

CMR Wales chart pack 2011

The market in context

Fast facts

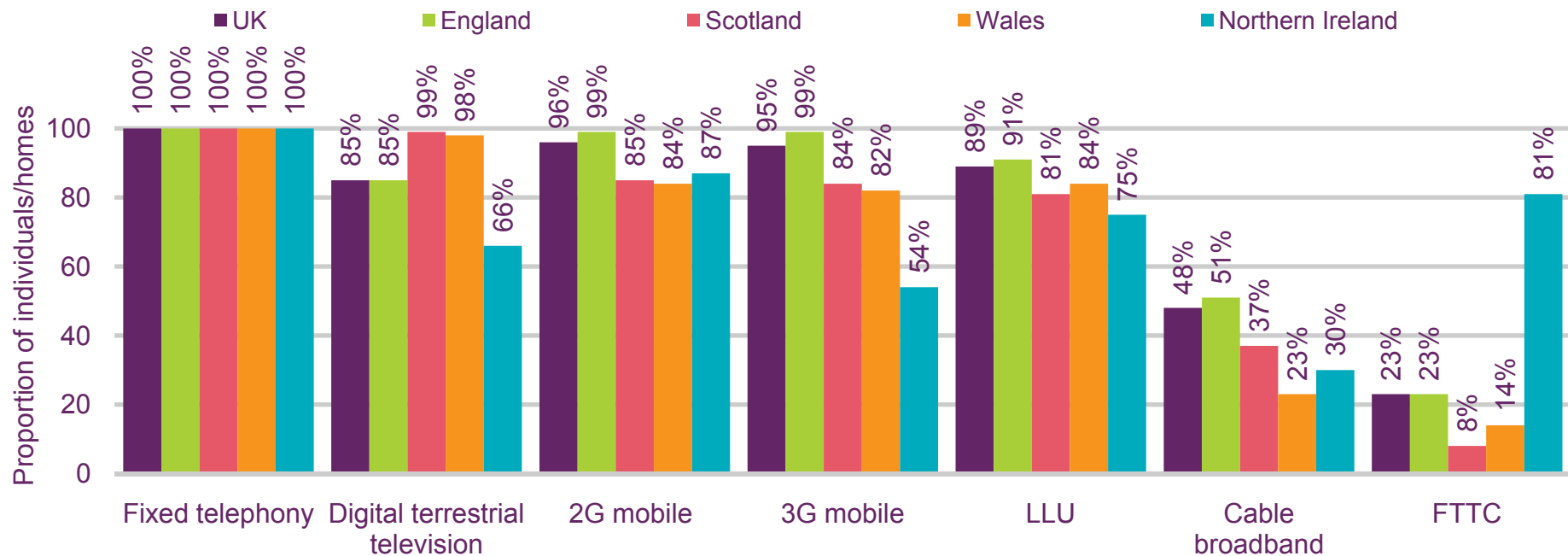
	UK	England	Scotland	Wales	Northern Ireland	Wales urban	Wales rural	UK urban	UK Rural
Digital TV take-up among TV homes	96 ↑+4	96 ↑+4	97 ↑+6	99	90	99	98	96 ↑+4	95 ↑+3
Broadband take-up	74 ↑+3	76	61	71 ↑+7	75	72 ↑+10	67	74 ↑+4	80 ↑+5
Mobile broadband	17 ↑+2	18 ↑+3	9	16	13	18	12	17	14
Mobile phone take-up	91 ↑+2	92 ↑+2	86	87	92	88	85	91 ↑+2	92
Use mobile to access internet	32 ↑+9	34 ↑+9	21 ↑+6	25	29 ↑+8	26	22	34 ↑+8	23
Smartphone take-up amongst mobile phone owners	30 ↑+	31 ↑+	21 ↑+	29 ↑+	23 ↑+	30 ↑+	23 ↑+	30 ↑+	30 ↑+
Fixed landline take-up	85	85	80	80	84	78	85	84	90
Households taking bundles	53	54	49	47	46	49	37	54 ↑+3	47
DAB ownership amongst radio listeners	37	39	31	27	28	26	30	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, 241 Wales urban, 252 Wales 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.

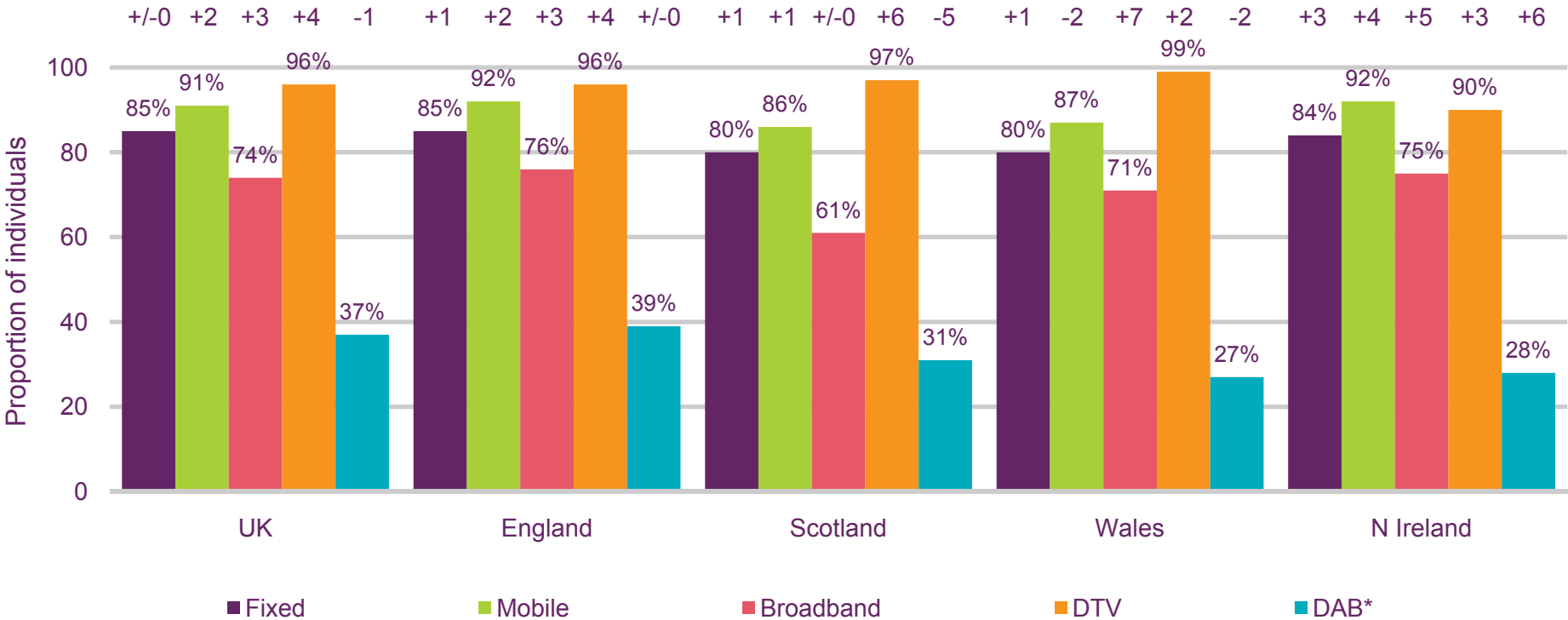
5. Proportion of households connected to an LLU-enabled exchange

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

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

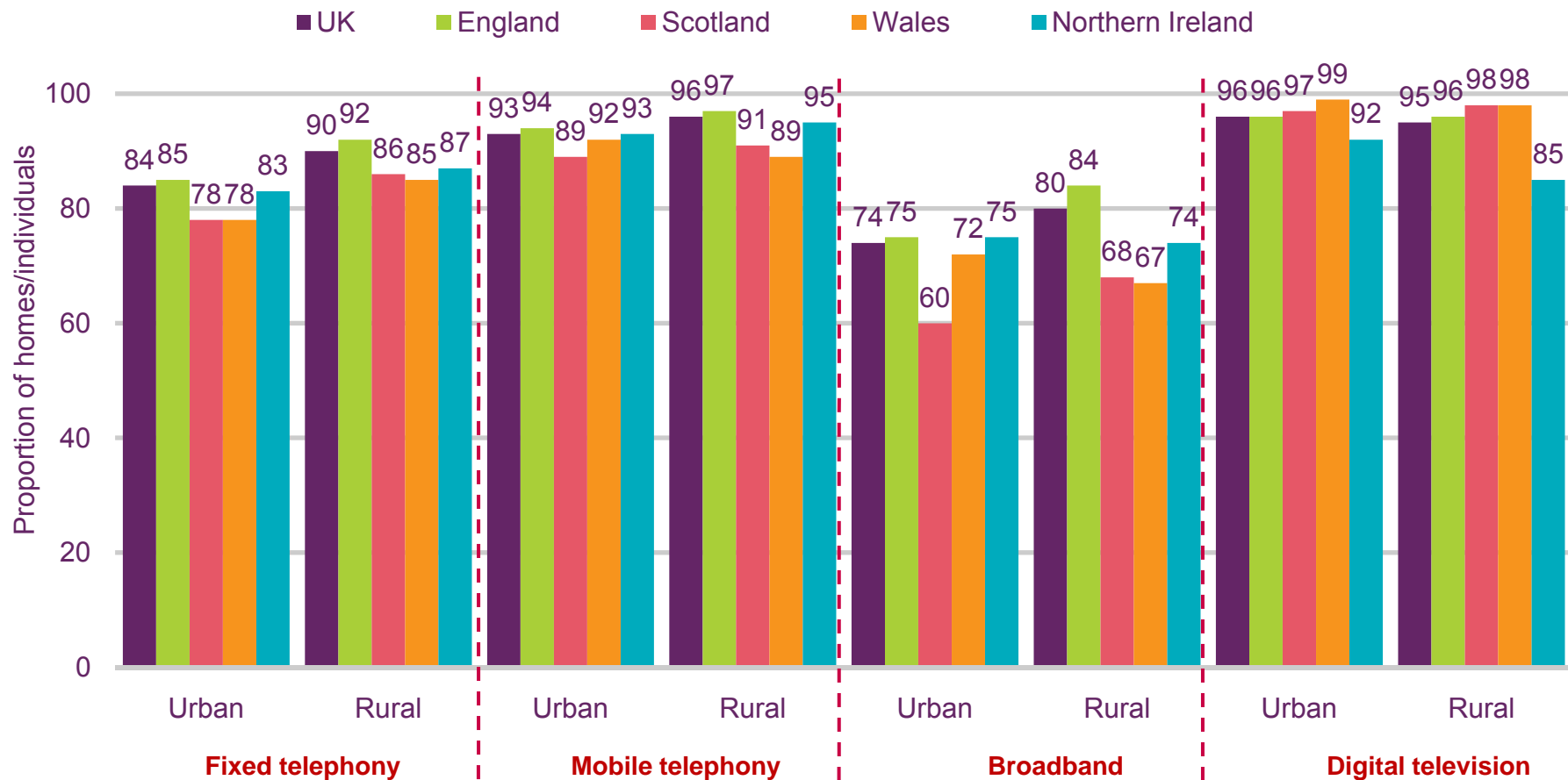
Patterns communications service adoption across the nations, 2011

Figure above bar shows % point change from Q1 2010



Source: Ofcom research, Quarter 1 2011
 Fixed line, broadband, mobile bases: 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 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 question: Do you personally use a mobile phone?

Adoption of communications technology/services in urban and rural locations

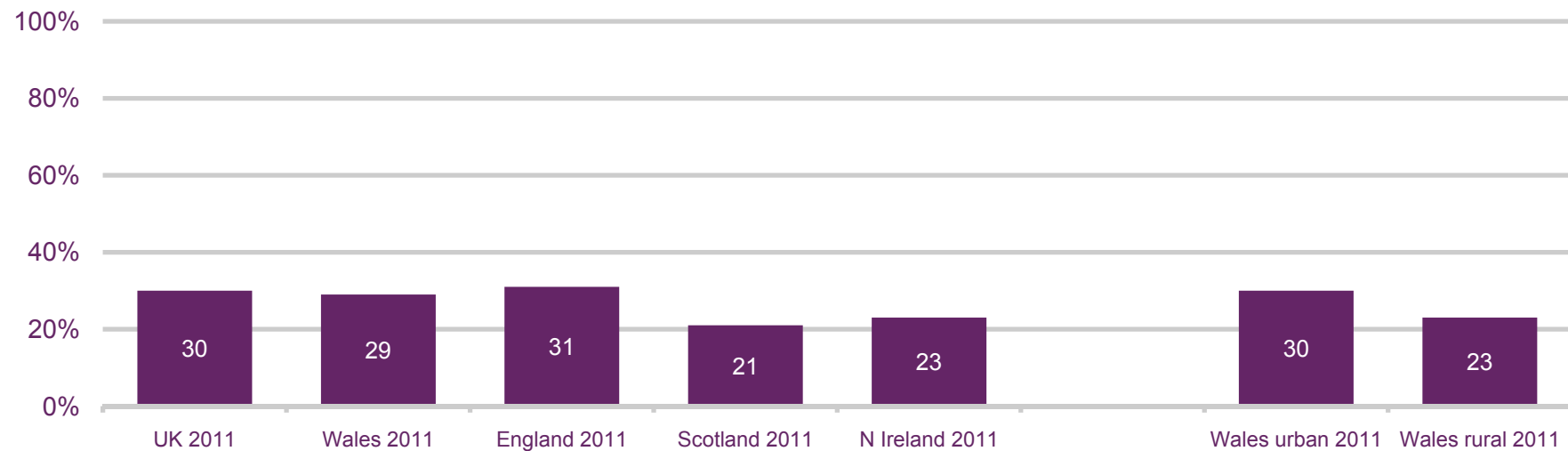


Source: Ofcom research, Quarter 1 2011

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 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, 416 Wales, 1786 England, 425 Scotland, 464 Northern Ireland, 208 Wales urban, 208 Wales rural)

Mobile-only households in the UK

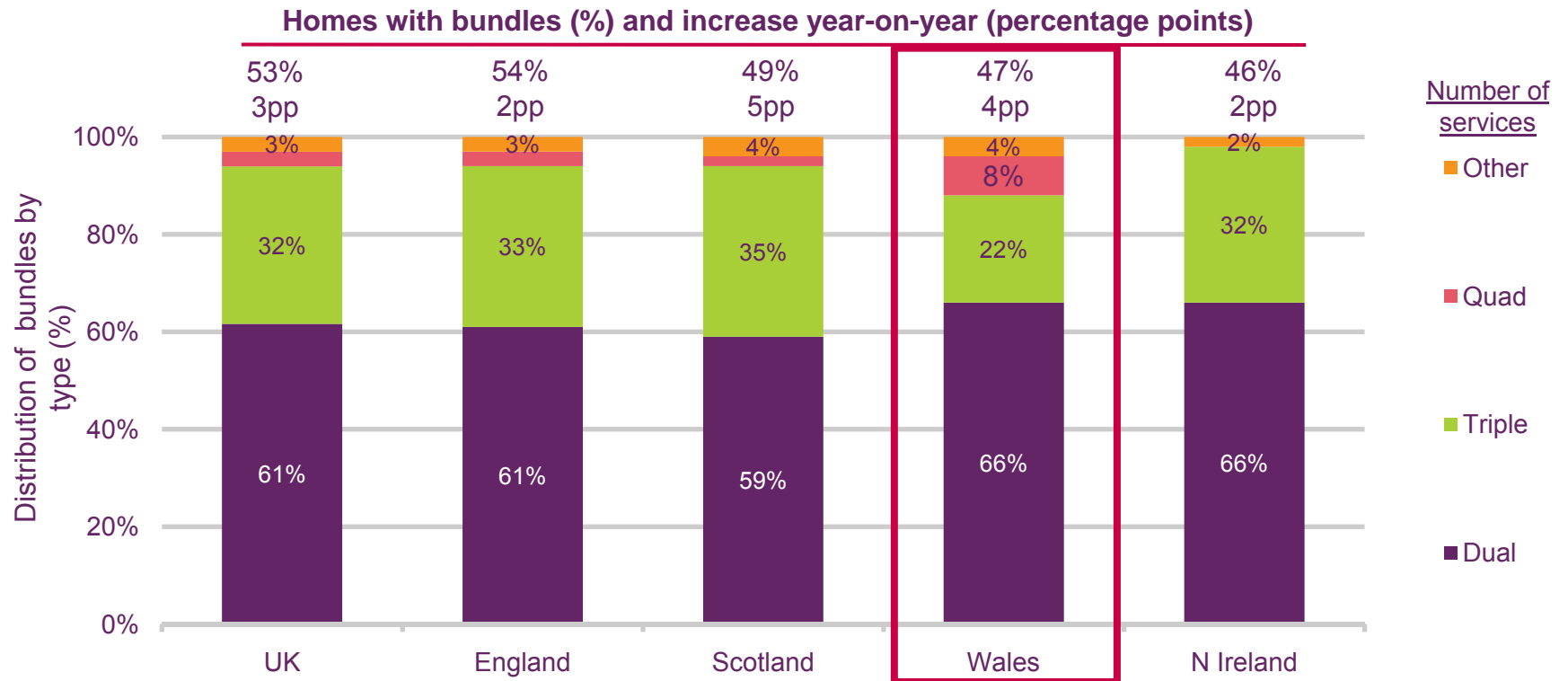


QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2011

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

Take-up of bundles, by nation

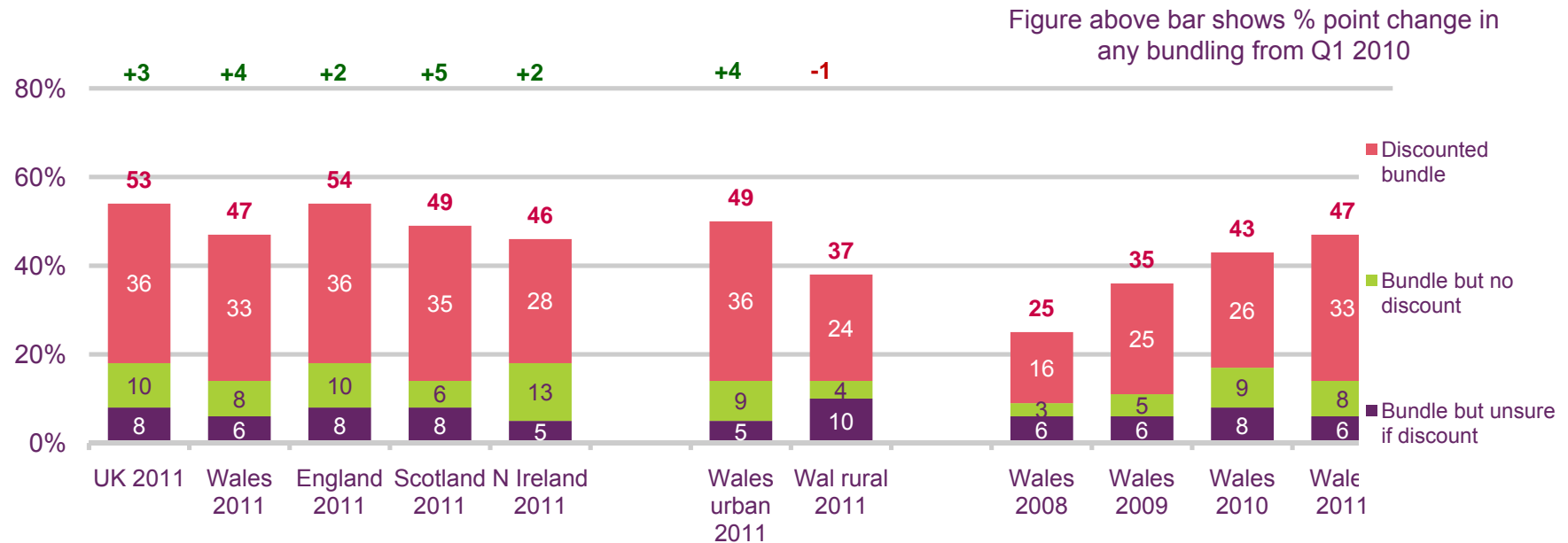


Source: Ofcom research, Q1 2011

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



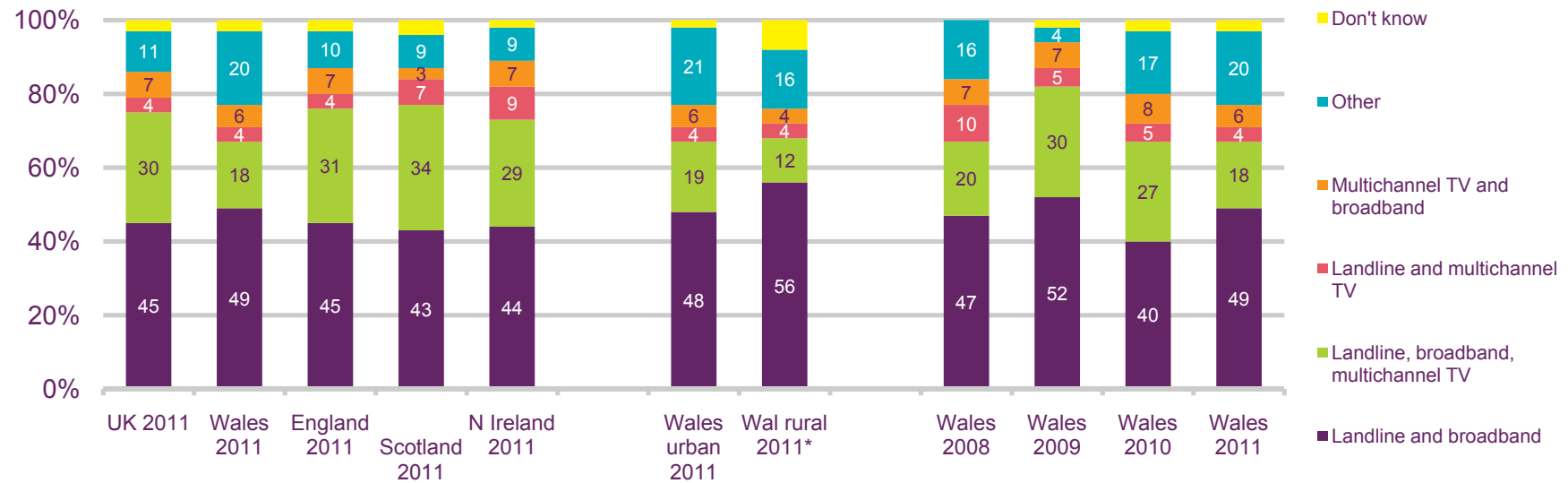
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier? QG3. Do you receive a discount or special deal for subscribing to this package of services?

Source: Ofcom research, Quarter 1 2011

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

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

Trends in purchasing multiple communication services from a single supplier



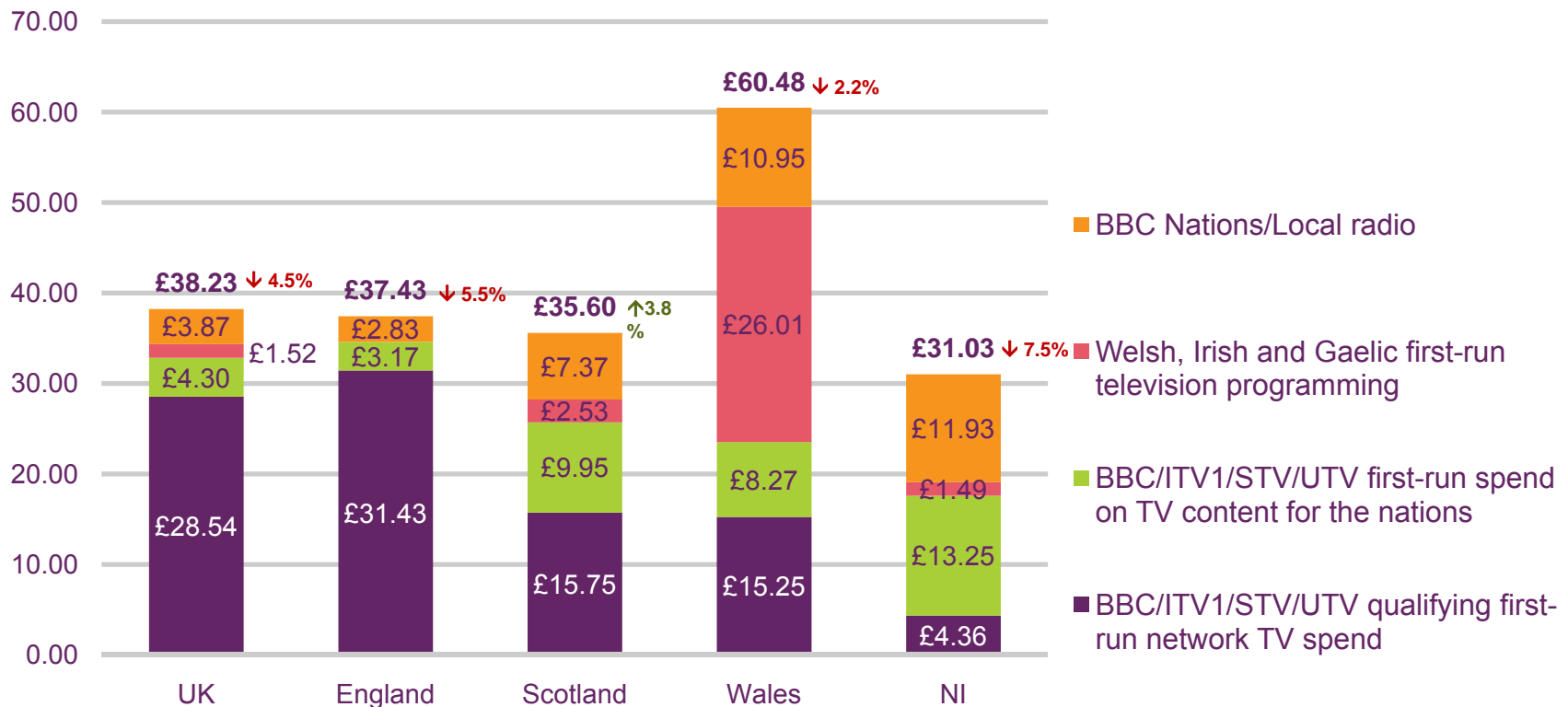
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ QG3. Do you receive a discount or special deal for subscribing to this package of services?

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, 197 Wales, 1035 England, 226 Scotland, 222 Northern Ireland, 110 Wales urban, 87 Wales rural, 247 Wales 2008, 344 Wales 2009, 437 Wales 2010, 197 Wales 2011) *Caution: Low base

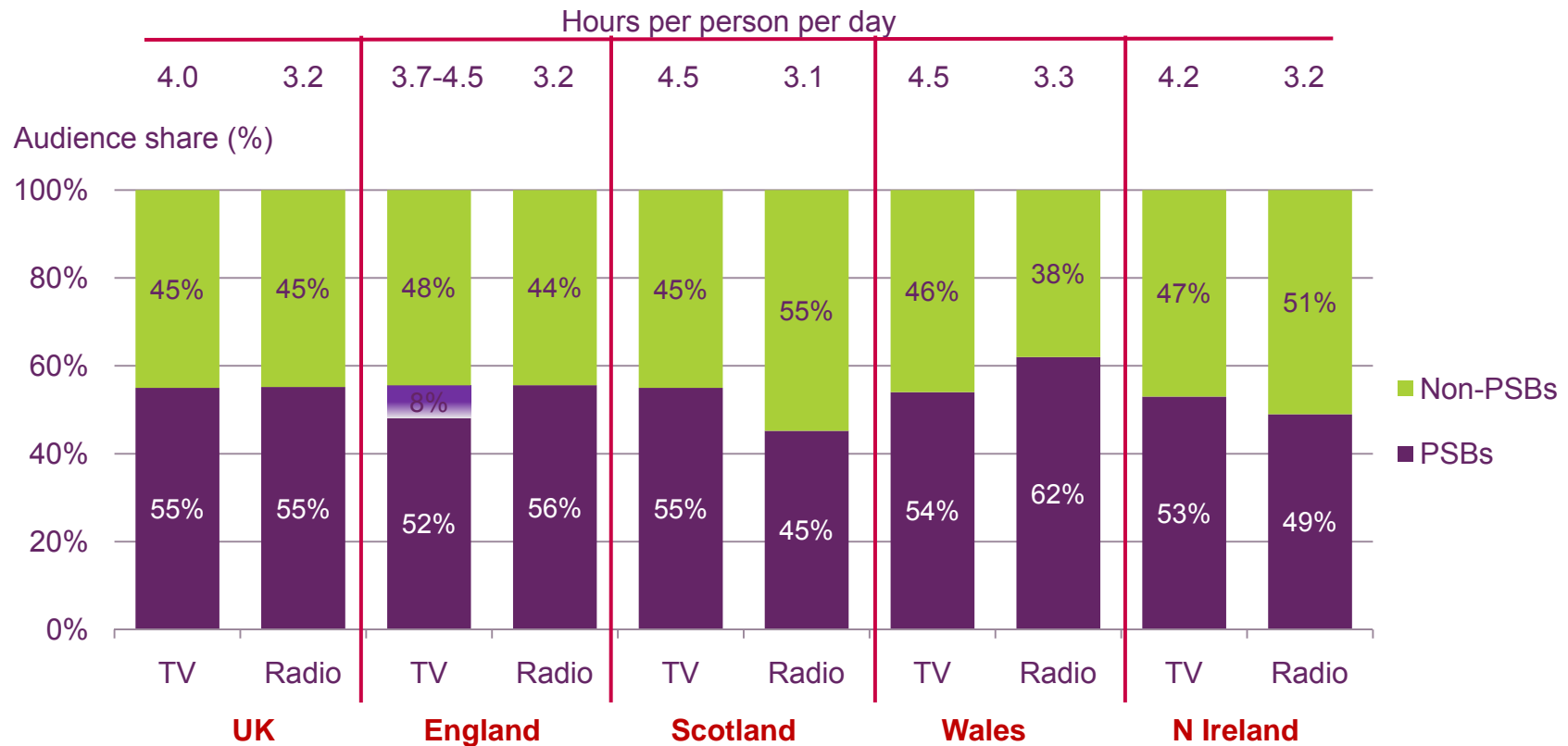
Spend per head on UK-originated content by broadcast by PSBs on TV and radio, 2010

Spend per head (£)



Source: Operators, Annual Reports and Ofcom calculations

Hours of daily TV and radio use by nation, 2010



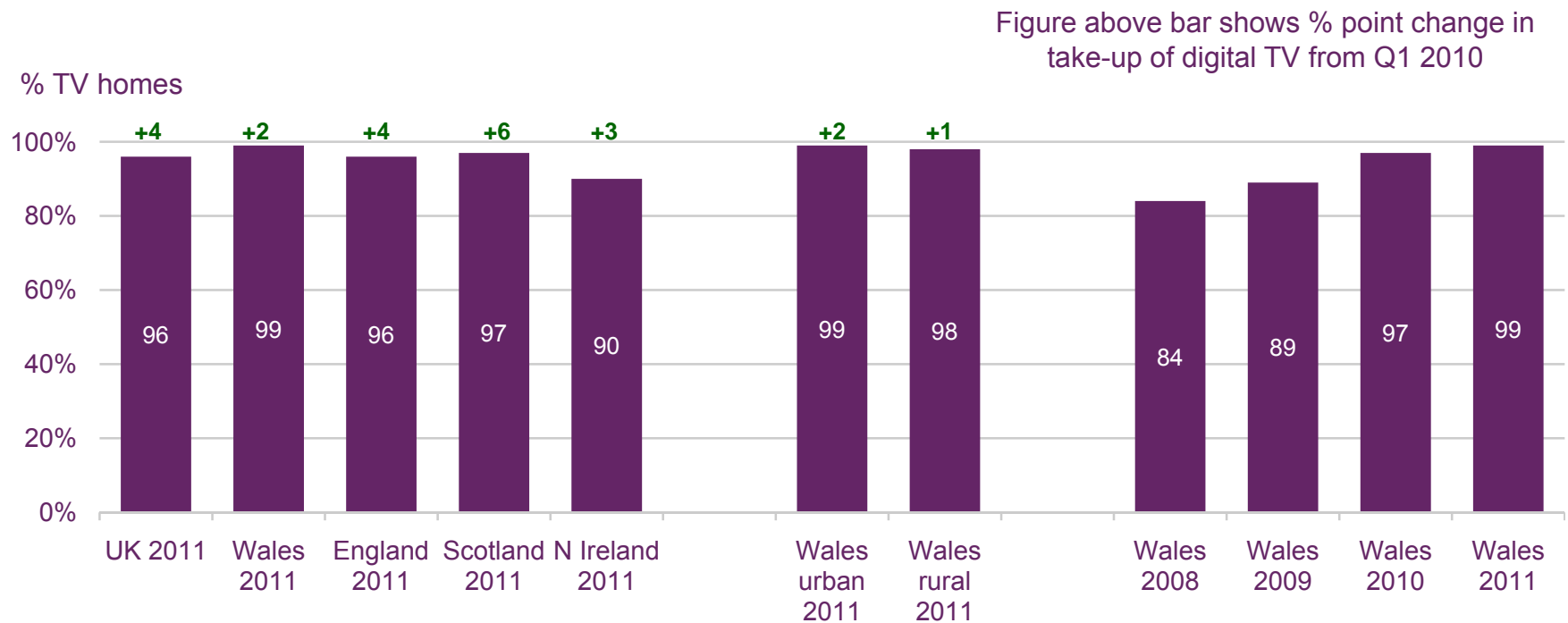
Source: BARB. i) TV: PSBs = BBC One, BBC Two, ITV1, C4+S4C, Five. (ii) Radio : PSBs = all BBC radio stations.

