1 The market in context
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1.1 Introduction and structure

1.1.1 Introduction

This introductory section of the Communications Market Report 2012 is divided into seven sections:

- **Key market trends** (Section 1.3, page 23)
  The section summarises developments in the UK’s communications sectors during 2011 and 2012. It focuses on services availability, take-up and industry revenues, as well as covering consumers’ use of different devices and household spending on communications services.

- **The rise in text-based communications** (Section 1.4, page 33)
  With the growth in take up and use of a range of digital communications services, this research looks at UK consumers preferences for and use of different communications methods. The research highlights that text-based communications services are now more widely used than voice-based methods to communicate with family and friends.

- **The generation gap** (Section 1.5, page 49)
  While the use of media and communications services is developing rapidly across the UK, the experience of consumers varies by age. This section examines the differences in device take up and media consumption between younger and older people.

- **The fourth screen** (Section 1.6, page 61)
  With the rapid increase in tablet and e-reader ownership in the past year, the section explores how these devices have affected people’s lives. It explores the impact on owners’ media use and attitudes.

- **The London 2012 Games: media consumption** (Section 1.7, page 75)
  The London 2012 Olympic and Paralympic Games is set to be a significant event in the UK media and communications landscape. In this section we examine television viewer behaviour to past Olympic Games and present new research on the media intentions of UK consumers for the London 2012 Olympic and Paralympic Games.

- **The nations’ communications markets** (Section 1.8, page 91)
  This section outlines a range of key findings for communications markets in the UK’s nations. It draws on the detailed reports that Ofcom publishes on communications services in each of the UK’s nations, which can be found at www.ofcom.org.uk/cmr12

- **Hyperlocal websites** (Section 1.9, page 103)
  There are now more than 400 local community, or ‘hyperlocal’ websites in the UK collectively produce around 2500 news stories a week. This section presents new research on the hyperlocal website landscape.
## 1.2 Fast Facts

### TV
- Proportion of UK homes with digital TV: 96%
- Minutes spent watching TV per day (person aged 4+): 242 (4 hours)
- Proportion of homes with a DVR: 47%

### Radio
- Proportion of households with access to a DAB digital radio: 43%
- Proportion of listener hours through a digital platform (DAB, online DTV): 29%
- Number of local radio stations broadcasting on analogue (excluding community stations): 342
- Number of community radio stations currently on air: 198
- Number of national radio stations (analogue and DAB): 27

### Internet
- Number of fixed residential broadband connections: 18.749m
- Proportion of adults with broadband (fixed and mobile): 76%
- Proportion of adults with mobile broadband: 13%
- Market share of fixed broadband providers (connections): BT 29.3%, Virgin Media 20.2% Talk Talk Group 18.5%, Sky 17.9%, Other 14.2%
- Average actual broadband speed: 7.6Mbit/s
- Proportion of homes with a PC or Laptop: 79%
- Proportion of people who use their mobile to access the internet: 39%
- Number of mobile broadband subscriptions (dongles/PC datacard): 5.056m

### Fixed and mobile telephony
- Number of residential fixed landlines: 23.872m
- Number of fixed landlines in the UK, including ISDN channels: 33.230m
- Market share of fixed line providers (voice call volumes): BT 36%, Virgin Media 12%, Others 52%
- Proportion of adults who personally own/use a mobile phone: 92%
- Proportion of adults who live in a mobile-only home: 15%
- Proportion of prepay mobile subscriptions: 51%
- Number of text messages sent per mobile subscription per month: 200

### Post
- Mail market revenue: £6.7bn
- Addressed mail volume: 16.6bn items
- Approximate number of letters and cards received by residential consumers each week: 8.5
1.3 Key market trends

1.3.1 UK communications industry revenue decreases by 0.3%

Overall, communications revenue decreases by 0.3% year on year to £53.2bn

Total UK telecoms revenues declined for the third successive year in 2011, falling by £0.8bn (1.9%) to £39.7bn. Retail revenues increased by £0.1bn to £31.0bn during the year as a £0.2bn increase in fixed internet revenues (as a result of increasing broadband take-up and slowing price decreases), a similar rise in corporate data service revenues and a £0.1bn increase in retail revenues from mobile voice and data services were offset by a £0.5bn fall in fixed call and access revenues. Operator-reported wholesale revenues fell by £0.9bn (8.9%) in 2011.

The UK television industry generated revenue of £12.3bn in 2011, an increase of 4.9% on 2010, driven by continued growth in subscription revenues, coupled with an increase in advertising revenues. Total UK radio industry revenue stood at £1.2bn in 2011, up by 3.5% on the year.

In 2011 Ofcom took on responsibility and powers for the regulation of the postal sector. The fall in postal sector revenues has slowed, following years of decline. In 2011, revenue increased in nominal terms for the first time in four years, to reach £6.7bn\(^{14}\), driven by price increases for Royal Mail bulk mail products. Mail volumes and revenues have been declining since 2007, although annual price increases for Royal Mail products have meant that revenue has fallen at a slower rate than volumes.

Figure 1.1 Communications industry revenue – telecoms, TV, radio

![Graph showing communications industry revenue from 2006 to 2011](image)

Source: Ofcom / Operators. Note: Includes licence fee allocation for radio and TV. Figures expressed in nominal terms.

1.3.2 Availability of communications services

The availability of most key communication services remained to a great extent unchanged year on year.

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\(^{14}\) Addressed mail revenues include Royal Mail total mails (excluding Parcelforce and unaddressed), access revenues and end-to-end delivered addressed letter mail. This does not include courier or express volumes and revenues.
ADSL has the highest availability of the technologies used to deliver fixed broadband in the UK, and at the end of 2011 almost all UK homes (over 99.9%) were connected to an ADSL-enabled BT exchange.\(^{15}\)

Figure 1.2 shows that availability of broadband via local loop unbundling (LLU) rose to 92% of UK homes connected to an LLU-enabled BT exchange\(^{16}\), a three percentage point increase compared to a year previously.

Ofcom’s estimates show that 44% of UK homes were passed by Virgin Media’s cable broadband network in May 2012\(^{17}\). We estimate that the proportion of UK homes able to receive BT’s fibre to the cabinet (FTTC) broadband services have increased to 31% by March 2012, 15 percentage points higher than a year previously. Overall, an estimated\(^{18}\) 60% of UK homes were able to receive superfast broadband by March 2012, a seven percentage point increase compared to a year previously.

In terms of mobile phone coverage\(^{19}\), across the UK we estimate that 99.7% of premises have outdoor 2G mobile coverage from at least one operator. 3G coverage is slightly lower, with 99.1% outdoor coverage from at least one operator. 3G coverage is lowest in Northern Ireland, where 88.3% of premises have outdoor 3G coverage from at least one operator.

As the UK’s switchover to digital television nears completion in 2012, availability of digital terrestrial television rose from 85% to 97% of households. While the analogue terrestrial signal was turned off in Scotland and Wales in 2010, the switchover process will complete in England and Northern Ireland in autumn 2012, as the UK’s 80-year-old analogue television signal is due to be turned off in October 2012.

The BBC DAB network consists of 230 transmitters across the UK, which provide coverage to 94% of UK households, while the DAB commercial network, Digital One, reached 85% of the UK population.

\(^{15}\) Note: some people in these areas may not be able to receive ADSL broadband services, or may only be able to do so at very slow speeds, as a result of the long length or poor quality of the copper telephone line from their premises to the local exchange.

\(^{16}\) Local loop unbundling (LLU) involves an alternative operator placing its own equipment in the incumbent’s local exchange, and consumers living in LLU-enabled exchange areas are likely to have a greater choice of ADSL broadband services and, typically, access to lower-cost (particularly bundled) services.

\(^{17}\) Note: this is based on data provided by Virgin Media. This figure will be under-stated as it excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV services.

\(^{18}\) As all of Virgin Media’s cable broadband network is able to provide superfast broadband services, we are able to estimate overall UK superfast broadband availability by overlaying Virgin Media cable broadband availability data onto that of BT’s FTTC network. Note: the resulting figures will be under-stated as they exclude BT’s fibre to the premises network, homes where Virgin Media is not able to provide fixed voice and pay-TV cable services, and other smaller-scale fibre deployments.

\(^{19}\) Mobile coverage is measured using an improved methodology compared with the 2010 Communications Market Report and therefore the data presented in this year’s report is not comparable with the 2010 report.
Figure 1.2  Digital communications services availability: 2010 and 2011

<table>
<thead>
<tr>
<th>Platform</th>
<th>UK 2011</th>
<th>UK 2010</th>
<th>UK change</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>N Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed line</td>
<td>100%</td>
<td>100%</td>
<td>0pp</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>2G mobile¹</td>
<td>99.7%</td>
<td>n/a</td>
<td>n/a</td>
<td>99.8%</td>
<td>99.2%</td>
<td>99.2%</td>
<td>98.7%</td>
</tr>
<tr>
<td>3G mobile²</td>
<td>99.1%</td>
<td>n/a</td>
<td>n/a</td>
<td>99.7%</td>
<td>97.0%</td>
<td>97.6%</td>
<td>88.3%</td>
</tr>
<tr>
<td>Cable broadband³</td>
<td>44%</td>
<td>44%</td>
<td>0pp</td>
<td>47%</td>
<td>35%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>LLU⁴</td>
<td>92%</td>
<td>89%</td>
<td>+3pp</td>
<td>93%</td>
<td>84%</td>
<td>88%</td>
<td>79%</td>
</tr>
<tr>
<td>FTTC⁵</td>
<td>31%</td>
<td>16%</td>
<td>+15pp</td>
<td>33%</td>
<td>10%</td>
<td>17%</td>
<td>87%</td>
</tr>
<tr>
<td>Superfast broadband</td>
<td>60%</td>
<td>53%</td>
<td>+7pp</td>
<td>62%</td>
<td>42%</td>
<td>34%</td>
<td>94%</td>
</tr>
<tr>
<td>Digital satellite TV</td>
<td>98%</td>
<td>98%</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Digital terrestrial TV⁶</td>
<td>97%</td>
<td>85%</td>
<td>12pp</td>
<td>98%</td>
<td>99%</td>
<td>98%</td>
<td>66%</td>
</tr>
<tr>
<td>DAB BBC Network⁷</td>
<td>94.3%</td>
<td>92%</td>
<td>+2.3pp</td>
<td>95.5%</td>
<td>90.9%</td>
<td>85.9%</td>
<td>85.4%</td>
</tr>
<tr>
<td>DAB commercial network (Digital One)⁸</td>
<td>85%</td>
<td>85%</td>
<td>-</td>
<td>90%</td>
<td>75%</td>
<td>60%</td>
<td>-</td>
</tr>
</tbody>
</table>

Sources: Ofcom and operators:
1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator. Data are not comparable with previous report due to changes made by the mobile operators in the methodology used to calculate coverage.
2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator. Data are not comparable with previous report due to changes made by the mobile operators in the methodology used to calculate coverage.
3. Proportion of homes passed by Virgin Media’s cable broadband network, May 2012: excludes households that are not also able to receive Virgin Media’s cable fixed telecoms and/or pay-TV services. 4. Proportion of homes connected to an LLU-enabled BT local exchange, December 2011. 5. Ofcom’s estimate of proportion of homes able to receive FTT services, based on the proportion of homes in FTTC-enabled BT local exchange areas, March 2012. 6. Calculations based on the estimated proportion of homes that can now receive at least 17 channels, versus the coverage of the DTT signal prior to digital switch-over. 7. BBC National DAB network coverage as of April 2012 (indoor proportional method) 8. Digital One coverage (indoor proportional method – households), April 2012


1.3.3 Take-up of services and devices

Internet access edges up to 80% of households

According to Ofcom’s research, total internet take-up has continued to edge up each year, to 80% of UK households in Q1 2012. This figure comprises access via fixed and/or mobile broadband, or a mobile phone. Further analysis shows that:

- Total broadband take-up continued to increase steadily and in Q1 2012 stood at 76% of UK households, up two percentage points compared to the same period last year. This figure includes households with fixed and/or mobile broadband connections.
- Fixed broadband access rose to 72% of households, whereas mobile broadband decreased to 13%. (Mobile broadband is defined as access via a mobile network – connecting via a USB stick or dongle, or built-in connectivity in a laptop, netbook or tablet.)
• The majority of mobile broadband connections are purchased in addition to fixed broadband access, with only 5% of households relying solely on mobile broadband.

• Internet on a mobile phone continued to grow substantially and stood at 39% of UK adults in Q1 2012, driven by growth in the smartphone market. Almost all UK adults who have mobile phone internet access also have access via fixed broadband. Only 3% of UK adults rely solely on their phone for home internet access.

Figure 1.3 Household internet take-up

Take-up of newer connected devices shows rapid growth

Take-up of a range of connected devices has increased. Our research shows that UK households now have access to an average of three different types of internet enabled device.

Smartphone ownership rose rapidly; to 39% of UK adults in Q1 2012 (up 12 percentage points on Q1 2011). Tablet ownership went up from 2% to 11% of UK households in the same period, and smart TV ownership stood at 5% of TV homes. E-readers have also increased in popularity, and 10% of UK adults now own one.

DVR penetration’s rate of growth has slowed; reaching 47% of UK homes in Q1 2012, while take-up of games consoles has levelled out at around 55% of homes.
Superfast broadband connections rise by 162% to 1.4 million at the end of March 2012

Figure 1.5 shows that at the end of March 2012 there were around 1.4 million residential and small to medium sized enterprises (SME) with superfast broadband connections in the UK; 960,000 (162%) more than there had been a year previously.

Over the same period the proportion of all non-corporate broadband connections that were superfast tripled, increasing to 6.6%, and we expect this figure to increase significantly over the next few years as Virgin Media upgrades its entire cable broadband base onto superfast services and more consumers migrate from lower-speed services.

Source: Ofcom / operators. Note: Includes estimates where Ofcom does not receive data from operators
1.3.4 Time spent on communications services

Television represents the greatest amount of media consumed each day

Figure 1.6 shows how much time people spend consuming different types of media in a typical day.

Time spent watching television has remained resilient and at 242 minutes per day in 2011 represents the greatest amount of consumption of the communications services measured\(^{20}\). Time spent listening to radio accounted for 175 minutes per day among adults aged 15 and over (Quarter 1 2011) which represents a decrease of six minutes compared to the same period in 2006.

The amount of time spent using a PC/laptop to access the internet at home increased from 14 minutes per day to 27 minutes per day per person in the five years to March 2012, although there was no change in use between March 2011 and March 2012. This is likely to be as a result of consumers increasingly using devices such as smartphones and tablet PCs to access the internet. See section 4.2.5 for further information.

While the amount of time spent using a mobile phone to make or receive voice calls, send messages or surf the internet more than doubled from 12 minutes per day to 29 minutes per day between 2006 and 2011, the average time spent using a fixed phone to make or receive calls fell by 24% to 11 minutes per day over the same period.

Figure 1.6 Time spent on communications services, minutes per day

![Bar chart showing time spent on communications services](chart)

Source: Ofcom / BARB / RAJAR / Ofcom estimates based on Nielsen/UKOM (home use only) / Strategy Analytics

Note: Daily figures for mobile voice & data and fixed voice were calculated from monthly data on the assumption that there are 30.4 days in the average month; for internet consumption where the quoted figures relate to March 2011 and March 2012, and 31 days was used; the internet consumption figures include the use of online applications such as streaming media and only include use at home; mobile telephony figures are Ofcom estimates based on message volume data and Ofcom Digital Day research conducted in 2010.

Adults in the UK claim to receive an average of 8.5 letters or cards in an average week (Figure 1.7) compared to an average of approximately 3.2 letters or cards sent in an average month. This difference is due to the fact that the majority of UK mail is sent by businesses to households.

