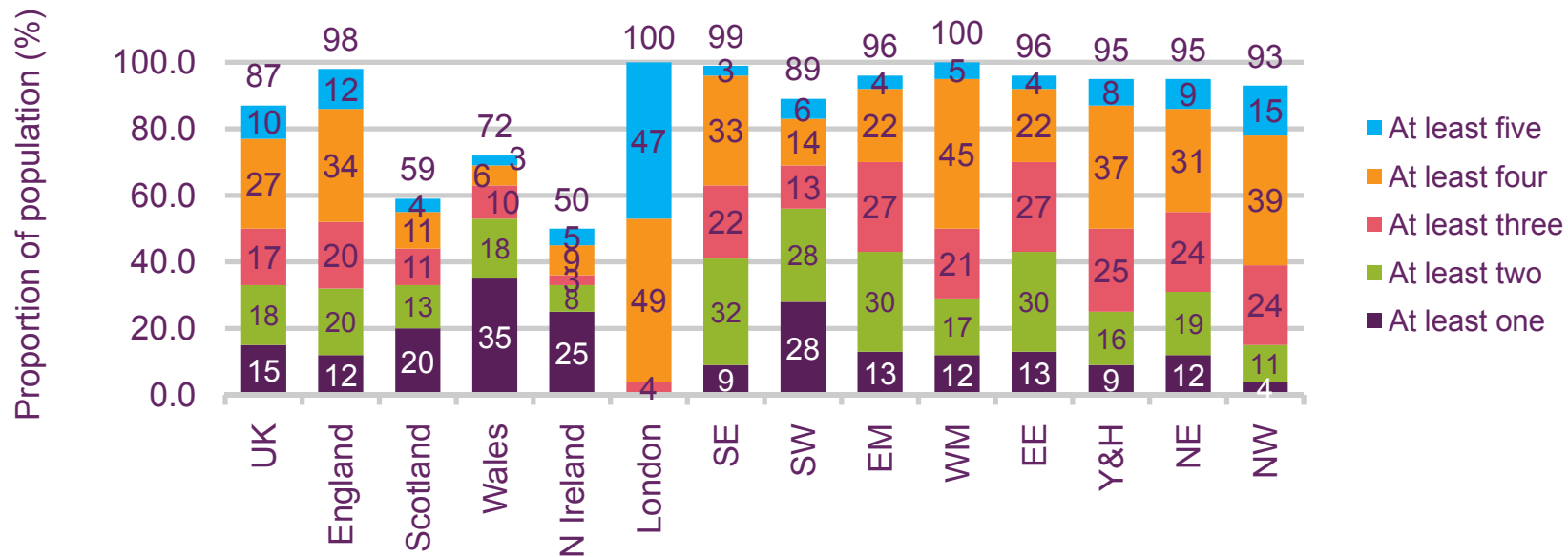
3G mobile phone population coverage (90%) – by number of operators



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

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 3G area coverage; data not directly comparable to that published in the 2010 report.

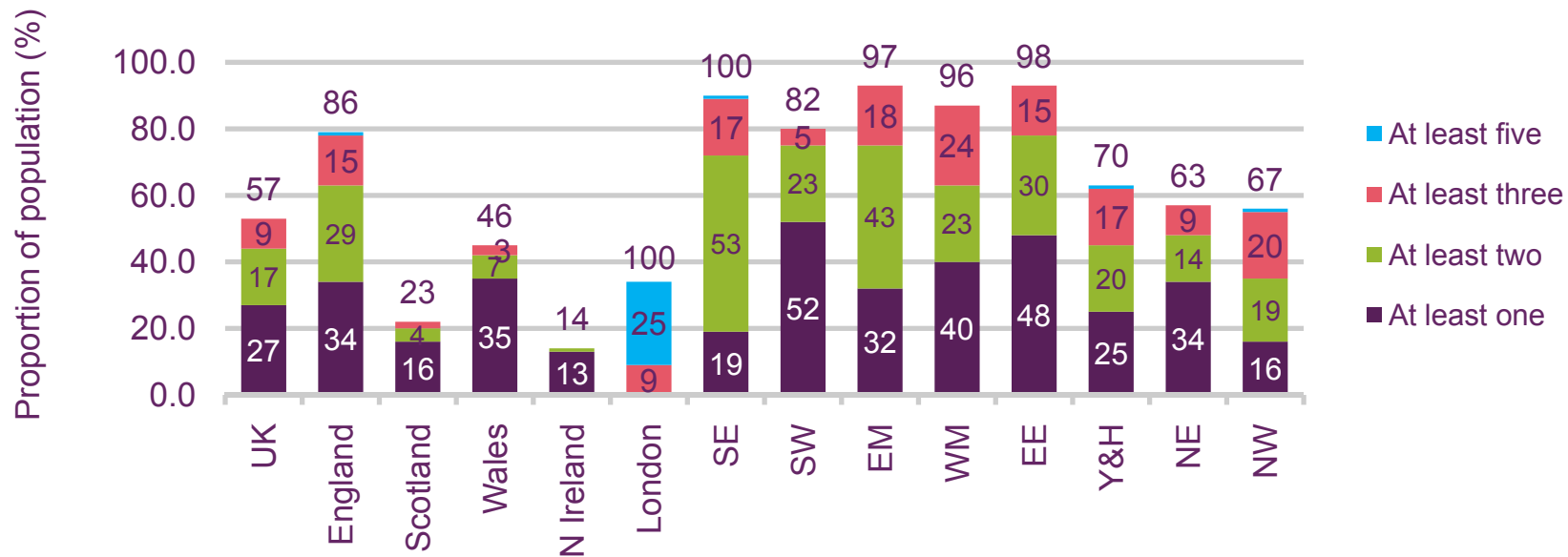
3G mobile phone geographic coverage by postcode (90%) – by number of operators



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

Note: Figures show the percentage of population within postcode districts where at least one operator had at least 90% 3G area coverage; data not directly comparable to that published in the 2010 report.