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, so 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 and re-defined regions, however, viewing of C4 in these regions is now included.

Tv and audio-visual

Take-up digital TV



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, 483 Wales, 1941 England, 479 Scotland, 509 Northern Ireland, 234 Wales urban, 239 Wales rural, 797 Wales 2008, 970 Wales 2009, 1060 Wales 2010, 483 Wales 2011)

Main TV set share by platform



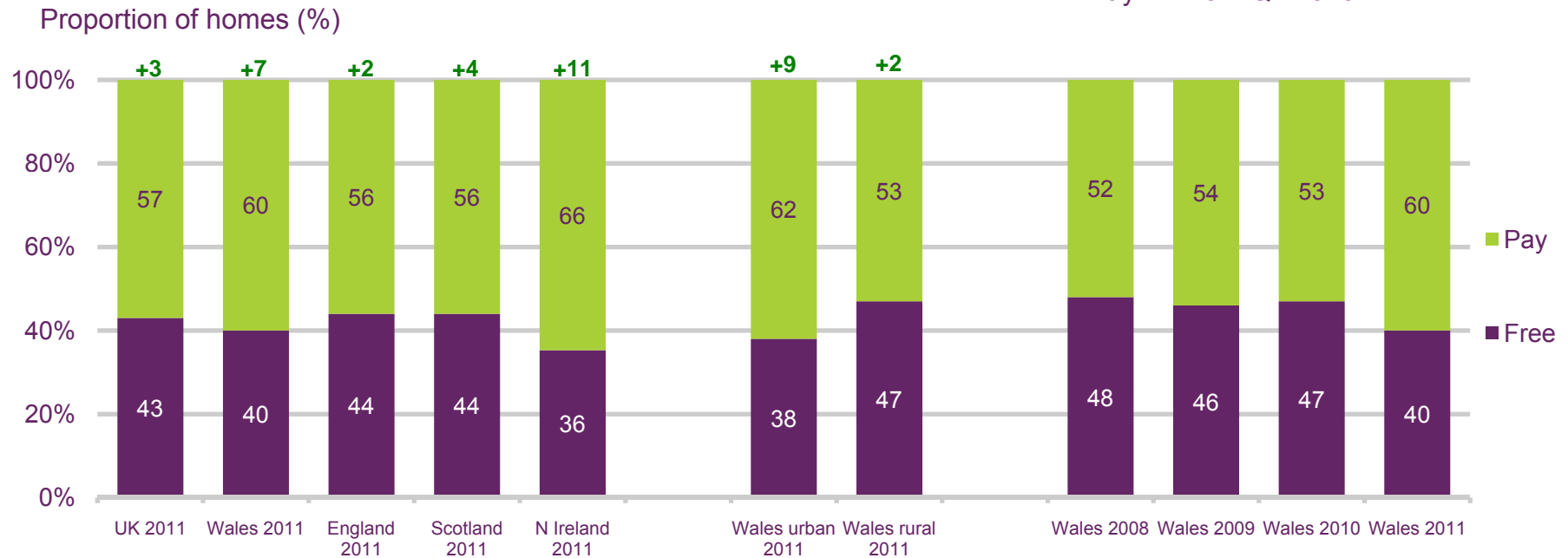
QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

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

Proportion of homes with free and pay television

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

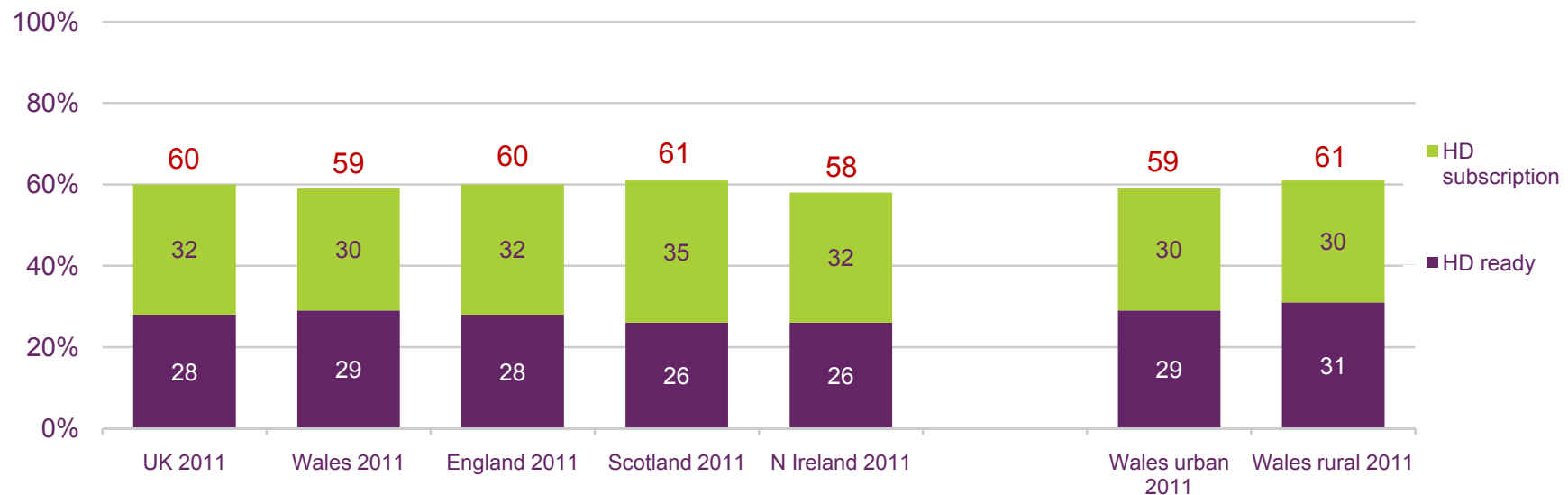


QH1a. Which, if any, of these types of television does your household use at the moment?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 483 Wales, 1941 England, 479 Scotland, 509 Northern Ireland, 234 Wales urban, 239 Wales rural, 797 Wales 2008, 970 Wales 2009, 1060 Wales 2010, 483 Wales 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

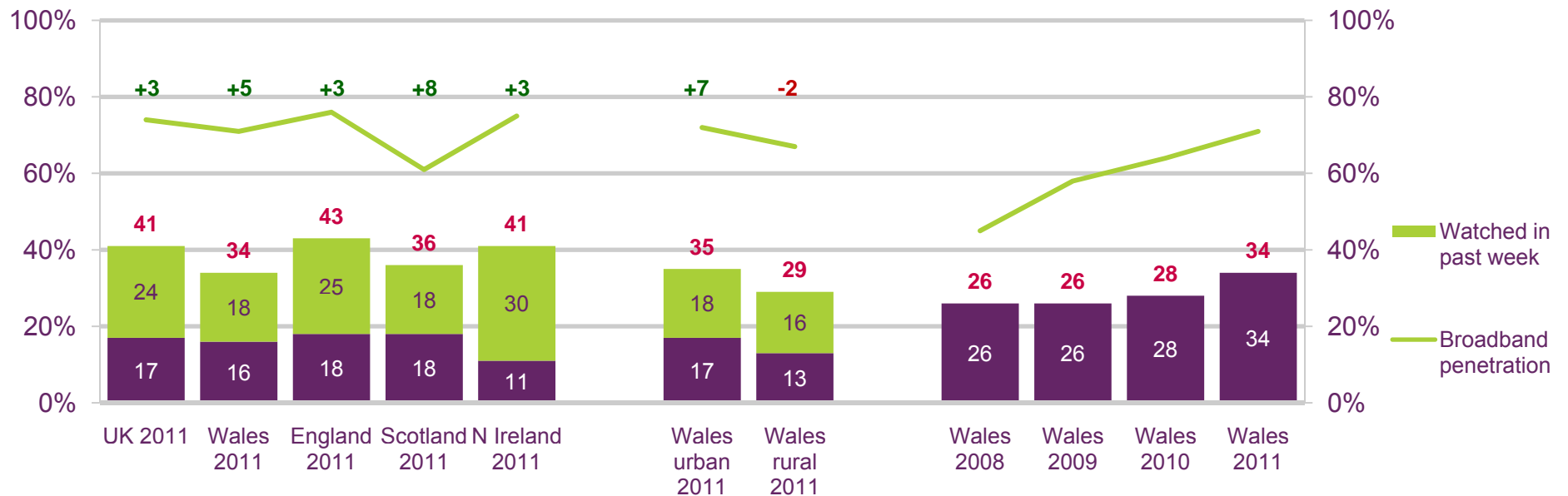
Base: All adults aged 16+ (n = 3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural)

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



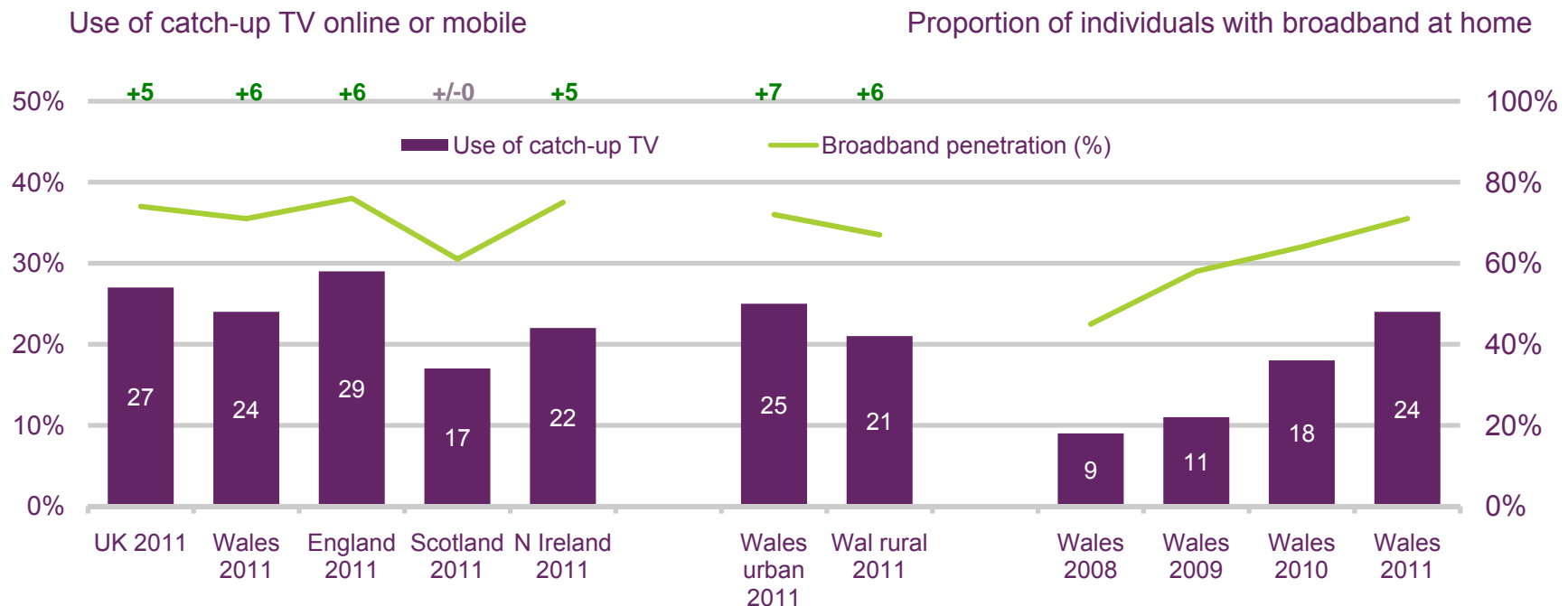
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? / QD28A-B. Which if any, of the following activities, other than making and receiving 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, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Use of catch-up TV

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

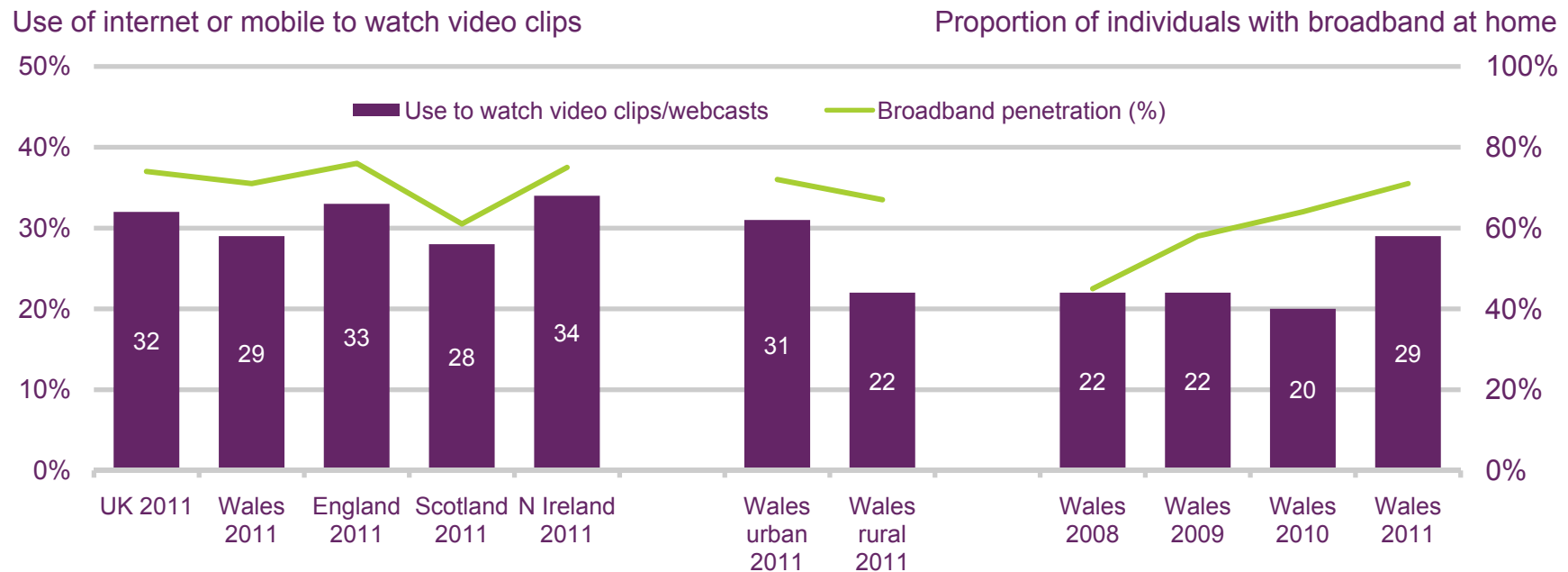


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

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

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

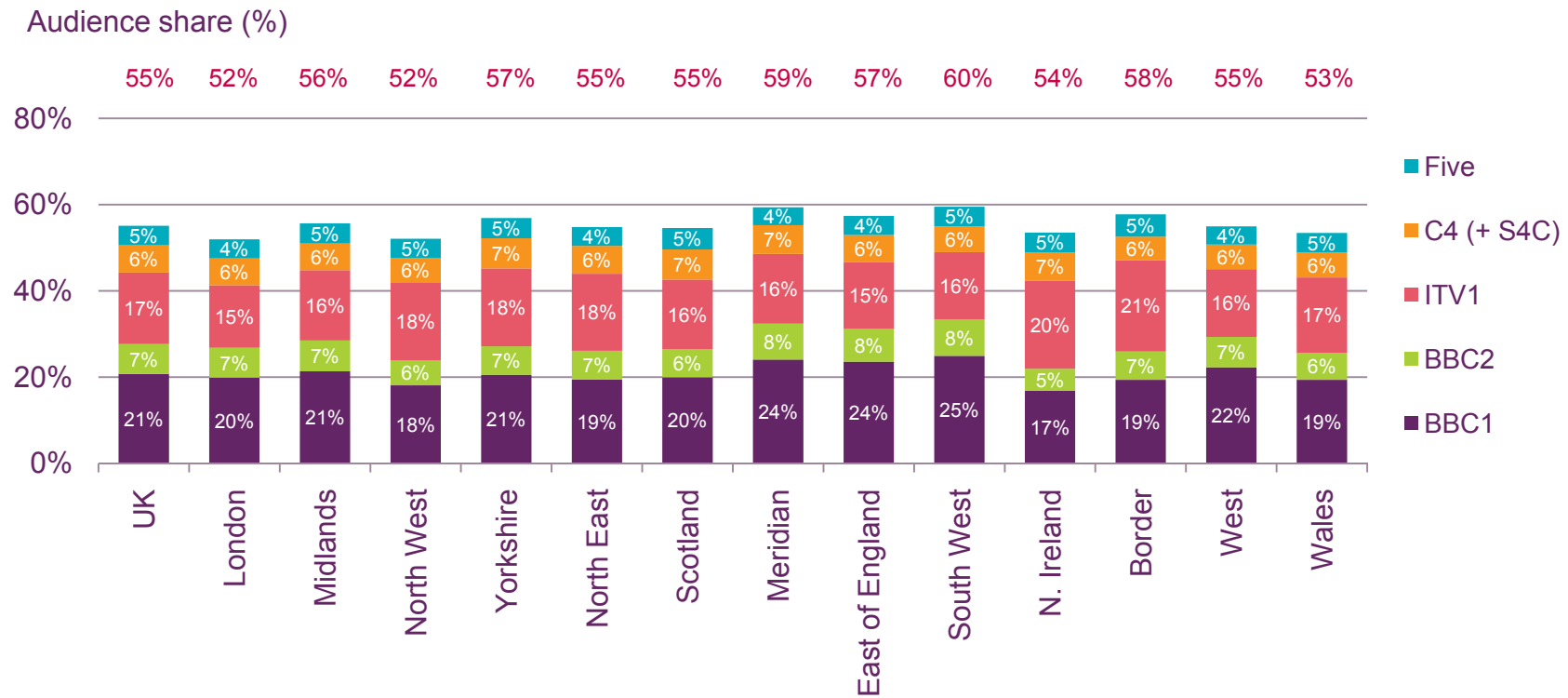


QE10A. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

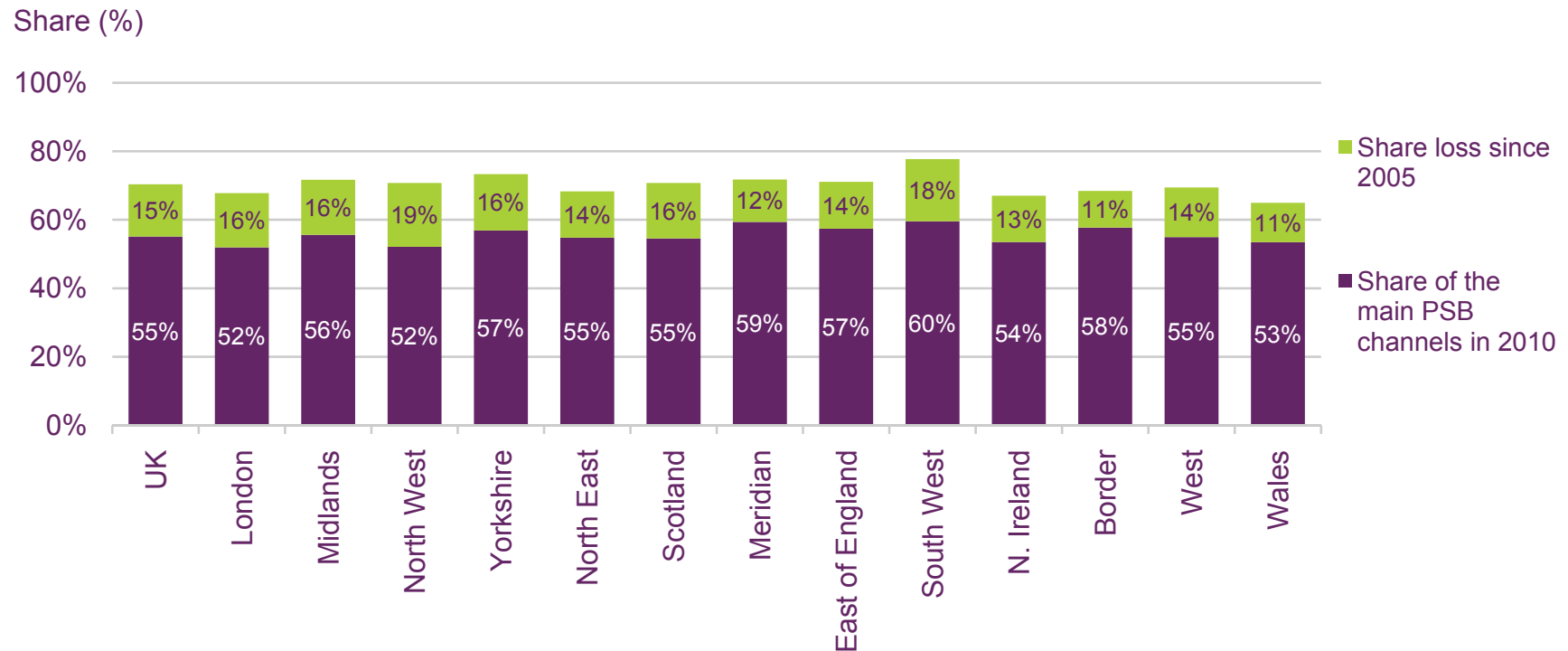
Base: All adults aged 16+ (n = 3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Share of the five terrestrial networks in all homes, 2010



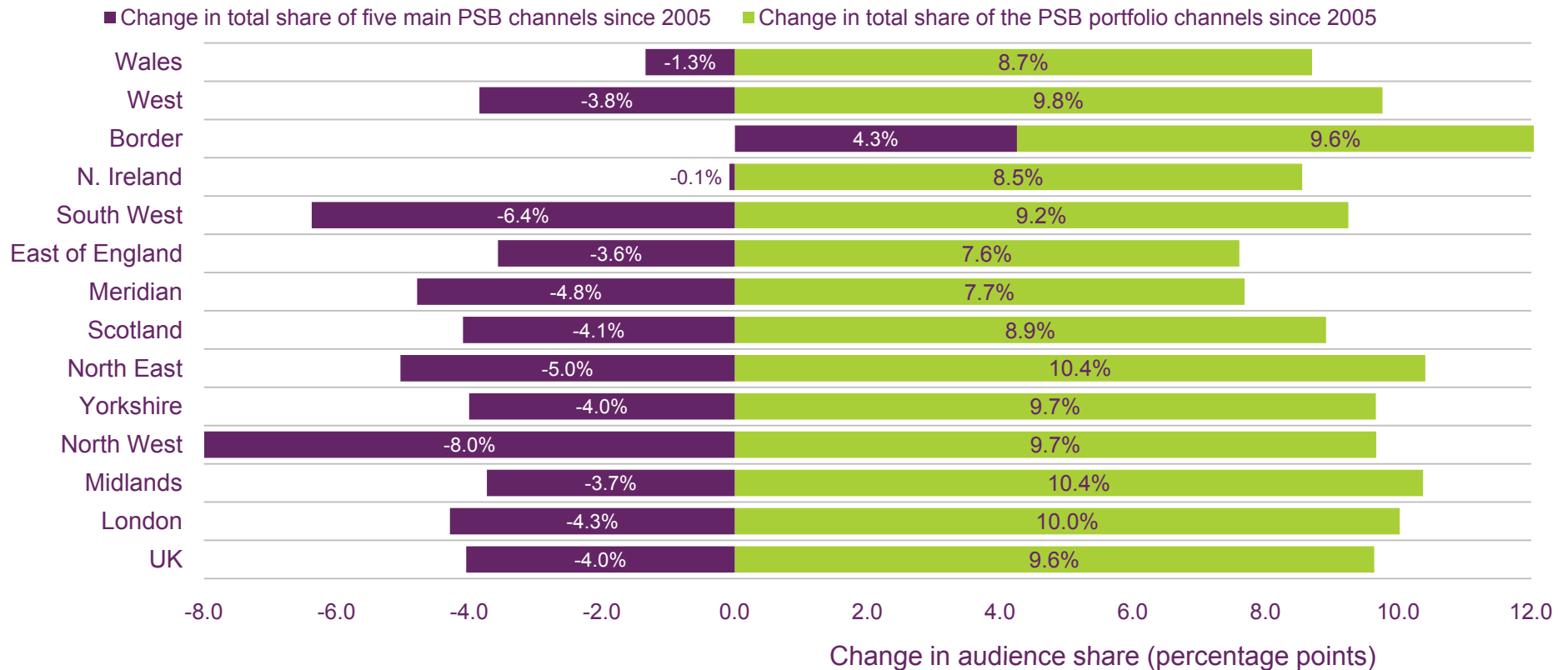
Source: BARB

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



Source: BARB.

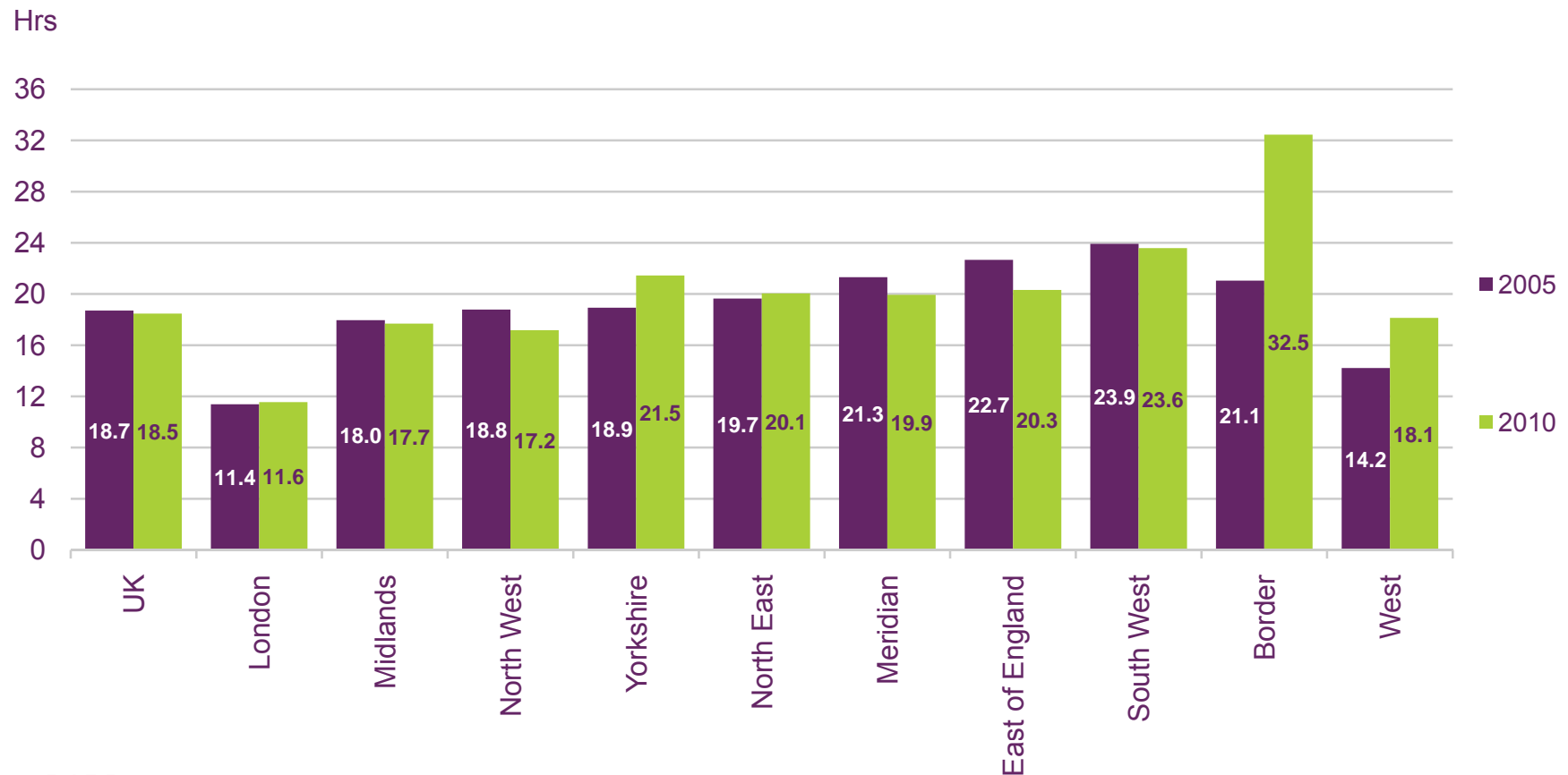
Net change in the audience share of the five main networks and the PSB portfolio channels across multichannel homes, 2005 - 2010



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)

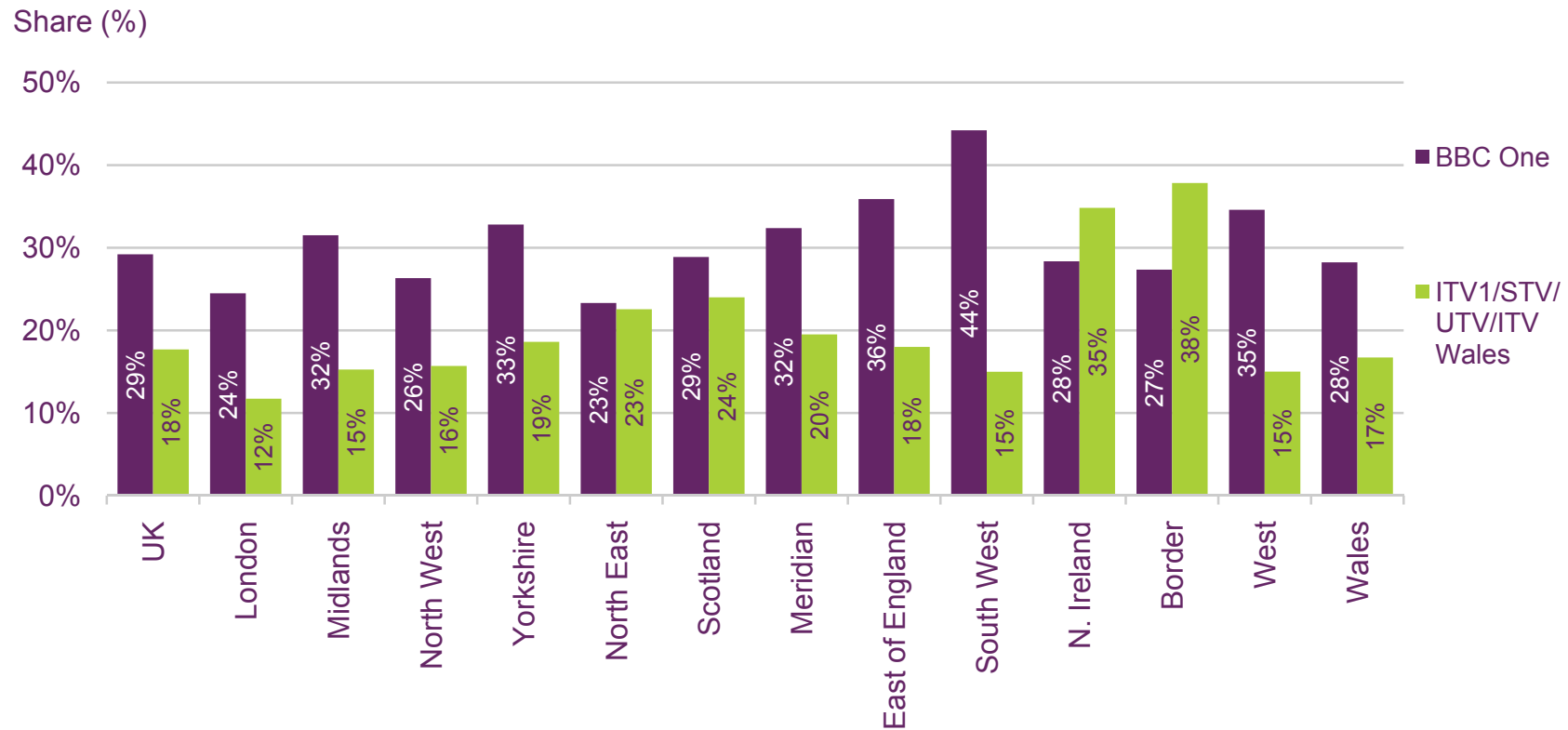
Combined total hours of viewing of early evening regional news bulletins, all homes in 2005-2010, by English region