\(^{20}\) It should be noted that a new BARB panel for measuring television viewing went live in January 2010, so comparisons of 2011 viewing with years before 2010 should be treated with caution.
Figure 1.7  Approximate number of letters/cards sent per month, received per week

Source: Ofcom Post Omnibus 2011 - fieldwork 1st Dec – 13th Dec 2011
Base: All consumers responsible for sending or receiving post (n= 3621) Q: Approximately how many letters or cards do you receive in an average week? Please don’t include parcels, we will ask you about these separately. Q: Approximately how many letters and cards do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately.

1.3.5 Use of converged platforms

Figure 1.8 shows that watching audio-visual content over the internet continues to be a popular pastime. Over four in ten (44%) homes watch services such as BBC iPlayer, 4oD and ITV Player, or stream live TV, or watch video clips online. Online radio listening is more of a minority pastime, with 16% of UK adults listening online.
1.3.6 Which medium UK adults would miss the most

Television continues to be the most popular medium, with 46% of UK adults choosing this option in 2011. However, there have been some notable changes over time. Around one fifth (18%) of UK adults now say they would miss their mobile the most – an increase of eight percentage points since 2005. Similarly, those naming the internet has gone up from 8% in 2005 to 17% of UK adults in 2011.

Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 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 WiFi, 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
1.3.7 Purchasing communications services in bundles grows

One in five UK households purchase fixed voice, broadband and multichannel TV in a bundle

Figure 1.10 shows that 57% of UK households purchase communication services in a bundle – i.e. more than one service from the same provider. This has grown steadily since 2008. The most popular type of bundle remains a dual fixed voice and broadband package, purchased by 27% of UK households in Q1 2012.

Taking a triple play bundle of fixed voice, broadband and multichannel TV accounted for 19% of UK homes, up by three percentage points on the same period last year.

1.3.8 Consumer satisfaction with communications services

For most communications services, consumer satisfaction remained the same year on year. Ninety five per cent of mobile phone owners were satisfied with their mobile service – the
highest results across the services measured. Almost nine in ten (89%) were satisfied with their fixed-line telephone service, and a similar proportion (87%) for fixed broadband. Although there was an apparent year-on-year decrease in satisfaction among mobile broadband users, this is within the survey’s error margins and should therefore not be treated as significant.

**Figure 1.11  Consumer satisfaction with communications services**

Proportion of users of service (per cent)

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

**1.3.9 Household spend on communications services**

Household spend on communication services fell from £110.50 in 2006 to £97.62 in 2011, representing a monthly saving of £12.88, or £154.56 per year.

Average monthly household spend on telecoms services fell to £65.04 in 2011, a £3.02 a month (4.4%) fall in real terms. Household spend on television remained stable year on year, at £29.94.

**Figure 1.12  Average household spend on communications services**

Source: Ofcom/Operators/ONS. Notes: Radio data before 2004 were compiled using a different methodology and are not directly comparable to subsequent figures. TV includes pay-per-view from 2004 onwards. Figures expressed in 2011 prices.
1.4 The rise in text-based communications

1.4.1 Introduction

This section of the report summarises the findings of a face-to-face omnibus survey about the use of communications services in the UK. It was commissioned in February/March 2012 and in total 2,012 UK adults aged 16+ were interviewed.

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

1.4.2 Preferred methods of communication with friends and family

Face-to-face is the preferred way of communicating with friends and family

Meeting face-to-face is by far the preferred means of personal communication with friends and family. When asked to choose, two-thirds (67%) of people prefer to communicate with friends and family in this way.

The second most-preferred method is phone calls. One in ten prefers to communicate with friends and family using mobile calls and the same proportion prefer using fixed-line calls.

Figure 1.13 Preferred method of communication with friends and family

Q5a: If you had to pick one method of communicating with friends and family which one would it be?
Source: Ofcom research, 2012
Base: all who ever use at least one form of communication: Friends and family, n=2007
Note - other mentions by 1% or fewer included: Emails, social networking, VoIP calls

Face-to-face communication is preferred by old and young alike

Figure 1.14 shows that seven in ten of those aged 65+ prefer to meet friends and family face to face. While not as popular with younger people, face-to-face is still their favoured method for catching up with friends and family (59% of 16-24 years olds).

Landline calls are more popular among people aged 65+, with one in five preferring this method to talk to friends and family. Landline calls are far less popular among those aged 16-24, with just 1% saying that this is their preferred method.
Younger people are more likely to favour mobile voice calls, with 15% of 16-24s choosing this as their preferred method for catching up with friends and family. This compares to 3% of people aged 65+.

**Figure 1.14  Preferred methods of communication with friends and family, by age**

<table>
<thead>
<tr>
<th>Method</th>
<th>All</th>
<th>16-24</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet face to face</td>
<td></td>
<td>59</td>
<td>70</td>
</tr>
<tr>
<td>Voice calls on mobile phone</td>
<td>15</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Voice calls via fixed landline phone</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Text messaging</td>
<td>11</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Emails</td>
<td>2</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Social networking e.g. Facebook</td>
<td>3</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Instant messaging</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>VoIP (e.g. Skype)</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Post</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Q5a: If you had to pick one method of communicating with friends and family which one would it be?
Source: Ofcom research, 2012
Base: all who ever use at least one form of communication: Friends and family, n= 2007.

1.4.3 Frequency of using communication methods with friends and family

Text messages are the most-used method for daily communications with friends and family

Respondents were asked which methods they used at least once a day to communicate with friends and family. The findings show that overall, text messages are the most widely-used method.

Figure 1.15 shows that about six in ten (58%) stated that they use text messages to communicate with friends and family at least once a day. This is higher than the proportion who claimed to communicate face to face (49%). Social networking is used daily to communicate by about one third (32%) of adults.

Looking at the overall ways in which people communicate with friends and family on a daily basis, 68% use any text-based methods and 63% use any voice-based services.
Figure 1.15  Methods used on daily basis to communicate with friends and family

% of adults

- Text messages: 58%
- Face to face: 49%
- Voice call on mobile phone: 47%
- Social networking: 32%
- Emails: 30%
- Voice calls on fixed landline: 29%
- Instant messaging: 26%
- Comments on websites: 12%
- VoIP (e.g. Skype): 9%
- Micro blogging (e.g. Twitter): 8%
- Post (letters/cards/packages): 1%

Source: Ofcom research, 2012
Q2a: How often do you use x to communicate with friends and family?
Base: UK adults who use communication methods aged 16+, n = 1980
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

On a daily basis, 16-24 year olds are more likely to send a text message to friends and family than to phone or talk face to face

Figure 1.16 shows that daily use of text-based digital communications such as text messages, social networking and instant messaging is largely driven by people aged 16-24. Nine in ten 16-24 year olds say they communicate with friends and family on a daily basis via text messages, compared to 15% of over-65s. Almost three-quarters (73%) of 16-24 year olds use social networking to communicate with friends and family on a daily basis, compared to just 4% of those aged 65+. Instant messaging is used to contact friends and family daily by 62% of 16-24 year olds, compared to 2% of those aged 65+.

Fixed-line telephone calls are used to communicate daily with friends and family by four in ten (42%) adults aged 65+. Among 16-24 year olds this figure is much lower: 15%.

Overall, 96% of 16-24 year olds use any text-based services to communicate with friends and family on a daily basis, compared to just 21% of those aged over 65. Any voice-based services are used in this context by almost half (49%) of over-65s and 74% of 16-24 year olds.
Figure 1.16 Method of communication used at least once a day to communicate with friends and family, by age of respondent

Source: Ofcom research, 2012
Q2a: How often do you use x to communicate with friends and family?
Base: UK adults who use communication methods aged 16+, n = 1980
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

On a weekly basis, face-to-face is the most-used method for communicating with friends and family

Figure 1.17 shows that when the timeframe is extended to ‘at least once a week’, face-to-face meetings (86%) emerge as the most common way of communicating with friends and family. Text messages (70%), telephone calls (67% mobile, 55% fixed) and emails (47%) were the next most popular methods. This is consistent with respondents' stated communication preferences (see Figure 1.13).

One in ten adults use post on a weekly basis to keep in touch with friends and family.

Overall, any text-based services are used by eight in ten people (80%) at least once a week as a way to communicate with friends and family. Voice-based services are used by a greater proportion of UK adults on a weekly basis, with 88% communicating with friends and family using these methods.
Figure 1.17 Methods used at least once a week to communicate with friends and family

<table>
<thead>
<tr>
<th>% of adults</th>
<th>Face to face</th>
<th>Text messages</th>
<th>Voice call on mobile phone</th>
<th>Voice calls on fixed landline</th>
<th>Emails</th>
<th>Social networking</th>
<th>Instant messaging</th>
<th>Comments on websites</th>
<th>VoIP (e.g. Skype)</th>
<th>Micro blogging</th>
<th>Post (letters/cards/packages)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>86</td>
<td>70</td>
<td>67</td>
<td>55</td>
<td>47</td>
<td>41</td>
<td>34</td>
<td>18</td>
<td>17</td>
<td>11</td>
<td>10</td>
</tr>
</tbody>
</table>

Source: Ofcom research, 2012
Q2a: How often do you use x to communicate with friends and family?
Base: UK adults who use communication methods aged 16+, n = 1980
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

Less than three in ten 16-24 year olds make landline telephone calls on a weekly basis

Figure 1.18 shows that weekly use of communications services differs by age, with those aged 16-24 much more likely to use text messages, social networking, instant messaging or call on their mobile. On a weekly basis those aged 65+ are more likely to use landline telephony (74%) than those aged 16-24 (27%).

In terms of overall use, 97% of 16-24 year olds choose text-based services to contact friends and family each week, compared to 88% using voice-based communication. Older respondents are almost twice as likely to choose voice-based than text-based communication with friends and family, at 82% and 42% respectively.
Figure 1.18  Methods of communication used at least once a week to communicate with friends and family, by age of respondent

Source: Ofcom research, 2012
Q2a: How often do you use x to communicate with friends and family?
Base: UK adults who use communication methods aged 16+, n = 1980
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

1.4.4 Communicating in different circumstances

Non-digital methods of communication are the most used for birthdays and other greetings

Figure 1.19 shows that respondents most frequently use the post (58%) and meeting in person (55%), on occasions such as birthdays. Telephony is the next most commonly-used method, with about one third of respondents saying that they have sent greetings by text message (36%), by a mobile phone call (33%) or a fixed-line phone call (30%). Online methods such as social networking websites (21%) or email (20%) are used less frequently for greetings.
Figure 1.19 Communication methods ever used to send greetings (e.g. birthdays)

- **Post (letters/cards/packages)**: 58%
- **Meet face to face**: 55%
- **Text messaging**: 36%
- **Voice calls on mobile phone**: 33%
- **Voice calls via fixed landline phone**: 30%
- **Any social networking**: 21%
- **Any email**: 20%
- **Any instant messaging**: 11%
- **Any comments on website forums**: 2%

Source: Ofcom research, 2012
Q3a: …which of these methods do you ever use to send greetings for occasions such as birthdays, get well, congratulations etc
Base: UK adults aged 16+ who communicate with friends and family, n = 2012
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

Overall, post is the preferred way of sending a greeting – although for 16-24 year olds it is less popular than text messages and social networking

Figure 1.20 shows that over three-quarters (77%) of over-65s use the postal service to send letters, cards or packets when they wish to send a greeting. Those in the 16-24 age group are much less likely to use the post (31%).

A substantial proportion of respondents aged 16-24 are using newer text-based communications methods to send greetings, such as text messages (53%), social networking (41%), and instant messaging (23%).

Meeting face-to-face on such occasions is popular among young and old, with 16-24s (59%) more likely than over-65s (46%) to do this.
Figure 1.20  Communication methods ever used to send greetings (e.g. birthdays), by age of respondent

Source: Ofcom research, 2012
Q3a: …which of these methods do you ever use to send greetings for occasions such as birthdays, get well, congratulations etc.
Base: UK adults aged 16+ who communicate with friends and family, n = 2012
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

1.4.5 Changing patterns of communicating with friends and family

Use of post has diminished in the past two years while digital methods such as email and text messaging have gained in popularity

We asked respondents whether they thought they used different communications services more or less than they did two years ago.

Figure 1.21 shows that, overall, respondents claimed to have increased their use of many communications services – largely those that rely on the internet or mobile telephony. The largest claimed increases in use were for email and SMS, both with 17% of respondents claiming to use them more (net).

Claimed use of post has declined dramatically, by 30% (net) versus two years ago, and the use of landline calls appears to have declined slightly.
Figure 1.21  Net claimed changes in communications methods used: past two years

Source: Ofcom research, 2012
Q6a/b: Which of these methods of communication do you use to communicate more/ less than you did 2 years ago? (Multiple choice)
Note chart shows net percentage (% who claimed to use more - % who claimed to use less)
Base: UK adults aged 16+, n = 2009

16-24 year-olds use text messages and social networking to communicate with friends and family more than other age groups, and have increased their use of these methods.

The biggest increase in communications methods used in the past two years among 16-24 year olds is in the use of social networking (31% net claimed increase), followed by mobile text messages (+23%) and instant messaging (+12%). In common with the wider population, the largest claimed net decrease was in the use of post (-25%).

Figure 1.22  Net claimed changes in communications methods used in past two years, 16-24 year olds

Source: Ofcom research, 2012
Q6a/b: Which of these methods of communication do you use to communicate more/ less than you did 2 years ago? (Multiple choice)
Note chart shows net percentage (% who claimed to use more - % who claimed to use less)
Base: All UK adults aged 16-24, n = 319
While 12% of 16-24 year use landlines less, 13% of those aged 65+ say they have increased their use of landline calls

The picture is different for older people (Figure 1.23). Although those aged 65+ claim to be increasing their use of digital methods such as email and text messaging, it is at a slower rate than younger people.

The biggest claimed increase in use among the over-65s is in landline telephone calls (+13%). This is the reverse of the trend noted among 16-24 year olds.

Figure 1.23  Net claimed changes in communications methods used in past two years, 65+ year olds

Source: Ofcom research, 2012
Q6a/6b: Which of these methods of communication do you use to communicate more/ less than you did 2 years ago? (Multiple choice). Note chart shows net percentage (% who claimed to use more - % who claimed to use less)
Base: UK adults aged 65+, n = 420

1.4.6 Communication in the future

Respondents predict that they will continue to increase their use of digital text-based communications, and continue to decrease their use of post

We asked respondents which communication methods they expected to use more, and less, in the future. Figure 1.24 shows that, broadly, across all age groups respondents expect their behavioural changes over the past couple of years to continue. Respondents expect to be using more email (+17% net), text messages (+7%), voice over IP (+7%), mobile calls (+7%), and social networking (+7%).

Many respondents also predict that they will continue to reduce their use of post for letters, card and parcels (-22% net).

The data in Figure 1.24 should of course be treated with caution since they are based on respondents’ predicted behaviour. It should also be noted that the survey took place shortly after an announcement that stamp prices were to increase, so respondents’ stated future intentions about use of the postal service may have been influenced by this.
1.4.7 Communicating with businesses

Post is more widely used for business communications, but face-to-face is still more popular

Figure 1.25 shows that people use a wide range of methods to communicate with businesses and services. The most widely-used (weekly) methods of interaction are face-to-face (28%), email (24%), phone calls (21% mobile, 20% fixed), post (13%), and text messages (13%). Other methods are used by a smaller proportion of people for business communications.

Compared to communications with friends and family, one of the most notable differences is that post is used more for engaging with businesses, and text messages are used less. Face-to-face, email and phone calls are commonly used methods of communications with business and personal contacts.