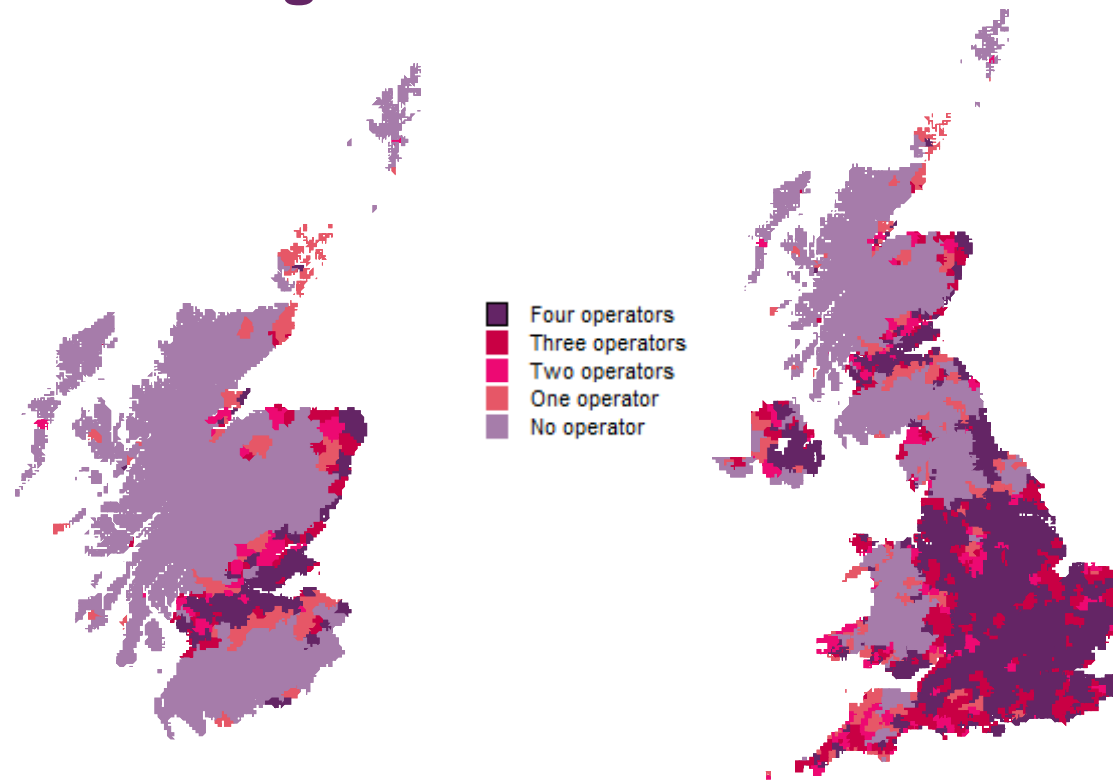
3G mobile phone geographic coverage by land mass (90%) – by number of operators



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

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

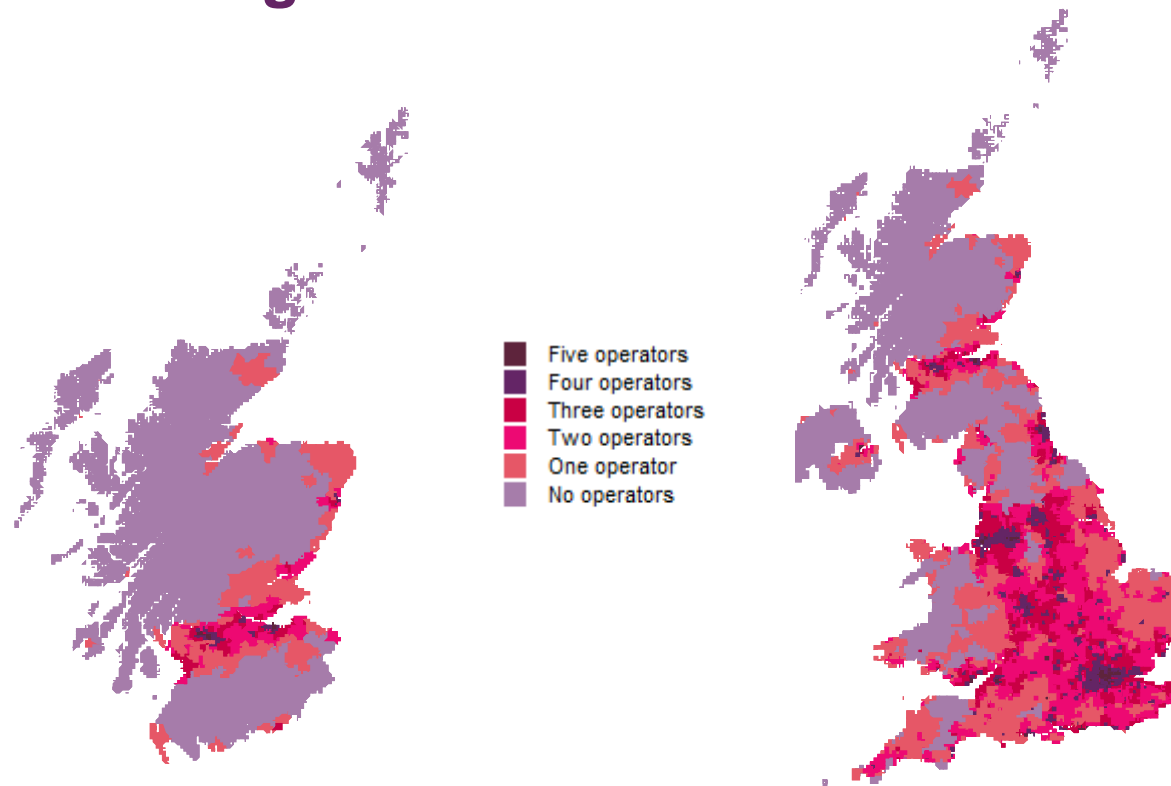
2G mobile coverage in Scotland and the UK



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

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

3G mobile coverage in Scotland and the UK



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

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

Take-up of communications services, 2011

	UK	Scotland	England	Wales	N Ireland	Scot urban	Scot rural
Individual							
Voice telephony Fixed Line	85%	80%	85%	80%	84%	78%	86%
Mobile	91%	86%	92%	87%	92%	85%	88%
Mobile-only home	15%	17%	14%	19%	15%	18%	14%
Internet PC	77%	65%	78%	74%	78%	63%	70%
Total Internet	76%	64%	78%	72%	76%	63%	70%
Broadband (fixed and mobile)	74%	61%	76%	71%	75%	60%	68%
Fixed Broadband	67%	57%	68%	65%	67%	56%	62%
Mobile Broadband	17%	9%	18%	16%	13%	8%	13%

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

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural)

Fixed line take-up

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



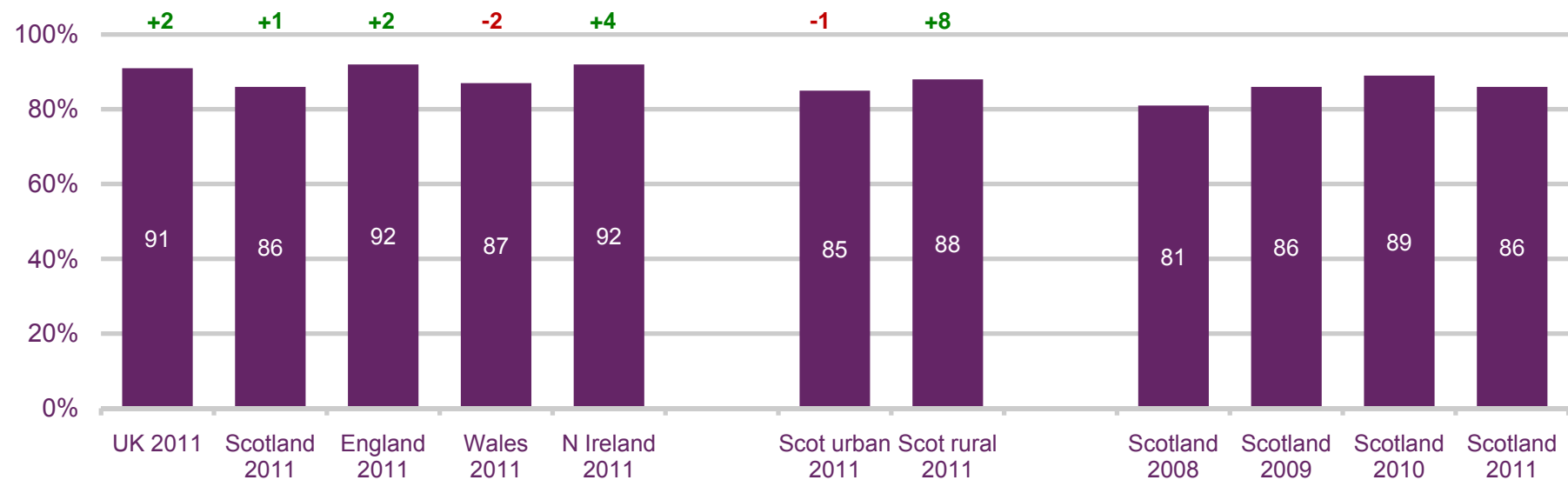
QC1. Is there a landline phone in your home that can be used to make and receive calls?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Mobile take-up