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

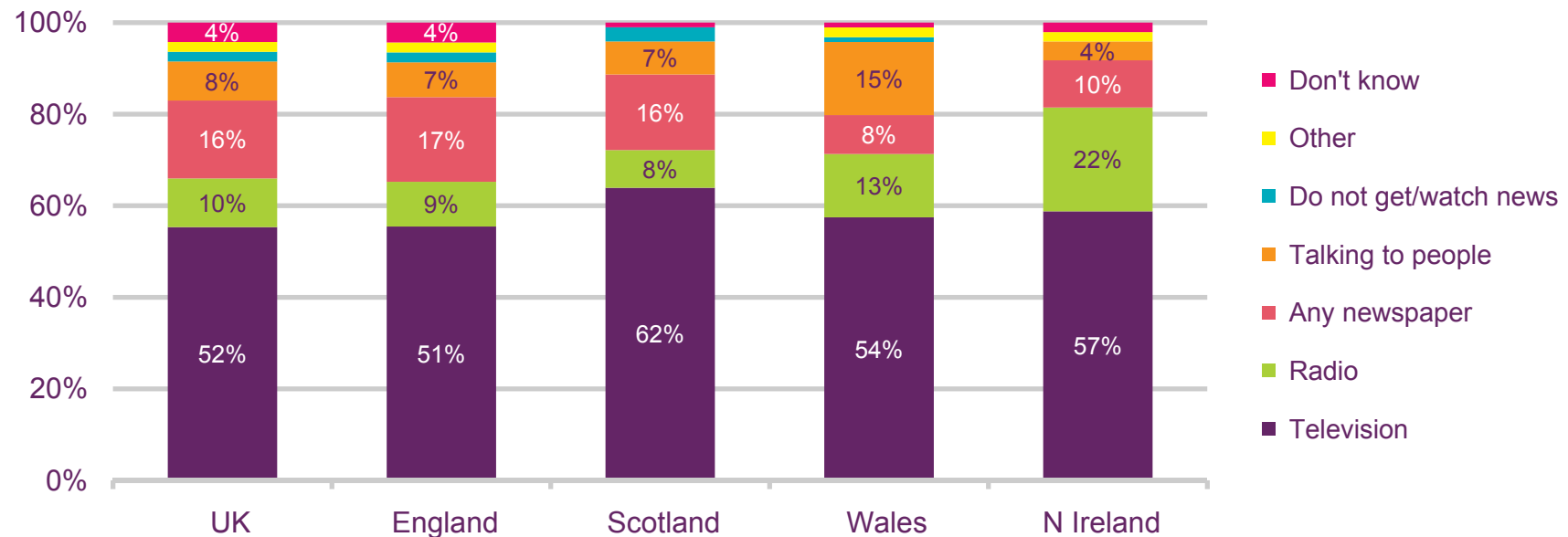


Source: BARB

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’

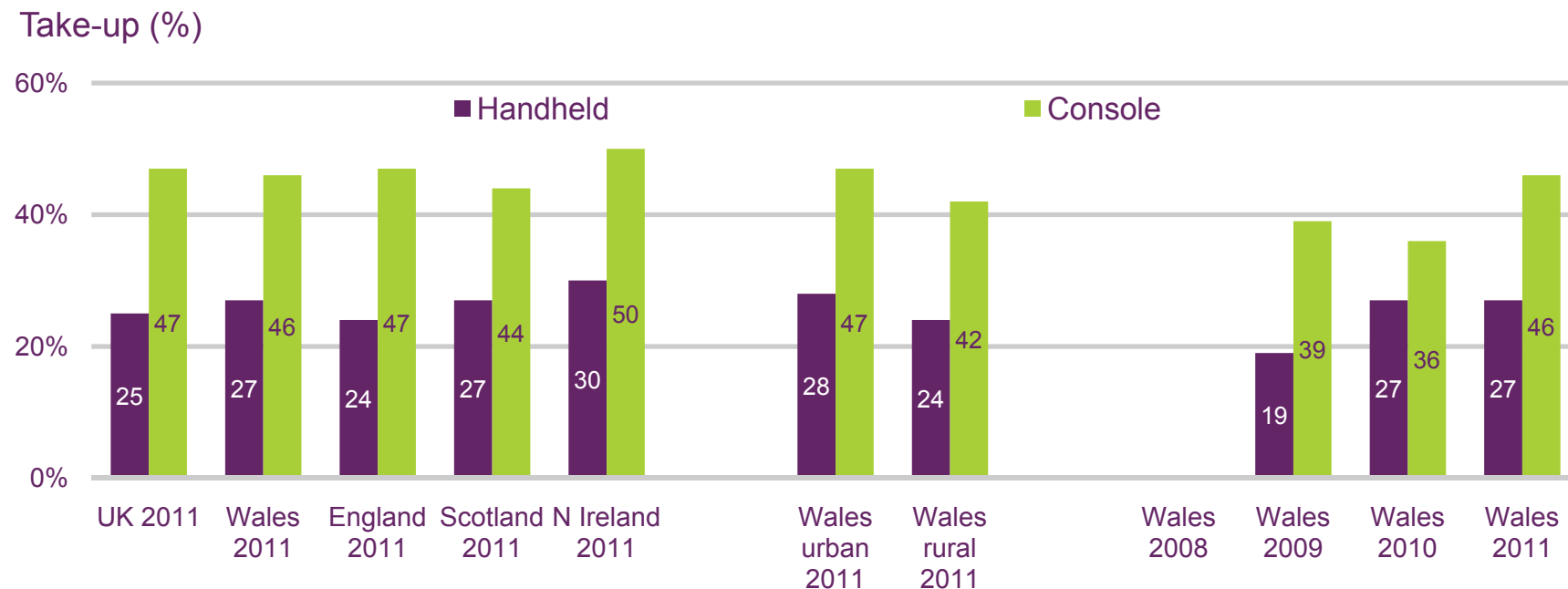


Source: Ofcom Media Tracker Survey 2010

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

Only responses ≥ 4% labelled

Take up of leading games consoles in Wales



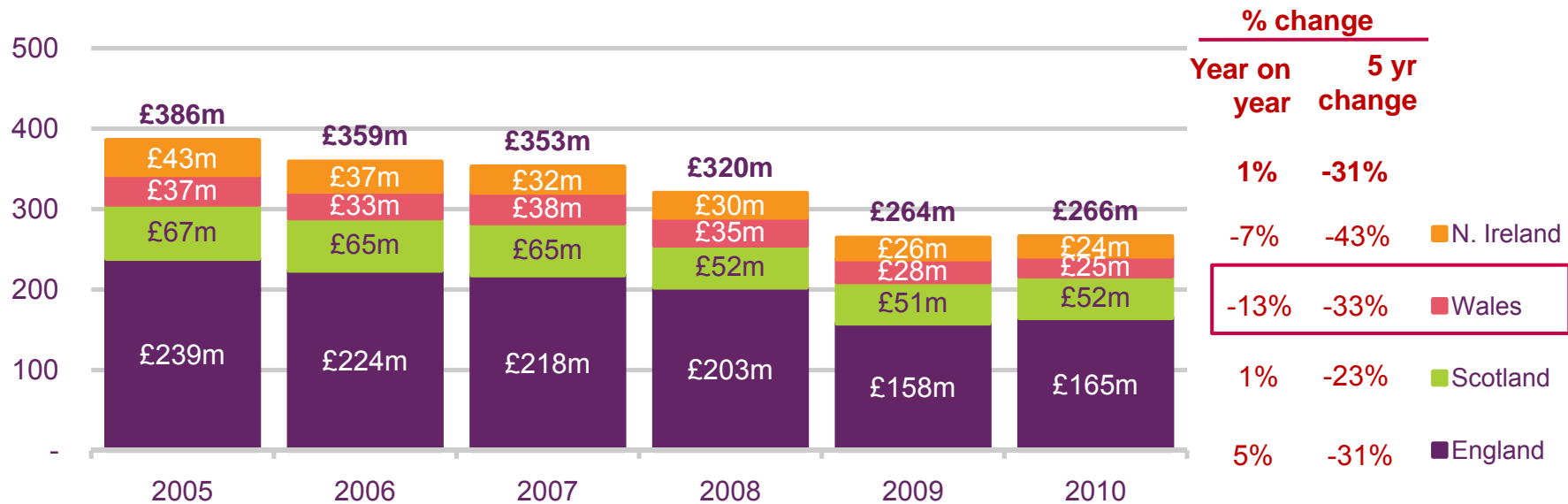
QB4. Which games console/s do you or does anyone in your household have at the moment? (NB Not asked in 2008)

Source: Ofcom research, Quarter 1 2011

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

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

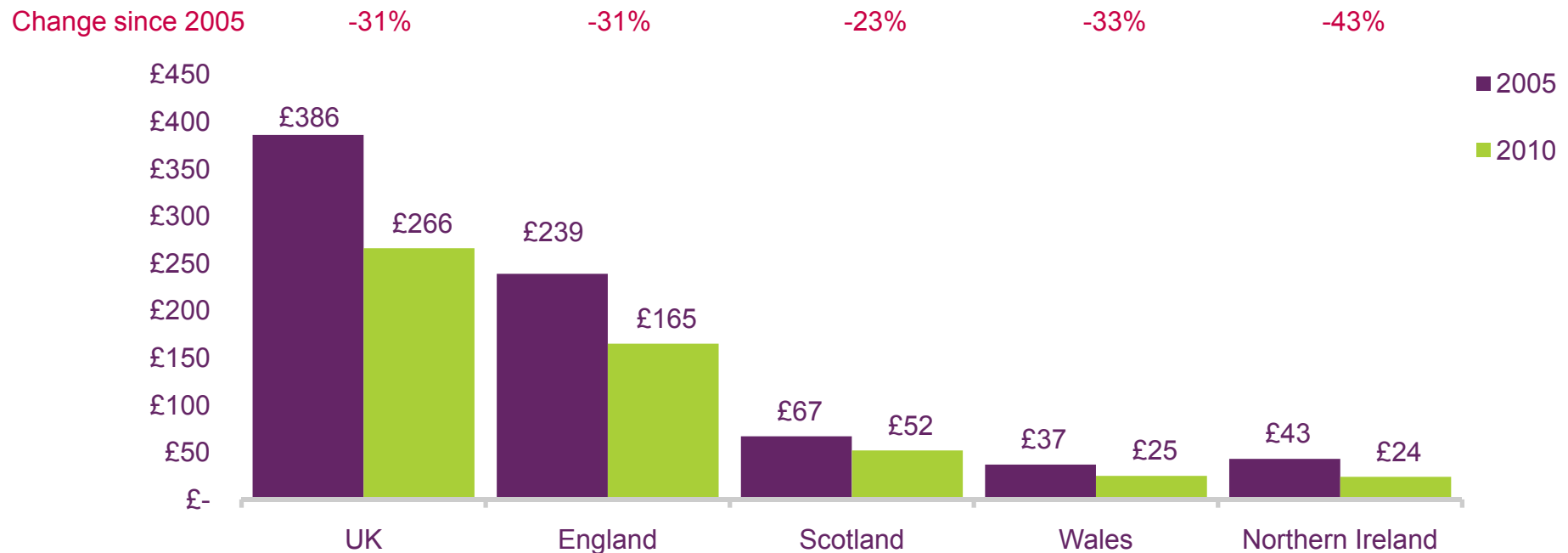
Spend (£m, 2010 prices)



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
 Note that these figures supersede those published in previous reports; the index used to convert the data to 2010 prices in this report is CPI (RPI was used in previous editions); some historic data points have been restated.

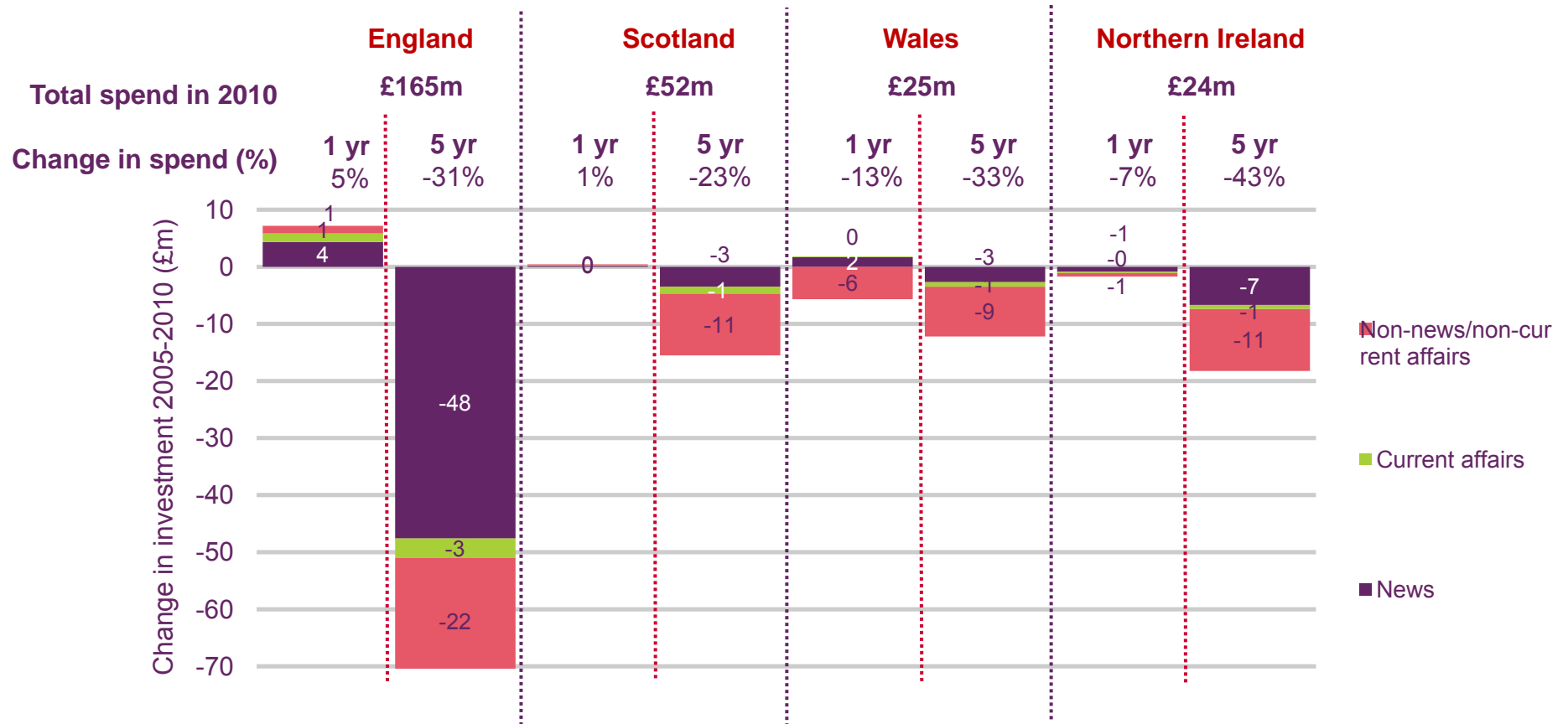
Spend on originated nations and regions output by nation, 2005 and 2010



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.
 Note that these figures supersede those published in previous reports; the index used to convert the data to 2010 prices in this report is CPI (RPI was used in previous editions); some historic data points have been restated.

Change in spend 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.

Note that these figures supersede those published in previous reports; the index used to convert the data to 2010 prices in this report is CPI (RPI was used in previous editions); some historic data points have been restated.

Change in spend 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	

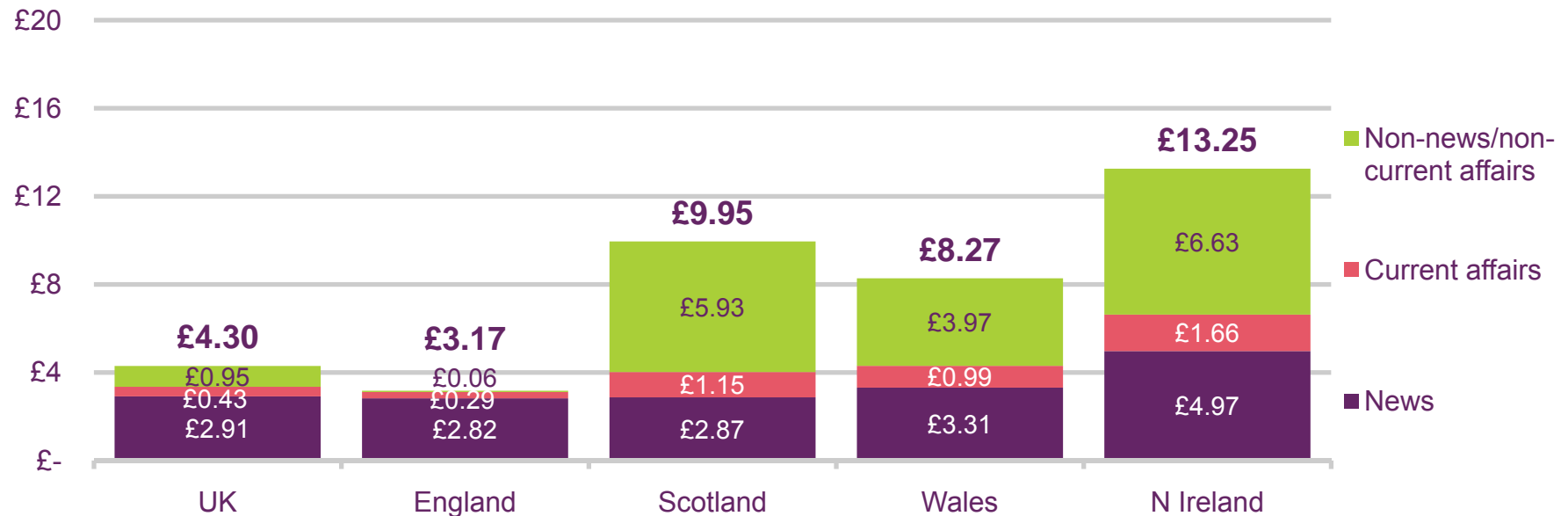
	England		Scotland		Wales		N. Ireland	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
Change in Spend	5%	-31%	1%	-23%	-13%	-33%	-7%	-43%

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. Note that these figures supersede those published in previous reports; the index used to convert the data to 2010 prices in this report is CPI (RPI was used in previous editions); some historic data points have been restated.

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. Note that these figures supersede those published in previous reports; the index used to convert the data to 2010 prices in this report is CPI (RPI was used in previous editions); some historic data points have been restated.

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.

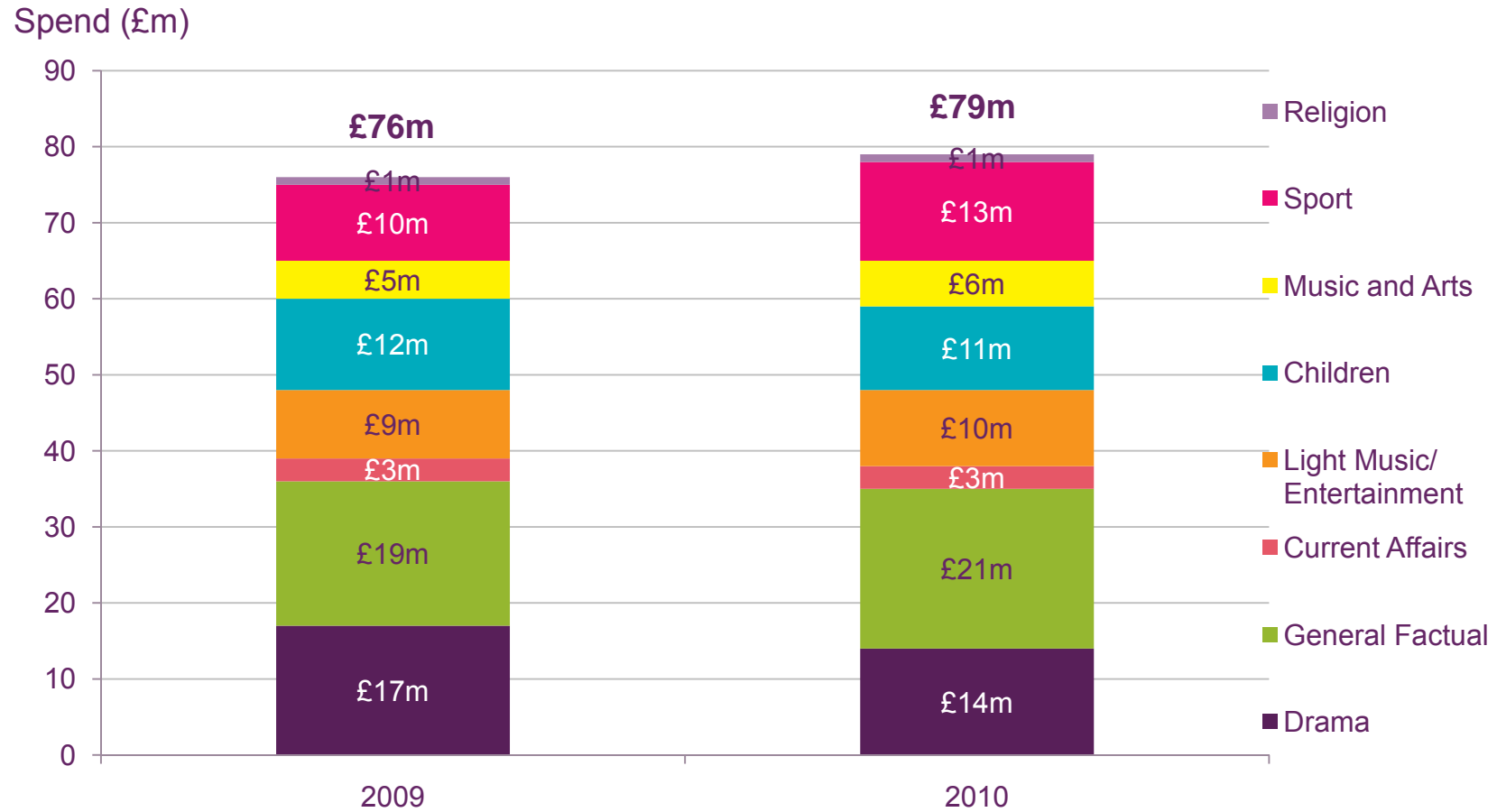
Regionalised output cost per hour by nation 2005 - 2010



Source: Broadcasters. All figures expressed in 2010 prices.

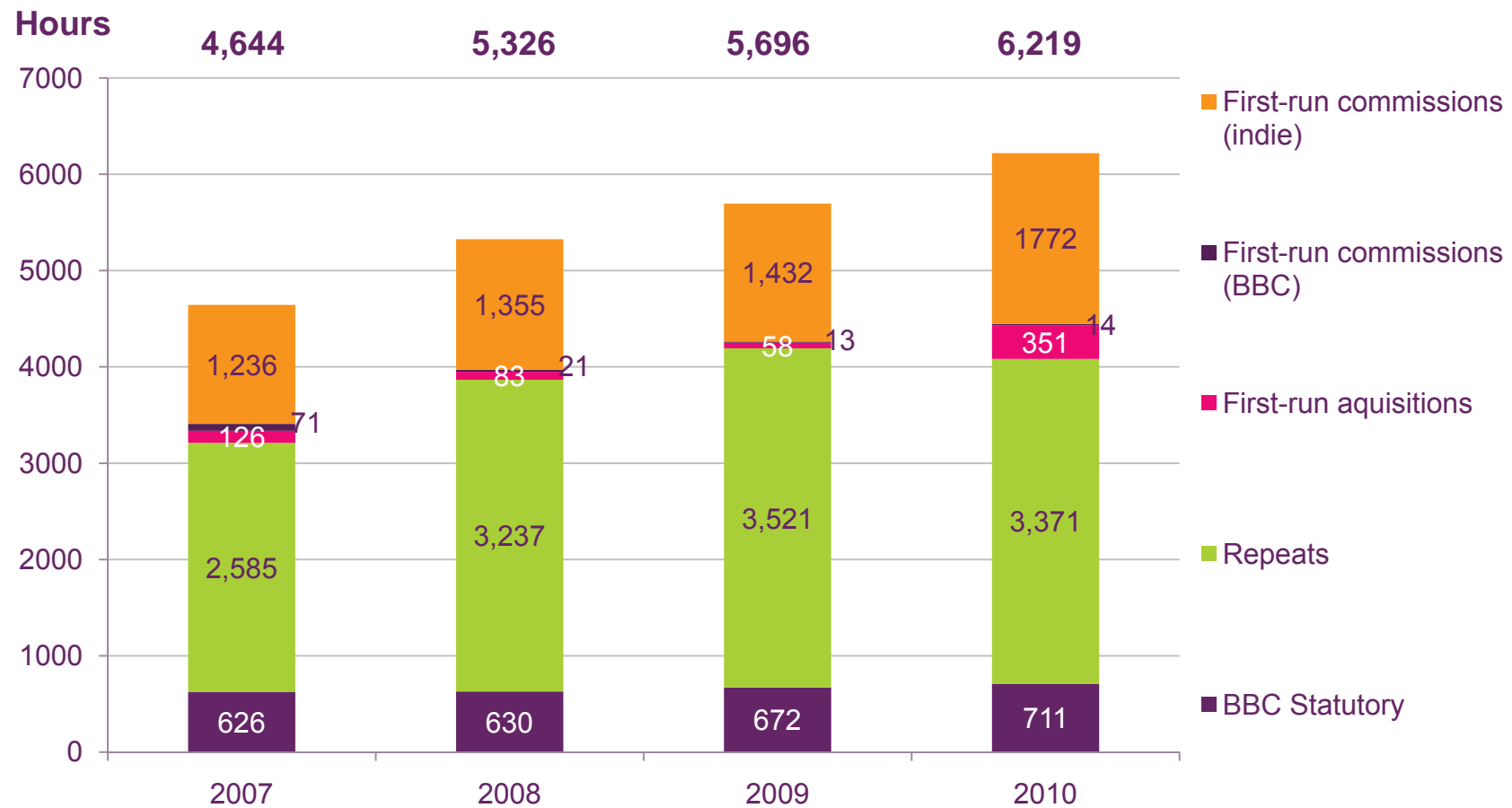
Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

Spend by S4C on Welsh language programming



Source: S4C Annual Report (<http://www.s4c.co.uk/abouts4c/annualreport/acrobats/s4c-annual-report-2010.pdf>)

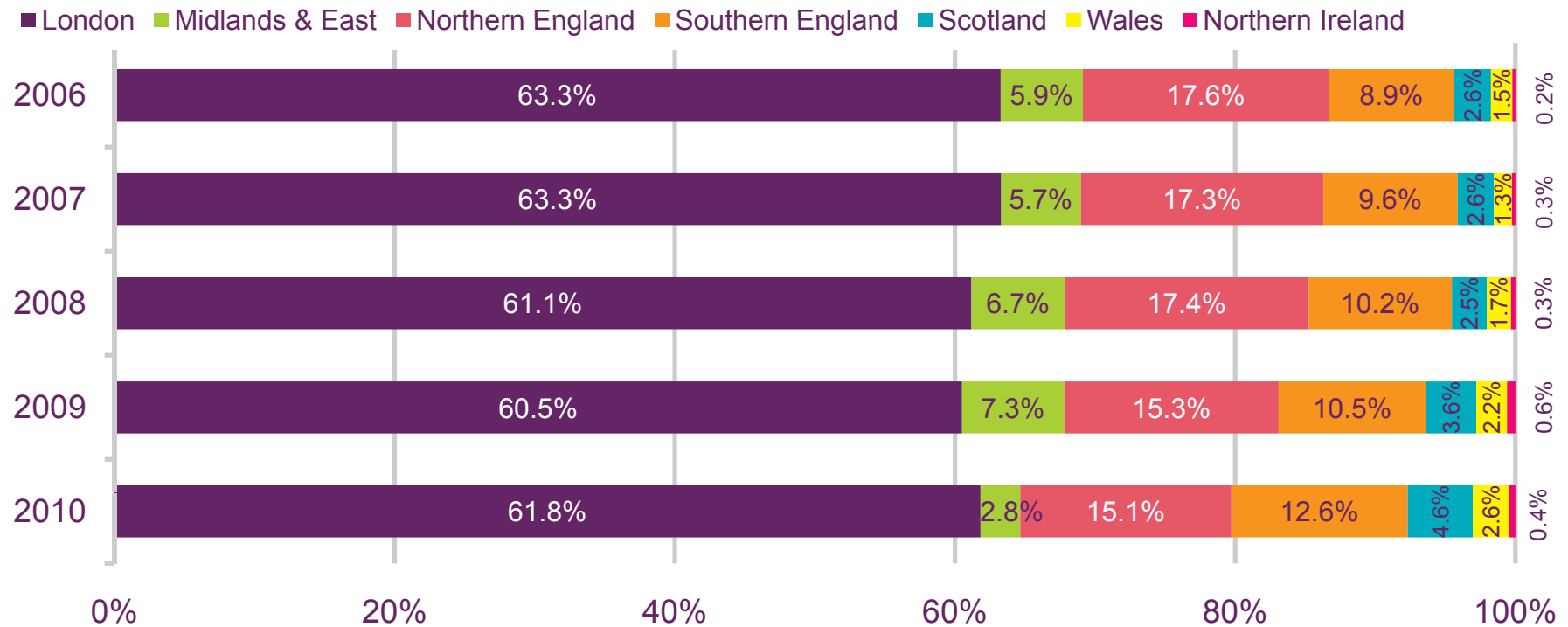
Type of Welsh-language output on S4C, by hours



Source: S4C Annual Report (<http://www.s4c.co.uk/abouts4c/annualreport/acrobats/s4c-annual-report-2010.pdf>)