On a weekly basis, as a way of communicating with businesses and services, any text-based services are used by more people than any voice-based methods, at 35% and 31% respectively.
Figure 1.25   Methods used at least once a week to communicate with businesses and services

% of adults

Meet face to face  28
Any email  24
Voice calls on mobile phone  21
Voice calls via fixed landline phone  20
Post (letters/cards/packages)  13
Text messaging on mobile phone  13
Any Comments on websites  6
Any social networking eg Facebook  6
Any instant messaging eg MSN  5
Any internet based voice calls eg Skype  3
Any microblogging e.g. Twitter  3

Source: Ofcom research, 2012
Q2b: How often do you use X to communicate with businesses and services?
Base: UK adults aged 16+, n = 2012
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

Figure 1.26 shows that people aged 16-24 are more likely to use mobile phone calls (18%) and email (21%) for weekly business communications, whereas over-65s are more likely to use traditional methods such as post (11%) and fixed-line phone calls (15%).

Overall, 16-24s are more likely to use text-based methods to communicate with businesses and services each week, with 33% using these services, compared to 22% who use any voice-based services. The difference is less marked among older respondents, with 15% of over-65s using text-based services, compared to 17% who use voice-based methods in this context.
Figure 1.26  Methods used at least once a week to communicate with businesses and services, by age

<table>
<thead>
<tr>
<th>% of adults</th>
<th>Meet face to face</th>
<th>Any email</th>
<th>Voice calls on mobile phone</th>
<th>Voice calls via fixed landline phone</th>
<th>Post (letters/cards/packages)</th>
<th>Text messaging on mobile phone</th>
<th>Any Comments on websites</th>
<th>Any social networking eg Facebook</th>
<th>Any instant messaging e.g. MSN</th>
<th>Any internet based voice calls eg Skype</th>
<th>Any microblogging e.g. Twitter</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td>21</td>
<td>15</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>12</td>
<td>13</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>65+</td>
<td>28</td>
<td>21</td>
<td>20</td>
<td>15</td>
<td>11</td>
<td>13</td>
<td>13</td>
<td>11</td>
<td>11</td>
<td>11</td>
<td>11</td>
</tr>
</tbody>
</table>

Source: Ofcom research, 2012

Q2b: How often do you use X to communicate with businesses and services?

Base: UK adults aged 16+, n = 2012

Text-based services: text messages, social networking, emails, instant messaging, comments on websites, microblogging, post

Voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

People prefer to communicate with banks face-to-face, while for services and utilities a landline phone is preferred

Figure 1.27 shows that people prefer to communicate with businesses in different ways, depending on the circumstances. Overall, verbal communication methods tend to be preferred, perhaps because of the ability to interact in ‘real time’.

When contacting a bank or financial institution, face-to-face meetings are the most preferred method (28%). Fixed-line telephone calls (33%) are the most preferred method for official matters, such as contacting the tax office or local council. For queries with a supplier about goods and services that have already been purchased, a fixed-line phone call is preferred (30%) and for a prospective purchase, face-to-face enquiries are preferred by 23%.
1.4.8 Attitudes of people to modern / digital communication methods

Interviewers asked about attitudes to various methods of communication. A series of statements were read out and respondents were asked to indicate the extent to which the statement applied to them, using a 1 to 5 scale (Figure 1.28).

Overwhelmingly, people would prefer to communicate in person with friends and family

Almost nine in ten (88%) respondents indicated that they preferred to speak to a real person rather than an automated service, and over eight in ten (83%) said that they prefer to speak to family and friends face-to-face.

Around two-thirds (64%) stated that technology has changed the way they communicate, while almost six in ten (57%) state that new communication methods have made their lives easier.

Almost half (48%) also say that they are sending fewer letters and cards by post because they prefer digital methods of communication.

Over three-quarters of people (78%) agree that they communicate with their family a lot and slightly fewer (71%) agree that they communicate with their friends a lot.
Figure 1.28  Agreement with attitudes towards communication methods

<table>
<thead>
<tr>
<th>Statement</th>
<th>Proportion Indicating Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer to communicate with a real person rather than an automated service</td>
<td>88</td>
</tr>
<tr>
<td>I prefer to speak in person to family and friends rather than over other communication methods</td>
<td>83</td>
</tr>
<tr>
<td>I communicate with my family a lot</td>
<td>78</td>
</tr>
<tr>
<td>I communicate with my friends a lot</td>
<td>71</td>
</tr>
<tr>
<td>Technology has changed the way I communicate</td>
<td>64</td>
</tr>
<tr>
<td>New communication methods have made my life easier</td>
<td>57</td>
</tr>
<tr>
<td>I often use the cheapest form of communication possible</td>
<td>54</td>
</tr>
<tr>
<td>I don’t send as many letters and cards by post as I used to because I prefer digital methods</td>
<td>48</td>
</tr>
<tr>
<td>I think Ecards are impersonal</td>
<td>40</td>
</tr>
<tr>
<td>I am happy to post messages online that a wide audience can see</td>
<td>21</td>
</tr>
</tbody>
</table>

Source: Ofcom research, 2012
Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.
Base: UK adults aged 16+ n = 2012

People of all ages and social groups prefer face-to-face when communicating with family and friends

Figure 1.29 shows respondents’ preference for face-to-face communication, by demographic group. Younger respondents are slightly less likely to prefer face-to-face, although even in the 16-24 year old group, 75% still favour in-person communications.

Figure 1.29  Preferences for face-to-face communication with friends and family

Source: Ofcom research, 2012
Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.
Base: UK adults aged 16+ n = 2012
Many younger people agree that new communications services have made life easier—72% of 16-24s and 73% of 25-34 year olds agree

Figure 1.30 shows that the proportion of respondents who agreed that “new communications methods have made life easier” differs by age, socio-economic group and gender. Those aged under 35 were the most likely to agree with this statement (72% of 16-24s and 73% of 25-34 year olds). Those in ABC1 households (65%) were more likely to agree than those in C2DE homes (49%).

Older people are less likely to agree – only 30% of over-65s say that new communications methods have made life easier

Among over-65s, a minority (30%) agreed that new communications methods have made life easier. Half of this group said that this statement did not apply to them, perhaps indicating that they either did not necessarily use new communication methods or that they thought that new communications methods have made life more difficult.

Figure 1.30 Views on whether new communications methods have made life easier

Source: Ofcom research, 2012

Q8: I am going to read out some statements and I would like you to tell me how much each one applies to you using a scale of 1-5, where 5 = totally applies. Chart shows the proportion that indicated that the statement applies to them, by rating 4 or 5.

Base: UK adults aged 16+ n = 2012
1.5 The generation gap

1.5.1 Introduction

There have been rapid advances in the media communications market over the past decade\(^\text{21}\), but differences still remain between older and younger people in terms of take-up and use of various services.

This section examines take-up and consumption by age, to explore these differences. It reports on a variety of measures, including television and radio consumption, take-up of landlines, mobile phones and the internet. A range of sources have been used including industry standard sources such as BARB for television viewing and RAJAR for radio listening, as well as Ofcom surveys.

Key points:

- **Television has been a highly resilient medium over the past 10 years.** According to BARB, UK adults spent 4.3 hours per day watching television in 2011. Since 2002 viewing has increased among audiences aged 55 and over, and remained stable among 16-24s (2.8 hours per day). However, viewing by 25-34s decreased from 3.5 to 3.3 hours per day between 2005 and 2011\(^\text{22}\).

- **The average amount of time UK adults spend listening to radio each week has dropped from 24.4 to 22.5 hours over the past ten years, according to RAJAR.** This decrease has been largely driven by a drop among 15-24 year old radio listeners, from 21.8 hours in 2001 to 17 hours of listening a week in 2011. There has been a less pronounced drop for the 65+ audience; from 26.6 hours a week in 2001 to 25.8 hours in 2011.

- **The proportion of 16-24s who live in homes where mobile is the sole form of telephony is more than double the UK average.** While mobile-only homes have risen from 10% in 2006 to 15% in 2012, the increase has been greatest in the 16-24 and 25-34 age groups. Thirty three per cent of 16-24s and 26% of 25-34s now live in mobile-only households, compared to 1% of over-75s.

- **The rise in mobile-only homes among younger people is likely to be linked to the increase in take-up of smartphones.** Take-up is highest among younger age groups; 66% of those aged 16 to 24, and 60% of those aged 25 to 34 have a smartphone, compared to 2% of those aged 65 and over (Q1 2012).

- **According to Ofcom’s media literacy research (2011), 16-24s are most likely to choose their mobile as the medium they would miss most (40%), compared to 1% of the 65+ age group.**

- **Eighty per cent of UK homes now have internet access.** While penetration is high among those aged under 55, it is much lower among the over-65s (46% in Q1 2012).

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\(^{21}\) See Digital Decade section in the 2011 Communications Market Report

\(^{22}\) Note: BARB introduced a new measurement panel on 1st January 2010. As a result comparison of pre and post panel data should be treated with caution.
1.5.2 The UK population

The over-65 population is predicted to increase by 1.8 million between 2012 and 2020

In this section we compare the media behaviour of 16-24s with that of older adults, so it is important to note the age profile of the UK population today and how it is predicted to change in the future. Today it is estimated that 13% of the population are aged 15-24 and 17% are aged 65+. Over the next eight years it is predicted that the number of 16-24s in the UK will drop by 0.7 million (to make up 11% of the population) and the number of people aged 65+ will grow by 1.8 million, to make up 19% of the population (Figure 1.31).

Figure 1.31 UK population predictions, by age group: 2010 - 2020

![Population projection graph](image)

Sources: ONS 2010-based National Population Projections, published 26 October 2011

Life expectancy is increasing in the UK, rising for men from 73 in 1990 to 78.5 by 2010, and for women from 78.7 to 82.123. Some traditional lifestage milestones are also happening later in life. For example, in 1991 9% of births were to women over 35; by 2009 it was 20%24

Media consumption and use by different age groups

The rate of adoption of some technologies is slower among older age groups

Our research shows growth in uptake of new media devices across all age groups, but as we can see in Figure 1.32, take-up is slower among older age groups. For example, 90% of 16-24s have internet access at home, compared to 46% for the 65+ age group. Although mobile phone ownership has grown rapidly among the 65+ group, up from 47% in 2005 to 68% in Q1 2012, this is still lower than for 16-24s (98% own a mobile phone).

23 Source: ONS UK Interim Life tables 198-82 to 2008-2010
24 Source: ONS Households and Families Social Trends 2010
**Figure 1.32** Take-up of internet, digital video recorders and mobile phones, by age

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>All Adults</td>
<td>54%</td>
<td>80%</td>
<td>11%</td>
<td>47%</td>
<td>80%</td>
<td>92%</td>
</tr>
<tr>
<td>16-24</td>
<td>60%</td>
<td>90%</td>
<td>19%</td>
<td>45%</td>
<td>92%</td>
<td>98%</td>
</tr>
<tr>
<td>25-34</td>
<td>62%</td>
<td>90%</td>
<td>10%</td>
<td>51%</td>
<td>91%</td>
<td>98%</td>
</tr>
<tr>
<td>35-44</td>
<td>71%</td>
<td>91%</td>
<td>16%</td>
<td>55%</td>
<td>91%</td>
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</tr>
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<td>45-54</td>
<td>70%</td>
<td>85%</td>
<td>15%</td>
<td>52%</td>
<td>84%</td>
<td>97%</td>
</tr>
<tr>
<td>55-64</td>
<td>59%</td>
<td>75%</td>
<td>7%</td>
<td>47%</td>
<td>75%</td>
<td>91%</td>
</tr>
<tr>
<td>65+</td>
<td>24%</td>
<td>46%</td>
<td>4%</td>
<td>31%</td>
<td>47%</td>
<td>68%</td>
</tr>
</tbody>
</table>

*Source: Internet, Mobile phone Ofcom’s Technology Tracker Q1 2012, 2005. DVR figures from Ofcom’s Media Literacy Tracker Q1 2005 and Ofcom’s Technology Tracker, Q1 2012. Internet figures represent total internet access home via fixed/mobile or mobile phone.*

**16-24s differ in their methods of personal communication compared to those aged 65+**

Figure 1.33 illustrates that 16-24s communicate with friends and family on a daily basis more than UK adults as a whole, and using a wide range of devices. Text messaging is their number-one way to communicate each day, with 90% of 16-24s doing this, and they are least likely to use a fixed-line phone (15%). The opposite is the case for the 65+ age group, who are more likely to use a fixed-line phone to communicate with family and friends each day than any other method (42%).

In addition, the research shows that 16-24s are more likely to use some newer forms of communication such as VoIP (19%) and Twitter (27%) on a daily basis to communicate with family and friends.
Figure 1.33  Methods of communication used at least once a day to communicate with friends and family

Source: Ofcom research, 2012
Q2a: How often do you use x to communicate with friends and family?
Base: UK adults who use communication methods aged 16+, n = 1980
Any text-based services: text messages, social networking, emails, instant messaging, comments on websites, micro blogging, post
Any voice-based services: voice calls on mobile, voice calls on fixed landline, VoIP

1.5.3 Television viewing

Television viewing has increased over time but not consistently among all age groups

Television has been a highly resilient medium over the past 10 years. Figure 1.34 shows that according to BARB, average adult viewing rose from 3.8 to 4.3 hours a day between 2002 and 2011.\(^{25}\)

The average viewer aged 65+ spends over double the time viewing TV than the average 16-24 year old (5.8 hours vs. 2.8 hours in 2011). Viewing among 16-24s has remained stable; however, there is evidence of changing viewing behaviour among 25-34s. Overall television viewing has fallen among 25-34s in recent years (from 3.5 to 3.3 hours per day between 2005 and 2011).

Note: The BARB panel changed on the 1st January 2010 and any comparisons with data prior to this should be made with caution.
The under-45s watch a wider repertoire of television channels

Digital television has made more channels available to UK audiences. Figure 1.35 shows the impact that this has had on the number of channels watched by UK adults. The average number of channels watched has increased from five in 2002 to 24 in 2011. For adults under 45, 75% of their viewing is accounted for by 30 channels. People aged 65+ have changed their viewing habits much less - in 2002 75% of their viewing was to three channels (BBC One, ITV1 and BBC Two) and this has risen to an average of eight channels in 2011.

Younger viewers are watching less on the main five PSB channels but more on the PSBs’ portfolio channels, compared to older age groups

Figure 1.36 shows that 40% of 16-24s’ viewing is to the five main PSB channels, compared to nearly 75% for the 65+ age group. The PSBs’ portfolio channels account for 27% of 16-24s total TV viewing, compared to 16% for the 65+ age group.
Figure 1.36  Share of viewing for the main five PSB channels and their portfolio channels

<table>
<thead>
<tr>
<th></th>
<th>Adults</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC One</td>
<td>21%</td>
<td>12%</td>
<td>15%</td>
<td>17%</td>
<td>21%</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>BBC Two</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>ITV1</td>
<td>16%</td>
<td>5%</td>
<td>9%</td>
<td>14%</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>BBC digital channels</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>C4 digital channels</td>
<td>7%</td>
<td>11%</td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>C5 digital channels</td>
<td>5%</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: BARB Q1 2012 – all adults 16+, Q1 2012

There are many other differences in television consumption by age, including: time-shifting is more prevalent among younger audiences (20% of viewing by under-35s is time-shifted compared to 11% for the 65+ age group)\(^{26}\), and 48% of 16-24s with internet access at home watch online catch-up TV, compared to 18% of those aged 65+.\(^{27}\)

Figure 1.37  Proportion of adults with home internet who watch online catch-up TV

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>16-24</th>
<th>25-34</th>
<th>35-54</th>
<th>55-64</th>
<th>65+</th>
<th>Male</th>
<th>Female</th>
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<tr>
<td>男</td>
<td>31%</td>
<td>33%</td>
<td>36%</td>
<td>35%</td>
<td>32%</td>
<td>26%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>女</td>
<td>35%</td>
<td>31%</td>
<td>37%</td>
<td>38%</td>
<td>31%</td>
<td>18%</td>
<td>26%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Source: Ofcom research Q1 2012

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

Base: All adults who have the internet at home (n=2823 UK, 423 16-24, 524 25-34, 1113 35-54, 431 55-64, 330 65+, 1367 Male, 1456 Female)

\(^{26}\) Source: BARB 12 month data , 2011

\(^{27}\) Source: Ofcom research Q1 2012 QE5A. Which, if any, of these do you or your household use the internet for whilst at home?
Overall, the research evidence suggests that the amount of television viewed is in part related to lifestage and age – as people get older they tend to watch more television. However, the research shows that younger age groups are watching a wider variety of content than older people and are more likely to use different devices, such as catch-up services, to access television. They may take these habits with them as they age.