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



QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Cross-ownership of household telephony services

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



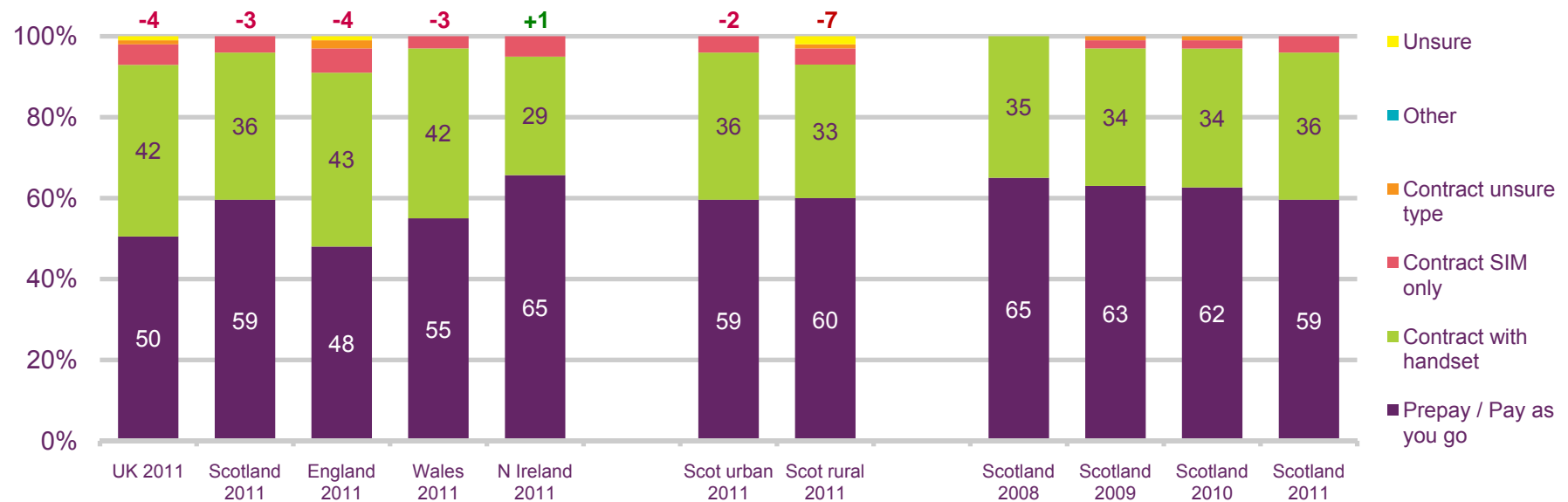
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Type of mobile subscription

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

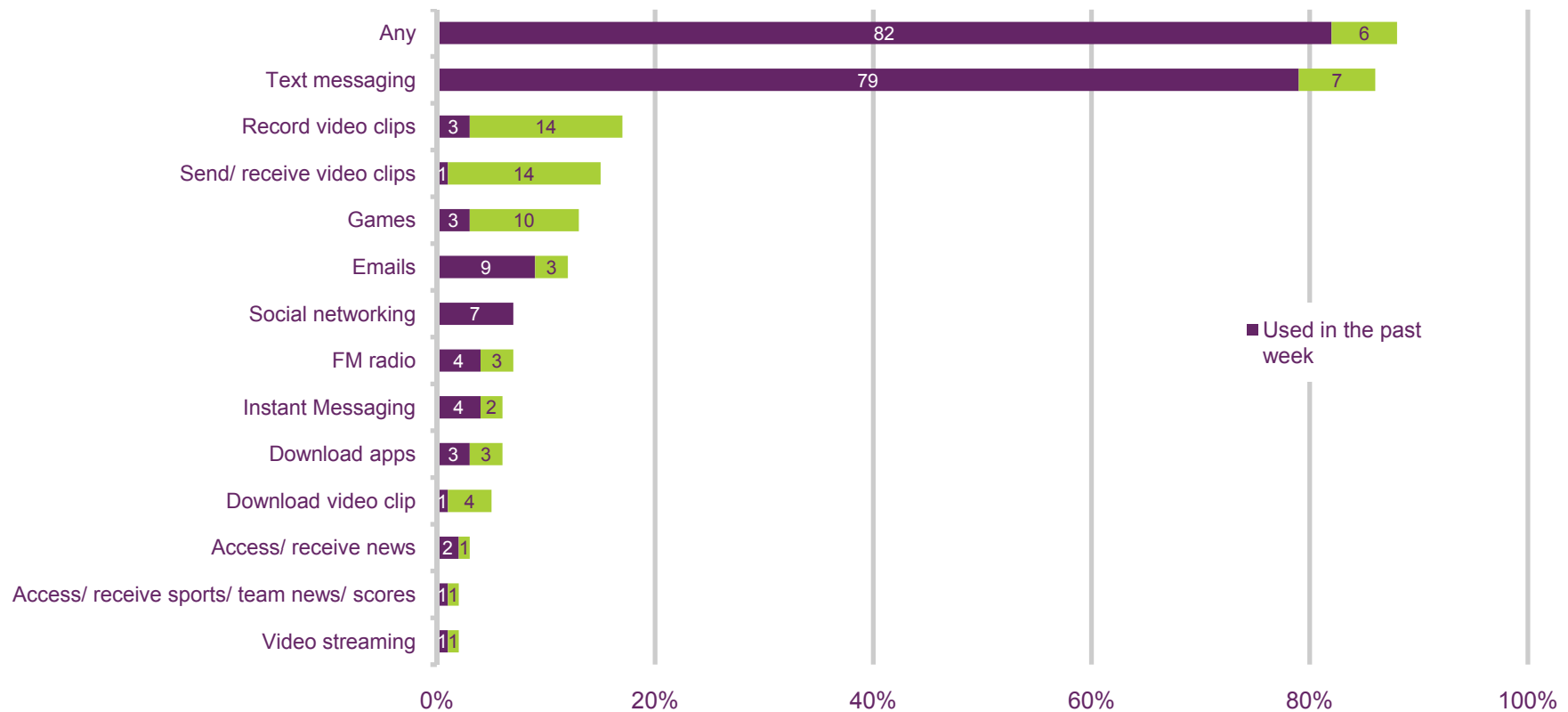


QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 425 Scotland, 1786 England, 416 Wales, 464 Northern Ireland, 205 Scotland urban, 220 Scotland rural, 744 Scotland 2008, 877 Scotland 2009, 1237 Scotland 2010, 425 Scotland 2011)