Expenditure on out-of-London productions

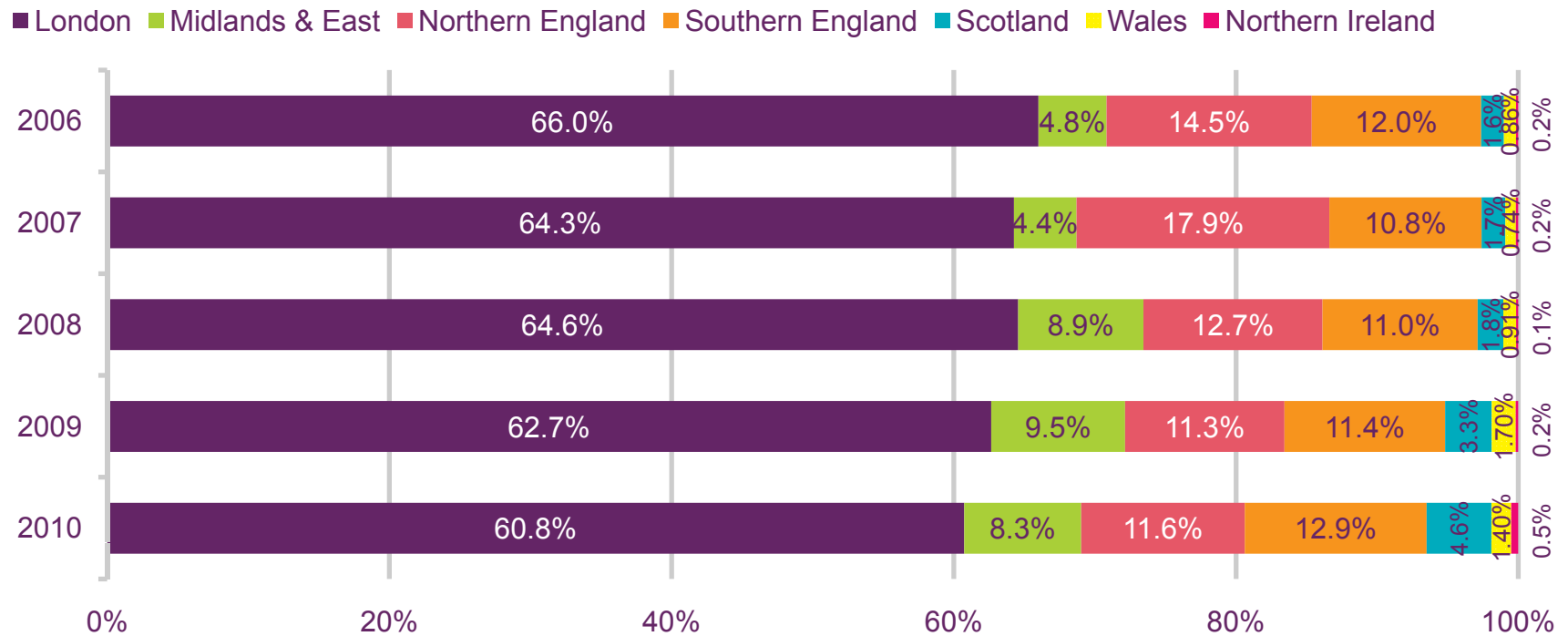
Percentage of production by value



Source: Broadcaster returns

Volume of out-of-London production

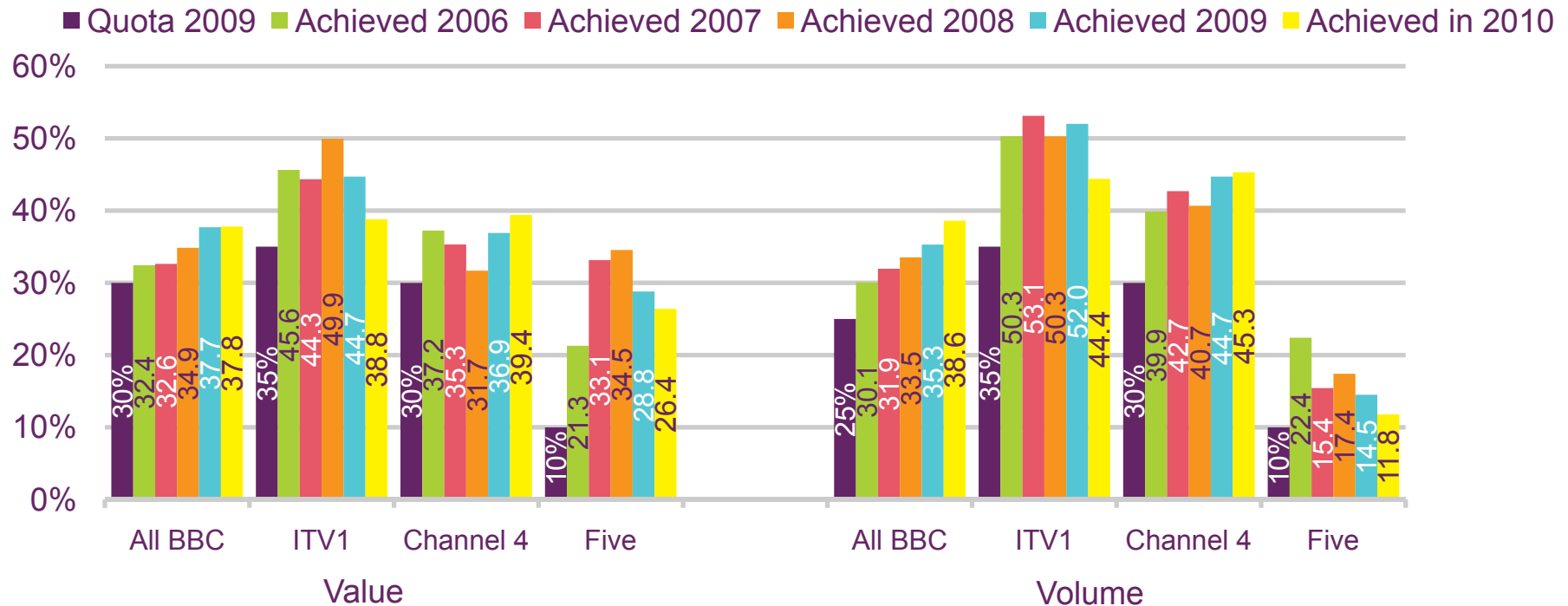
Percentage of production by volume



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

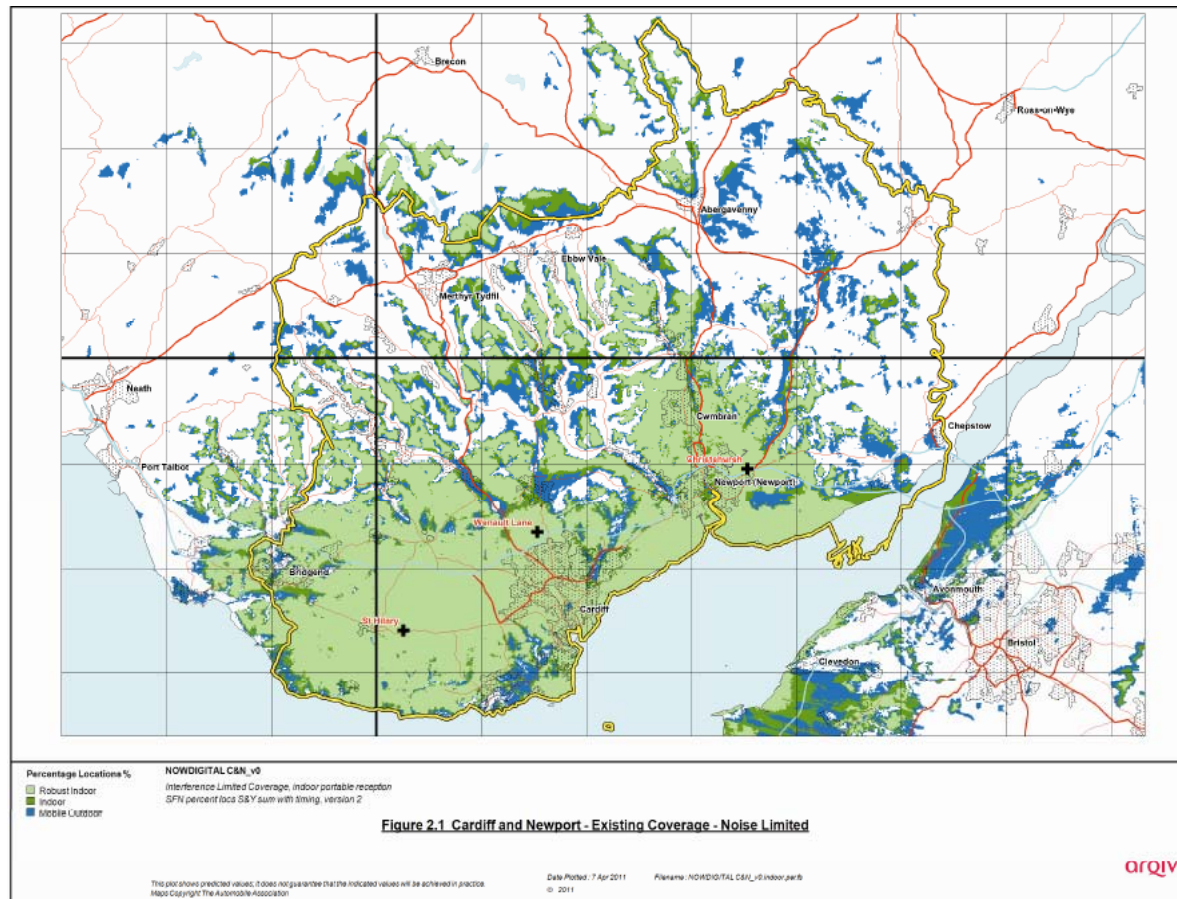
Distribution of hours of qualifying productions by macro region and channel (%)

	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%

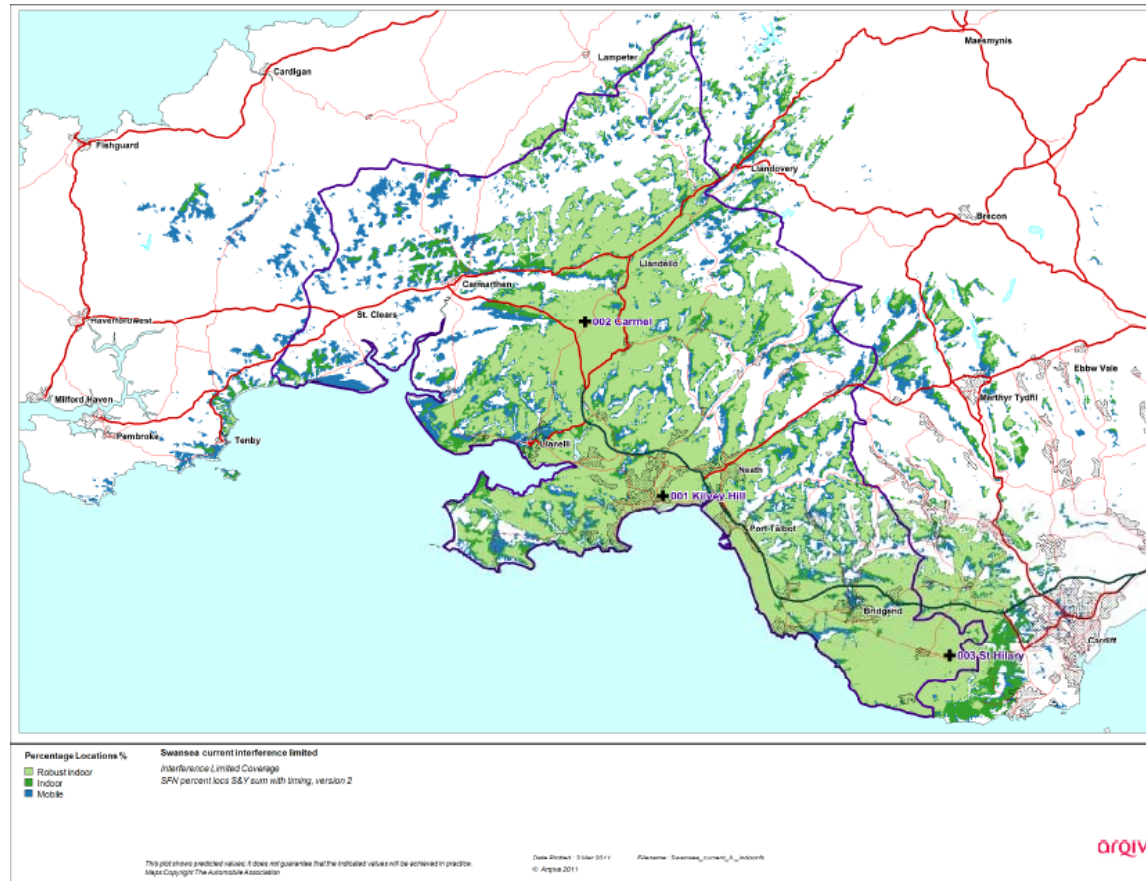
Source: Broadcaster returns

Radio and audio content

Commercial DAB multiplex map for Cardiff and Newport



Commercial DAB multiplex coverage map for Swansea



Wales and Scotland, DAB station availability

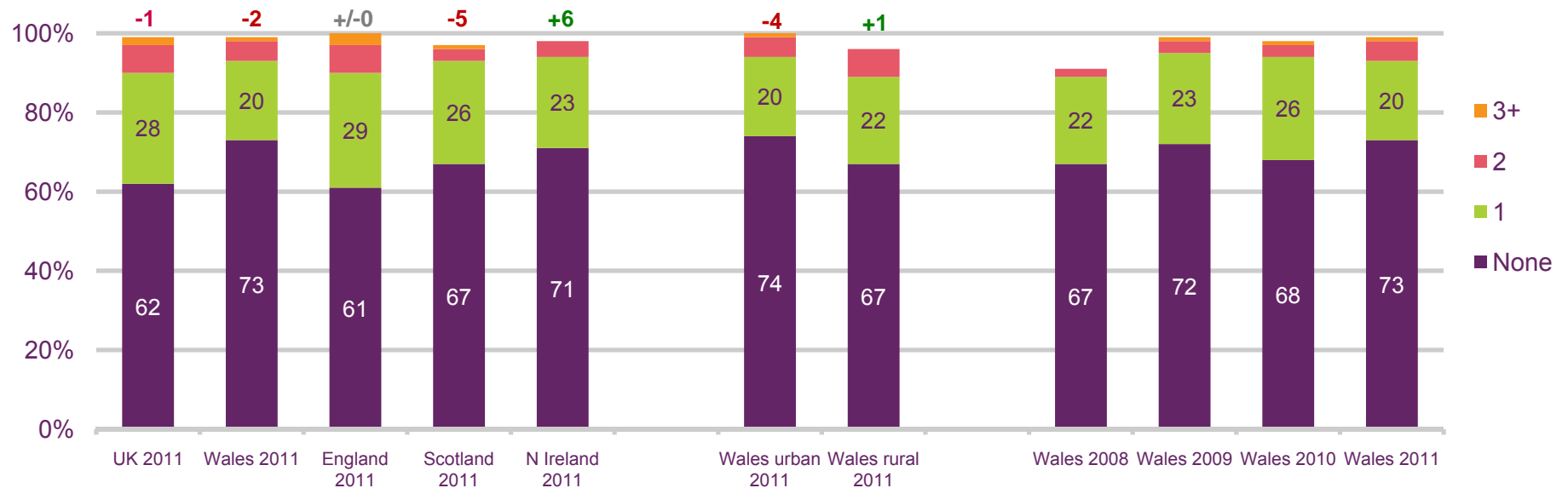
Local DAB multiplex	Number of commercial services carried on the local multiplex	no. commercial services carried on the national multiplex (Digital One)	BBC network/ local and nations
Aberdeen	6	12	13
Dundee and Perth	5	12	13
Glasgow	8	12	13
Edinburgh	7	12	13
Inverness	3	12	13
Central Scotland	7	12	13
Ayr	7	12	13
Cardiff and Newport	7	12	13
Swansea	4	12	13

Source: Ofcom, July 2011

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%	27%	39%	31%	28%	26%	30%	27%	27%	29%	27%
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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?

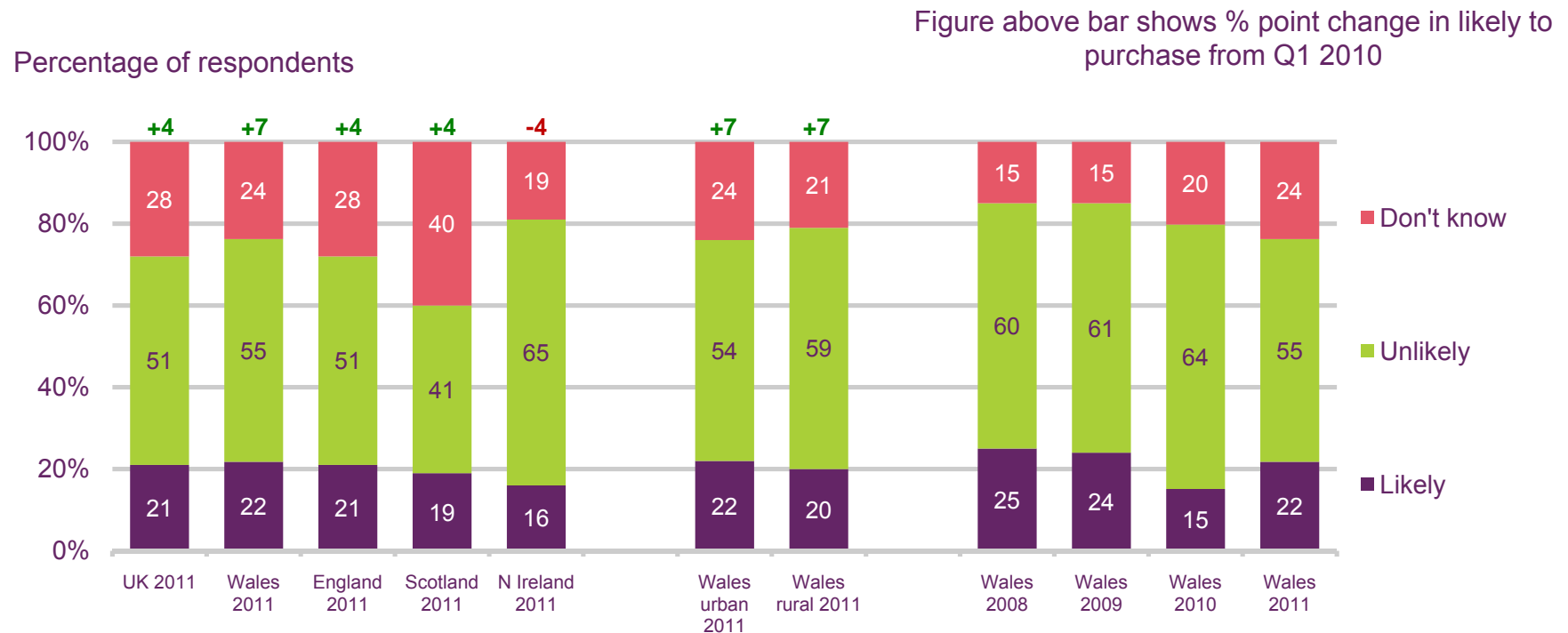
Source: Ofcom research, Quarter 1 2011

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, 397 Wales, 1629 England, 357 Scotland, 428 Northern Ireland, 191 Wales urban, 206 Wales rural, 638 Wales 2008, 848 Wales 2009, 854 Wales 2010, 397 Wales 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



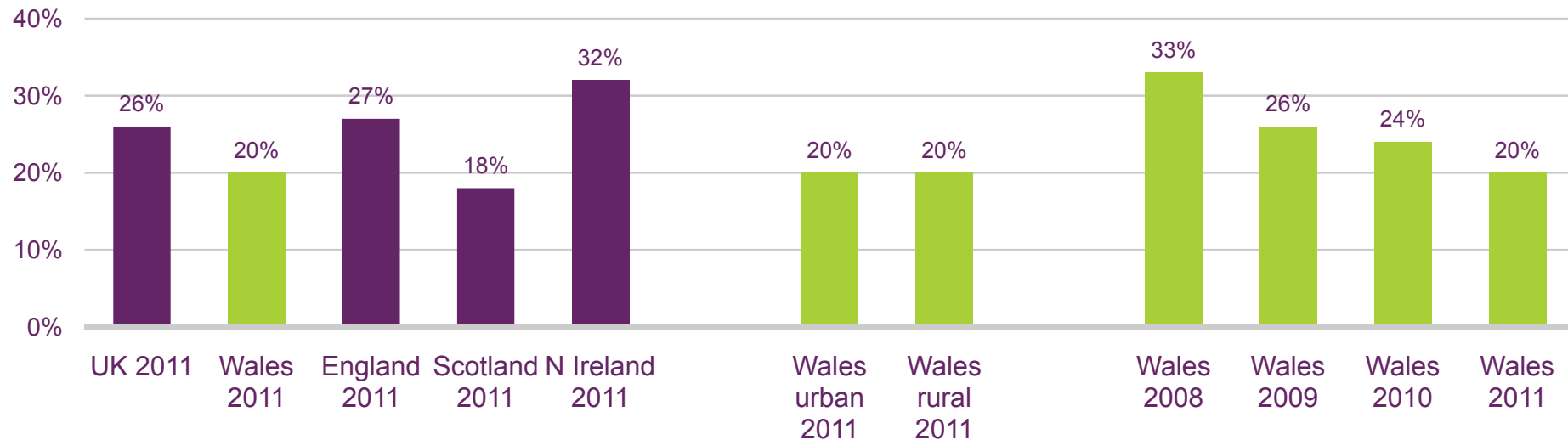
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1304 UK, 207 Wales, 703 England, 156 Scotland, 238 Northern Ireland, 104 Wales urban, 103 Wales rural, 445 Wales 2008, 607 Wales 2009, 594 Wales 2010, 207 Wales 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)



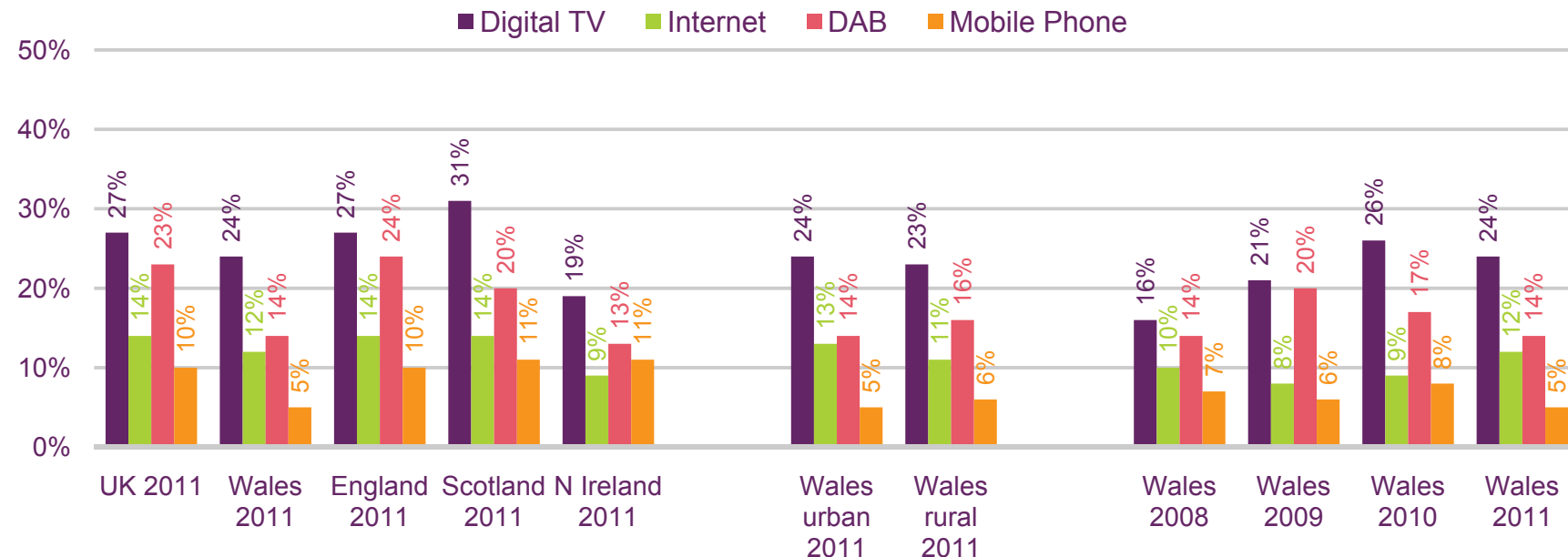
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2011

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

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?

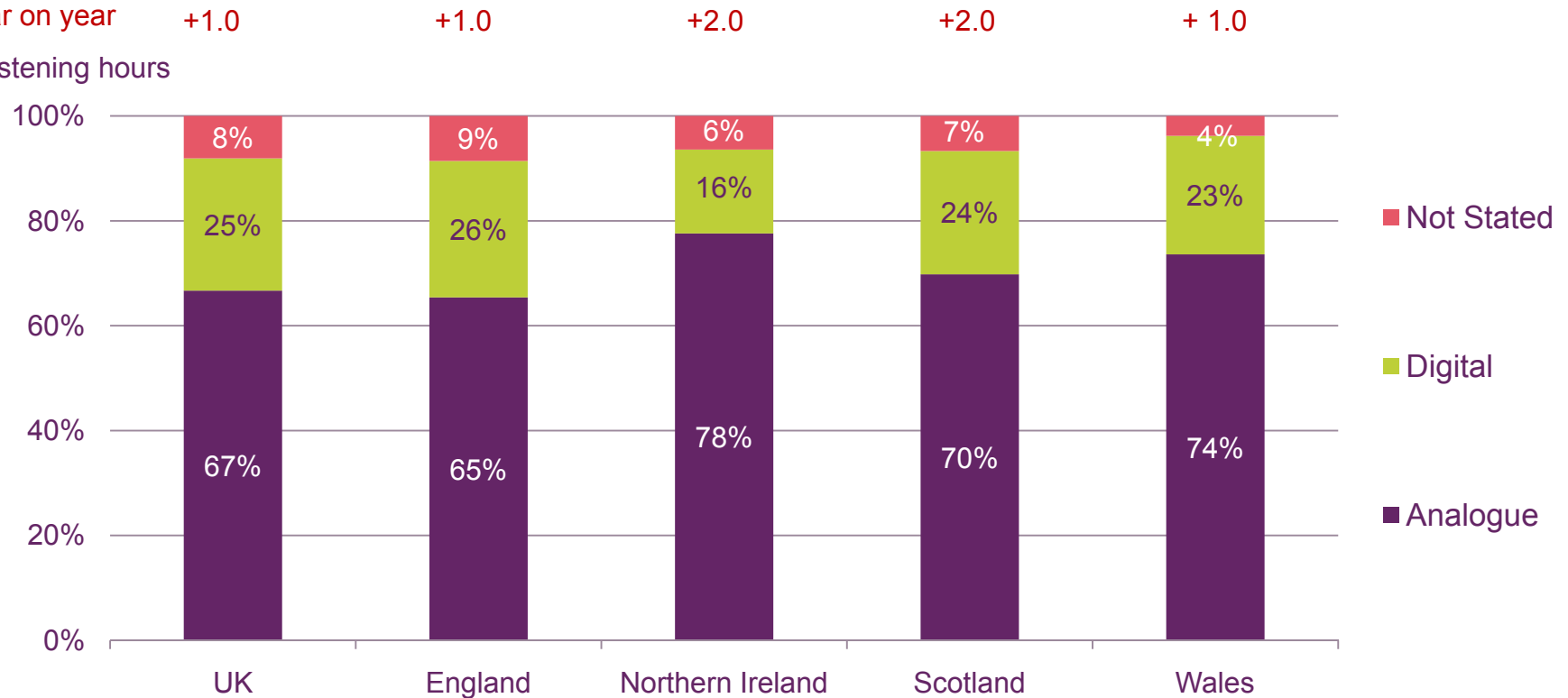
Source: Ofcom research, Quarter 1 2011

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

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

Digital increase
year on year

% listening hours

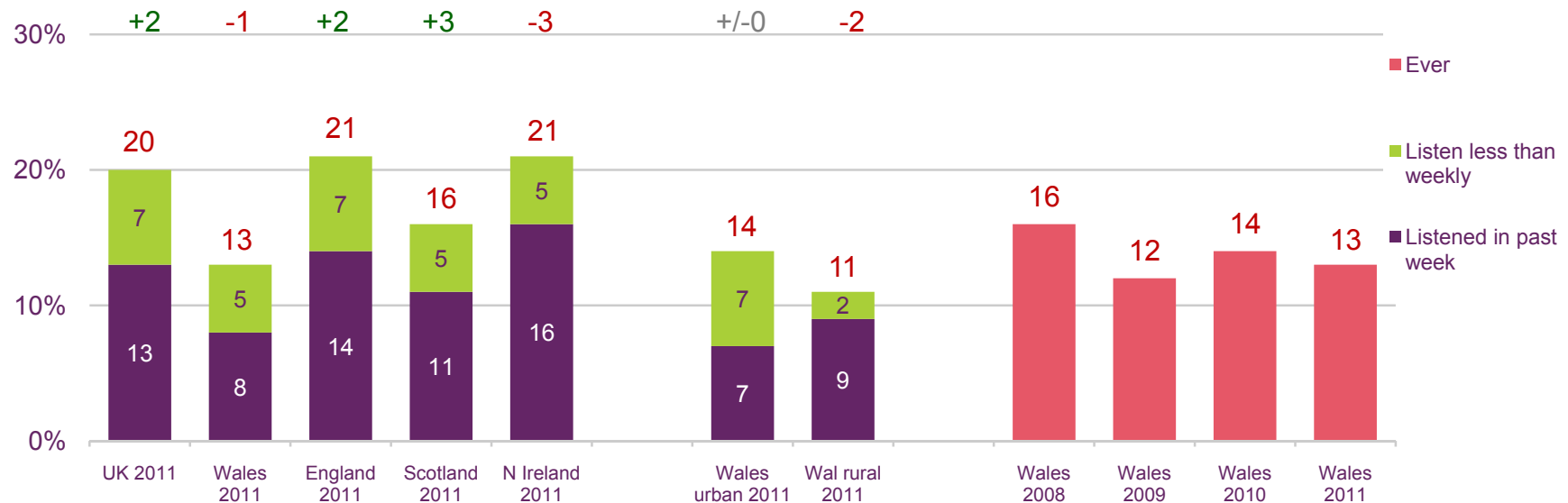


Source: RAJAR, All adults (15+), year ended Q1 2011.