1.5.4 Radio listening

Radio listening has declined, with adult average listening hours down 7.8% between 2001 and 2011

Figure 1.38 shows that, according to RAJAR, adult average weekly listening to radio has dropped from 24.4 to 22.5 hours over the past ten years (down 8%). This drop has been largely driven by a decrease among 15-24 year old listeners; from 21.8 to 17.0 hours' listening a week (22%). For the 25-34s there has been a drop in listening, from just under 23 hours per week to slightly over 19 hours. There has been a less pronounced decrease for the 65+ audience; from 26.6 hours a week in 2001 to 25.8 hours in 2011 (3%).

However, the results also indicate a small uplift in listening year on year from 2010 to 2011, for each age group.

Figure 1.38 Average hours listened per week, by age: 2001 - 2011

Source: RAJAR, weekly listening per listener to all stations at a network level, and on the 12 months of each respective year ending Q4.

A 2010 BBC study showed that 82% of all adult audio consumption was radio listening, but that radio listening accounted for only 56% of 15-18s audio consumption.  

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RAJAR uses a diary-based survey to measure live listening to radio stations on analogue/DAB radio sets, digital TV, and online.

Source: BBC (A&M Audiences) Brand Driver, Share of Ear research 2010
Ofcom’s media literacy research (2011) shows that 16-24s are more likely to listen to other audio via a range of devices, 62% regularly listen to music on their mobile, compared to 28% for all adults; and 62% via an mp3 player, compared to 34% for all adults.

Over the past ten years there has been a rise in the proportion of people listening to four or more radio stations

Figure 1.40 shows that since 2002 there has been a rise in the proportion of UK adults listening to four or more radio stations. The largest increase is among 25-34s - the proportion listening to four or more stations has risen from 24% in Q1 2002 to 31.5% in Q1 2011, whereas for 15-24s this has remained steady at around 36%. Similarly, for the 65+ age group there has been little change, with 17.5% listening to four or more stations.

<table>
<thead>
<tr>
<th></th>
<th>Q1 2002</th>
<th>Q1 2011</th>
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<tr>
<td>Adults</td>
<td>24.0%</td>
<td>28.0%</td>
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<td>15-24</td>
<td>34.0%</td>
<td>36.0%</td>
<td>+5.9%</td>
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<tr>
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<td>+31.3%</td>
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<td>45-54</td>
<td>23.3%</td>
<td>30.0%</td>
<td>+28.8%</td>
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<td>20.5%</td>
<td>25.6%</td>
<td>+25%</td>
</tr>
<tr>
<td>65+</td>
<td>15.0%</td>
<td>17.5%</td>
<td>+16.7%</td>
</tr>
</tbody>
</table>

Source: RAJAR 3 month data number of stations listened to Q1 2002 and Q1 2011

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30 Source: Ofcom Media Literacy Tracker 2011 QM8A) Please tell me from this list the types of things you use your mobile phone for
31 Source: Ofcom Media Literacy Tracker 2011 QA1) Which of the following do you regularly do? (Prompted responses, multi-coded)
In summary, the research evidence suggests that younger age groups are listening to less radio, compared to the same age group ten years ago, and may be substituting some radio listening for other audio content on devices such as mobile phones or mp3 players.

### 1.5.5 Telephony services

**Mobile-only households have increased most in the 16-24 and 25-34 age groups**

Figure 1.41 shows that 33% of 16-24s and 26% of 25-34s live in homes where mobile is the sole form of telephony – this is around double the UK average of 15%. These proportions have grown among the under-35s since 2006. This change is not being seen to the same extent in any other age group.

**Figure 1.41 Household penetration of fixed and mobile telephony, by age**

![Proportion of respondents (percent)](image)

*Source: Ofcom Technology Tracker Q1 2012 and Ofcom Residential Tracker 2006*

**Changes in mobile use are likely to be driven by take-up of smartphones**

Figure 1.42 shows that 98% of 16-34s and 97% of 35-54s use a mobile phone and ownership drops slightly to 91% for 55-64s. Ownership remains lower among the 65+ age group, although 68% now use a mobile, up from 47% in 2005. The chart also shows that 39% of adults now use a smartphone, and this rises to 66% among 16-24s, and 60% among 25-34s, compared to 3% for the over-65s.

Differences by age are most apparent when we look at how people use their mobile phones and the range of activities that they undertake. 16-24s and 25-34s exhibit similar behaviour and are more likely than older mobile users to undertake a range of activities. Sixty-two percent of 16-24s and 53% of 25-34s access social networks via their mobile phone at least once a week, compared to 29% of UK adults. Over a third of 16-24s (35%) and 25% of 25-34s visit sites such as YouTube and Bebo to look at videos at least once a week, compared to 15% of UK adults as a whole.32

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32 Source: Ofcom Media Literacy Tracker 2011
Ofcom’s research (2012) shows that smartphone owners demonstrate some different behaviours to other mobile phone owners. Forty-two per cent of smartphone users claim that their phone is their most important device for accessing the internet, rising to 51% for 16-24s, compared to 19% of over-55s. Forty-one per cent of smartphone owners say they have a ‘high level of addiction’ to their phone (rating 7/8/9/10 out of 10), and this rises to 59% for 16-24s, compared to 11% for over-55s.33

16-24s are most likely to choose their mobile as the medium they would miss most (40%), compared to 1% saying this is the case among the 65+ age group

Figure 1.43 shows that 40% of 16-24s and 25% of 25-34s say their mobile is the media activity they would miss most, compared to 1% saying this is the case among the 65+ age group. The rapid increase in smartphone take-up is likely to affect younger people’s attitudes towards their phone.

Figure 1.43 Media activity missed the most, by age

Source: Ofcom Media Literacy Tracker 2011 and 2006 (Q Which of these activities would you miss most? (prompted responses)
In conclusion, the research indicates that mobile phones are most important to people aged 16-24, and that this attitude is spreading to those aged 25-34 and over.

1.5.6 Internet use

While eight in ten UK households have home internet access, this decreases to 46% among those aged 65+. 

Figure 1.44 shows that 80% of UK homes now have internet access, up from 54% in 2005. While penetration is high among those aged under 55, it is much lower among the over-65s (46% in Q1 2012).

Figure 1.44   Household internet access, by age: 2005 vs 2012

Source: Ofcom Technology Tracker Q1 2012, Ofcom Residential Tracker Q1 2005. Total internet access is based on fixed/mobile and mobile phones.

There are a number of differences by age group in terms of volume and range of online use, and the devices used to go online.

Ofcom’s 2011 media literacy study showed that 16-24s claim to spend the most time online: 34 19.6 hours a week compared to the all-adult average of 15.1 hours. 25-34s also spend more time online than average.

Figure 1.45 shows that younger people undertake a wider range of activities online. Over a third of internet users aged 16-44 take part in between 11 and 17 different activities online, compared to 4% of 65-74s and 1% of those aged 75+.

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34 Claimed ‘time spent online’ covers at home or elsewhere.
Ofcom’s research (Q1 2012) shows that 64% of adults with home internet access use social networking sites at home. While this is highest among 16-24s (89%) it is also high among 25-34s (73%) and 35-54s (67%), and drops to 21% among those aged 65 and over. Ofcom’s research (Q1 2012) shows that 64% of adults with home internet access use social networking sites at home. While this is highest among 16-24s (89%) it is also high among 25-34s (73%) and 35-54s (67%), and drops to 21% among those aged 65 and over. Ofcom’s research (Q1 2012) shows that 64% of adults with home internet access use social networking sites at home. While this is highest among 16-24s (89%) it is also high among 25-34s (73%) and 35-54s (67%), and drops to 21% among those aged 65 and over.

Ofcom’s research (Q1 2012) shows that 64% of adults with home internet access use social networking sites at home. While this is highest among 16-24s (89%) it is also high among 25-34s (73%) and 35-54s (67%), and drops to 21% among those aged 65 and over.

Figure 1.45 Breadth of internet use (number of activities undertaken), by age

![Bar chart showing proportion of internet users by age group.]

Source: Ofcom Technology Tracker, Q1 2012

Ofcom’s research (Q1 2012) shows that 64% of adults with home internet access use social networking sites at home. While this is highest among 16-24s (89%) it is also high among 25-34s (73%) and 35-54s (67%), and drops to 21% among those aged 65 and over.

Figure 1.46 shows that 16-24s are more likely than other age groups to undertake a range of activities online, particularly playing games, downloading video and audio and watching video clips and webcasts.

Figure 1.46 Household internet activities, by age

![Bar chart showing household internet activities by age group.]

Source: Ofcom research, Q1 2012 Base: All adults who have the internet at home (n= 2823) Q5A: Which, if any, of these do you or members of your household use the internet for while at home?

In summary, the research indicates that while 16-24s are most likely to undertake a range of activities online, broadly consistent behaviours are developing among under-65 age groups overall in terms of internet take-up and use.

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35 Source: Ofcom Technology Tracker Q1 2012
1.6 The fourth screen

1.6.1 Introduction and background

The research in this section provides an overview of take-up and use of tablet computers and e-readers.

An e-reader (electronic reader) is a digital device for reading material such as e-books and newspapers (e.g. Kindle, Sony Reader, Kobo eReader, iRiver Reader). A tablet computer is a personal computer contained in a single panel (e.g. Apple’s iPad, Samsung, or Archos), with features including a large touch screen.

1.6.2 Summary of key findings on tablet owners

This research, new to Ofcom in 2012, sets outs to examine why consumers purchase tablets; how consumers are engaging with them and how this affects their use of other devices.

- **Tablet ownership has risen rapidly in the past year; from 2% to 11% of UK households in Q1 2012.** This growth looks set to continue, as 17% of adults said they intended to buy a tablet in the next year.

- **Ownership is higher among some groups** including: those aged 45-54 (16%), households with children (16% take-up), AB social groups (19%), higher-income groups (22% of those with £30k+ household income have a tablet), and those living in London and the south east (15% and 17% respectively).

- **The most common motivation for purchase is entertainment.** Fifty-six per cent of tablet owners bought their tablet for entertainment reasons. Half of all respondents (53%) said that easy access to the internet was a reason for buying a tablet computer. Likewise, 52% highlighted “easy to carry around” as a reason for purchase. However, 45% said they didn’t really need one, but bought it as a treat for themselves.

- **Even though a key reason for purchase is portability, 87% of tablet owners primarily use their tablet at home.**

- **Tablet computers are used on a regular basis.** Seventy-four per cent claimed to use their tablet to connect to the internet every day, or most days.

- **Tablets can increase time spent online** – 37% say that they browse the internet more than they did before owning a tablet. On the other hand, owning a tablet often leads to using other devices, such as a laptop or desktop PC, less. Thirty-seven per cent say they use their laptop less since owning a tablet and a third (33%) use their desktop PC less.

- **Tablet owners have a strong relationship with their new device** – over a third (34%) of respondents agreed with the statement: “I couldn’t live without my tablet computer”. Nine in ten (87%) of consumers are satisfied with their tablet.

- **Two-thirds of users regularly or occasionally share their tablet with others.**
1.6.3 Tablet take-up

Tablet take-up has risen substantially in the past year, from 2% in Q1 2011 to 11% of UK households by Q1 2012 (Figure 1.47). This trend looks set to continue as 17% of UK households said they intended to purchase a tablet in the next year.

In Q1 2012, one in ten (11%) adults owned a tablet computer. The Ofcom technology tracker shows that ownership was highest among those aged 45-54 (16%). There is also a skew in ownership towards households with children (16% take-up), AB social groups (19%), higher incomes (22% of those with £30k+ household income have a tablet), and those living in London and the south east (15% and 17% respectively). Men (13%) are slightly more likely than women (9%), to have a tablet computer, as are people in ABC1 households - 15% compared to 6% of C2DE homes.

![Figure 1.47 Take-up of tablet computers by age, SEG and gender](chart)

Proportion of UK households (%)

Two-thirds (65%) own a tablet that connects to the internet via a WiFi connection, while 33% own WiFi and 3G-enabled versions.

According to Ofcom’s research, Apple’s iPad is the most popular brand overall, with just over half (57%) of tablet owners having this brand, followed by Samsung (8%) and Archos (4%).

Source: Ofcom Technology Tracker 2012
Base: 2012: 3772
Q.B1 Firstly, what brand of tablet computer is it?
Base: All respondents with a tablet computer: 500

1.6.4 Reasons for purchasing a tablet

Entertainment and easy internet access drive tablet purchases

Consumers list a wide variety of reasons for purchasing a tablet computer, with entertainment the most cited reason. Fifty-six per cent of respondents claimed that ‘fun/entertainment’ or ‘entertainment on the go’ were reasons for deciding to buy a tablet. In addition, half of all respondents (53%) cited easy access to the internet as a reason for purchase. Just over half (52%) highlighted the portability of the device as a factor, while one in five (23%) received the tablet as a gift (Figure 1.49).

Treating oneself, rather than actual need, also appears to be an important factor when deciding to purchase a tablet. Forty-five per cent of respondents agreed with the statement “I didn’t really need one, but I bought my tablet computer as a treat for myself”.

Figure 1.48 Claimed ownership, by tablet brand

Source: Ofcom research

Q.B6 Why did you decide to buy a tablet computer?
Base: All respondents with a tablet computer: 500

36 Net entertainment code is a net of those who responded either ‘for fun/entertainment’ or ‘I can use it for entertainment on the go’. 
Tablets are predominantly used in the home

Despite the portability factors, such as “being able to use a tablet for entertainment on the go” and “its ease of carrying” being popular reasons for purchasing a tablet, 87% of consumers primarily use their tablet in the home (Figure 1.50).

**Figure 1.50  Where tablets are used**

![Pie chart showing tablet usage locations]

Source: Ofcom research
Q.B9 Where do you primarily use your tablet computer?
Base: All respondents with a tablet computer: 500

1.6.5 Tablet uses

Seventy-five per cent of consumers use their tablet most days or more

Forty-one per cent of consumers use their tablet every day and a further 34% use the device most days (Figure 1.51). Of those who use a tablet daily, the mean time spent per day is just under two hours. Sixty-two per cent of daily users spend an hour or more per day on the device.

**Figure 1.51  How often consumers use their tablet computer**

![Bar chart showing frequency of tablet use]

Source: Ofcom research
Q.B7 How often do you tend to use your tablet computer?
Base: All respondents with a tablet computer: 500

Internet browsing and checking email are popular activities on a tablet computer

Browsing the internet is the activity that people do most frequently on their tablet, with three-quarters (74%) using their device to connect to the internet every day, or most days (Figure...
Moreover, 37% of users claim to browse the internet more than they did before owning a tablet.