Use of mobile applications

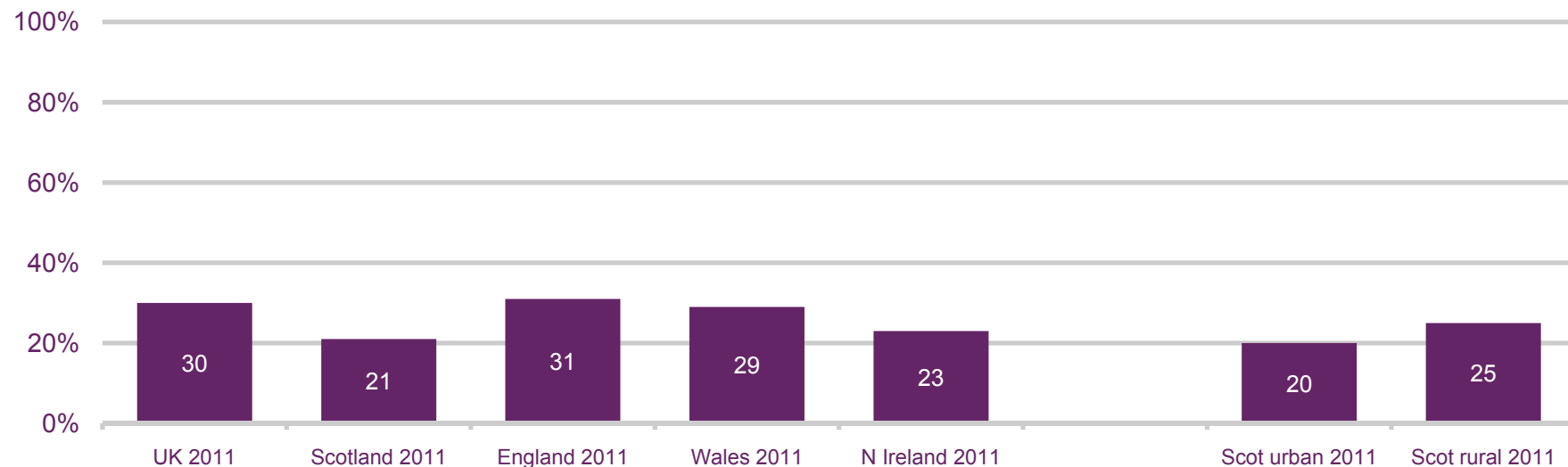


QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n= 425 Scotland 2011)

Take-up of smartphones



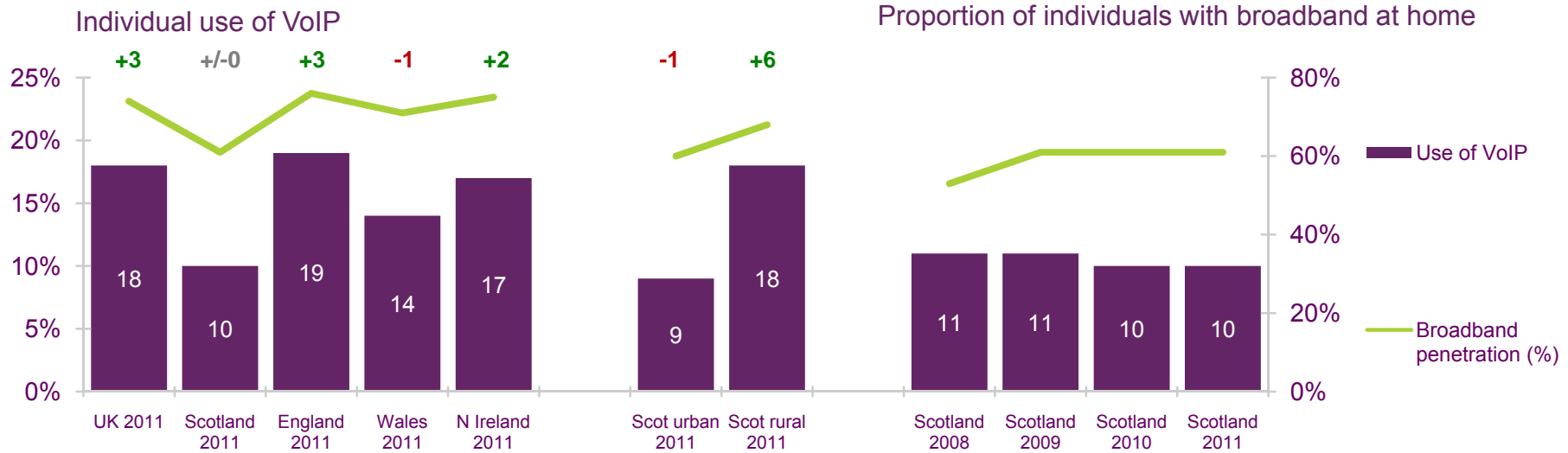
QD24B. Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the HTC Desire.

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 425 Scotland, 1786 England, 416 Wales, 464 Northern Ireland, 205 Scotland urban, 220 Scotland rural)