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

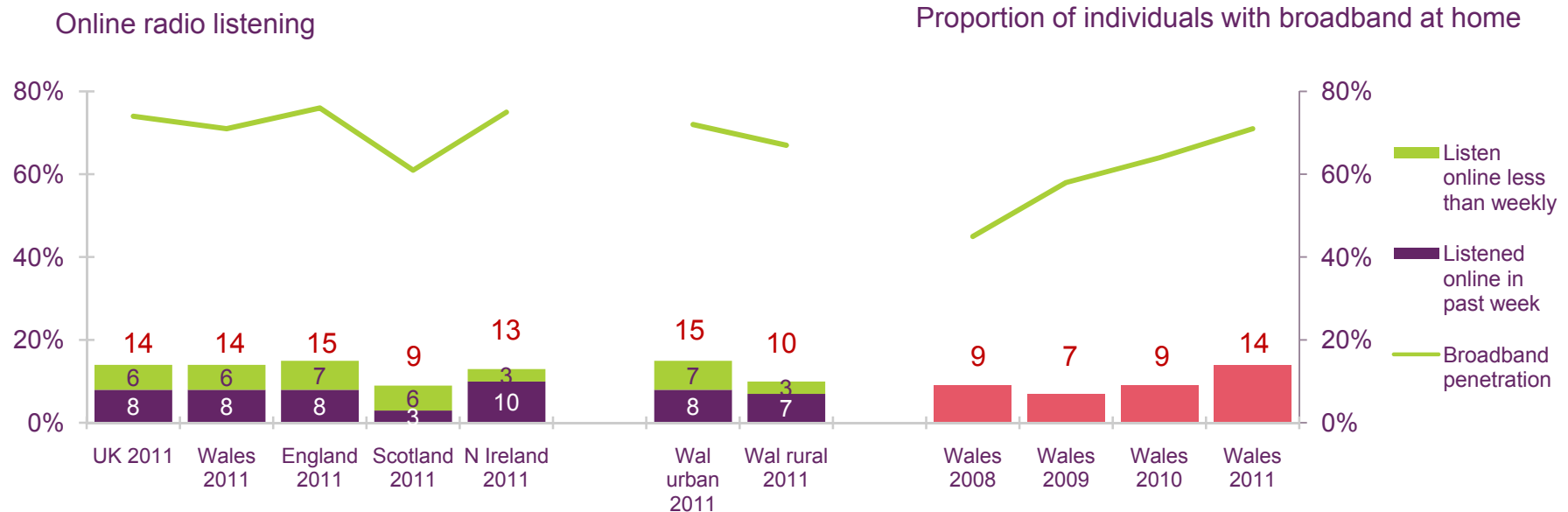


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever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

Source: Ofcom research, Quarter 1 2011

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

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



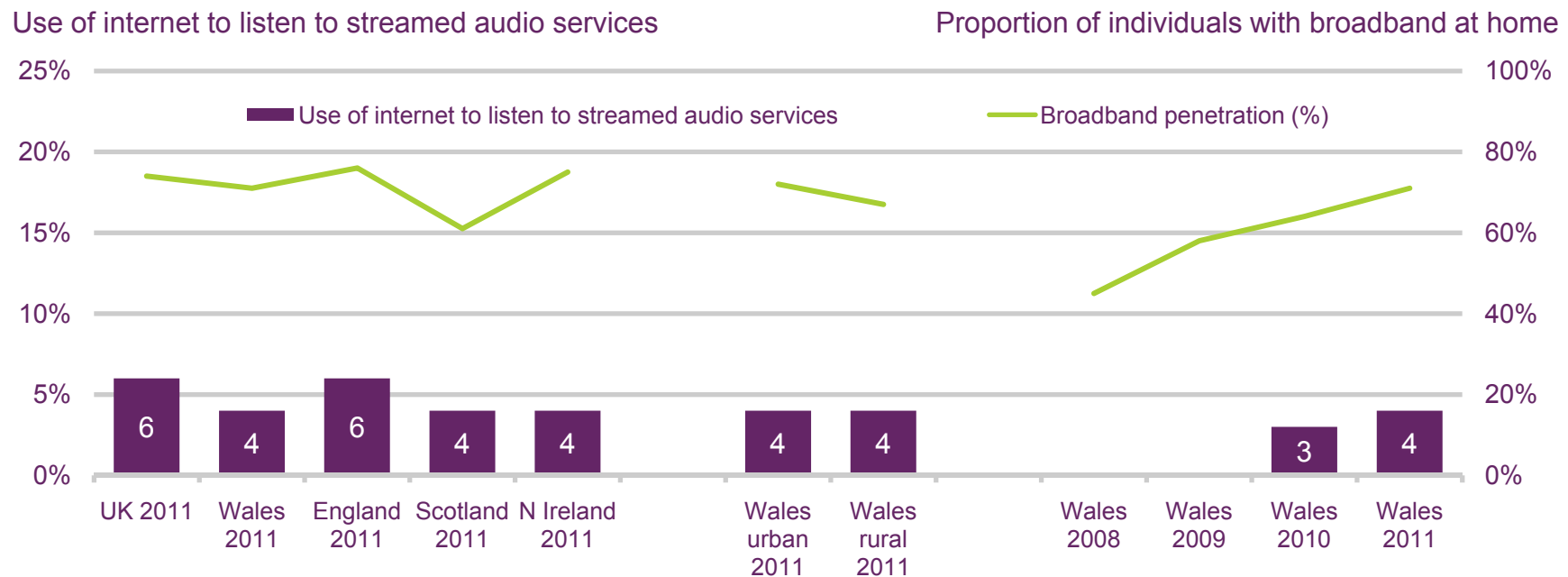
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data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

Source: Ofcom research, Quarter 1 2011

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

Source: Ofcom research, Quarter 1 2011

Use of internet for listening to streamed audio services

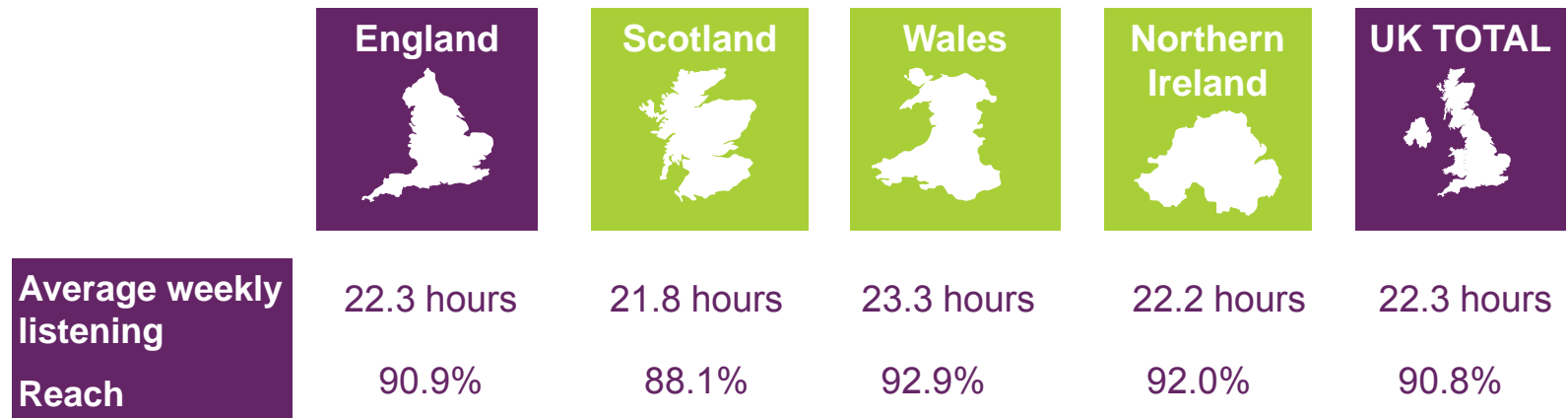


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2011

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

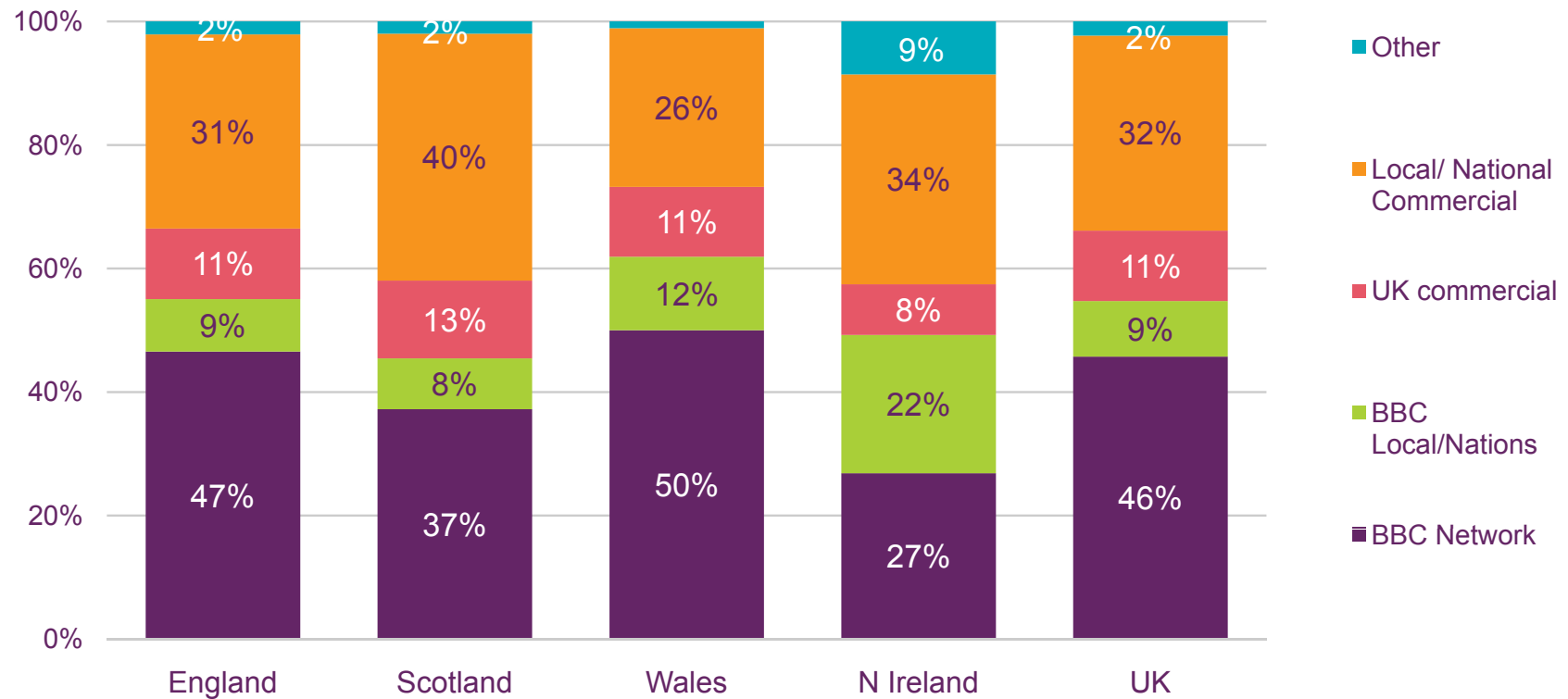
Average weekly reach and listening hours – year to Q1 2011



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.

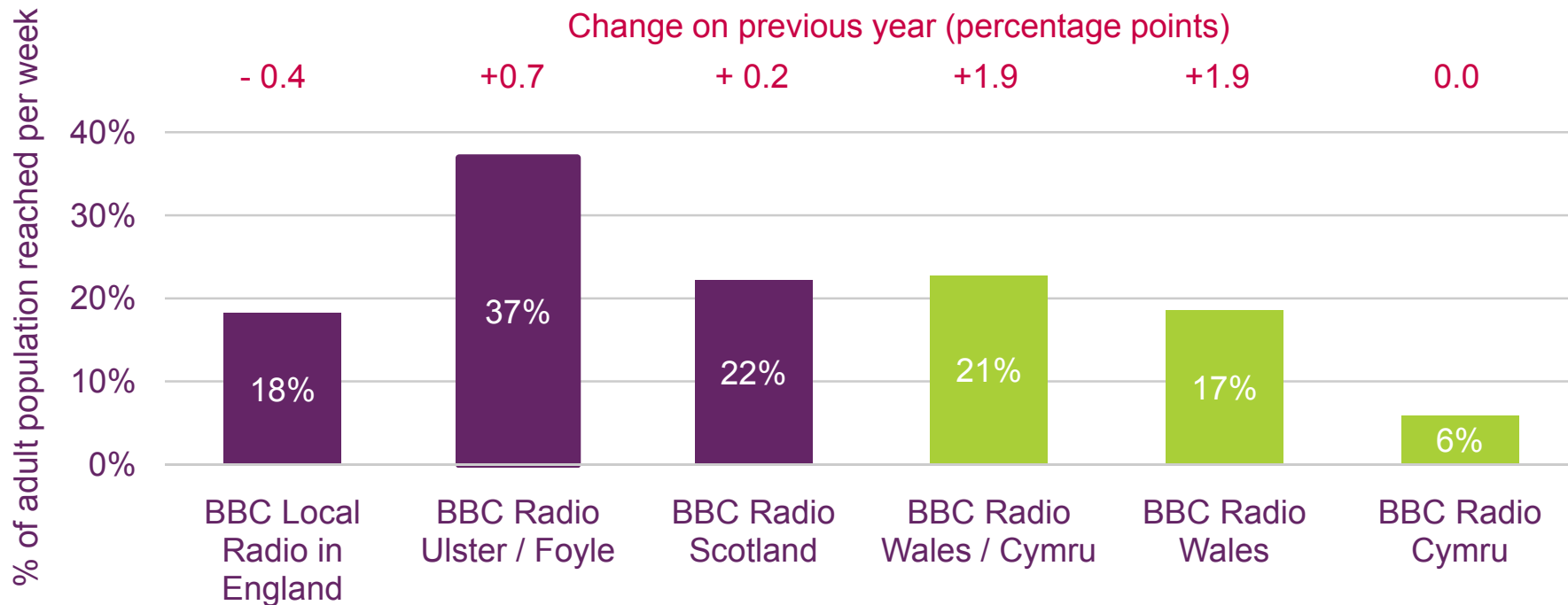
Share of listening hours, by nation

Audience share for BBC and commercial stations, local/national and UK



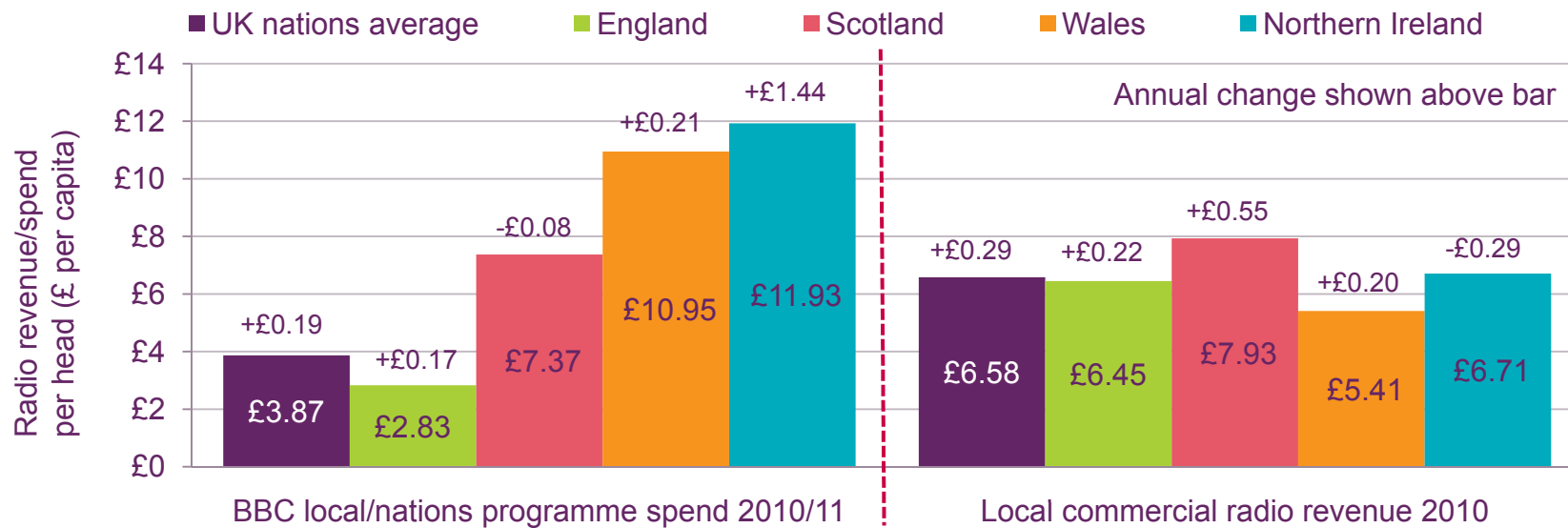
Source: RAJAR, All adults (15+), year ended Q1 2011

Weekly reach for National/local BBC services



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.

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



Source: Broadcasters, 2010

Note: The UK commercial revenue 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.

Wales community awards

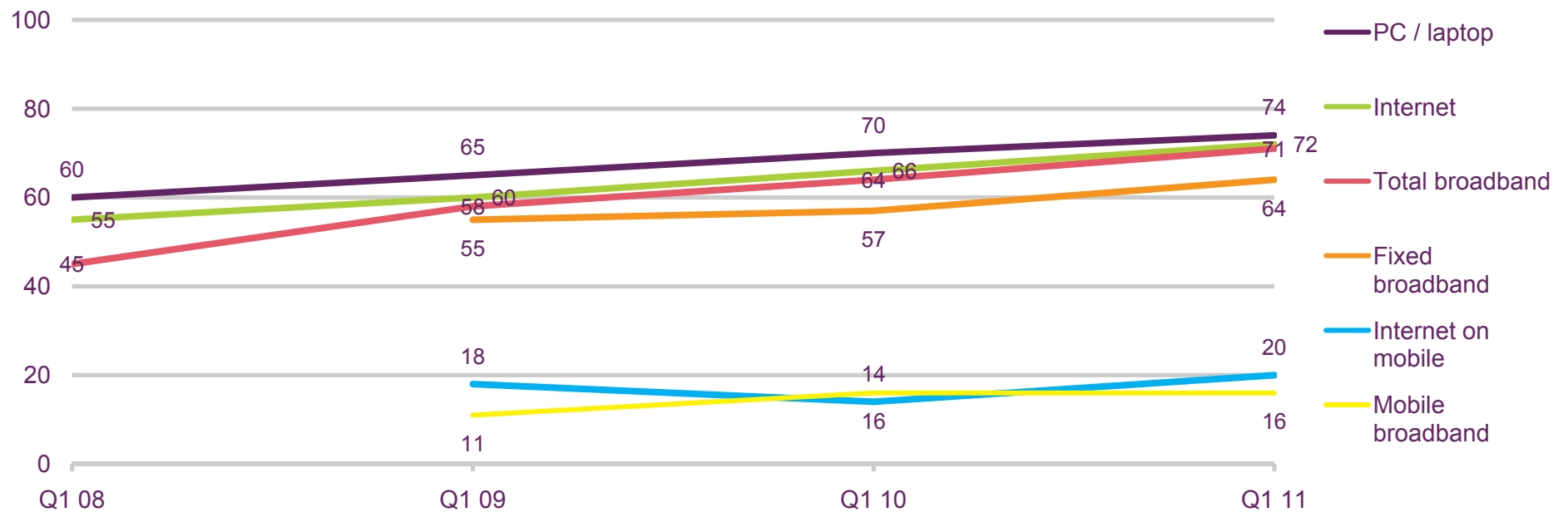
Community station	Location	On-air date	Target Audience
BRfm	Brynmawr, Blaenau Gwent	18/10/2007	Geographic - town/rural
Bro Radio	Barry, Vale of Glamorgan	31/03/2009	Geographic - town/rural
Calon FM	Wrexham	01/03/2008	Geographic - town/rural
GTFM Pontypridd	Pontypridd	01/01/2006	Geographic - town/rural
Point FM	Rhyl	24/03/2010	Geographic - town/rural
Radio Cardiff	Cardiff	08/10/2007	BME black & ethnic minorities
Radio Tircoed	Tircoed Forest , Swansea	01/12/2008	Geographic - town/rural
Tudno FM	Llandudno	12/07/2008	Geographic - town/rural
XS	Port Talbot	20/04/2007	Young people (11-25)

Source: Ofcom, July 2010

Internet and web-based content

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

Proportion of households (%)



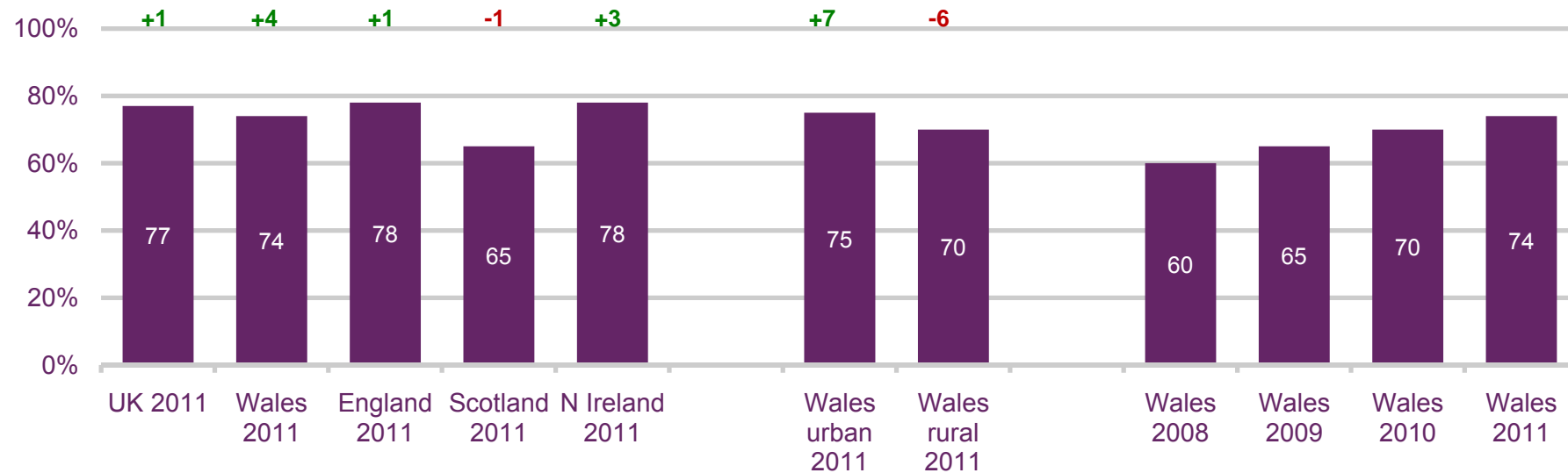
Source: Ofcom technology tracker

Base: All adults aged 16+ (811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Residential PC ownership

PC ownership

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



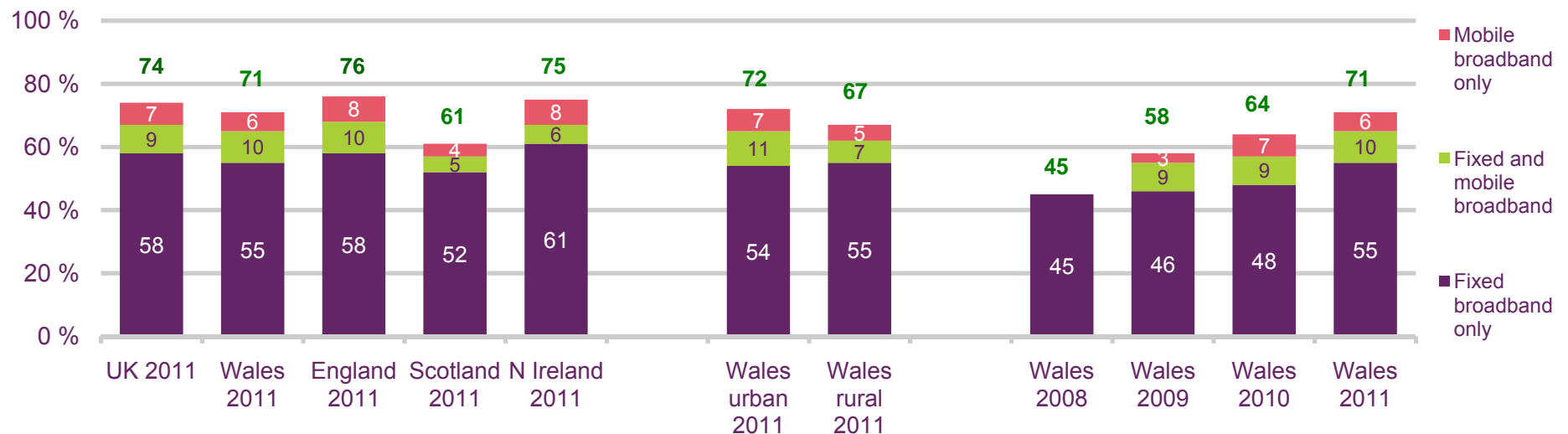
QE1. Does your household have a PC, laptop, netbook or tablet computer?

Source: Ofcom research, Quarter 1 2011

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

Broadband take-up at home

Proportion of homes (%)

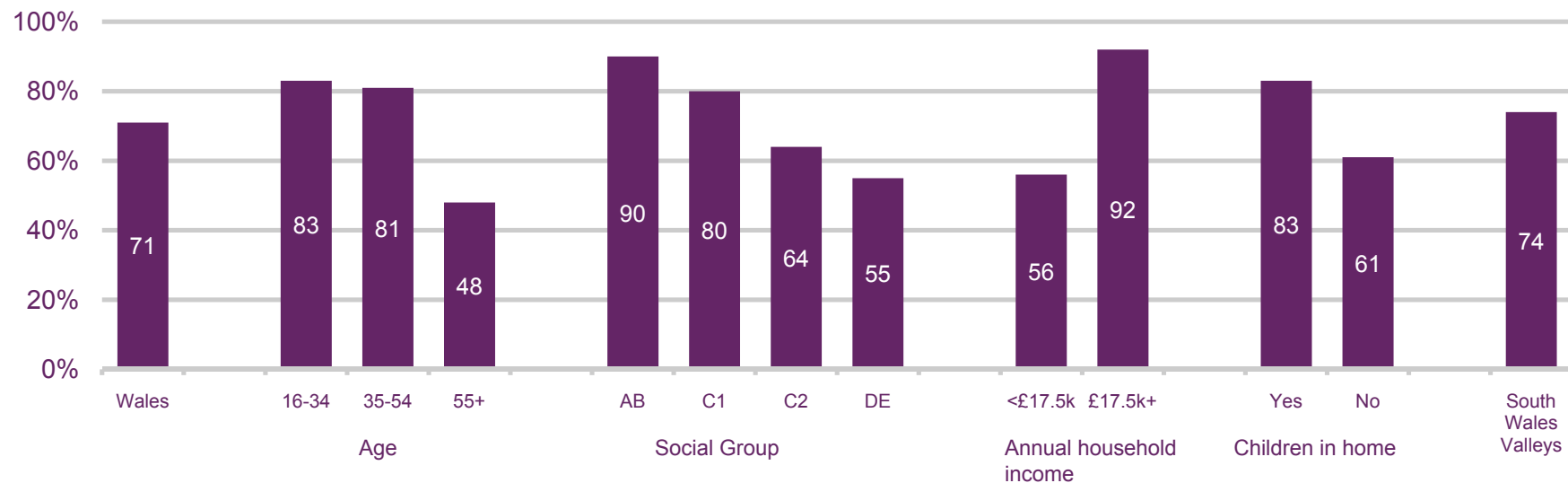


QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Source: Ofcom research, Quarter 1 2011

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

Broadband take-up in Wales (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 =493 Wales, 135 16-34s, 166 35-54s, 192 55+, 98 AB, 148 C1, 108 C2, 139 DE, 187 <£17.5k income, 116 £17.5k+, 169 children in home, 324 no children in home, 72 South Wales Valleys)

Take-up of mobile broadband

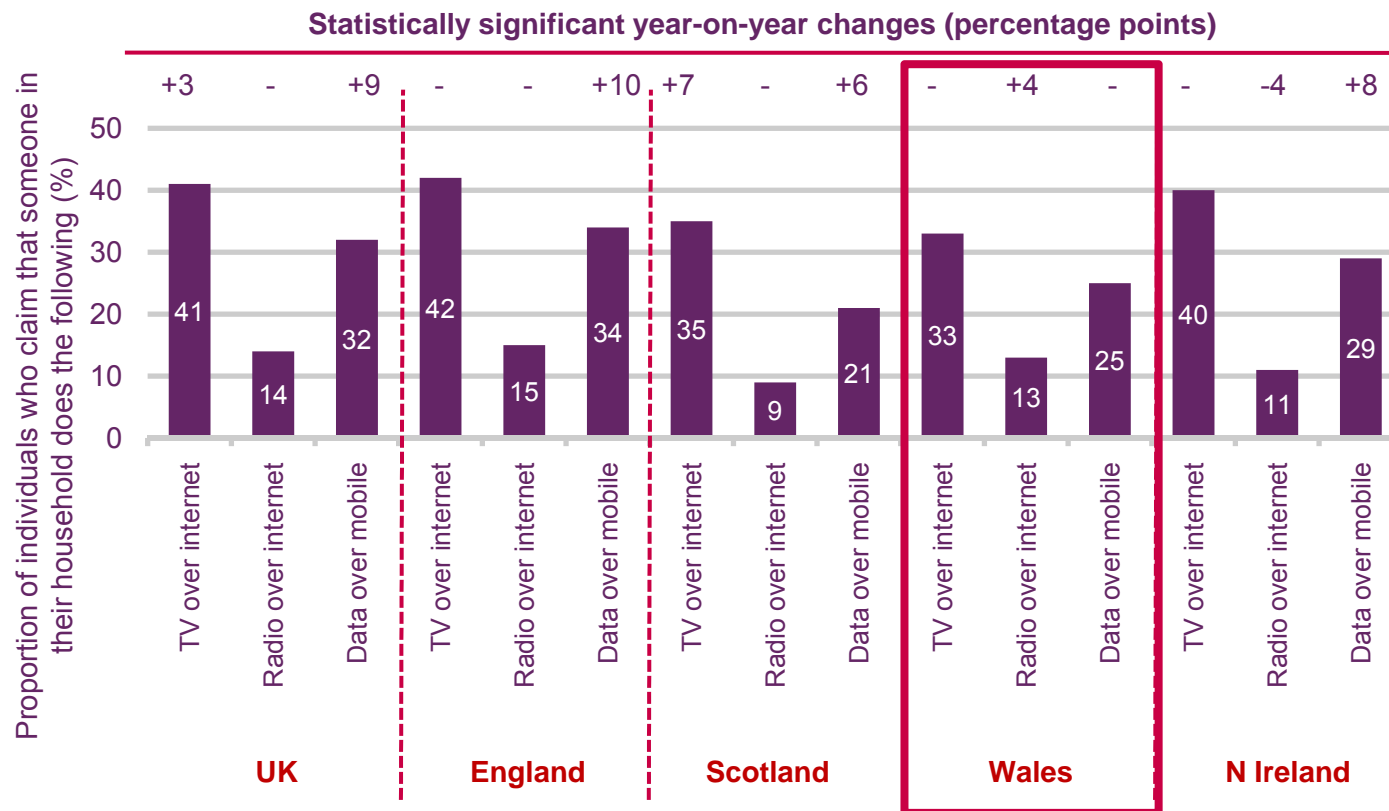


QE9. Which of these methods does your household use to connect to the Internet at home? (NB 2008 survey did not cover mobile broadband)