Tablets are used frequently for checking email; 63% claim to do this every/most days (Figure 1.52). Nearly half (46%) go on social networking sites every/most days (Figure 1.52) and since owning a tablet 23% of our panel claimed to spend more time on social networking sites more than they did previously. Other activities carried out by a large proportion of consumers every day or most days are: accessing news via a website (46%) and playing games (45%).

**Figure 1.52 Frequency of activities using a tablet**

Source: Ofcom research

Q.B11 How often, if at all, do you use your tablet computer for each of the following?
Base: All respondents with a tablet computer: 500

### 1.6.6 Impact on behaviour of tablet users

**Tablets are increasing the amount of time people spend online**

Tablets are affecting individuals’ online behaviour. Around four in ten (37%) say they are browsing the internet more since owning a tablet, while around one quarter (23%) say they are doing more social networking.

Tablets are also affecting engagement with other devices; including laptops and desktop PCs. Our research shows that 37% use their laptop less since owning a tablet, and one third (33%) use their desktop PC less. And 16% say that they watch less broadcast TV than before they owned a tablet (Figure 1.53).
Tablet owners reading less paper material

Since owning a tablet 39% of respondents claim to read less content on paper than before (the net reduction of paper books, paper newspapers and paper magazines shown in Figure 1.54). However, 17% claim to read more books (either eBooks or paperbacks) than before they owned a tablet computer, whereas 11% claim to read fewer.

Source: Ofcom research
Q.B20 For each of the activities below can you tell us whether you are doing it more, less or the same amount since owning your tablet computer?
Base: All respondents with a tablet computer: 500

Figure 1.54 Impact on reading behaviour

Source: Ofcom research
Q.B13/14 Since owning your tablet computer have you read books, magazines or newspapers more or less than before? We’d now like you to think specifically about paper based content - so since owning your tablet computer have you read books, magazines or newspapers more or less than before?
Base: All respondents with a tablet computer: 500
Most users multi-task while on their tablet computer

Eighty-four per cent of tablet users say that they multi-task in some way while using their tablet, while half (49%) of them triple-task. Watching television (68%) is the most common activity done concurrently with using a tablet. Our research shows that 35% of consumers listen to music while using a tablet (Figure 1.55).

**Figure 1.55  Multi-tasking while using a tablet**

![Multi-tasking while using a tablet](image)

Source: Ofcom research

Q.B12 Some people multi-task while using their tablet computer. Which, if any, of the following things do you tend to do at the same time as using your tablet computer?

**Base: All respondents with a tablet computer: 500**

Games/ fun apps are the most popular applications

Virtually all respondents (97%) have apps on their tablet computer. According to Ofcom’s research, the mean number of apps on a tablet is 17, although 45% say that they use less than half of their apps regularly. Of those with apps, 80% of owners say that they paid for fewer than half of them. The most popular types downloaded are: games/‘just for fun’ apps (75%), weather apps (60%) and social networking apps (58%) (Figure 1.56).

**Figure 1.56  Types of apps downloaded onto a tablet**

![Types of apps downloaded onto a tablet](image)

Source: Ofcom research

Q.B18: Which of the following types of apps have you downloaded?

**Base: All respondents with apps on their tablet computer: 484**
1.6.7 Sharing tablets with others

Two-thirds of consumers share their tablet in some way

One third (37%) of consumers share their tablet with the other people they live with, while a further 29% sometimes let other people use their tablet. Eighteen to thirty-four year-olds are least likely (29%) to share their tablet with the people they live with, and those aged 35 and over are more likely to share their device with others (Figure 1.57).

Figure 1.57 Sharing vs. personal device

Source: Ofcom research
Q.B5 Which of these statements best describes who uses your tablet computer?
Base: All respondents with a tablet computer: 500

1.6.8 Children’s use of tablet computers

Playing games is the most popular activity carried out by children on a tablet

Eighty-five per cent of respondents with children aged 16 or under claimed their child/children had used their tablet. Of these, four in ten (39%) said their children used their tablet every day, or most days. A further 21% said their children used the tablet a couple of times a week.

According to parents and carers, 83% of child tablet users play games on them. Other popular activities carried out by children on tablets are internet browsing (41%) and listening to music (35%) (Figure 1.58).
Figure 1.58  Tablet use among children

Source: Ofcom research
Q.B22 What do your children use your tablet computer for?
Base: All respondents with children aged under 16 who use their tablet computer: 170

1.6.9 Tablet satisfaction

Tablet owners say they can’t live without it

One third (34%) of consumers agreed with the statement: “I couldn’t live without my tablet computer”. The same proportion (34%) agreed that they didn’t really see the point of tablet computers, until they got one. Sixty-three per cent of those asked rated their tablet computer better than their initial expectations, whereas 11% said that, overall, their tablet was worse than expected.

Figure 1.59  Personal attachment to tablets

Source: Ofcom research
QB23 To what extent do you agree or disagree with the following statements?
Base: All respondents with a tablet computer: 500

Nine in ten (87%) of consumers are satisfied with their tablet computer. Of these, over half (54%) are ‘very satisfied’. Less than one in ten (8%) are dissatisfied with their tablet.
One in ten (10%) UK adults own an e-reader, an increase from 3% in 2011.

Portability is the most-cited reason for buying an e-reader. Fifty-three per cent of respondents said they decided to buy an e-reader because it was easy to carry around, 50% so they could easily carry lots of books on holiday, and 45% as it was lightweight.

Although it is a portable device, the majority (67%) of consumers primarily use their e-reader at home. Despite its being a mobile device, the majority of consumers primarily use their e-reader in the home, 15% primarily use it while travelling, and 14% primarily use it on holiday.

While almost all consumers use their e-reader to read books, three in ten (29%) have used it to read magazines or newspapers.

E-readers have a positive impact on the amount people read. Forty-one per cent claimed to have increased their overall reading since owning an e-reader. This trend is most prominent among 18-34 year-olds - 53% of this group claimed they had read more since having an e-reader.

Six in ten (62%) say they read less paper-based material since owning an e-reader. This is driven by a decrease in reading paperback books (60%). One in ten (10%) also say they have decreased reading paper magazines and 8% said they have decreased reading paper newspapers since owning an e-reader. And four in ten (44%) agree that they doubt they will buy many more paper books, although 37% disagree with this statement.
1.6.11 E-reader take-up

More people are buying e-readers

E-reader penetration has seen significant growth in the past year. Ofcom technology tracker research shows that 10% of UK adults now own an e-reader. This has risen from just 1% in the first quarter of 2010, and 3% in 2011 (Figure 1.61). This trend looks set to continue; when asked: “how likely is it that you or someone else in your household will buy another e-reader in the next six months?” 22% responded either ‘very likely’ or ‘likely’.

E-reader users are more likely to be older (14% 35-64 vs. 9% 16-34) and from the ABC1 socio-economic groups (15% vs. 6% C2DE).

Figure 1.61 Take-up of e-readers

Ofcom’s research shows that the majority are satisfied with their e-reader, with 91% of users claiming they are satisfied (66% very satisfied and 25% fairly satisfied). Two-thirds thought their e-reader was better than they initially expected.

Figure 1.62 Consumer e-reader satisfaction


Ofcom’s research shows that the majority are satisfied with their e-reader, with 91% of users claiming they are satisfied (66% very satisfied and 25% fairly satisfied). Two-thirds thought their e-reader was better than they initially expected.
According to Ofcom’s research, the Amazon Kindle is the most-owned brand overall; 86% of respondents said that they own this brand of e-reader.

Figure 1.63  Claimed ownership, by e-reader brand

Source: Ofcom research

Q.C1 What brand of e-reader is it?
Base: All respondents with an e-reader: 500

1.6.12 Reasons for purchasing an e-reader

Space saving and convenience are driving factors when deciding to buy an e-reader.

Portability is the most-cited reason for purchasing an e-reader (68%). Fifty-three per cent of respondents said they decided to buy one because it was easy to carry around, 50% so they could easily carry lots of books on holiday, and 45% as it was lightweight. Almost half (45%) of the respondents had received the e-reader as a gift. Finally, a third (34%) said they decided to buy an e-reader as “books take up too much space at home” (Figure 1.64).

Figure 1.64  Reasons why consumers decided to buy an e-reader

Source: Ofcom research

Q.C4 Why did you decide to buy an e-reader?
Base: All respondents with an e-reader: 500

Two-thirds of consumers primarily use their e-reader at home

Despite the fact that 68% of people cited portability as a reason for deciding to buy an e-reader, two-thirds (67%) primarily use their e-reader at home. A third of consumers mainly use their e-reader either while travelling (15%) or on holiday (14%) (Figure 1.65).
Figure 1.65  Where do people primarily use their e-reader?

Source: Ofcom research
Q.C8 Where do you primarily use your e-reader?
Base: All respondents with an e-reader: 500

1.6.13 Impact on behaviour of e-reader owners

E-readers have a positive impact on the amount people read

E-readers are almost universally used for reading books (99%), with 59% claiming to do this most days, or every day. Almost three in ten use their e-reader for reading magazines or newspapers.

E-readers appear to be having a positive effect on reading; 38% of respondents claimed to have read more books than before they owned one (Figure 1.66). Reading of magazines and newspapers appears to be relatively unaffected, neither significantly increasing nor decreasing.

Figure 1.66  Positive impact on reading books

Source: Ofcom research
Q.C6 Since owning your e-reader have you read books, magazines or newspapers more or less than before?
Base: All respondents with an e-reader: 500

For a third of users, e-readers are becoming a key device for their reading; 30% agreed with the statement: “I couldn’t live without my e-reader”. The 35-54 age group is more likely to agree with this statement (38% agreed) than the over-55s (23%). A third (34%) of women agreed with the statement, compared to 25% of men.
Six in ten say they are reading less paper-based material since owning an e-reader

Despite having positive implications for individuals’ overall reading patterns, 60% of those asked claimed that they are reading fewer paperbacks since owning an e-reader. A third (33%) of e-reader owners are reading the same amount of paper books as before (Figure 1.67).

Overall, 62% claimed to read hard-copy books, magazines or newspapers less since owning an e-reader. This is driven by the decrease in reading paper books (60%). One in ten (10%) also said they had decreased reading paper magazines and 8% said they had decreased reading paper newspapers since owning an e-reader (Figure 1.67).

**Figure 1.67 Impact on reading paper material**

Source: Ofcom research

Q.C7 We’d now like you to think specifically about paper based content so since owning your e-reader have you read books, magazines or newspapers more or less than before?
Base: All respondents with an e-reader: 500

Four in ten say they are likely to stop buying paper books

Forty-four per cent agree: “I doubt I will buy many paper books” (Figure 1.68). But despite this, the majority of e-reader users do not plan to replace their paperbacks with e-book equivalents. Sixty-two per cent disagreed with the statement: “I will replace most of the paper books I have at home with e-books to save space”. But almost a fifth (19%) agreed that they would replace their paperback books with e-books

**Figure 1.68 Replacing paperback books with e-book equivalents**

Source: Ofcom research

Q.C10 To what extent do you agree or disagree with the following statements?
Base: All respondents with an e-reader: 500
1.7 The London 2012 Games: media consumption

1.7.1 Introduction

The London 2012 Olympic and Paralympic Games is likely to be a significant event in the UK media and communications landscape in 2012. In this section we attempt to set that event in context. We examine past television viewer behaviour for the 2004 and 2008 Olympic Games, outline the options for following the London 2012 Games, and present new research on the media intentions of UK consumers for the London 2012 Games (the Games). This research was conducted in May 2012 among a nationally representative sample of 2192 UK adults aged 16 and over. As it was conducted over two months before the start of the Games, we may find that actual levels of media use and types of devices used will differ from those recorded in this research.

1.7.2 Key points

- **Past Olympics have attracted a large number of UK television viewers.** Forty-six million people aged four and over watched coverage of the 2004 Olympics in Athens and 41 million watched the 2008 Olympics in Beijing. Total television viewing during these events was up compared with the same period in the previous years.

- **According to Ofcom’s research, conducted in May 2012, 77% of UK adults say they are likely to follow the Games on any medium.** This equates to an estimated 39 million UK adults. Among younger people, 79% of 16-24s say they are likely to follow coverage of the Games. Around a third (35%) of UK adults say they are likely to follow as much of the Games as possible.

- **Around three-quarters (74%) of UK adults say they intend to follow coverage on TV.** This is in line with viewing figures from previous years – according to BARB, 75% of adults followed coverage on television in 2008 and 84% in 2004. Ofcom’s research was conducted over two months before the start of the Games so actual viewing may differ from anticipated levels.

- **One in five adults (19%) say that they intend to follow the Games online, whether through a computer (12%), tablet (6%) or a mobile phone (8%).** Sixteen per cent say they will use newspapers and magazines, and 12% say they will listen on the radio.

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37 Note: 2004 and 2008 BARB TV viewing data is based on Olympic Games only and does not include Paralympic Games data.
38 The London 2012 Olympic and Paralympic Games’ are shortened in this document to the ‘London 2012 Games’ and the ‘Games’.
40 Research was conducted by Kantar Media using a face to face omnibus methodology amongst a representative sample of 2192 adults aged 16+ in the UK. Fieldwork conducted May 18th – May 27th 2012. Universe source: Kantar - 50,654,000 (16+ UK).
41 Source: BARB. Adults 16+. Reach is defined as the percentage of adults who have watched at least 15 consecutive minutes of Olympics programming.
42 BARB analysis of actual viewing behaviour will be included in Ofcom’s ICMR due for publication in Autumn 2012.
• Online use is anticipated to be higher among younger people, with 32% of 16-24 year olds intending to follow coverage of the Games online, whether through a computer, tablet or mobile.

• Most people say that they intend to follow the Games at home. Around one in four people in full-time employment say that they are likely to watch or listen to the Games coverage at work.

• UK adults express the greatest interest in the athletics coverage, while the football is of more interest to men, and gymnastics and swimming to women.

• Fifty-three per cent of adults agree that “new technology is going to make accessing coverage of the Olympic and/or Paralympic Games easier”. This rises to 64% of 16-24s.

• Around a quarter of UK adults (26%), think that “social networking sites like Facebook and Twitter are going to make following the Olympic and/or Paralympic Games easier”, this rises to 48% of 16-24s.

1.7.3 Viewer behaviour: 2004 and 2008

The Olympics have a track record of drawing in large numbers of television viewers

In 2004 the Olympics were held in Athens, Greece. In 2008 they were held in Beijing, China. While Athens is just two hours ahead of the UK, Beijing is seven hours ahead. This meant that the action from the 2008 Games was often at a less accessible time for UK viewers and this is reflected in some of the television viewing figures.

Both the Athens and the Beijing Olympics attracted large numbers of television viewers in the UK: 45.7 million in 2004 and 41.1 million in 2008. This represents 83% of individuals in 2004 and 73% of individuals in 2008 (see Figure 1.69 below).

In 2004, 84% of adults watched television coverage of the Olympics, with the proportion of viewers increasing with age. Reach was slightly lower among children and people aged 16-24, at 74% and 69% respectively. In 2008, 75% of adults watched coverage of the Olympics, with reach rising from 69% of 25-34 year olds to 86% of people aged 65 and over. Among children and 16-24 year olds, on the other hand, reach was lower; at 60% and 57% respectively. The later transmission time of the broadcasts is likely to have affected these figures in 2008.

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43 2004 and 2008 TV viewing data are based on Olympic Games only and do not include Paralympic Games data

44 Source: BARB. Viewing is based on 15 consecutive minutes. Base: all individuals 4+
UK individuals spent an average of 826 minutes watching the Olympics in 2004, or nearly 14 hours. In 2008 this was 536 minutes, nearly 9 hours (see Figure 1.70). The amount of time spent watching increased with age.