Individual use of Voice over IP

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

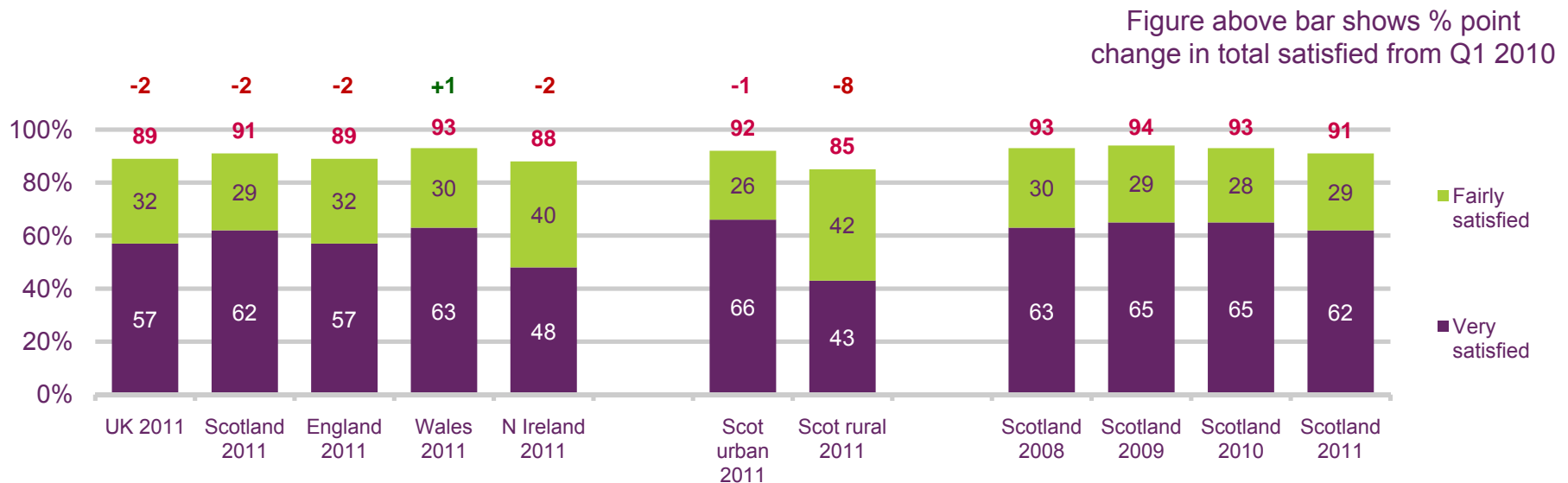


QE29. Before now, were you aware that you could make voice calls using the internet?/ QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Overall satisfaction with fixed line services



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

Source: Ofcom research, Quarter 1 2011

B Base: Adults aged 16+ with a landline phone at home (n = 2943 UK, 400 Scotland, 1707 England, 402 Wales, 434 Northern Ireland, 187 Scotland urban, 213 Scotland rural, 793 Scotland 2008, 804 Scotland 2009, 1411 Scotland 2010, 400 Scotland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed line service

Overall satisfaction with mobile phone service



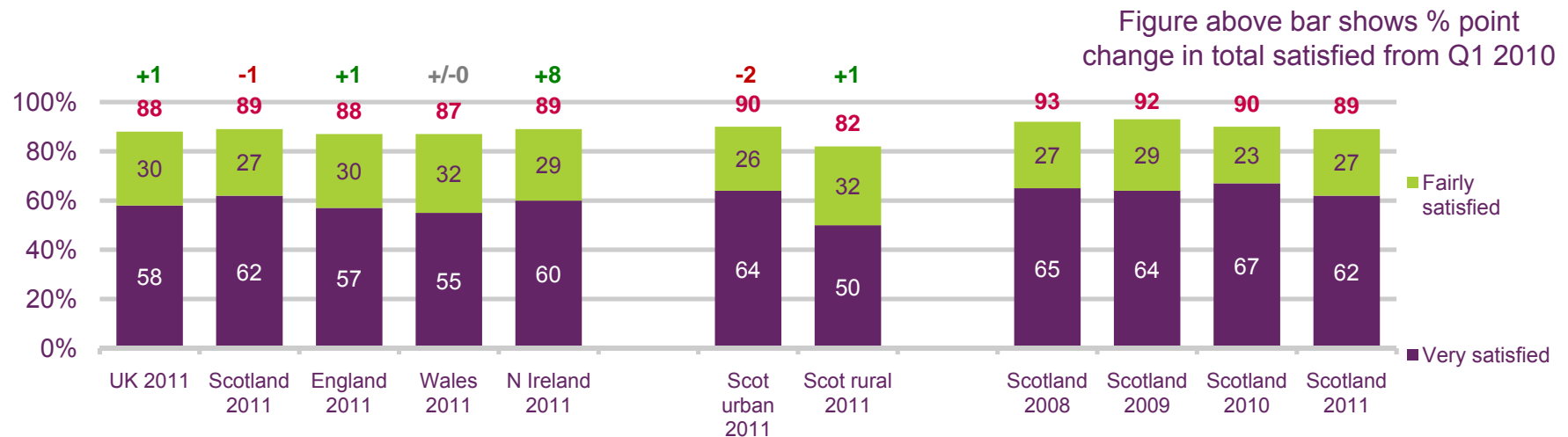
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 425 Scotland, 1786 England, 416 Wales, 464 Northern Ireland, 205 Scotland urban, 220 Scotland rural, 736 Scotland 2008, 837 Scotland 2009, 1237 Scotland 2010, 425 Scotland 2011)

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

Satisfaction with reception of mobile service



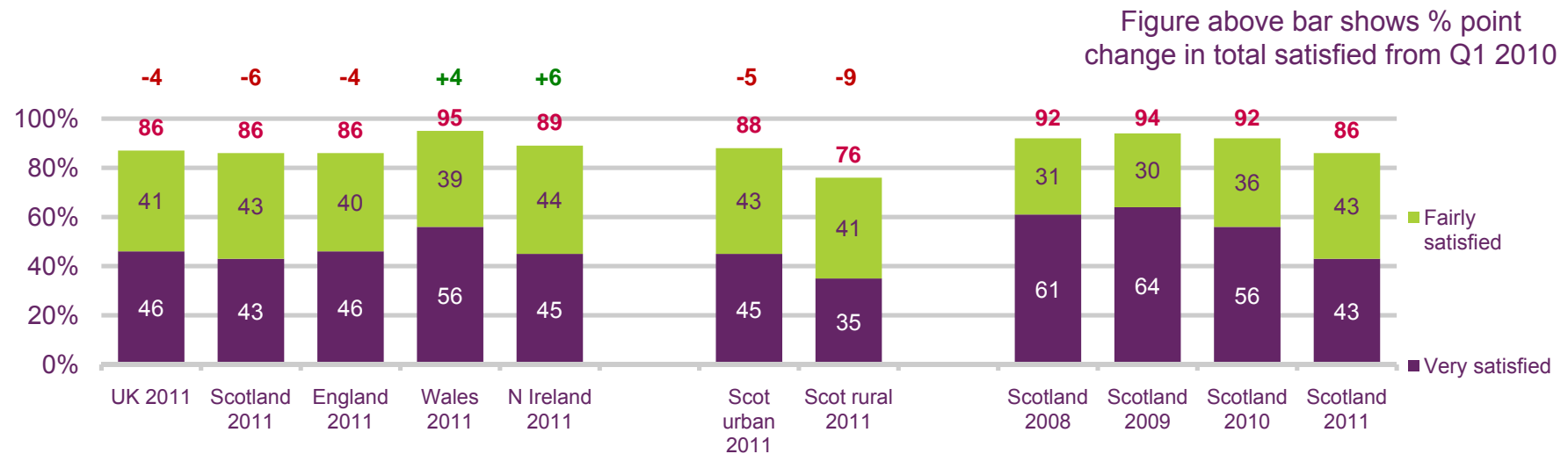
QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who personally use a mobile phone (n = 3091 UK, 425 Scotland, 1786 England, 416 Wales, 464 Northern Ireland, 205 Scotland urban, 220 Scotland rural, 736 Scotland 2008, 837 Scotland 2009, 1237 Scotland 2010, 425 Scotland 2011)