Source: Ofcom research, Quarter 1 2011

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

Consumers' use of converging platforms, 2011



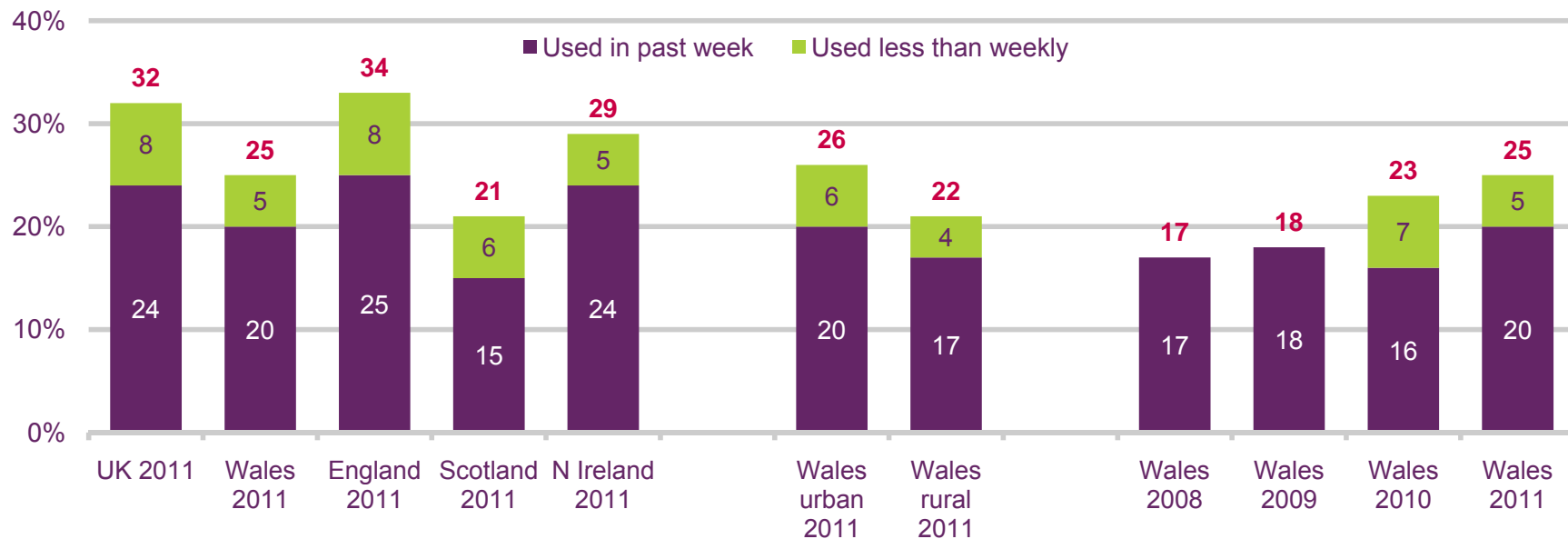
Source: Ofcom research, Quarter 1 2011

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

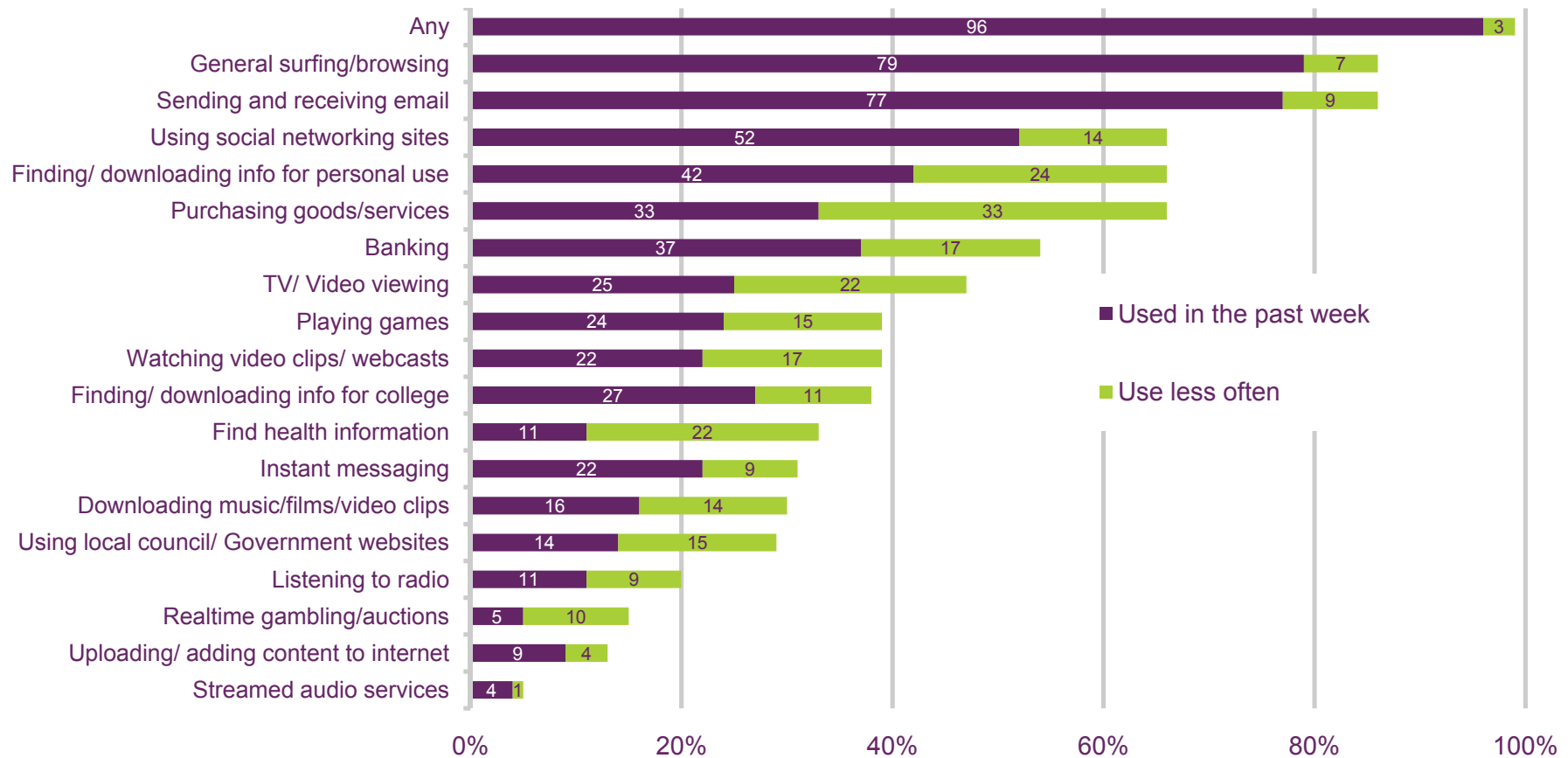


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB 2008 and 2009 surveys did not cover use in past week – 2008 and 2009 measures show any use)

Source: Ofcom research, Quarter 1 2011

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

Use of online applications among broadband users



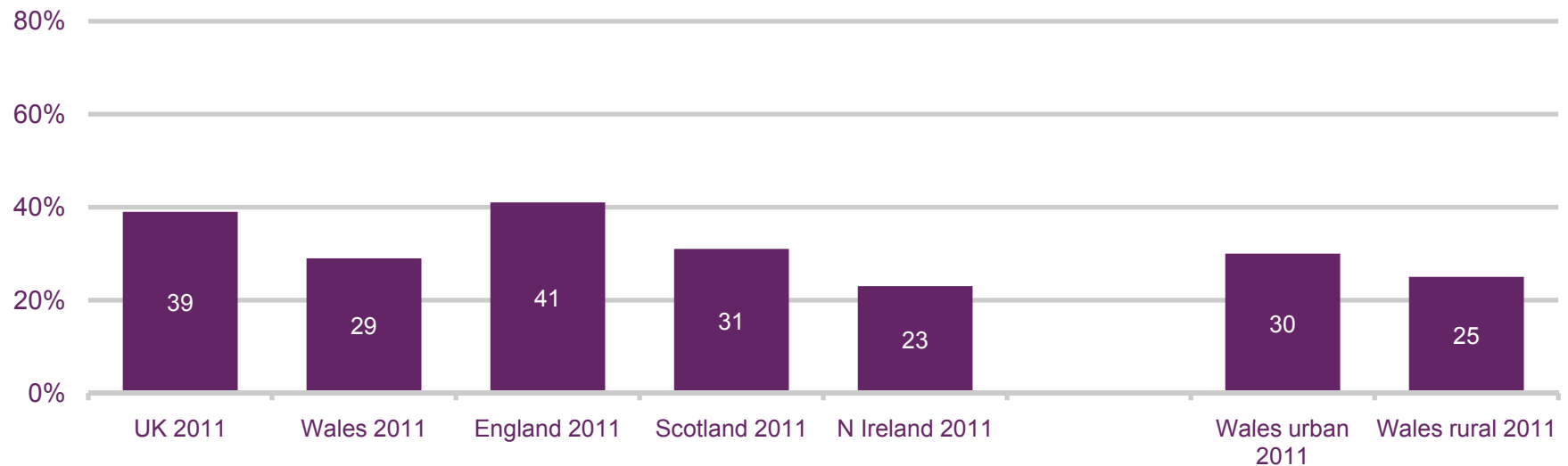
QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a broadband connection at home (n= 328 Wales 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, 334 Wales, 1493 England, 329 Scotland, 378 Northern Ireland, 171 Wales urban, 163 Wales 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, 334 Wales, 1493 England, 329 Scotland, 378 Northern Ireland, 171 Wales urban, 163 Wales rural)

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

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



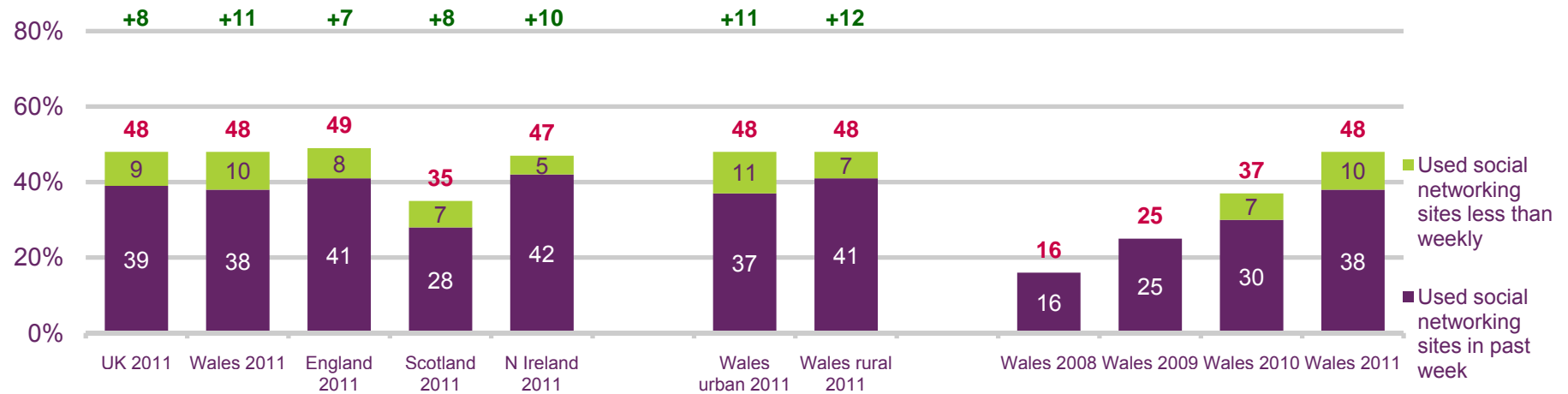
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with access to the internet at home (n = 2534 UK, 334 Wales, 1493 England, 329 Scotland, 378 Northern Ireland, 171 Wales urban, 163 Wales 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+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

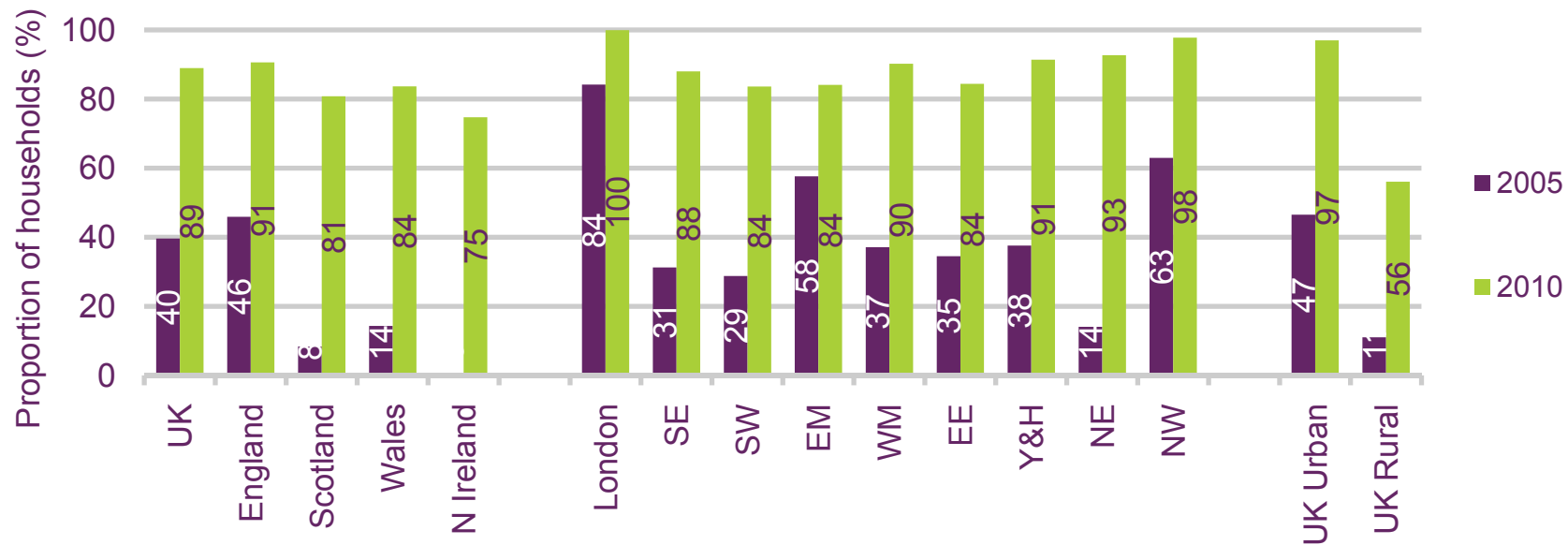
Telecoms and networks

Proportion of households connected to an ADSL-enabled BT exchange



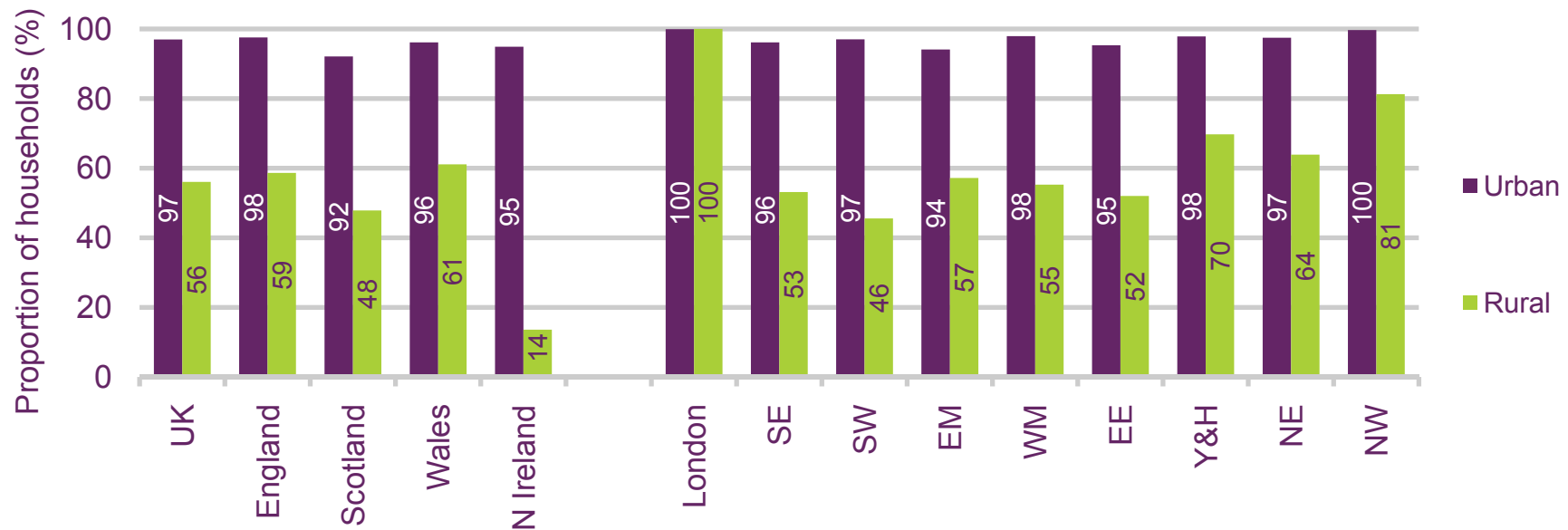
Source: Ofcom / BT, December 2010 data

Proportion of households in connected to an unbundled local exchange



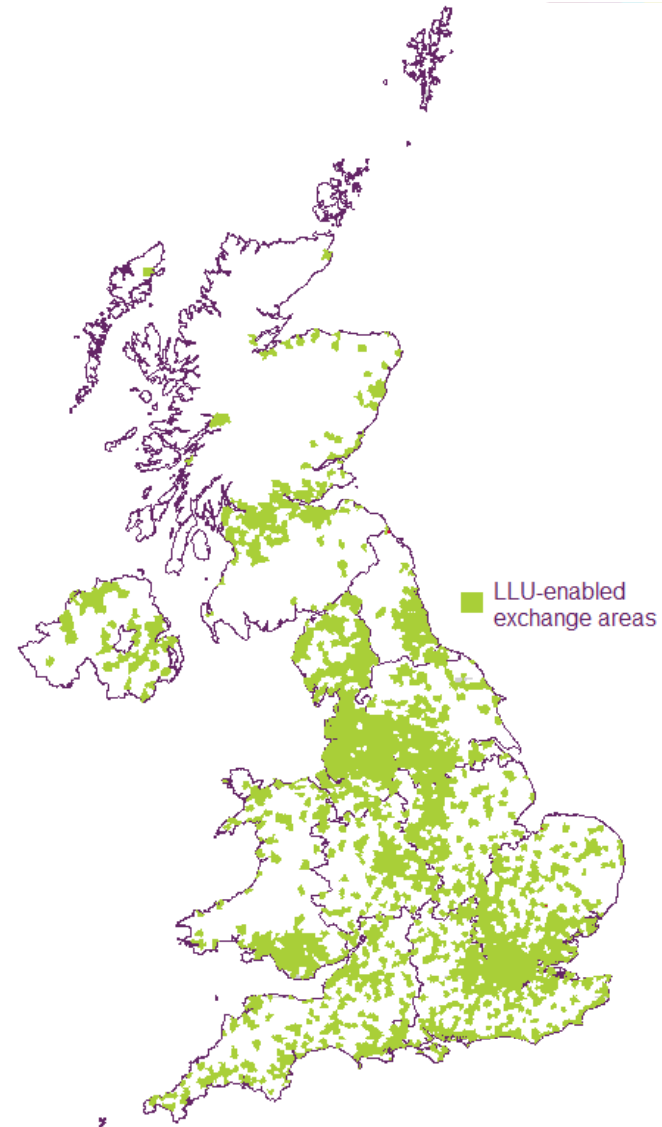
Source: Ofcom / BT, December 2010 data

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



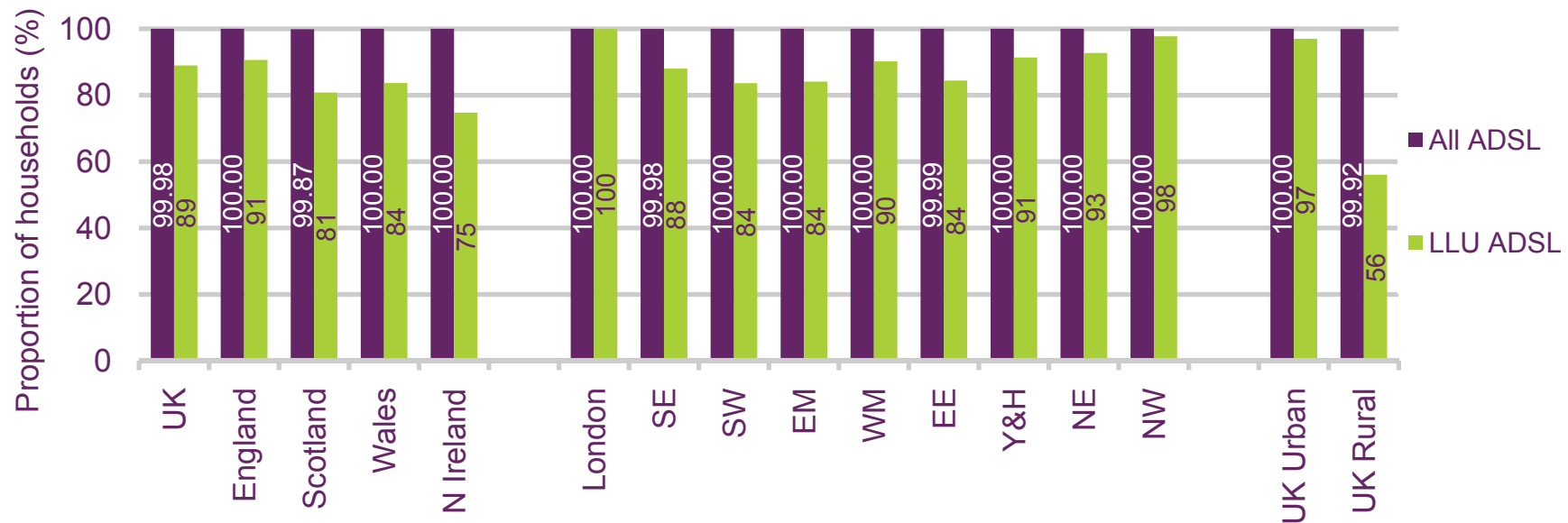
Source: Ofcom / BT, December 2010 data

Map showing areas served by unbundled local exchanges



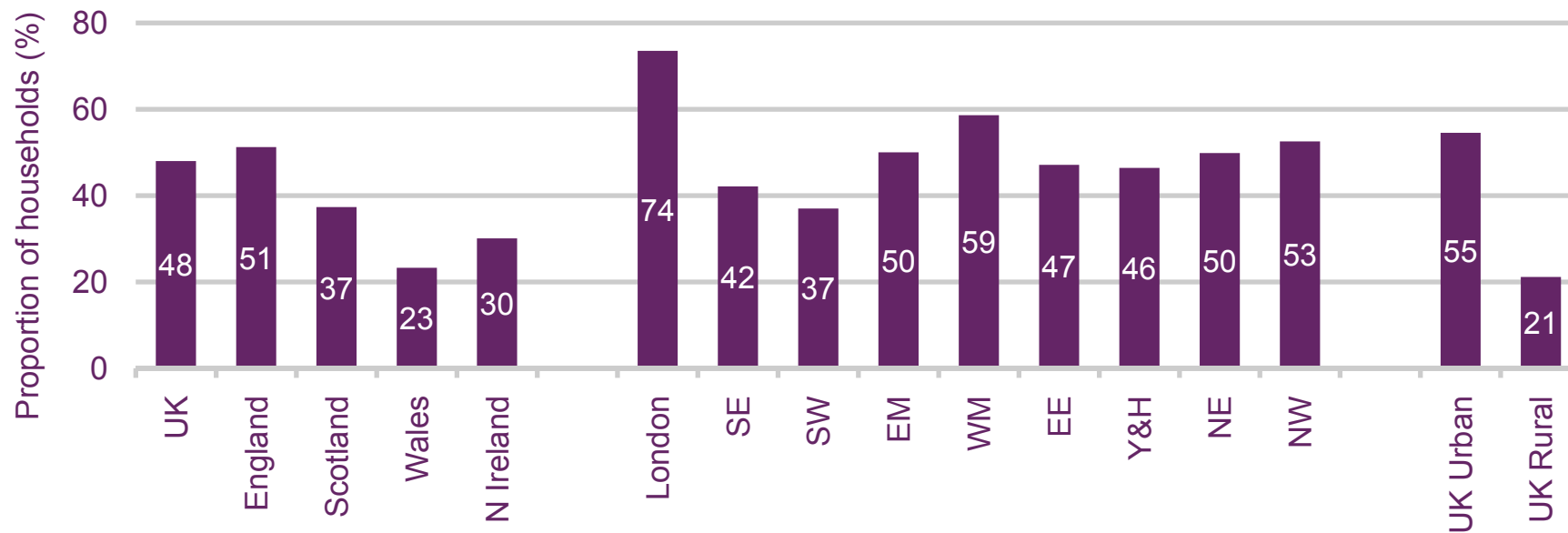
Source: Ofcom/BT, December 2010 data

Proportion of homes connected to ADSL-enabled and unbundled exchanges



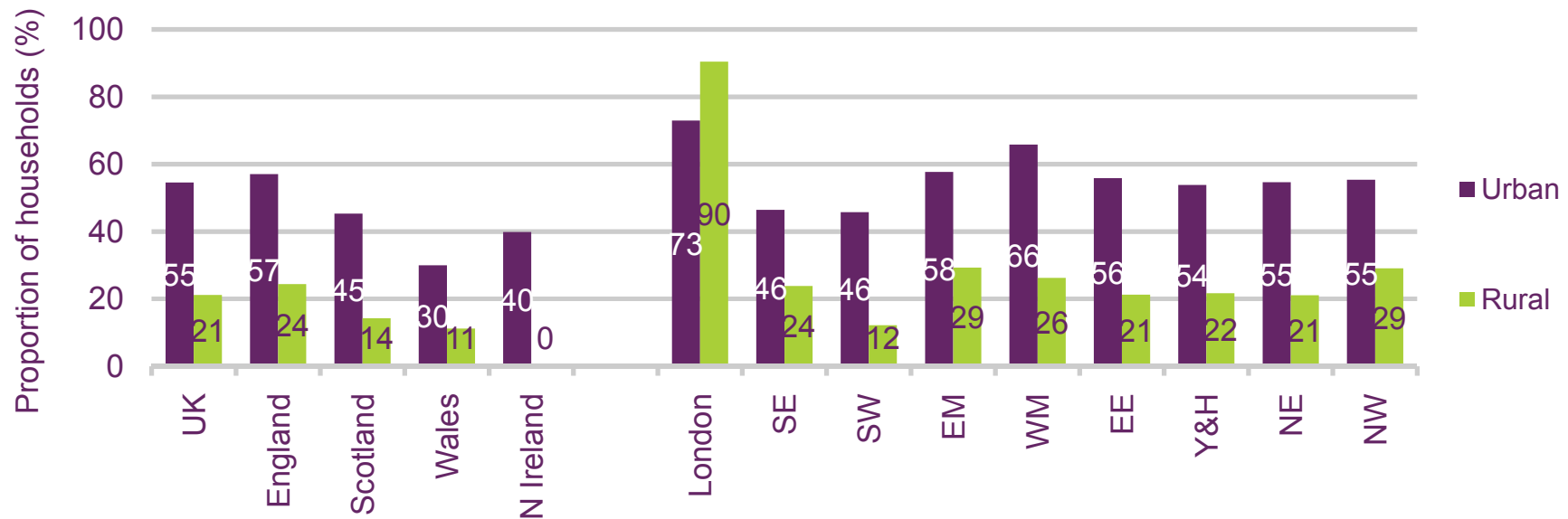
Source: Ofcom / BT, December 2010 data

Proportion of households passed by Virgin Media broadband



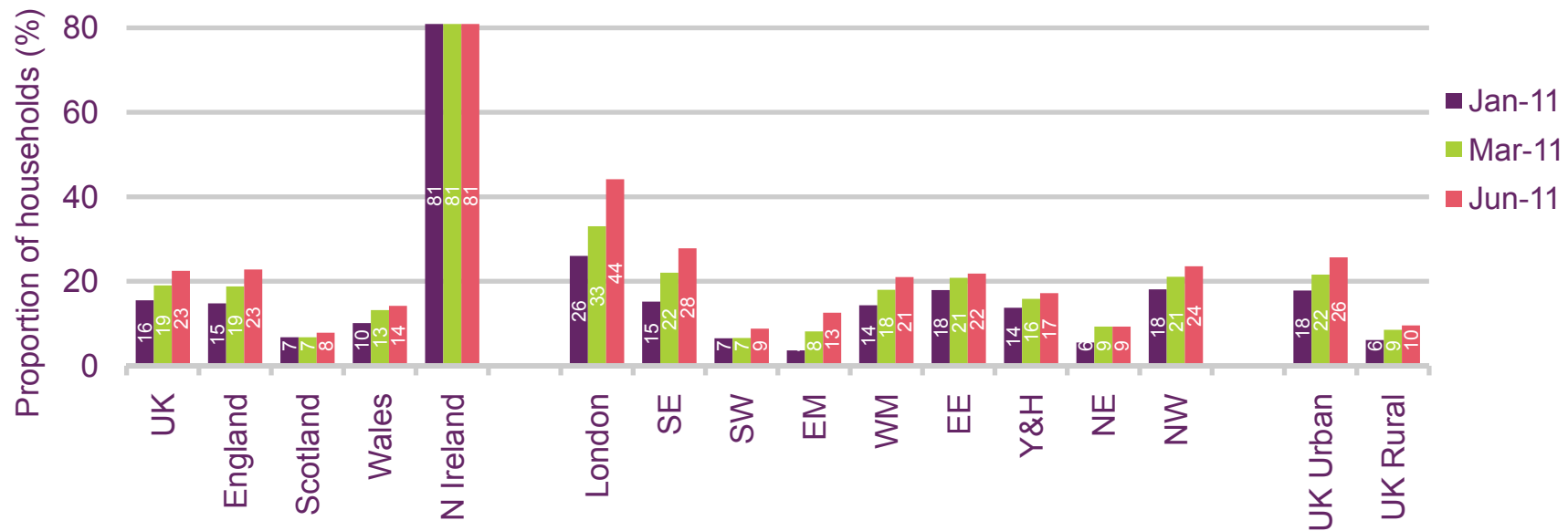
Source: Ofcom / Virgin Media, June 2010 data

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



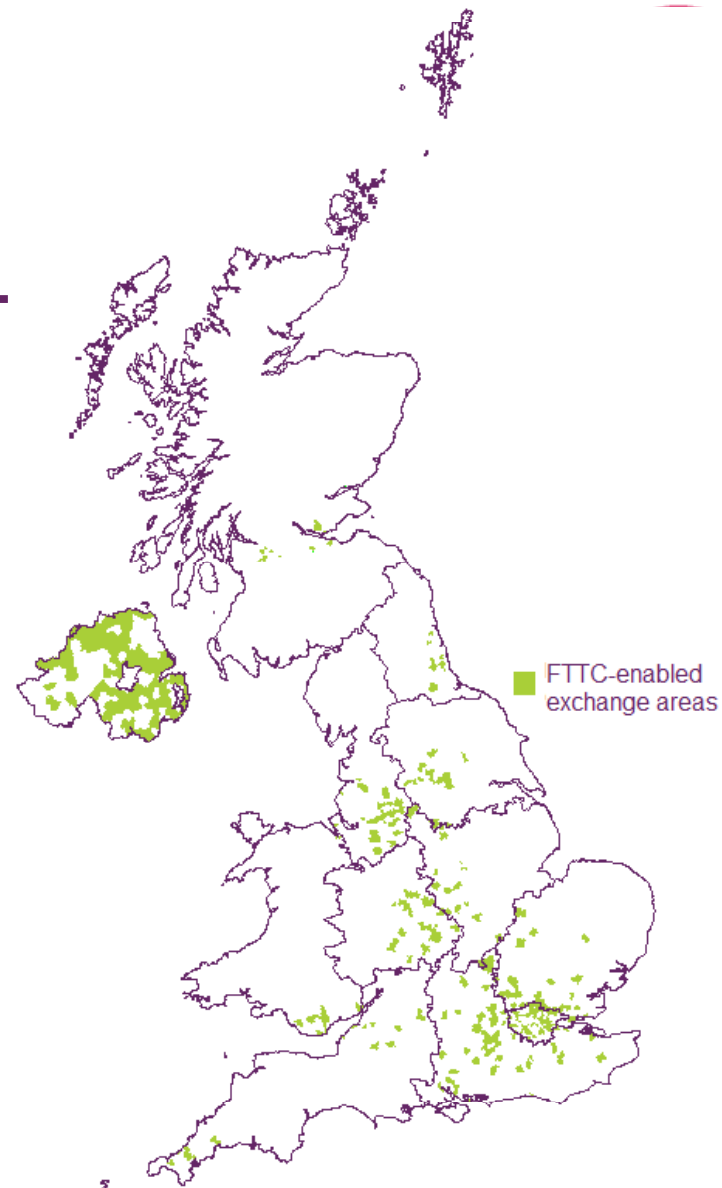
Source: Ofcom/Virgin Media, June 2010 data