Figure 1.71 shows analysis of total TV viewing during the period when the Olympics was taking place, compared to the same time period in the previous year. This shows that in each Olympic year, total TV viewing was higher than in the same period the previous year.
In 2004, people spent 3686 minutes watching TV in August, whereas in 2003 this was 3486 minutes. Similarly in 2008, time spent watching TV in total was 3898 minutes, compared to 3418 minutes in 2007. These results suggest the Olympics boosted total viewing figures. The time spent watching the Olympics represented 22% of total viewing in that time period in 2004 and 14% in 2008.

**Figure 1.71 Total viewing in Olympics and preceding year (total minutes)**

![Graph showing total viewing in Olympics and preceding year (total minutes)](source)


Athletics and the Olympics’ opening ceremonies were among the five most popular events in 2004 and 2008

The most-viewed events in 2004 and 2008 were athletics and the Olympics opening and closing ceremonies (see Figure 1.72 below). In 2004 three of the five most popular events were those in which the UK won gold medals: the men’s 4x100 relay, the women’s 1500m final and the women’s 800m final. In 2008 the UK’s gold medal in the men’s cycling was also among the top five most popular events.

**Figure 1.72 Top five most-viewed half-hour slots, by viewer numbers: 2004 and 2008**

![Graph showing top five most-viewed half-hour slots, by viewer numbers: 2004 and 2008](source)

Source: BARB data 2004 and 2008. Average audiences in 000s.
In 2004, Olympic programming featured in the top 50 programmes of the year, at number 38.45 This was the *Olympics Grandstand* programme on 28 August, with an average audience of 9 million people. This programme included footage of the women’s 1500m final in which Kelly Holmes won gold and of Team GB’s gold medal in the men’s 4x100 relay. The Olympic opening ceremony also featured in the top 50 programmes in 2004, at number 50, with an average audience of 8.7 million viewers. Olympics programming did not feature in the top 50 programmes in 2008.

1.7.4 London 2012: the media landscape

<table>
<thead>
<tr>
<th>Coverage of the London 2012 Olympic and Paralympic Games</th>
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<tbody>
<tr>
<td>Radio and televised coverage of the Games are co-ordinated by the Olympic Broadcasting Services (OBS) - the body created by the International Olympic Committee (IOC) in 2001.</td>
</tr>
<tr>
<td>In the case of the UK, the BBC holds domestic television and radio rights for the London 2012 Olympic Games, Eurosport holds the pan-European rights and Channel 4 has the UK television rights for the London 2012 Paralympic Games.46</td>
</tr>
<tr>
<td>The BBC has announced that it will broadcast live coverage of every London 2012 Olympic sport, from every venue, throughout the day, through a combination of its television channels and up to 24 simultaneous standard or HD live streams available online on PC, mobile, tablet and connected TV. This represents a total of around 2,500 hours of live sport, according to the BBC. The BBC’s red button service will provide access to live coverage and other content. There will also be coverage available on BBC Radio. In addition to a BBC mobile application, coverage of and news about the Games will be available on the BBC’s Olympics website and on BBC i-Player.47 Sky, Virgin Media, and Freesat each plan to offer their subscribers access to the BBC’s 24 live streams in both standard and high definition.</td>
</tr>
<tr>
<td>Channel 4 has committed to over 150 hours of Paralympic events. This is set to be the most extensive UK coverage dedicated to the Paralympic Games.</td>
</tr>
<tr>
<td>The BBC and Eurosport intend to broadcast 3D coverage of some of the events in the London 2012 Olympic Games. Sky and Virgin Media intend to make the BBC and Eurosport 3D coverage available to their subscribers.48</td>
</tr>
<tr>
<td>Coverage of the Games will also be broadcast on 22 big screens at ‘Live Sites’ across the UK, and the BBC plans to place ‘Super Hi Vision’ big screens at three UK locations.</td>
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</table>

The diversity in the range of devices and platforms on which coverage will be available reflects wider trends in consumer behaviour

More than three-quarters of UK adults now have home broadband access, compared to under 60% in 2008 (see Figure 1.73 below). Around four in ten (39%) now have a smartphone and 70% of UK adults own an HD or HD-ready TV set, while a small proportion have a smart TV or 3D-enabled television.

45 Source: BARB. Analysis based on individual transmissions, highest ranking only  
46 Enders note: Olympics win-win for free and pay TV  
47 As above and BBC Online  
http://www.bbc.co.uk/blogs/rogermosey/2012/04/since_the_start_of_our.html,  
48 As above and, http://www1.skysports.com/olympics/story/15234/7651672,  
http://mediacentre.virginmedia.com/Store/BC-and-Eurosport-bring-2012-Olympics-to-Virgin-  
Media-customers-239c.aspx
The growth in social networking provides viewers with the opportunity to build their own community around the Games. In 2012 50% of adults used the internet to access social networking sites, 15% read or browsed Twitter and 9% posted a message on Twitter. In 2008 just 20% of people used their internet connections at home to access social networking sites. Ofcom did not collect data on Twitter in 2008 as it was then a relatively new phenomenon.

Use of new devices and services is growing. According to the BBC, around 11.8 million people accessed the BBC Olympics coverage via the red button in 2008, compared with 9 million in 2004, and the BBC Sport website saw a peak of 8.5 million weekly UK unique browsers during the week commencing 17th Aug 2008 – its highest-ever traffic. There were 32 million requests to view audio-visual content during the 2008 Olympics, compared to just 2.4 million for Athens in 2004.

Consumers have greater choice in how they follow the Games in 2012. They will have access to more coverage, they will not have to manage time-zone differences, and they will have more opportunities for enhancing and personalising their Games experience. The big question is what impact this will have on media behaviour.

1.7.5 London 2012: research into media intentions

In order to understand which media people are likely to use to follow the Games, Ofcom commissioned some research into people’s attitudes and anticipated media behaviour during the Games. The research was conducted in May 2012, well in advance of the start of the competition, in order to be included in this report. We may find that actual levels of media use, and the devices used, will differ from the results of the research, although the research does indicate what we can expect in terms of media use, and how this will compare with previous years’ media consumption.

Around half of all UK adults say they are interested in the London 2012 Games

Our research shows that two months before the Games are due to begin, 48% of adults are very, or quite, interested in the Games. Around a quarter (24%) say they are not at all

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49 Ofcom Technology tracker Q1 2008/ 2012
50 Source: BBC 2012
51 Research was conducted using a face-to-face omnibus methodology among a representative sample of 2192 adults aged 16+ in the UK, including a boost of 100 adults in Northern Ireland. Data were weighted to be representative of the UK. Research was conducted by Kantar Media between 18 and 27 May 2012.
interested. Adults in the AB socio-economic group are more interested in the Games than those in the DE socio-economic group (62% vs. 41%) and men are slightly more interested than women in the Games (51% vs. 45%). However, no single age group stands out as having more or less of an interest in the Games (see Figure 1.74 below).

Interest in the Games is slightly higher in England and Northern Ireland than in Scotland and Wales. Forty-nine per cent of adults in England and 49% in Northern Ireland say they are interested in the Games, compared with 42% in Scotland and 41% in Wales.

**Figure 1.74  Levels of interest in the Games**

<table>
<thead>
<tr>
<th>Proportion of UK adults (%)</th>
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<tbody>
<tr>
<td>100%</td>
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<tr>
<td>80%</td>
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<td>60%</td>
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<td>40%</td>
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<tr>
<td>total</td>
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<td>16-24</td>
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<td>25-34</td>
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<td>35-44</td>
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<td>55-64</td>
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<td>65+</td>
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<tr>
<td>AB</td>
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<tr>
<td>DE</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td>Not at all interested</td>
</tr>
<tr>
<td>Not very interested</td>
</tr>
<tr>
<td>Neither interested or uninterested</td>
</tr>
<tr>
<td>Quite interested</td>
</tr>
<tr>
<td>Extremely interested</td>
</tr>
</tbody>
</table>

Source: Ofcom research
Q4. Thinking about the London 2012 Olympic and/or Paralympic Games happening this July and August, please tell me how interested you are, using the following scale?
Base: All adults in UK:2192

Seventy-seven per cent of UK adults say they are likely to follow the Games on any medium, with television the most popular

Seventy-seven per cent of UK adults say they are likely to follow the Games on any medium. 52 (See Figure 1.75). Our results indicate that television will be the main medium that people are likely to use to follow coverage of the Games (74% of adults say they intend to follow coverage on TV). This compares with a figure of 75% of adults in 2008 and 84% of adults in 2004, as recorded by BARB. 53

Nineteen per cent of adults are likely to follow the Games online, whether through a computer, mobile phone or tablet, while 16% of all adults plan to keep up with the Games by

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52 Note: Respondents were initially asked: Q4. “Thinking about the London 2012 Olympic and/or Paralympic Games happening this July and August, please tell me how interested you are, using the following scale” and Q5. “How likely or unlikely are you to follow coverage of the London 2012 Olympic Games through any device or service e.g. TV, radio, online, mobile phone etc”. From this 24% of respondents said they were not at all interested in the Games at Q4 (see Figure 1.6) and 18% said they would not follow any coverage at Q5. When the results of these two questions are taken together 17% of respondents were found to have no interest in the Olympics/Paralympics AND also said they would not follow any coverage when initially asked. These respondents, classified as Olympics rejectors, were not asked further questions. Data from further questions on the Games is based on responses from 83% of the sample (n=1803) and the results have then been re-based on all adults (n=2192)

53 NB: comparisons between this survey and BARB should be made with caution as Ofcom’s research was conducted over two months before the start of the Games so actual viewing levels may differ from anticipated levels.
reading newspapers and magazines. Twelve per cent of adults consider it likely that they will listen to the Games coverage on the radio.

**Figure 1.75 Type of media intentions**

Source: Ofcom research

**Q8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games**

Base: Question asked of 1803 adults/Olympic non-rejectors and answers re-based on UK adult sample of 2192

**UK adults express the greatest interest in the athletics coverage, while the football is of more interest to men, and gymnastics and swimming to women**

Forty per cent of UK adults said that they are interested in following the Olympics athletics events (See Figure 1.76 below). When asked which event they were most interested in, 18% chose the athletics category: making it the most popular Olympic category mentioned overall. In the 2008 Beijing Olympics athletics was popular among UK audiences, with these events achieving some of the highest viewing figures.

The opening ceremony was also in the top five most-viewed events in the Beijing Olympics and 27% of adults in Ofcom's research said they were interested in following it this year. The same proportion said they were interested in following coverage of Olympic swimming, the 100m sprint men’s final and Olympic football.

Levels of interest in some events differ by gender. Four in ten (41%) men have an interest in following coverage of the Olympic football, compared to just 13% of women (see Figure 1.76 below). And while 27% of women are interested in following coverage of the Olympic gymnastics events, only 16% of men are interested.

Overall, 44% of adults were interested in following any Paralympic event, whether sport or non-sport. Paralympic athletics events are the most popular; 24% of adults are interested in following coverage and these events appeal equally to men and women. Other popular Paralympic events are wheelchair basketball (13% interested in following coverage) and the Paralympic opening and closing ceremonies (12% interested in following coverage).
Figure 1.76  Interest in following coverage of Olympic events, by gender

Source: Ofcom research

Q.6A1 Which, if any, of these Olympic events are you interested in following coverage of?
Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

Around one quarter of men expect to follow coverage of the Games online

Figure 1.77 shows that men are more likely than women to follow the Games online (25% compared to 12%).

Figure 1.77  Type of media intentions, by gender

Source: Ofcom research

QA8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games
Base: Questions asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

Around one third of 16-24 year olds say they are likely to follow coverage of the Games online

Figure 1.78 below presents the same results, analysed by age. Thirty two per cent of 16-24 year olds expect to follow the Games online, whether through a computer (19%), tablet (11%) or mobile phone (19%). Among 25-34 year olds, 28% say that they are likely to access coverage online, as do 23% of 35-44 year olds. Newspapers and magazines, on the other hand, are more popular with older people; 20% of people aged over 65 say that they are likely to follow coverage through newspapers or magazines.
One in four adults say they intend to follow the Games daily – either on television, radio or online

When asked how often they think that they will access coverage of the Games, 77% of all UK adults expect to follow the Games, either via television, radio on online. This breaks down into 39% who say that they will follow Olympic and/or Paralympic coverage at least once a day and over two-thirds (67%) who will follow it at least once a week. (See Figure 1.79 below).

Men are likely to follow coverage more frequently; 42% say they will follow the Games daily, compared to 35% of women. Adults in the AB socio-economic group are also more likely than those in the DE socio-economic group to follow the Games daily (53% and 30% respectively) and 40% of people in full-time employment will follow coverage daily compared with 32% of people not working (excluding retired people and people in education).
Around one third of UK adults say they are likely to follow as much of the Games as possible

Around a third of UK adults (35%) agree: “I am likely to follow as much of the Olympic and/or Paralympic Games as possible” (see Figure 1.80 below). Men are more likely than women to agree with this statement (38% vs. 32%) as are adults in the AB socio-economic group (42%) compared to those in the DE socio-economic group (29%).

However, just under a third of UK adults say they will follow the Games to a lesser degree: 30% agreed that they will “probably only watch the finals of the biggest events”. Thirty-nine per cent of 16-24 year olds agreed with this statement, compared to one in four (23%) of 45-54 year olds. Eighteen per cent of all UK adults said that they would probably watch only the opening and/or closing ceremonies; 16-24 year olds were more likely to agree with this statement (22%) than were 45-54 year olds (11%).
Figure 1.80  Attitudes towards the Games

- I am likely to watch as much of the Olympic and/or Paralympic Games as possible: 35%
- I will probably only watch the finals of the biggest events: 30%
- I will probably only watch the opening and/or closing ceremonies: 18%

Source: Ofcom research
Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each. Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

The Games are likely to be followed primarily as a live television event

Two-thirds (67%) of adults consider it likely that they will watch live TV coverage “as it happens” (see Figure 1.81 below). Twenty-six per cent of adults think they will access Games coverage through TV news bulletins, 22% said they were likely to watch highlights coverage on TV, 9% think they will watch recorded coverage on their television; and 6% said they were likely to watch the Games using catch-up services.

Figure 1.81  How people expect to watch coverage on their television set

Source: Ofcom research
QA8 In which of the following ways do you think you are likely to personally follow coverage of the London 2012 Olympic and Paralympic Games...
Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192
Thirty one per cent of adults said that they expected to watch more TV over the Games period than they do normally.\(^54\) This supports the findings from the BARB analysis of 2004 and 2008 which found that TV viewing levels increased in Olympics years (see Figure 1.71).

**Most people say they are likely to follow coverage of the Games at home, but one in four people in full-time employment are likely to watch or listen to Games coverage at work**

Seventy-one per cent of adults expect to access coverage of the Games at home. Twenty-three per cent of adults expect to access coverage while out of home, whether at work, travelling or in a public place, out and about or in other people’s homes, and among 16-24 year olds this rises to 35%.\(^55\) When asked how likely it is that they will watch or listen to the Olympic and Paralympic Games at work, in order to watch or listen to more coverage, 12% of adults said it was likely that they are likely to access coverage of the Games whilst at work. Among people in full-time employment, this figure rises to 25%.\(^56\)

**Technology is set to make London 2012 a more mobile and interactive Games**

Technology has advanced significantly since the last Games, four years ago, and this is reflected in consumers’ responses: 53% of adults agreed with the statement “New technology is going to make accessing coverage of the Olympics and/or Paralympic Games easier” (see Figure 1.82 below). The figure rises to almost two-thirds of people aged 16-24 (64%).