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

Overall satisfaction with fixed broadband service



QE8a. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

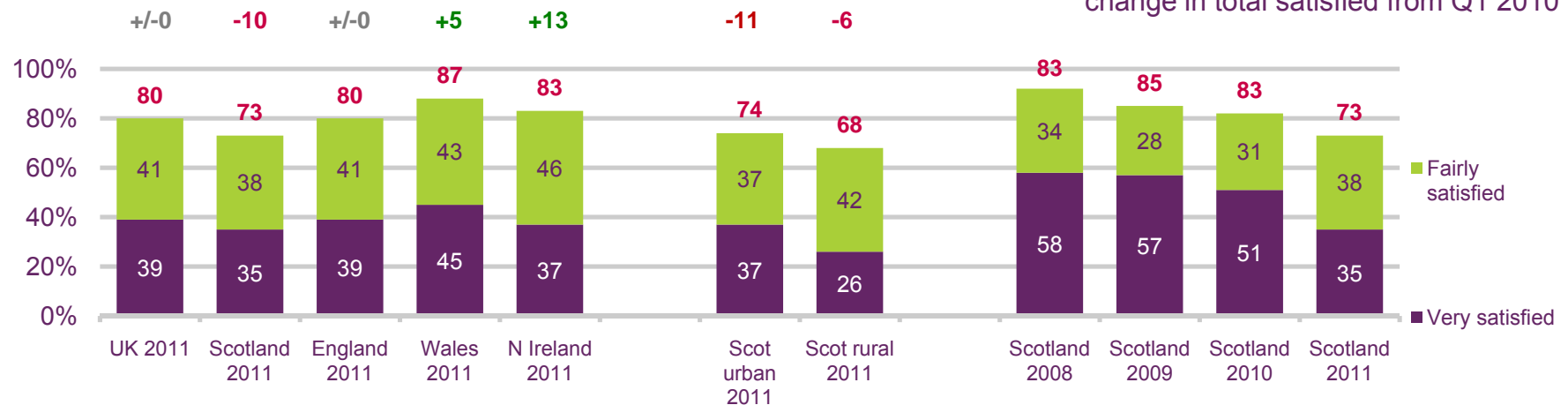
Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2243 UK, 294 Scotland, 1311 England, 303 Wales, 335 Northern Ireland, 137 Scotland urban, 157 Scotland rural, 489 Scotland 2008, 528 Scotland 2009, 778 Scotland 2010, 294 Scotland 2011)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed broadband service

Satisfaction with speed of fixed broadband connection

Figure above bar shows % point change in total satisfied from Q1 2010



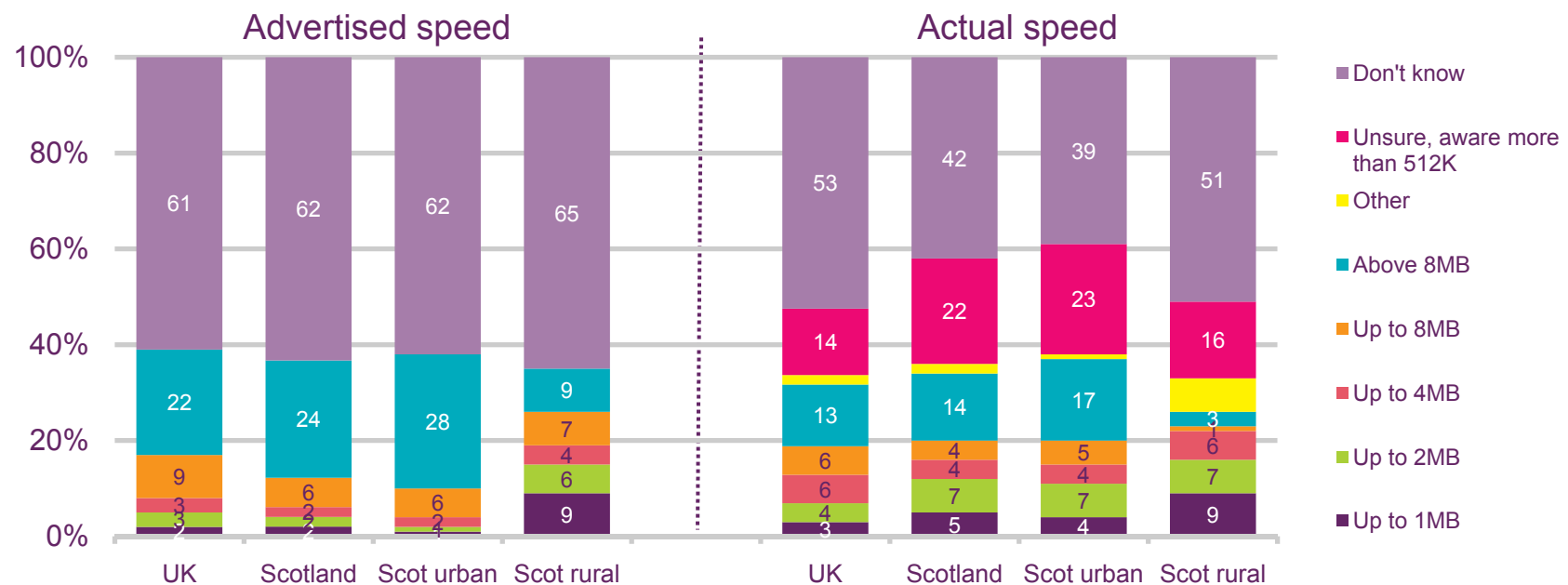
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2243 UK, 294 Scotland, 1311 England, 303 Wales, 335 Northern Ireland, 137 Scotland urban, 157 Scotland rural, 489 Scotland 2008, 528 Scotland 2009, 778 Scotland 2010, 294 Scotland 2011)

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

Awareness of advertised and actual broadband speeds in Scotland



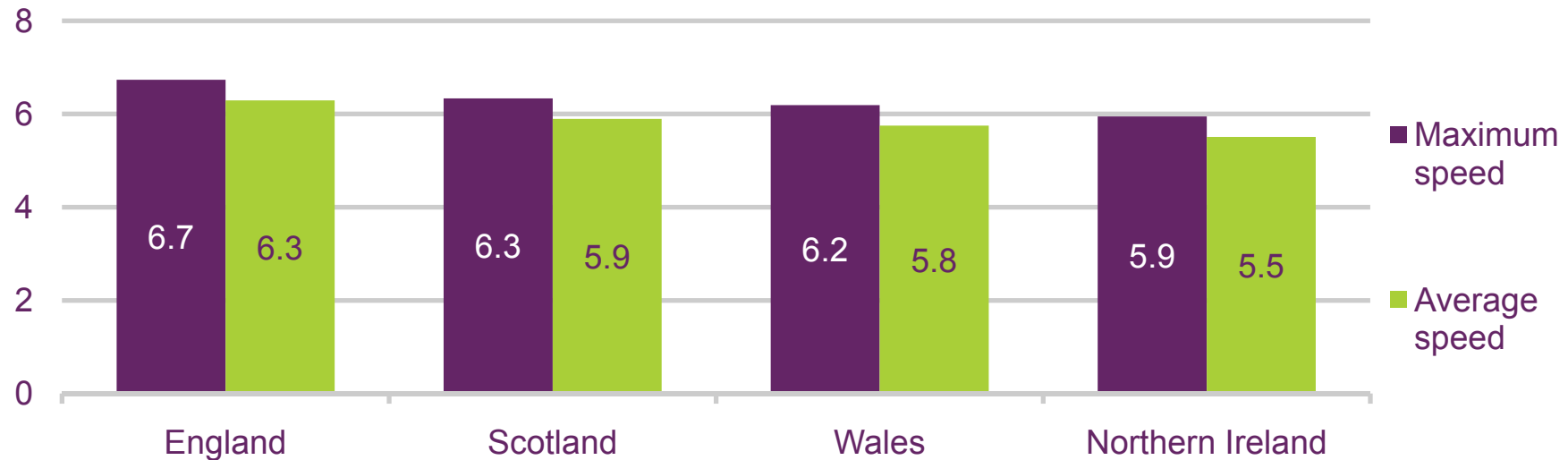
QE17. What was the advertised speed of your main home internet connection when you took up your service?/ QE16. What is the actual speed of your main home internet connection?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with broadband as their main connection at home (n = 2481 UK, 317 Scotland, 145 Scotland urban, 172 Scotland rural)