Proportion of households connected to an FTTC-enabled exchange



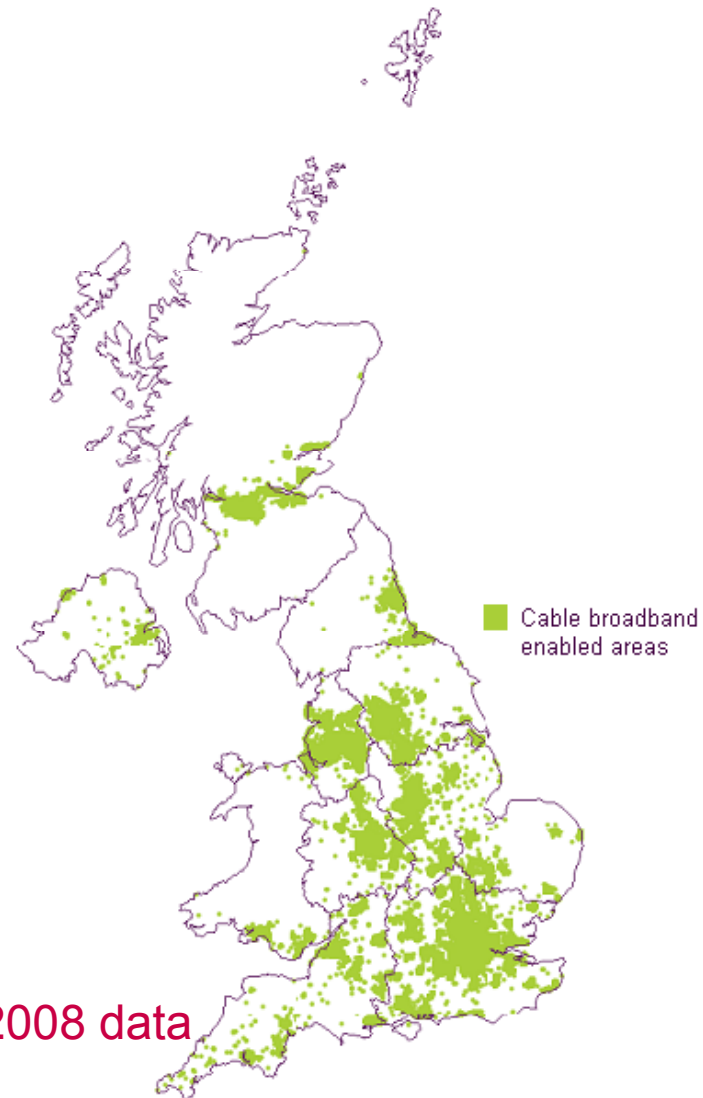
Source: Ofcom / BT

Map of FTTC-enabled BT exchange areas



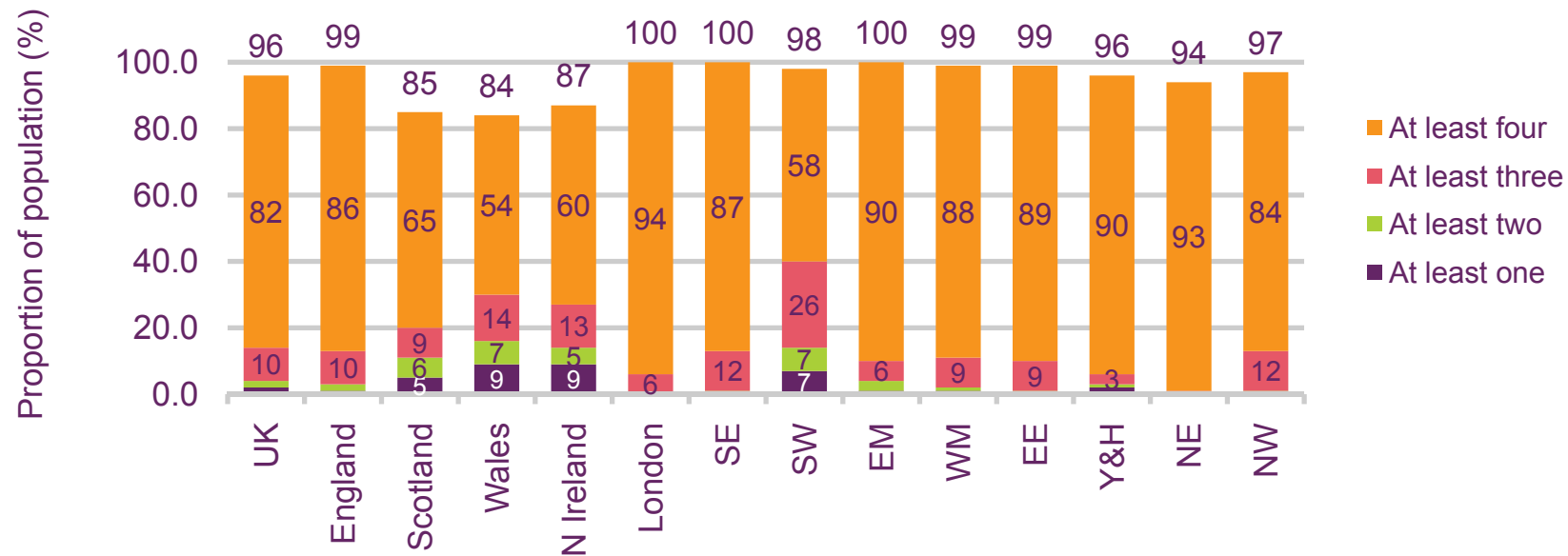
Source: Ofcom / BT, June 2011 data

Map of the availability of Virgin Media cable broadband



Source: Ofcom/Virgin Media, September 2008 data

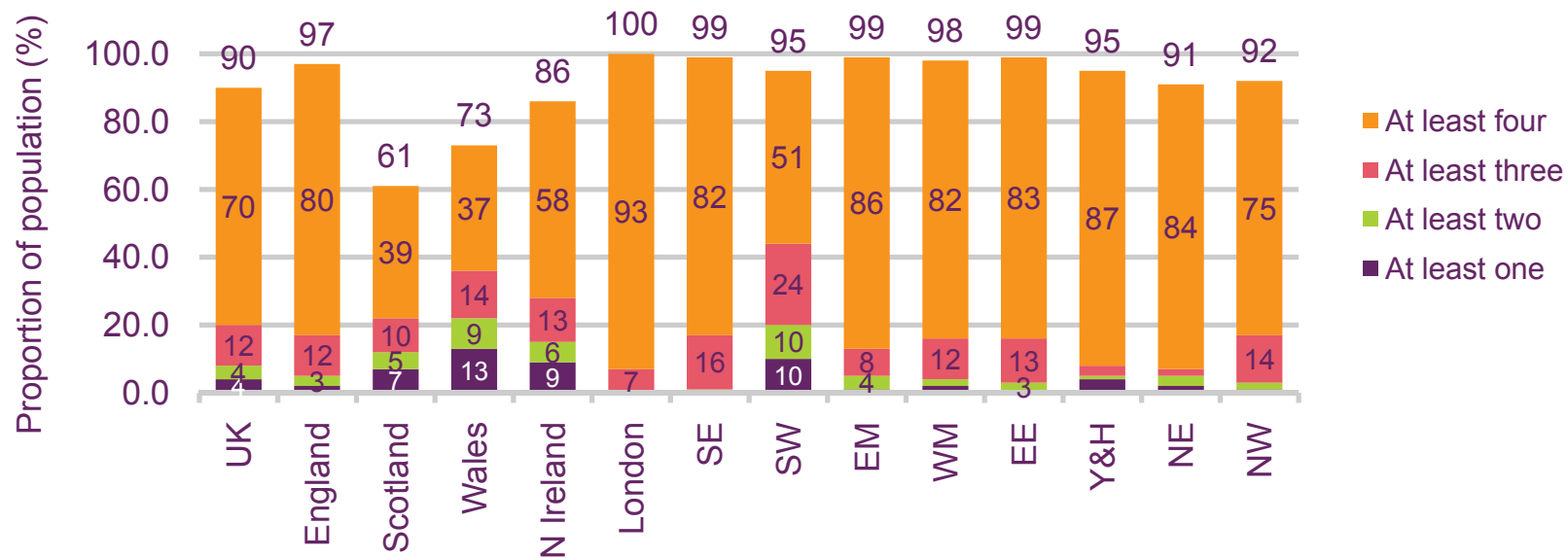
2G mobile phone population coverage (90%) – by number of operators



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

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

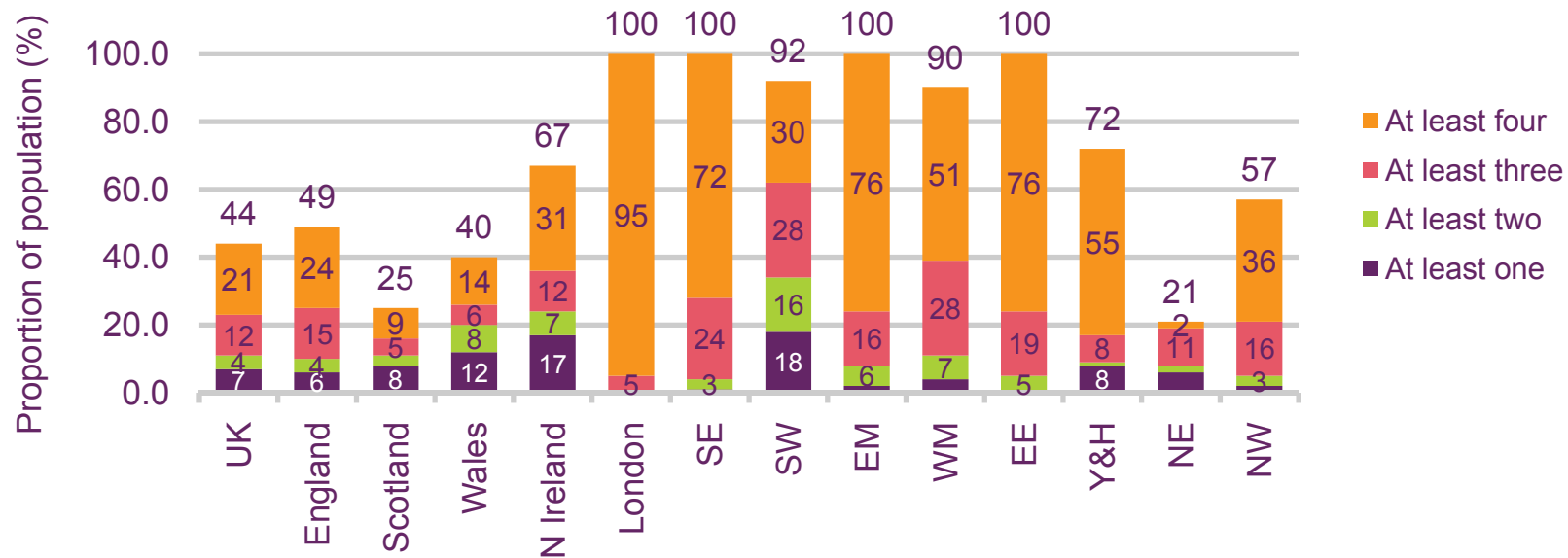
2G mobile phone geographic coverage by postcode (90%) – by number of operators



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

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

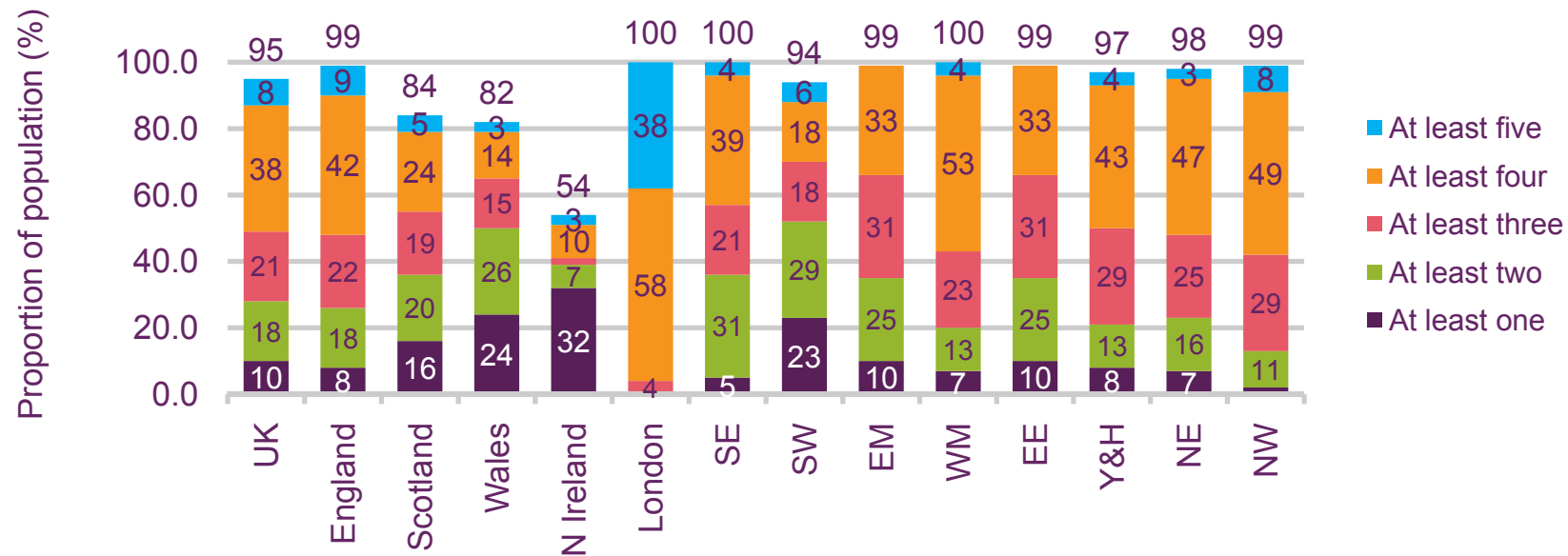
2G mobile phone geographic coverage by land mass (90%) – by number of operators



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

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

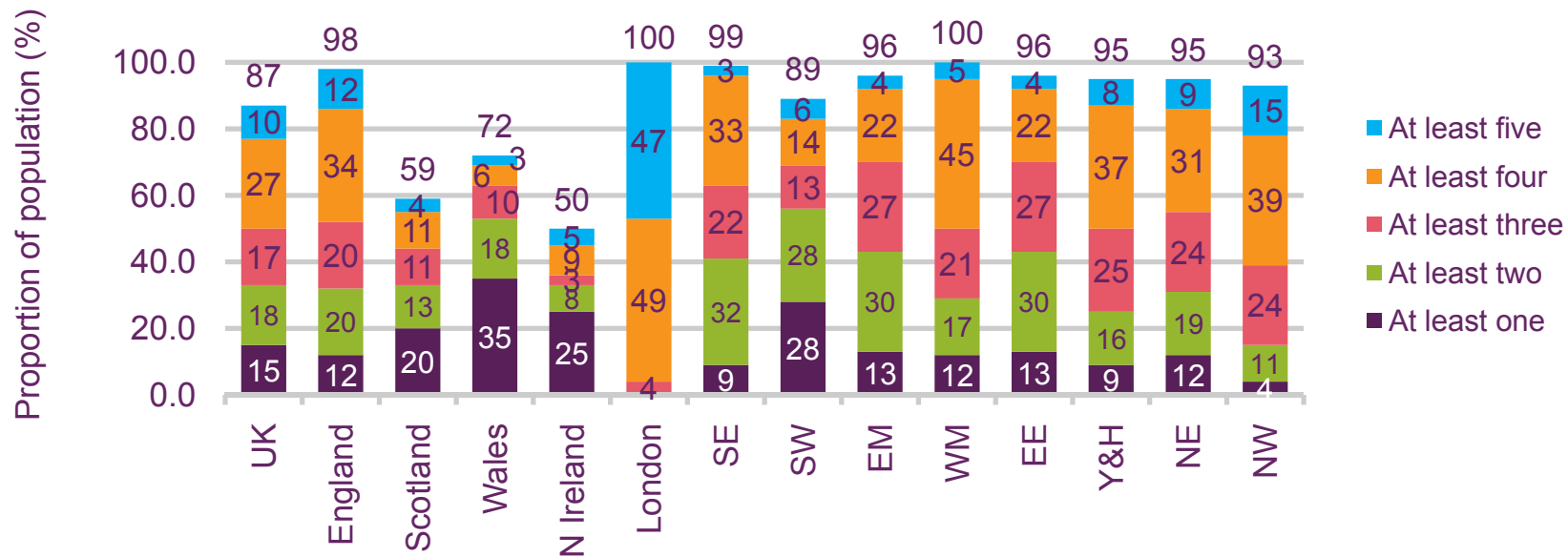
3G mobile phone population coverage (90%) – by number of operators



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

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

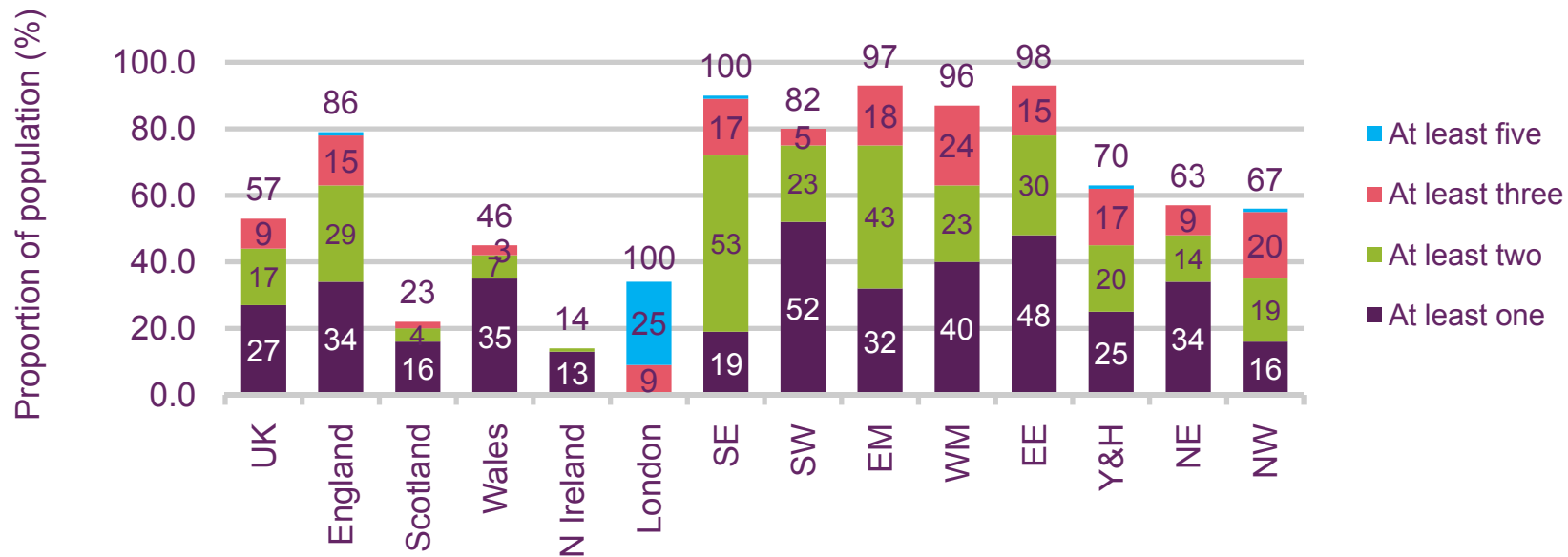
3G mobile phone geographic coverage by postcode (90%) – by number of operators



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

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

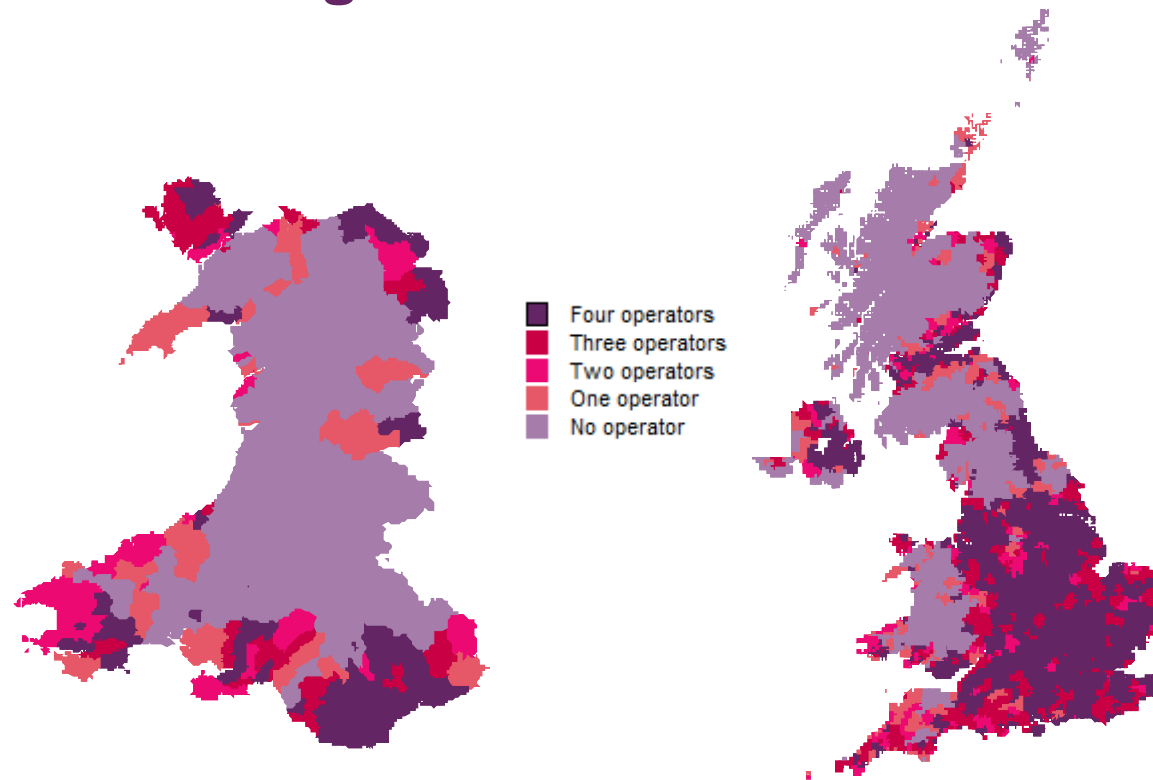
3G mobile phone geographic coverage by land mass (90%) – by number of operators



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

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

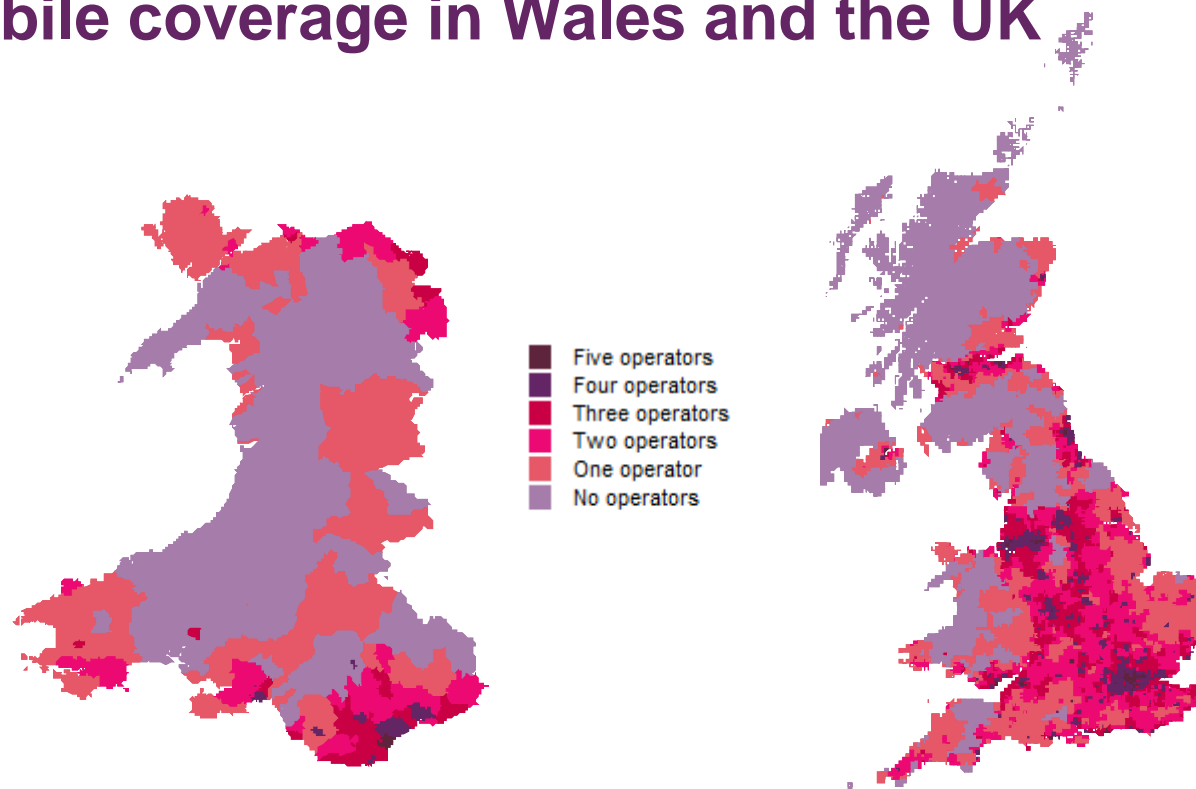
2G mobile coverage in Wales and the UK



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

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

3G mobile coverage in Wales and the UK



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

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

Take-up of communications services, 2011

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

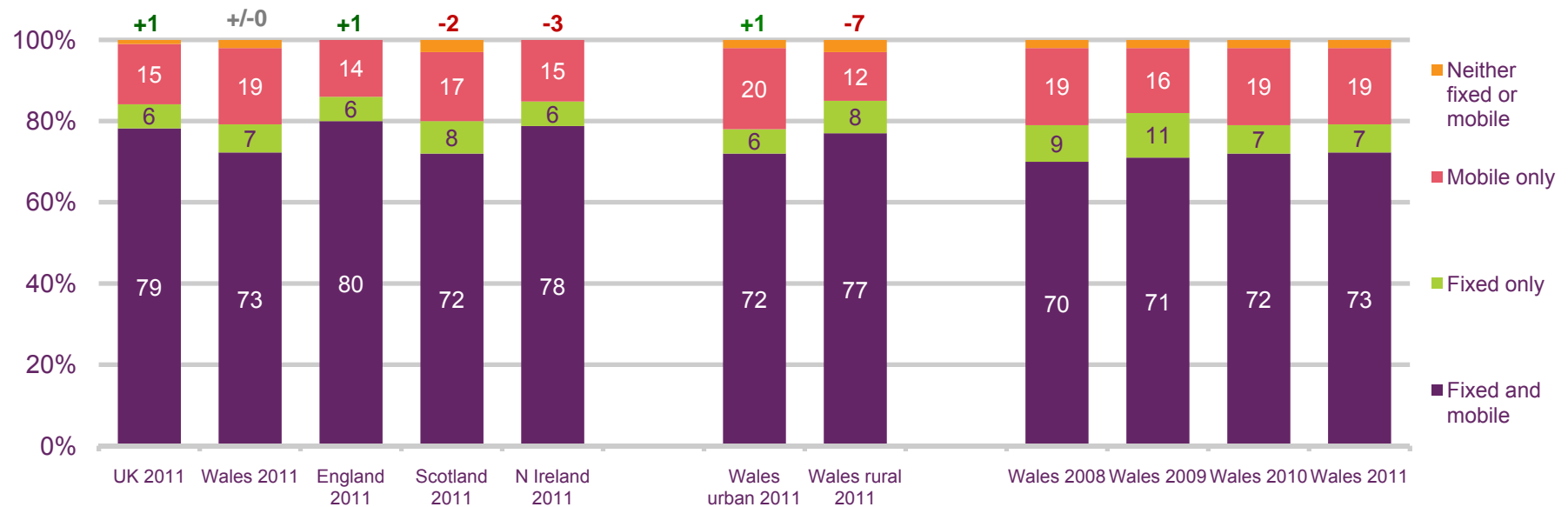
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QE9. Which of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

Source: Ofcom research, Quarter 1 2011

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

Cross-ownership of household telephony services

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



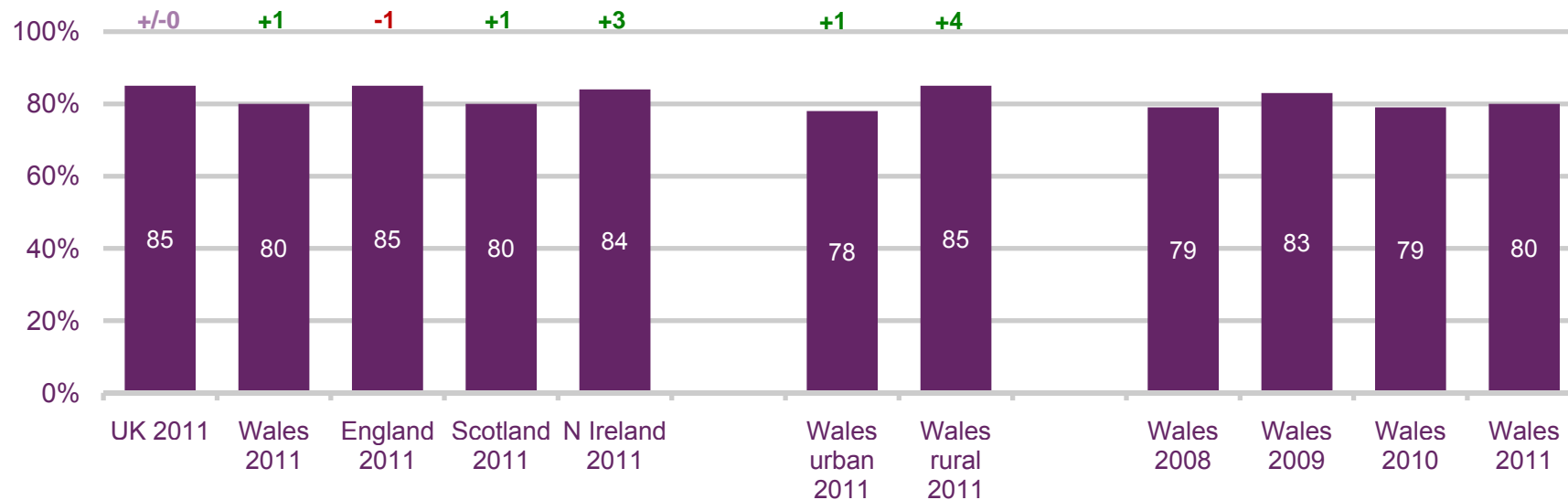
QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Quarter 1 2011

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

Fixed line take-up

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



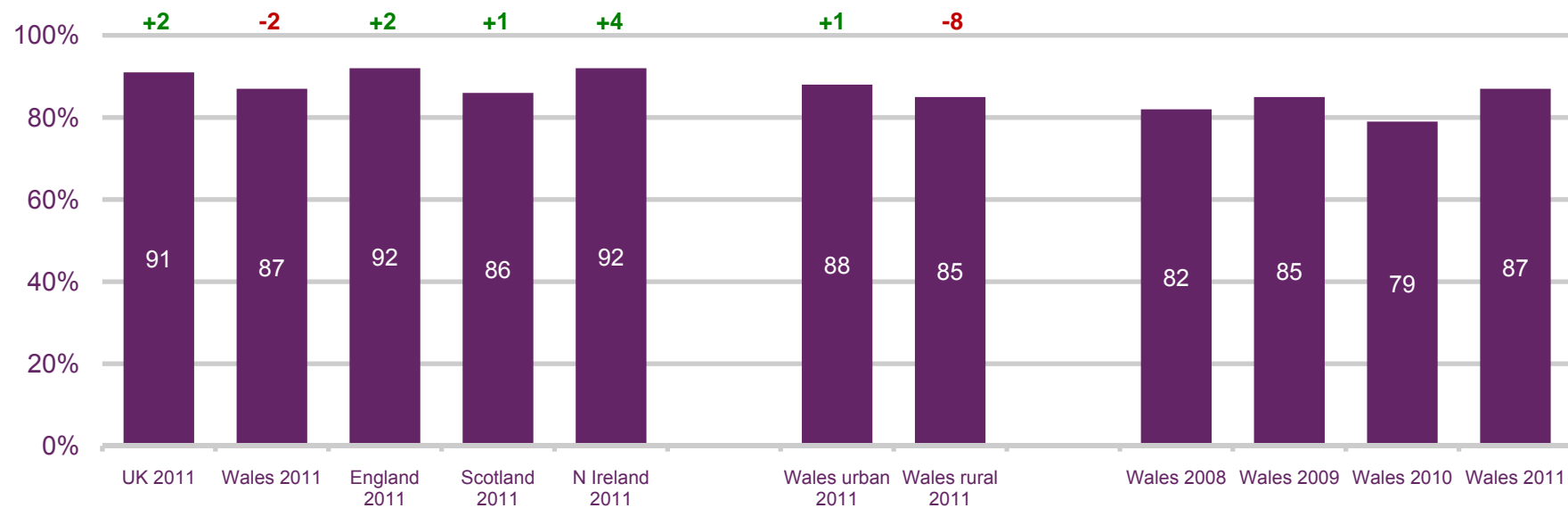
QC1. Is there a landline phone in your home that can be used to make and receive calls?