**Figure 1.82 New technology will make accessing coverage easier**

<table>
<thead>
<tr>
<th>% agree that new technology is going to make accessing coverage of the Olympic and/or Paralympic Games easier</th>
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<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>16-24</td>
</tr>
<tr>
<td>65+</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
</tr>
</tbody>
</table>

**Source:** Ofcom research

Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each. **Base:** Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

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\(^54\) Source: Q.11. *During the Olympics and/or Paralympics, which of the following do you think you will use more of compared to your normal usage?* Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

\(^55\) Q.12 *Thinking more specifically about how you may access coverage of the Olympic and/or Paralympic Games, at which locations do you think you will access coverage of the games?* Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

\(^56\) Q.17 *During the Olympics, how likely is it that you will do any of the following in order to watch or listen to more Olympic and/or Paralympic coverage? Watch/Listen to the Olympic and Paralympic Games at work* Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192
One fifth of respondents say they are likely to follow coverage on multiple devices

Nineteen per cent of people agreed with the statement: “I am likely to follow the Olympic and/or Paralympic Games on many different devices” (see Figure 1.83 below). The figure rises to 30% of 16-24 year olds and 24% of adults in the AB socio-economic group.

**Figure 1.83  Intention to follow coverage on many different devices**

![Intention to follow coverage on many different devices](chart)

Source: Ofcom research

Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each. I am likely to follow the Olympic Games and/or Paralympic Games on many different devices Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192

Around half of 16-24s say social networking will make following the Games easier

Social networking has grown substantially since Beijing 2008, and now 50% of UK adults use the internet at home to access social networking sites. Twenty six per cent of adults agreed with the statement: “Social networking sites like Facebook and Twitter are going to make following the Olympic and/or Paralympic Games easier” (see Figure 1.84). This figure rises to about half of 16-24 year olds (48%).
Q18 I am now going to read out some statements about the coverage of the London 2012 Olympic and Paralympic Games and I would like you to tell me how much you agree or disagree with each - Social networking sites like Facebook and Twitter are going to make following the Olympic and/or Paralympic Games easier.

Base: Question asked of 1803 adults/Olympic non-rejectors and answers rebased on UK adult sample of 2192.

Around one quarter of 16-34s say they are likely to read or post messages about the Games on social networking sites while watching or listening to coverage of the Games.  

Respondents were asked whether they ever use social networking sites to read or post messages about what they are watching on television. Those who said they did were asked how likely they were to read or post messages about the Games events on sites such as Facebook or Twitter, while they were watching or listening to coverage. Overall, around one in ten adults (11%) and one in four 16-24 year olds (24%) anticipate that they will do this.

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1803 respondents (unweighted) were asked: Q.13 When watching television, do you ever use social networking sites (e.g. Facebook or Twitter) to read or post related messages (e.g. about the programme or news event)? A further question was asked of the 331 (unweighted) respondents who do: When watching or listening to coverage of the Olympic and/or Paralympic Games, how likely are you to use social networking sites (e.g. Facebook or Twitter) to read or post related messages (e.g. about the Olympic event)? Answers were then rebased on the UK adult sample of 2192.
Figure 1.85  Anticipated social networking about the Games while watching/listening to coverage

Source: Ofcom research

Q14 When watching or listening to coverage of the Olympic and or Paralympic Games, how likely are you to use social networking (e.g. Facebook or Twitter) sites to read or post related messages (e.g. about the Olympic event)?

Base: Question asked of 331 adults/Olympic non-rejectors who ever use social networking sites (e.g. Facebook or Twitter) when watching television to read or post related messages (e.g. about the programme or news event). Answers re-based on UK adult sample of 2192

Furthermore, 15% of adults said they were likely to use the internet to look up Olympic/Paralympic information while watching or listening to coverage (see Figure 1.86). This rises to 27% of 16-34 year olds.  

Figure 1.86  Looking up information online about the Games while watching/listening to coverage

Source: Ofcom research

Q16 When watching or listening to coverage of the Olympic and or Paralympic Games, how likely are you to use the internet to look up relevant information (e.g. about the Olympic event)?

Base: Question asked of 508 adults/Olympic non-rejectors who ever use the internet to look up relevant information (e.g. about the programme). Answers re-based on UK adult sample of 2192

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58 1803 respondents (unweighted) were asked: Q.15 When watching television, do you ever use the internet to look up relevant information (e.g. about the programme) 508 answered that they do. A further question was asked of these 508 (unweighted) respondents: Q.16 When watching or listening to coverage of the Olympic and/or Paralympic Games, how likely are you to use the internet to look up relevant information (e.g. about the Olympic event)? Answers were then re-based on the UK adult sample of 2192.
1.8 The nations’ communications markets

1.8.1 Introduction and key points

Introduction

This section sets out a selection of the key facts and figures relating to communications markets across the UK’s nations in 2012, comparing and contrasting each nation and highlighting changes that have taken place in the past year.

The section begins by highlighting a range of ‘fast facts’ for England, Scotland, Wales and Northern Ireland, which draws on Ofcom’s annual survey of the nations and regions. It then reports on communications service availability and take-up by nation, and also includes analysis of data on service bundling and public service broadcasting spend and viewing.

Key points

• Digital terrestrial television (DTT) coverage is rising as digital switchover takes effect; 97% of homes across the UK can now receive the signal. Coverage is lowest in Northern Ireland (66%), with digital switchover not due to start there until October 2012.

• Superfast broadband services, which offer speeds of ‘up to’ 30Mbit/s or more, were available to an estimated 60% of UK homes by March 2012. There were significant variations in coverage across the nations, with availability being highest in Northern Ireland (94%), compared to 34% in Wales (where it was lowest).

• Broadband take-up continues to increase steadily, reaching 76%\(^{59}\) of UK households in Q1 2012. The largest year-on-year increase was recorded in Scotland (rising seven percentage points to 68%). In Wales and Northern Ireland broadband take-up stood at 68% and 69% respectively.

• Smartphone take-up increased year on year, to 39% of UK adults. Ownership within each nation also increased; to 32% in Scotland, 39% in Wales and 34% in Northern Ireland. Tablet ownership stands at 11% of UK adults, with each nation showing similar take-up levels.

• The trend of purchasing two or more communications services from the same supplier has continued across the UK this year. Fifty-seven per cent of UK adults now buy communications services in this way, with the largest increase over the past year being in Northern Ireland (up five percentage points to 51%).

• Across the UK, nearly 6 in 10 adults (58%) use the postal service regularly to send mail, while 3 in 10 (31%), regularly send parcels or packets. More consumers in Wales claim to send post regularly than in the other UK nations (69%).

• TV viewing share among the five main PSBs averaged 54% in 2011 across the UK, with similar levels of viewing to the PSBs in each nation, at around 54%.

• BBC radio services attracted a 55% listening share in 2011, ranging from 61% in Wales to 45% in Scotland and 46% in Northern Ireland, where commercial local/nations’ radio is popular.

\(^{59}\) Includes fixed and mobile broadband via a USB stick or dongle, or built-in connectivity in a laptop, netbook or tablet PC with a data card. Excludes internet access via a mobile phone. Total internet take-up including access on a mobile phone in Q1 2012 was 80%.
### 1.8.2 UK communications market: fast facts

#### Figure 1.87 UK communication markets: fast facts

<table>
<thead>
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<th>Service</th>
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<td>Radio consumption (hours per day)</td>
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<td>3.1</td>
<td>3.3</td>
<td>3.2</td>
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</table>

**Key:** *Figure is significantly higher than UK average; †Figure is significantly lower than UK average; ‡Figures have risen significantly by xx percentage points since 2011*
Availability of communications services varies across the UK’s nations

Figure 1.88 shows the proportion of the UK population able to receive various communications services, split by UK nation. The coverage of most services has not changed substantially in the past year, although digital terrestrial television (DTT) and fibre-to-the-cabinet (FTTC) broadband were both notable exceptions.

For DTT services this was because the switching-off of the analogue TV signal in parts of England has enabled improvements to DTT reception, while UK household FTTC broadband availability increased from 16% of homes to 31% in the year to March 2012 as a result of BT’s ongoing fibre network roll-out.

- Fixed-line voice telephony is available to 100% of homes in the UK as a result of the universal service obligation (USO) under which all households in the UK have access to a fixed line at a standard charge.

- Almost all UK homes (over 99.98%) are connected to a BT local exchange that has been upgraded to offer ADSL broadband, which is delivered over a standard fixed telephony line, at the end of 2011. However, not all premises in an ADSL exchange area can receive broadband services, or they may only be able to do so at low speeds, due to factors such as the distance from the local exchange, poor network quality and local technicalities.

- Consumers living in exchange areas that have been upgraded to offer local loop unbundling (LLU) typically have a greater choice of fixed-line telephony and broadband providers, and access to lower-cost bundled services, and by the end of 2011 92% of UK homes were connected to an LLU-enabled exchange, up by three percentage points year on year. England had the highest proportion of homes that were connected to an unbundled exchange (93% of the total), while this proportion was lowest in Northern Ireland, at 79%.

- Cable broadband services were available to 44% of UK homes in May 2012. Availability of cable broadband is concentrated in areas of high population density, and across the UK nations it ranged from 47% of homes in England to 23% in Wales. In March 2012 Virgin Media started an 18-month programme to double the speed of most of its broadband connections.
• BT’s fibre-to-the-cabinet deployment gained pace in 2011, and by March 2012 31% of UK homes were able to receive FTTC services using BT’s fibre network, up from 16% a year previously. BT aims to make its fibre broadband services available to two-thirds of UK premises, and in October 2011 it announced that this goal would be attained by the end of 2014, a year sooner than originally planned. In April 2012 BT upgraded its network to offer ‘up to’ 80Mbit/s FTTC services, offering speeds twice as fast as those available previously. Northern Ireland had the highest household availability of FTTC services at the end of March 2012, at 87%, largely as a result of a Department of Enterprise, Trade and Investment project to promote the deployment of fibre broadband services.

• 99.7% of UK premises had outdoor 2G mobile coverage from at least one operator in May 2012, leaving 0.3% of premises (homes and offices) with no outdoor coverage. Indoor coverage figures can be expected to be lower, because mobile signals weaken as they pass through building walls. Levels of coverage are influenced by population densities and by topography. As a result, 99.8% of England’s premises were covered by 2G mobile from at least one operator, in contrast to 99.2% in Wales, 99.2% in Scotland and 98.7% in Northern Ireland. The comparable figures for 3G coverage were lower: 99.1% of UK premises; 99.7% in England, 97.0% in Scotland, 97.6% in Wales and 88.3% in Northern Ireland had 3G mobile coverage outside the premise from at least one operator.

• DTT services were available to 97% of the UK population by July 2012, up from 85% a year previously. The increase was as a result of the ongoing digital switchover in England, where the proportion of people able to receive DTT services increased from 85% to 98% over the period. 

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60 http://www.btplc.com/news/articles/showarticle.cfm?articleid=%7Bd228f2b4-25fc-4095-8ec4-bd17b903cc3b%7D
Figure 1.88  Communications infrastructure availability across the UK’s nations

<table>
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</tbody>
</table>

**Sources:** Ofcom

1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator.
2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator.
3. Ofcom estimate of the proportion of households connected to an ADSL-enabled BT local exchange.
4. Ofcom estimate of the proportion of households connected to an LLU-enabled BT local exchange.
5. Ofcom estimate of the proportion of households passed by Virgin Media’s cable broadband network; excludes homes where Virgin Media is not also able to provide fixed voice and pay-TV cable services.
6. Ofcom estimate of the proportion of households able to receive FTTC services
7. Ofcom estimate of the proportion of households able to receive superfast broadband services

### 1.8.3 Geographical coverage of 2G and 3G mobile services

Figure 1.89 illustrates the geographic coverage, as opposed to premises-based coverage, of 2G and 3G mobile services. The parts of the country where there is the most coverage tend to coincide with areas of high population density. Geographic coverage tends to be lower than premises-based coverage, because mobile operators tend to deploy services specifically to cover centres of population. The lower network coverage in Scotland, Wales and Northern Ireland, reflects these nations’ large areas of low population density, and the presence of hilly or mountainous terrain, which limits the range of cellular signals.

**Figure 1.89  Geographical coverage of 2G and 3G mobile services**

<table>
<thead>
<tr>
<th>Service</th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>N Ireland</th>
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<tr>
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<td>96</td>
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<td>76</td>
<td>94</td>
<td>49</td>
<td>78</td>
<td>52</td>
</tr>
</tbody>
</table>

**Source:** Ofcom based on mobile operator data, May 2012. Figures give the percentage of geographic area covered by at least one operator.

**Note:** This data is based on calculating coverage in 200 metre square pixels that cover the UK; this improved methodology is different to that used in the 2011 Communications Market Report, and as such the two sets of figures are not comparable.
1.8.4 Take-up of communications platforms and services across the UK

Modest increases in take-up of established communications services across the UK nations

Take-up of the most established communications services remained stable or increased modestly in the past year. Digital television and mobile telephony services are approaching universal ownership, so year-on-year increases in take-up have slowed.

- Ownership of fixed-line telephones has remained stable across the UK in the past year, at 84%. Take up of fixed-line telephones is lowest in Wales (80%).

- Broadband take-up (whether fixed or mobile) has continued steadily to increase, with a two percentage point rise in the past year, and 76% of households are now connected. The largest percentage point increase was seen in Scotland (+7). In Wales and Northern Ireland the apparent decreases in broadband take-up are within the survey’s error margins, so should not be considered significant.

- Over nine in ten UK adults (92%) own a mobile phone, with take-up remaining stable during the past year. There is modest variation between nations, with highest take-up (93%) in England and Northern Ireland and the lowest take-up in Scotland (85%).

- Digital television take-up has increased to 98% of households with a TV. Wales and Scotland (the two UK nations to have completed switchover to digital) had the highest take-up, at 99%. Take-up in Northern Ireland at the start of 2012 (fieldwork took place in January and February) was 91%, with digital switchover scheduled there for October 2012.

Figure 1.90 Communications service adoption across the nations of the UK: 2012

Source: Ofcom research, Q1 2012
Fixed-line base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)
DTV base: Adults aged 16+ with a TV in the household (n= 3713 UK, 2214 England, 489 Scotland, 508 Wales, 502 Northern Ireland)
DAB base: Adults aged 16+ who listen to radio. *NB data in 2011 is based on all with any active radio sets in the household who listen to radio (n = 2963 UK, 1790 England, 364 Scotland, 405 Wales, 404 Northern Ireland). Elsewhere in this report UK-level DAB take-up data is taken from RAJAR.
See published tables for questions:
Figure 1.91 sets out patterns of communications technology / service adoption, by nation and by location (urban/rural). Broadly speaking, take-up of communications services are at similar levels in urban and rural locations. Fixed-line services are the only deviation from this pattern, where take-up is higher – sometimes substantially – in rural locations. That said, there are some variations in take-up by location: broadband take-up among homes in rural areas is higher than in urban areas in Scotland and Wales, which is likely to relate to higher-income households in rural areas.