Estimated average and maximum download speeds by UK nation, November/December 2010

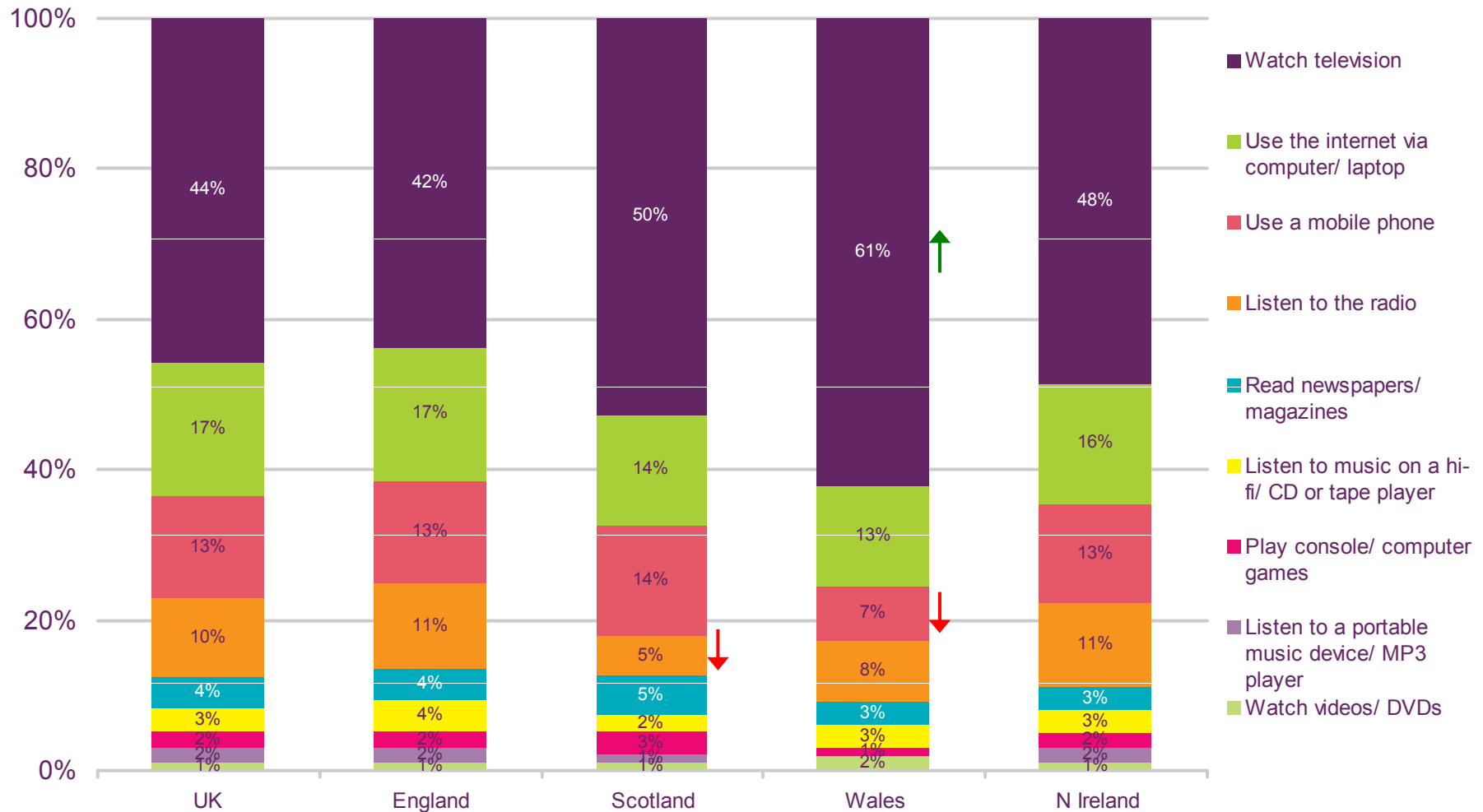
Speed (Mbit/s)



Source: SamKnows measurement data for all panel members with a connection in November/December 2010, Panel Base: 999

Notes: (1) Data have been weighted by ISP package and LLU/non-LLU connections, Rural/Urban, Geographic Market classification and distance from exchange to ensure that they are representative of UK residential broadband consumers as a whole; (2) As sufficient sample sizes were not available for consumers on packages of 'up to' 2Mbit/s or less, data collected for these packages in April 2009 has been factored in, in proportion to share of all connections in November/December 2010 and an estimated split between nations; (3) Data collected from multi-thread download speed tests