Source: Ofcom research, Quarter 1 2011

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

Mobile take-up

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



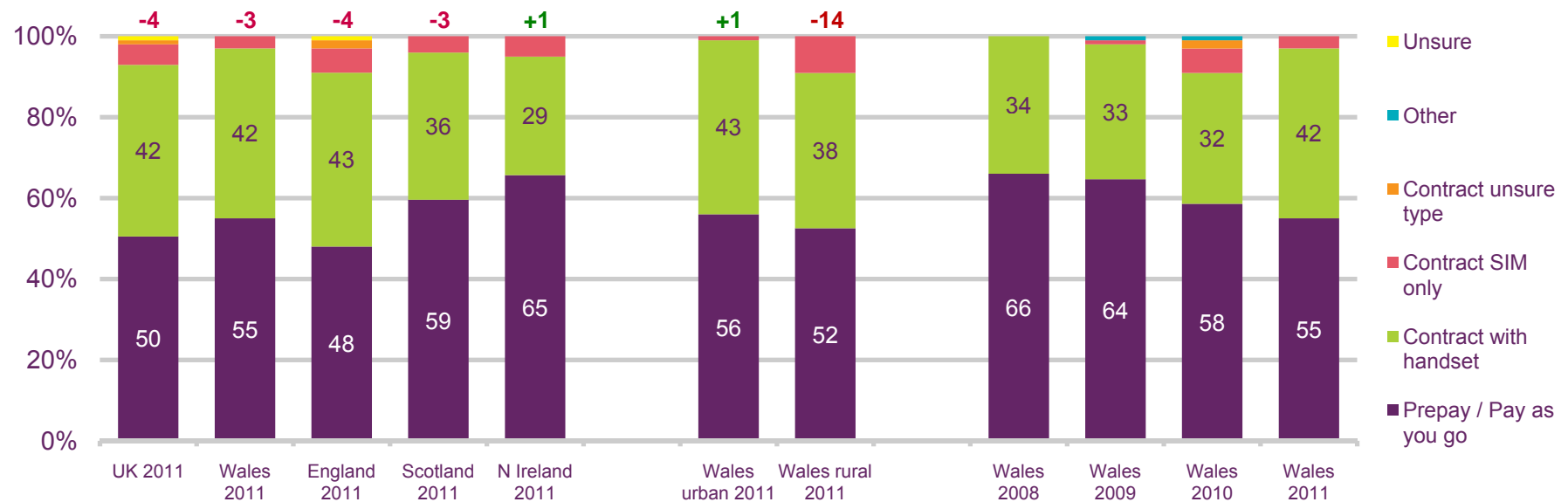
QD2. Do you personally use a mobile phone?

Source: Ofcom research, Quarter 1 2011

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

Type of mobile subscription

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

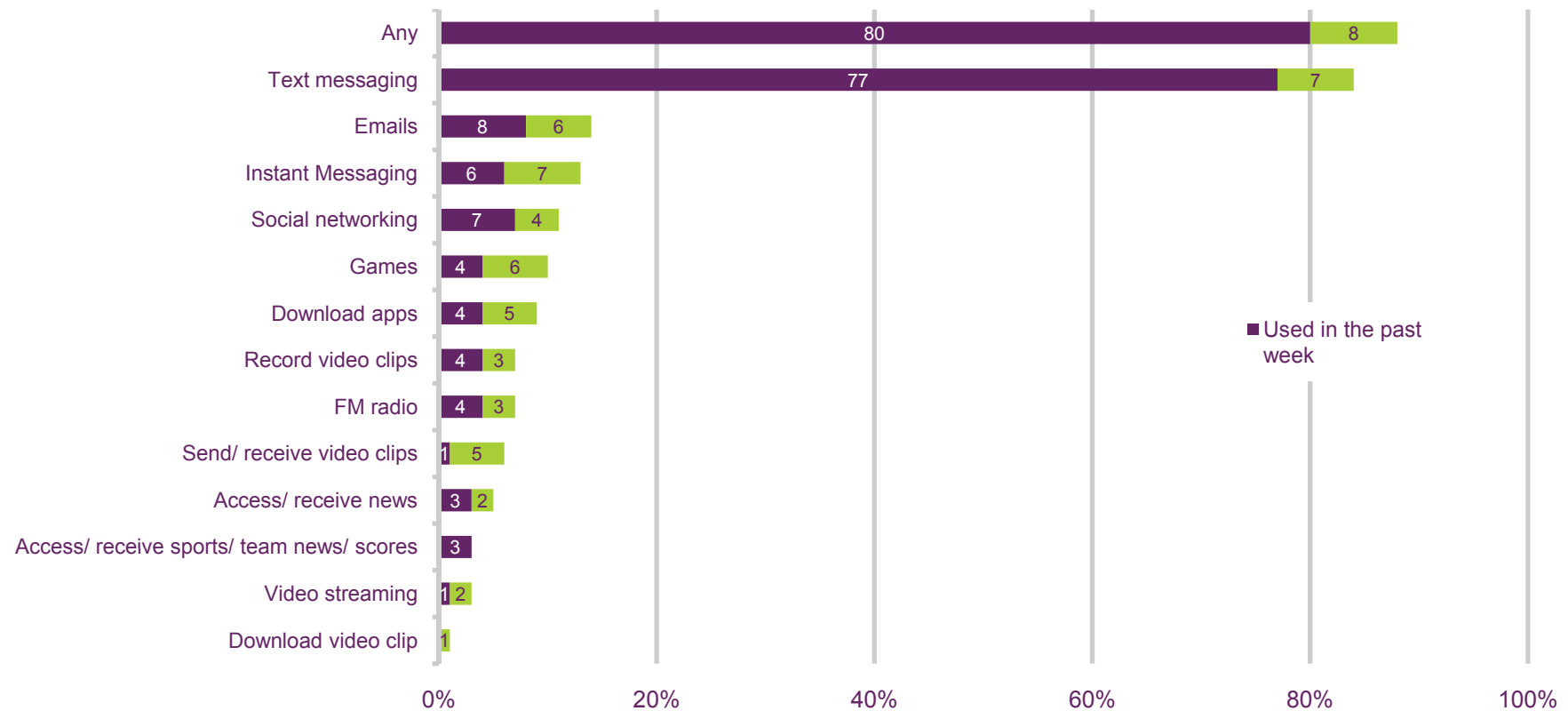


QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

Source: Ofcom research, Quarter 1 2011

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

Use of mobile applications among mobile users in Wales



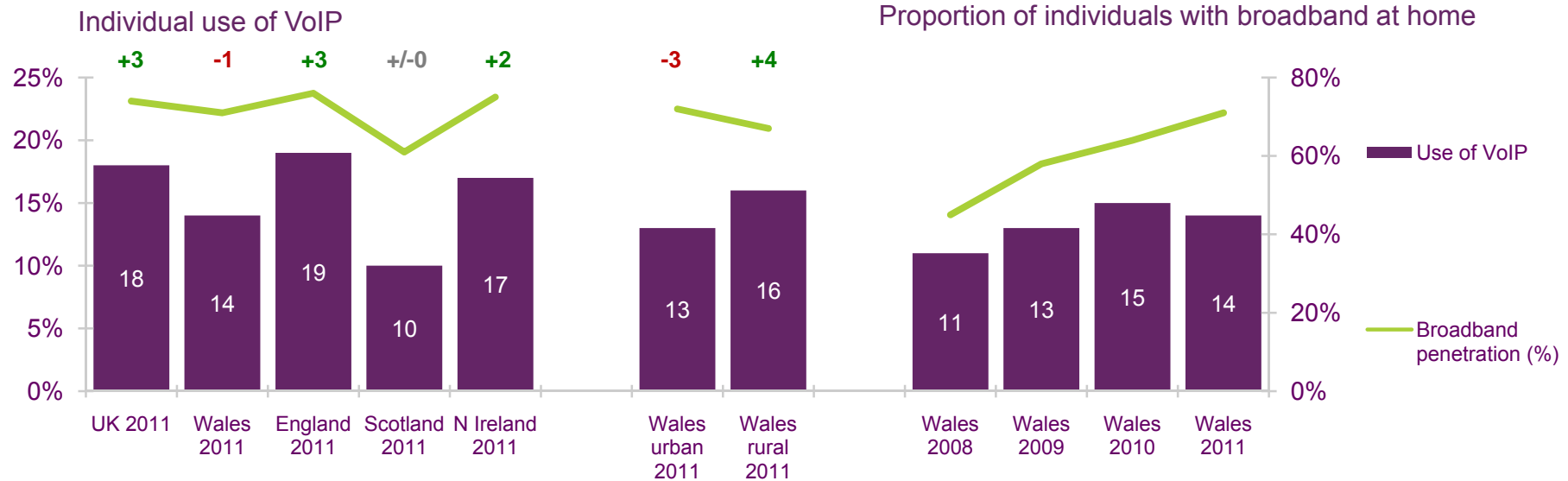
QD28. Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Quarter 1 2011

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

Individual use of Voice over IP

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

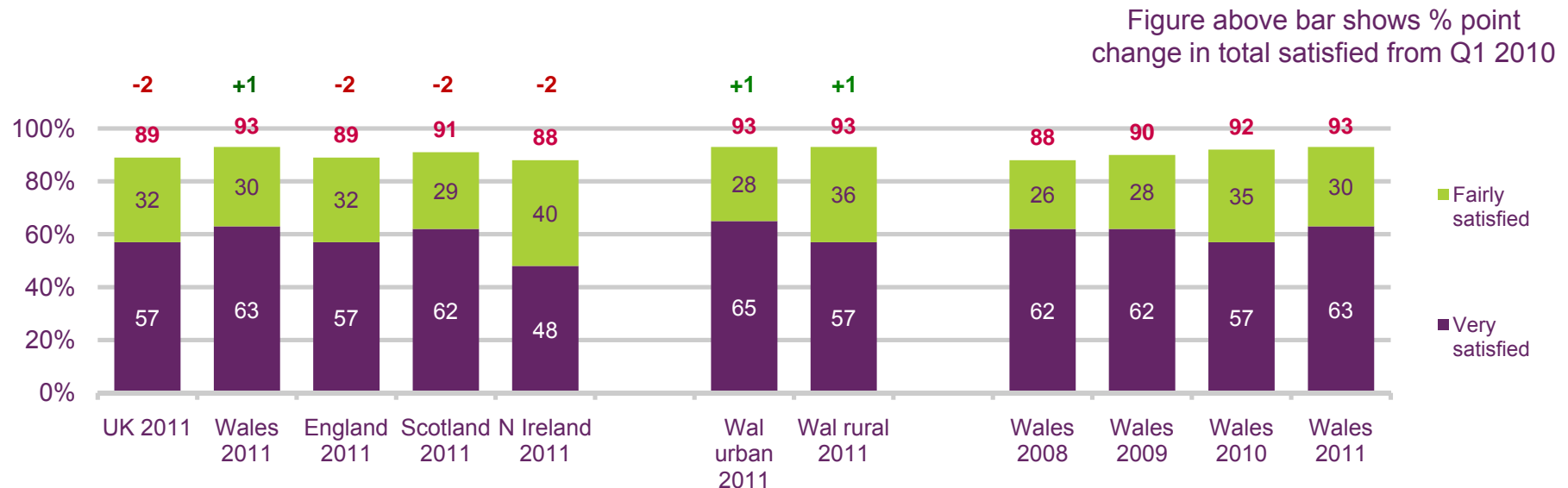


QE29. Before now, were you aware that you could make voice calls using the internet?/ QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?

Source: Ofcom research, Quarter 1 2011

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

Overall satisfaction with fixed line services



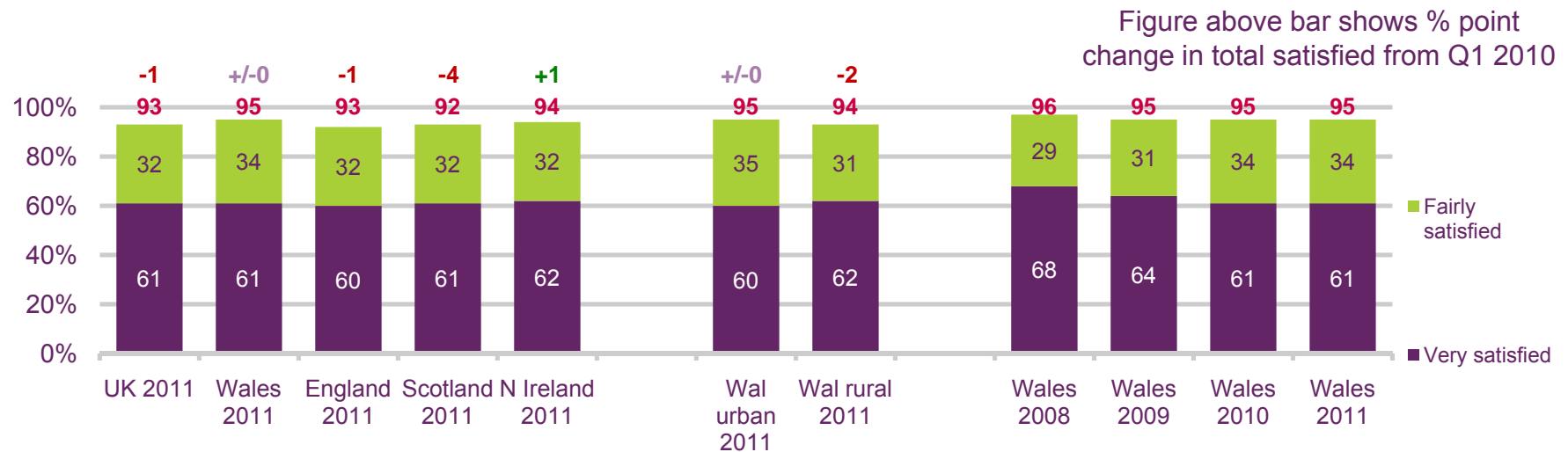
QC13a. Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

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

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

Overall satisfaction with mobile phone service



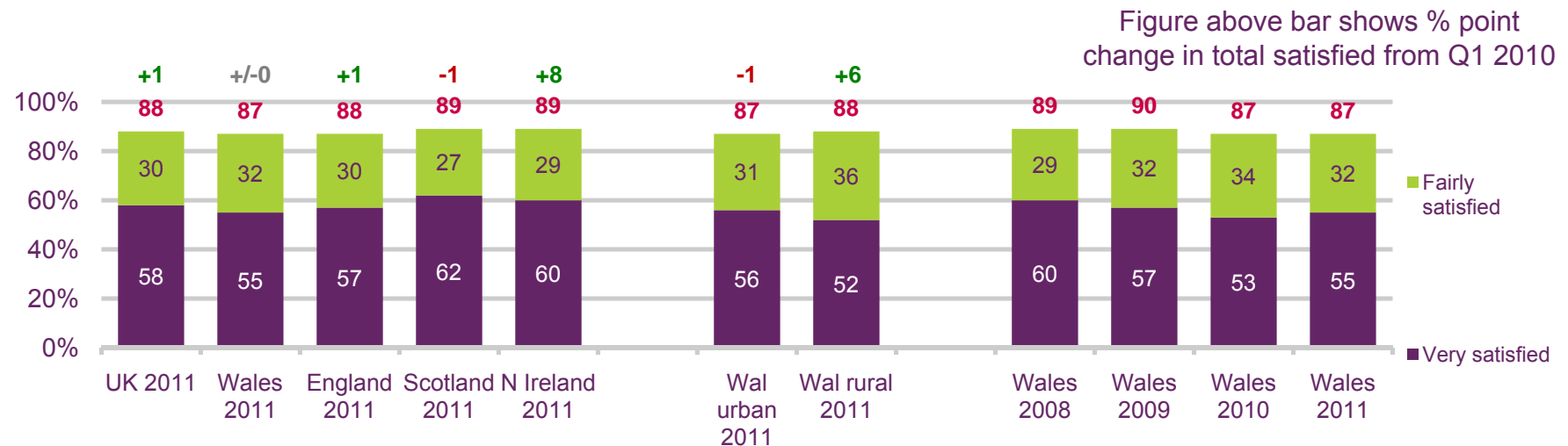
QD21a. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Source: Ofcom research, Quarter 1 2011

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

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

Satisfaction with reception of mobile service



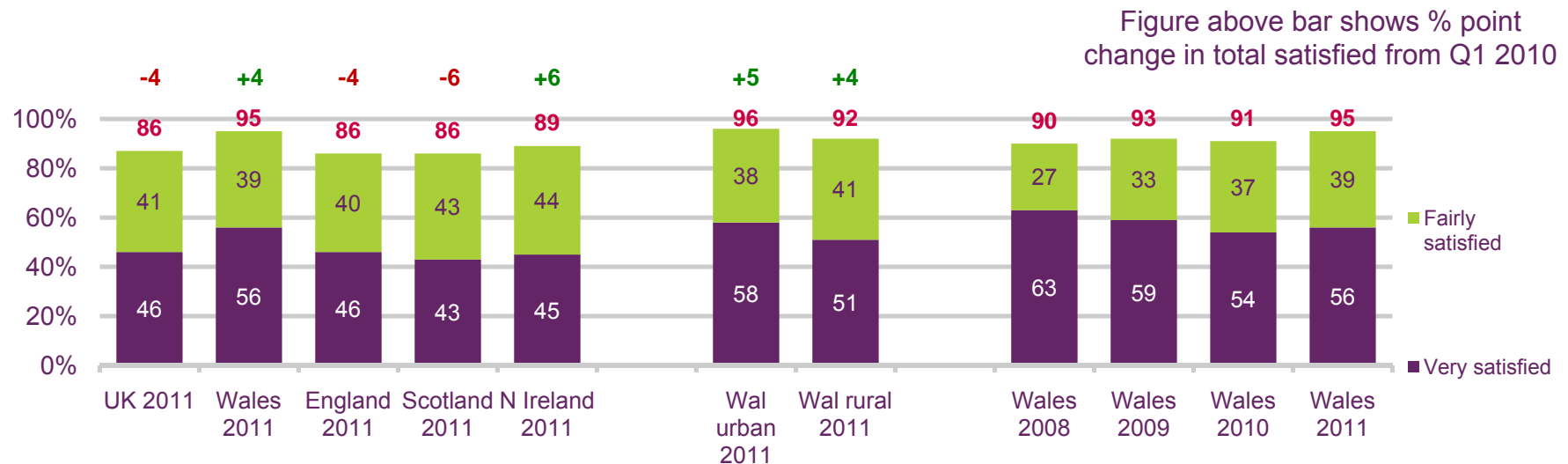
QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Source: Ofcom research, Quarter 1 2011

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

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

Overall satisfaction with fixed broadband service



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

Source: Ofcom research, Quarter 1 2011

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

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

Satisfaction with speed of fixed broadband connection



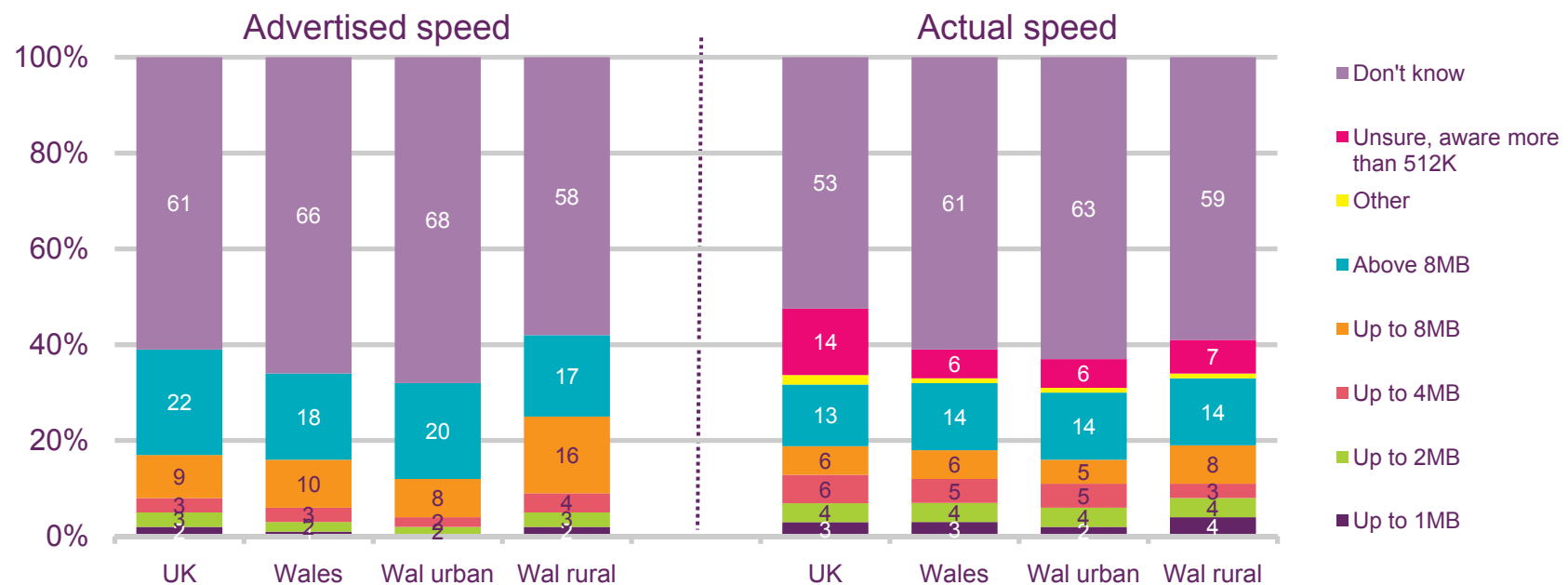
QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Quarter 1 2011

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

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

Awareness of advertised and actual broadband speeds in Wales



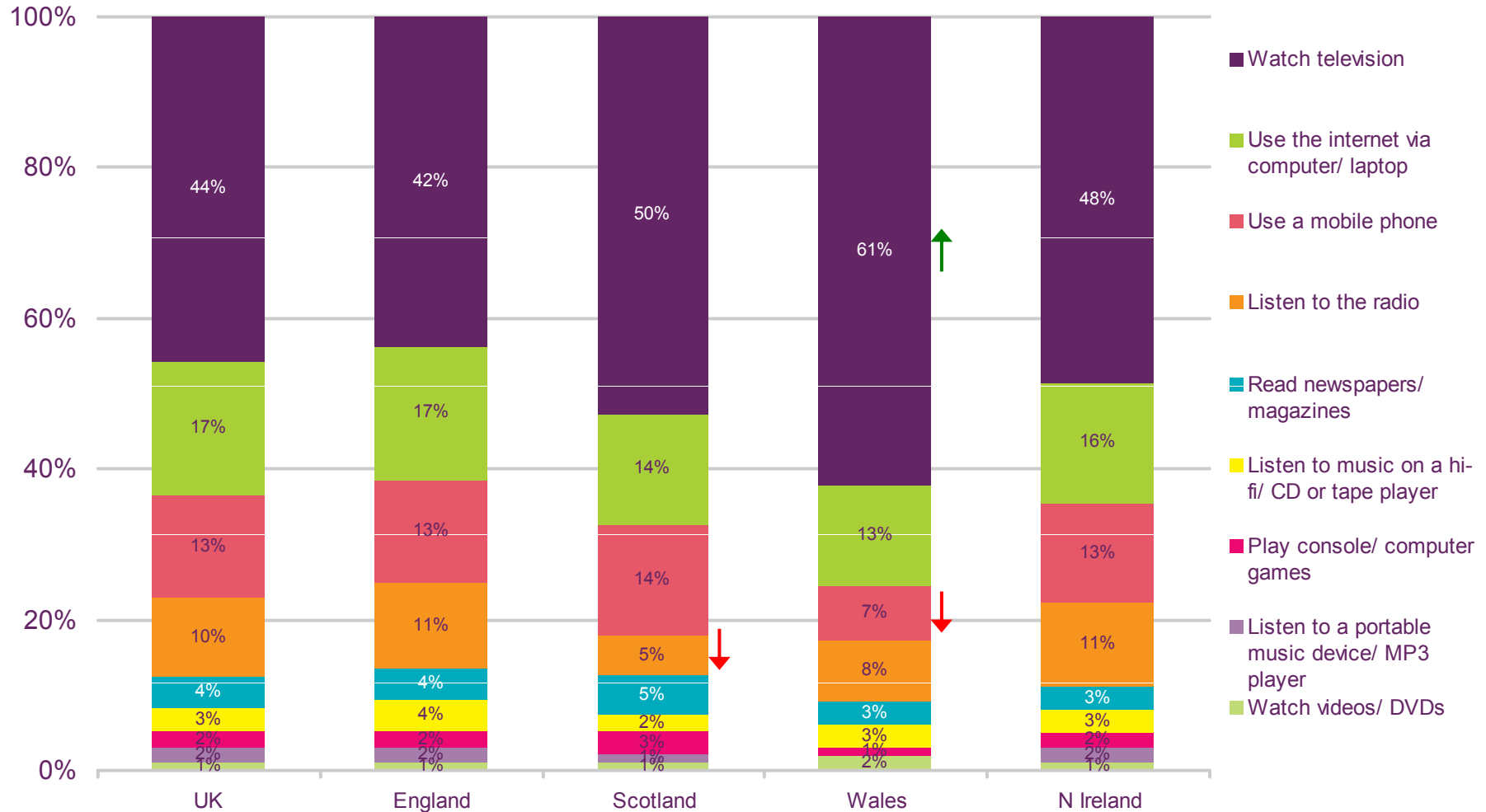
QE17. What was the advertised speed of your main home internet connection when you took up your service?/ QE16. What is the actual speed of your main home internet connection?

Source: Ofcom research, Quarter 1 2011

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

Media literacy in Wales

Most-missed media activity

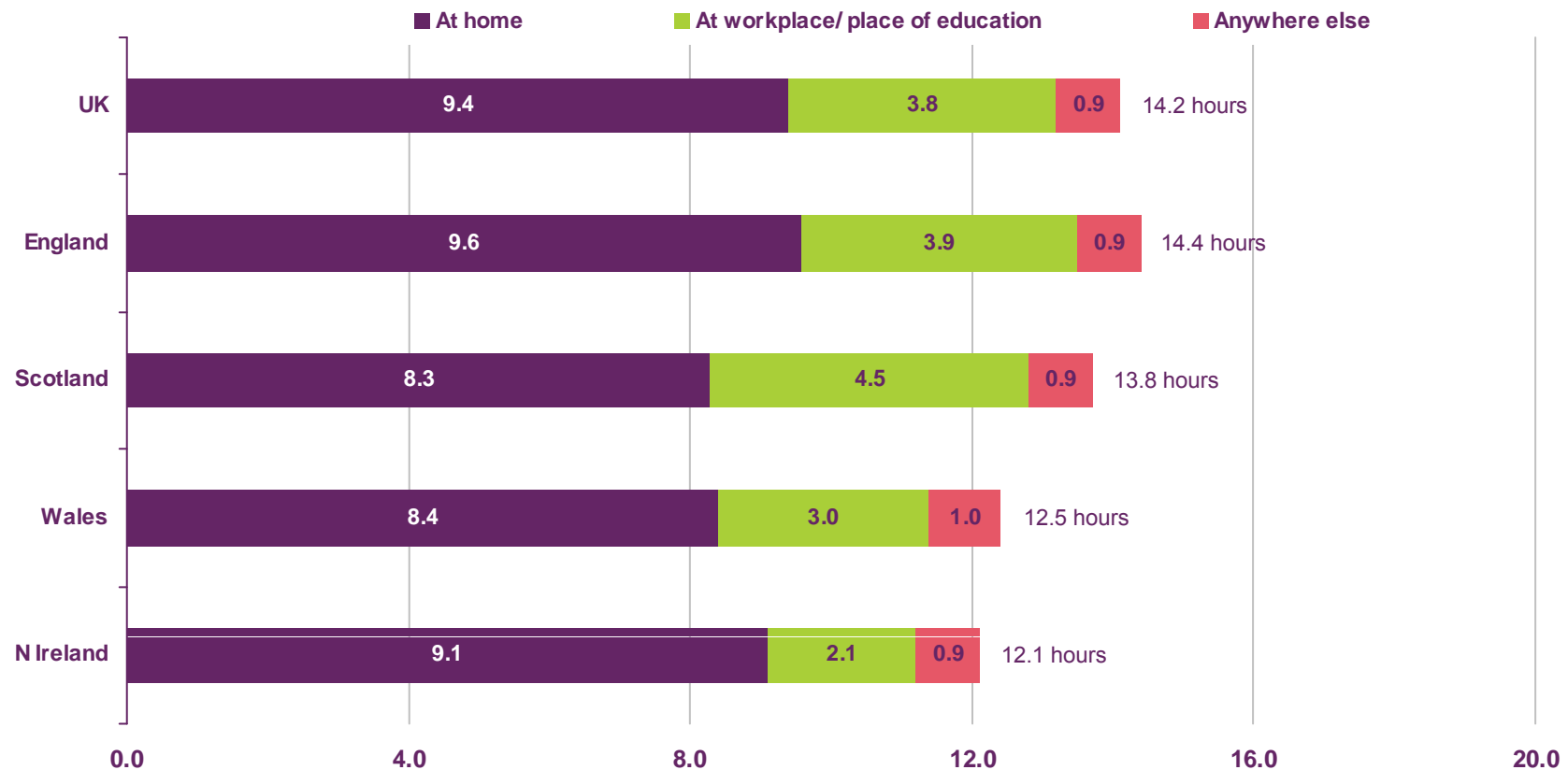


A2 – Which one of these would you miss doing the most? (Prompted responses, single coded)

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



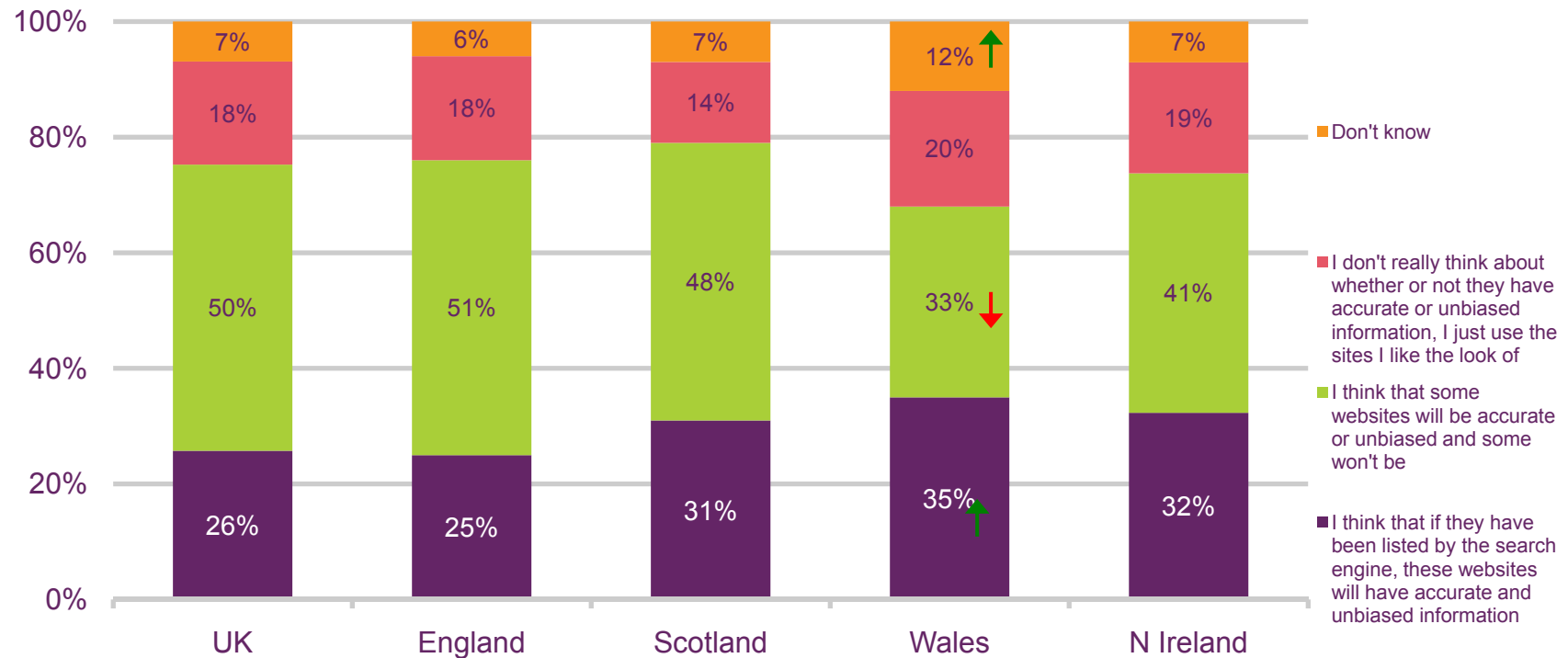
IN7A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

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

Search engine users attitudes towards the accuracy or bias of the websites returned by a search



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

Base: All adults aged 16+ who ever use search engines (1090 UK, 738 England, 114 Scotland, 120 Wales, 118 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