![Figure 1.91 Adoption of communications technology / services in urban and rural locations](image)

Source: Ofcom research, Quarter 1 2012

**Fixed telephony, mobile telephony, broadband base:** All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

**DTV base:** Adults aged 16+ with a TV in the household (n = 3713 UK, 2214 England, 489 Scotland, 508 Wales, 502 Northern Ireland)

**Adoption of new technologies increasing rapidly**

One in four (39%) UK adults now own a smartphone, an increase of 12 percentage points over the past year. Smartphone ownership varies across the UK nations with the highest levels of take-up being found among consumers in England (40%) and Wales (39%). Smartphone ownership is higher among ABC1 social groups and those aged 16-34. Similarly, household take-up of tablet PCs has rapidly increased since Q1 2011, with 11% take-up across the UK, up from 2% the previous year. Smart TVs are in 5% of UK households. We discuss tablet computer ownership in section 1.6, smart TVs in section 2.1.2, and smartphones in section 4.1.2.
1.8.5 Consumer take-up of bundled services in the UK

Approaching six in ten households purchasing communications services in a bundle

Purchasing communications services in bundles continues to increase in popularity across the UK. Fifty-seven per cent of UK homes now purchase communications services in this way, a four percentage point increase year on year, following a three percentage point increase from 2010-2011. The most popular type of bundle is a ‘dual’ package of two services (typically fixed-line telephony and broadband).

Take-up of bundled services is highest in England (58%), but is becoming an increasingly popular way to purchase services in Northern Ireland, where there has been a year-on-year increase of five percentage points. The proportion of homes with bundled services in Scotland and Wales has remained stable, at 47%.
1.8.6 Use of postal services

Seven in ten consumers in Wales regularly send mail

Across the UK, nearly six in ten adults (58%) use the postal service regularly to send mail, while three in ten (31%), regularly send parcels or packets by post. More consumers in Wales claim to send post regularly, compared to all other UK nations (69%). In Scotland and Northern Ireland, fewer consumers (51% and 49% respectively) claim to send items of post regularly than the UK average. As would be expected, fewer consumers in these nations claim to regularly buy stamps for letters and cards (45% in Scotland and 42% in Northern Ireland) compared to 53% across the UK.
1.8.7 Spending by public service broadcasters on television and radio content across the UK’s nations

Figure 1.95 illustrates patterns of spend on broadcast output. It adjusts for population size by expressing spend on a per-head basis. The chart illustrates four types of expenditure:

- the value of qualifying first-run ‘made out of London’ network TV spending: TV programmes that are produced in one nation/English macro region, and then broadcast to all UK viewers;
- spend by the BBC and ITV/STV/UTV on first-run originated TV programmes specifically for viewers in each nation or region;
- TV programming produced in Welsh (and broadcast on S4C), Gaelic (BBC ALBA) and the Irish language; and
- BBC spend on radio services for listeners in the nations (BBC Radio Foyle/Ulster, BBC Radio Wales/Cymru, BBC Radio Scotland/nan Gàidheal and BBC local radio in England).

Total spend per head across the UK based on the four types of expenditure outlined above stood at £39.01 in 2011; networked television productions accounted for three-quarters (75%) of that total, and nations/regional television output for a further 11%.

Spending for each of the four nations differed in terms of level and composition. Spend per head in Wales was the highest among the four nations, reaching £60.36 in 2011. In England, spend per head stood at £37.66. In Scotland spend per head stood at £36.86 where made-out-of-London networked programmes and productions for viewers in Scotland both made substantial contributions to that total. In Northern Ireland spend per head was £38.91; with television programming for Northern Ireland viewers, and radio output, making up a large proportion of the total.

Figure 1.95 Spend per head by PSBs: 2011

Source: broadcasters, BBC and S4C Annual Report and Accounts and Ofcom calculations. Figures include the BBC spend on programmes for S4C and BBC ALBA. Made-out-of-London figures are taken from the Network Compliance Report, 2011. For further details on qualifying made out of London programmes, see http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/ on the Ofcom website
1.8.8 Consumption of television and radio services

TV viewing remains stable, with people across the UK watching on average 4 hours per day

In 2011, average daily TV viewing among individuals (aged 4+) in the UK remained comparable to 2010, at 4 hours per day. Viewing was highest in Wales and Scotland (average 4.5 and 4.4 hours respectively per day). Average daily radio listening among adults (15+) in the UK was 3.2 hours, levels of listening among listeners in Wales and the UK’s other nations were broadly similar, and all were comparable to the 2010 figures.

Figure 1.96 Hours of daily viewing of television and radio, by nation: 2011

Source: TV = BARB, 2011. Based on all individuals (aged 4+). Main 5 PSBs = BBC One, BBC Two, ITV1, C4, Five.
*Notes: It is not possible to provide a single figure for ‘England’ so instead a range is displayed reflecting the regions with the highest (North East) and lowest (West) figures respectively.

1.8.9 Use of converged platforms and devices by people across the UK

Consumers’ use of data on mobile handsets has increased by 22% in the past year

Four in ten (39%) of UK consumers now say that somebody in their households uses their mobile phone to access data services (internet, emails, web-enabled apps etc). This is an increase of seven percentage points (or 22%) since last year. This rapid growth has been driven by the fast-increasing popularity of smartphones.

Watching audio-visual content over the internet continues to be a popular pastime, with over four in ten (44%) homes watching services such as BBC iPlayer, 4oD and ITV Player, watching video clips online or streaming live TV. Online radio listening is more of a minority pastime, with 16% of consumers doing this across the UK.
Figure 1.97  Consumers’ use of converging platforms

<table>
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<tr>
<th>Activity</th>
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<th>Scotland</th>
<th>Wales</th>
<th>N Ireland</th>
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<tr>
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<td>39</td>
<td>46</td>
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</tr>
<tr>
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<td>11</td>
<td>31</td>
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<td>TV/video over internet</td>
<td>17</td>
<td>11</td>
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</tr>
</tbody>
</table>

Source: Ofcom research, Quarter 1 2012
Base: All adults aged 16+ (n = 3772 UK, 2251 England, 500 Scotland, 513 Wales, 508 Northern Ireland)

Q5A-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
1.9 Hyperlocal websites

1.9.1 Introduction
The growth in internet take-up and use has provided a range of opportunities for locally-focused providers to use online services as a means to reach audiences and tackle issues that are important to citizens and communities. This ‘hyperlocal’ website sector is evolving rapidly in the UK, enabled by developments in technology and changes in consumer behaviour. It has the potential to support and broaden the range of local media content available to citizens and consumers at a time when traditional local media providers continue to find themselves under financial pressure.

1.9.2 Key points

- Use of local community websites is growing, with around 1 in 7 (14%) using services monthly or more frequently. Adults aged between 25-34 are particularly likely to use these services (22%), while those aged above 65 are less likely (7%).

- To those that use them, local community websites are very important, with 37% of users rating the importance of services as 7 or more out of 10. Although this is not as high as the importance ascribed to TV by viewers (59%), it is greater than other services such as local newspaper websites (27%).

- There are more than 400 hyperlocal websites in the UK producing original news stories, the vast majority of which (93%) are in England. In general, sites are clustered around large urban conurbations, with London (77 websites), Birmingham (28 websites) and Bristol (8 sites) all particularly well served.

- Collectively they produce almost 2500 stories a week, or the equivalent of 5.6 stories per week per site.

1.9.3 Key characteristics of hyperlocal websites

What do we mean by hyperlocal websites?

A broad definition of the hyperlocal website sector can be found in Nesta’s recent publication Here and Now – UK Hyperlocal Media Today61, which describes hyperlocal media as:

“Online news or content services pertaining to a town, village, single postcode or other small geographically-defined community” (p9)

This is a wide definition covering a diverse set of services, including content produced both professionally and voluntarily. It includes websites that publish original stories, those that act as aggregators for news items from other providers, and forums or message boards focused on a particular geographic community. The content these websites carry can range from simple text-only blog posts to audiovisual content with interactive features. The content and tone of hyperlocal sites varies enormously. Some focus on very specific local campaigns, while others offer broader coverage of local community life.

A commonality that most hyperlocal websites share, however, is that they tend to operate at a more localised level – both in terms of geography and types of content – than traditional media providers such as local newspapers, commercial radio or regional TV.

61 Available from: http://www.nesta.org.uk/about_us/assets/features/here_and_now_uk_hyperlocal_media_today
Why are hyperlocal websites growing?

A number of factors have combined to enable the emergence of hyperlocal websites. These include:

- **Technological developments** - The internet has created opportunities for both producers and consumers of content to interact at significantly reduced costs. Online services such as Wordpress and YouTube mean that it is easy for anyone to create and distribute local content, while rising ownership of devices (such as smartphones and tablets) and the use of social media and geolocation services makes consumption of this content easier too.

- **Changes in competitive environment** – The traditional local media sector has faced challenges in recent years, with declining advertising revenue and the need to make cost savings. This may have resulted in reduced local coverage of some geographic areas. Hyperlocal websites have tried to fill this gap, in the knowledge that local news and information remains important to audiences.

1.9.4 Consumption of hyperlocal websites

Use of hyperlocal websites is growing, but this is still an emerging sector

Ofcom conducted research in May 2012 on consumers’ use of local media. Hyperlocal websites – termed ‘local community websites’ in the survey – are used less than traditional local media such as TV and radio. However, around 1 in 7 (14%) people state that they use a local community website on at least a monthly basis.

![Figure 1.98 Frequency of local media use](image)

Source: Ofcom research (2012) Q: I would now like you to think specifically about your local and regional media usage. By local, I mean the area in which you live. On average, how frequently do you use each of the following things? Base: All UK adults aged 15+ (n=2452)

Local community websites are used to varying extents by different demographic groups. Although there is little difference between the levels of male and female users, there is a noticeable difference by age and socio-economic group. Over one in five (22%) individuals aged between 35-44 use local community websites at least monthly. In contrast, 15-24 year olds

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62 Similarly, the Government’s local TV policy is aimed at enabling genuinely local services (as opposed to regional) to be broadcast on Freeview for the first time. Ofcom aims to license 21 local TV services in 2012.
olds and those aged above 65 are less likely to use local community websites. Those in ABC1 households are more likely to use local community websites at least monthly (16%) than are those in C2DE households (11%).

Figure 1.99  Frequency of use of local community websites

Source: Ofcom research (2012) Q: I would now like you to think specifically about your local and regional media usage. By local, I mean the area in which you live. On average, how frequently do you use each of the following things? Base: All UK adults aged 15+ who use local community websites (variable base sizes)

To those who use them, local community websites are very important

Although use of local community websites is lower than that of other local media, the importance attached to them by their users is at a similar level to some other services providing local news. Thirty-seven per cent of users rated local community websites as a 7 or above in importance (where 10 is extremely important and 1 is not important at all). This is similar to the rating for the internet more generally as a source of local information (38%), local paid-for newspapers (43%) and local radio (44%). It is also significantly above other services, including local news websites run by newspapers (28%). This compares to 59% of TV users naming local/regional TV as important.

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63 This may be linked to lower internet access. According to Ofcom’s technology tracker, 46% of those aged 65 and over have internet access at home (Q1 2012).
When asked about the most important local media source, consumers are much more likely to choose mainstream services such as local / regional TV (50%) rather than local community websites (1%). However, those who use local community websites are more likely to rate them as the most important media source (6%).

There are more than 400 hyperlocal websites in the UK producing original news stories (that we know about)

Mapping the size of this sector is a difficult task. Hyperlocal websites are an emerging phenomenon, and as such there is no established trade association or official membership.
body. And as services are unregulated, there is no requirement for them to notify Ofcom or any other organisation.

There are, however, resources available which provide a basis for quantifying the size of the sector. A database of hyperlocal websites has been established by Openly Local, a project aimed at developing an open and unified way of accessing local government information. Sites are listed through a combination of self-declaration and research by the Openly Local team.

These data have been analysed by Birmingham City University, as part of an Arts and Humanities Research Council and Engineering and Physical Sciences Research Council funded programme (of which Ofcom is a partner) which focuses on the creative citizen. The work has estimated the size of the hyperlocal website sector through interrogation of the Openly Local directory.

Using a definition of an ‘active’ hyperlocal site as one that had published at least once in the five months prior to the sample period, as well as using the definition we have listed above (whereby news is the focus rather than message forums), research shows that the database currently records 432 active hyperlocal websites across the UK. A similar snapshot taken in 2010 shows 295 sites listed – representing a 46% increase in sites in two years. In comparison, the Newspaper Society estimates that there are around 1,600 websites associated with local and regional newspapers in the UK.

Ninety-three per cent of the active hyperlocal websites we identified are based in England. There is a particular focus on urban areas, with 38 services focused on localities in London. Birmingham had the greatest concentration of hyperlocal websites, with 28 active sites, while there were eight sites operating in the Bristol area. In general, there is a clustering of sites around large urban conurbations. However, some rural areas were well served, with South Gloucestershire having 11 sites, largely aimed at small towns and villages, and Wiltshire having ten.

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64 See [http://openlylocal.com/hyperlocal_sites](http://openlylocal.com/hyperlocal_sites)
65 See [http://creativecitizens.co.uk/](http://creativecitizens.co.uk/)
66 The directory contains some sites which are no longer operating (the URL either does not resolve or points to a site no longer publishing news items).
Figure 1.103  Location of hyperlocal websites in the UK

Key: Number of hyperlocal websites
- = 0-15
- = 15-30
- = 30-45
- = 45-60
- = 60-75
- = 75+

Source: Openly Local / Ofcom / Birmingham City University (May 2012)
Many areas of the UK appear to have no hyperlocal provision at all (although the limitations of the data collection may mean that some of these areas are served by sites that have not registered with Openly Local). There appears to be only a loose correlation between population size and hyperlocal website provision. The areas with the lowest populations (Northern Ireland and the North East) also have the smallest number of hyperlocal websites, while more populous areas of the UK (such as London and the South East) are well served by the sector. But there are significant variations between areas. While Scotland and the South West are similar in population terms, with a little over 5 million individuals each, they have strikingly different hyperlocal website sectors – only 13 in Scotland against 76 in the South West. It may be, therefore, that there are other variables which explain the distribution of hyperlocal websites across the UK.
There is a high variance in the number of articles that hyperlocal websites publish

During a sample period of 11 days in May 2012, Birmingham City University researchers counted the number of articles published by hyperlocal websites. In total, 3819 items were found to be produced during this period.

Further analysis revealed that 312 of the 432 sites produced at least one story during the sampling period (72%). On average, an active hyperlocal website publishes 7.7 items a week, but the lower median figure (4.2) shows that activity varies widely by site. There is significant variance in the frequency of publication – 20% of sites are responsible for 58% of the output, and 75% of items were produced by a third of the sites. Thirty-nine sites produced just one story in the sample period, while 17 sites produced more than 50 items.

Source: Ofcom / Birmingham City University (May 2012)
These figures highlight the variety of services that operate within the sector. Clearly there are some websites which are particularly active in publishing original news stories, whereas others produce content on a more sporadic basis. This may be because some website operators are able to dedicate more time to writing stories, or because there are more notable events and activities in some areas than in others.

**The collective output of the sector is substantial, with publishing highest during the morning**

Collectively, the hyperlocal website sector publishes 15 news stories per hour at an average of 366 items per day. On weekdays between 7am and 7pm production averaged 24 items per hour, with the highest number of stories being published between 9am and 10am (an average of 38 stories).

![Average hourly stories from hyperlocal sites, excluding weekends](image)

*Source: Openly Local/Birmingham City University/Ofcom (May 2012)*

**Hyperlocal websites may have consumer and citizen benefits**

As use of hyperlocal websites continues to grow – with around 1 in 7 people now using them at least monthly – these services may be well positioned to play an important role in the provision of local news and information to communities. Hyperlocal websites are often more localised both in terms of geographical and story focus, covering stories which more mainstream services are unaware of, or choose not to cover. Although hyperlocal websites are not yet ubiquitous, many of them were created in order to fill particular gaps in the provision of locally-focused content. Furthermore, the value and role of this type of community media may go beyond the provision of content, with the potential for specific value in the social capital generated through the production of hyperlocal websites.

Because of these potential societal benefits, and the increasing role that these services are likely to play in the local media ecosystem, Ofcom plans to continue to follow the development of the hyperlocal website sector.