Figure 2: Most-missed media activity

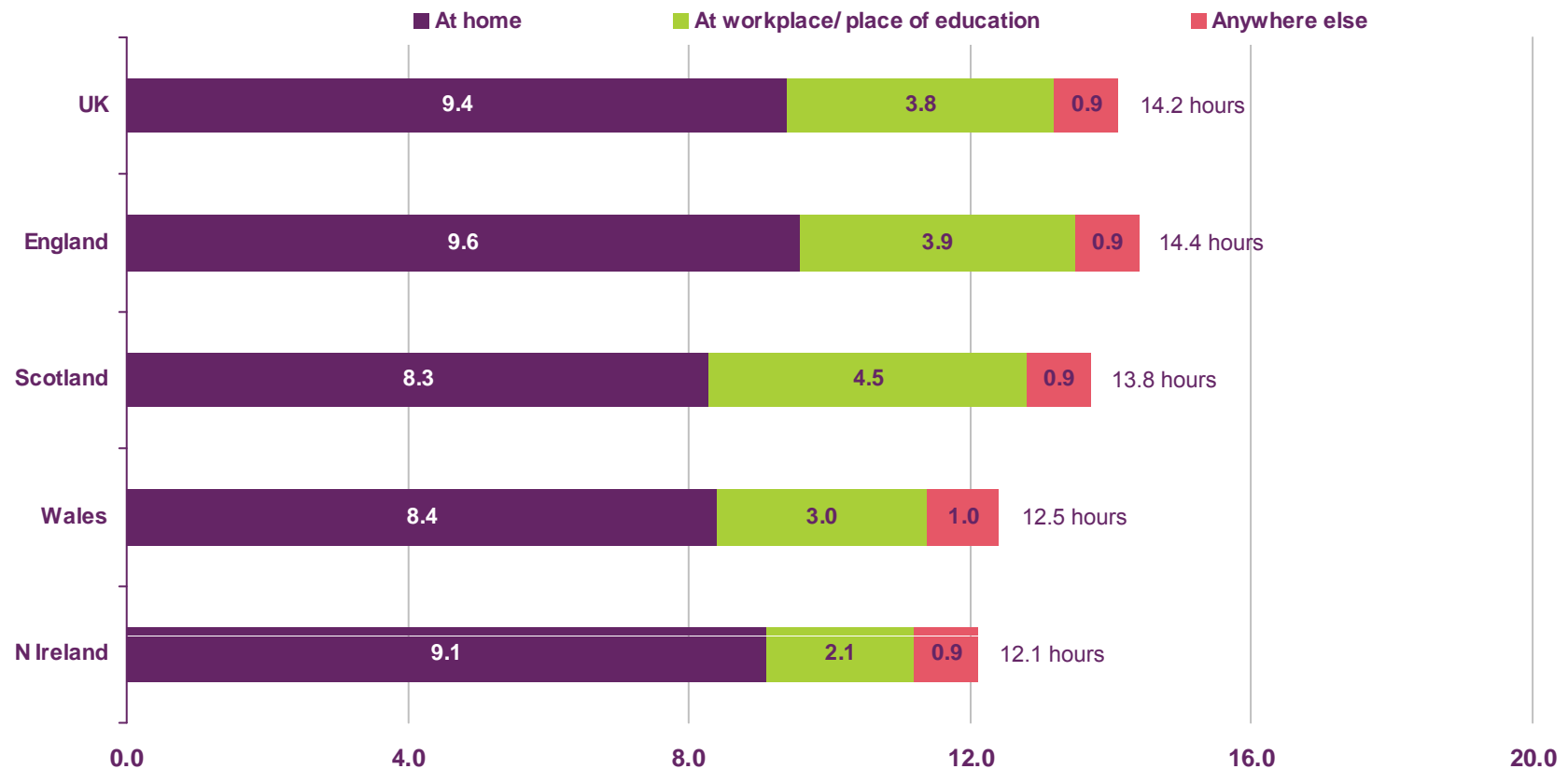


A2 – Which one of these would you miss doing the most? (Prompted responses, single coded)

Base: All adults aged 16+ (2117 UK, 1382 England, 256 Scotland, 240 Wales, 239 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

Claimed volume of internet use per week



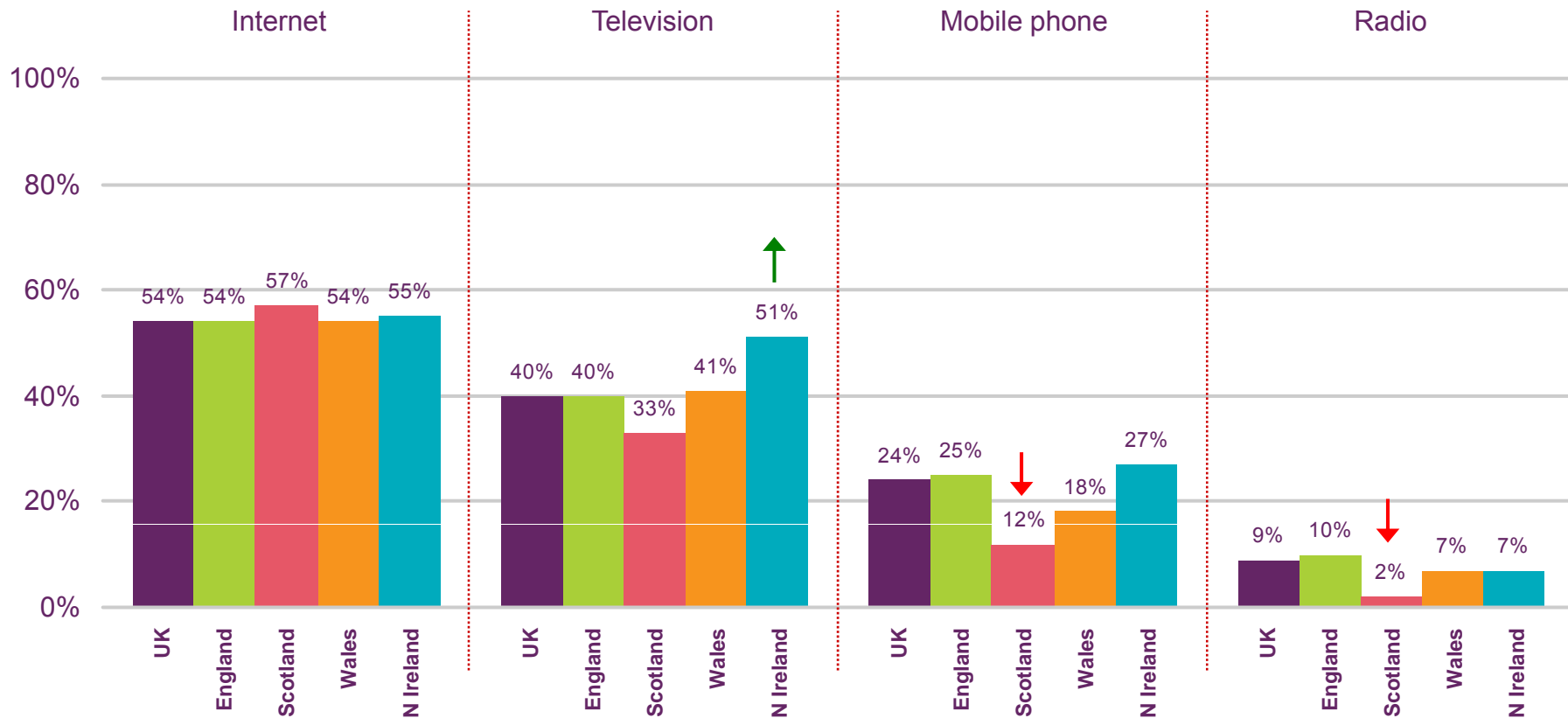
IN7A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1489 UK, 1004 England, 162 Scotland, 156 Wales, 167 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

Concerns about key media platforms



IN30/ T7/ M4/ R6 – Can you tell me if you have any concerns about what is on the internet/ TV/ mobile phones/ radio? (unprompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1489 UK, 1004 England, 162 Scotland, 156 Wales, 167 Northern Ireland), with any TVs at home (2075 UK, 1357 England, 245 Scotland, 236 Wales, 237 Northern Ireland), who use a mobile phone (1885 UK, 1245 England, 219 Scotland, 208 Wales, 213 Northern Ireland), who listen to radio at home (1605 UK, 1050 England, 178 Scotland, 201 Wales, 176 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010