Section 6

Take-up of services and devices

In this section we highlight the extent to which consumers have communications services and devices available in their household. We illustrate how take-up has changed over time, highlight any demographic differences in ownership, and make broad international comparisons. This section also looks at the changes in usage levels and changes over time in the types of activities being undertaken.

By examining take-up and use of communications services we are able to identify whether there are any concerns regarding non-ownership that we need to consider.

Key trends

- **Fixed-line ownership has stabilised in the UK.** Following the decline in fixed-line ownership seen in 2009, ownership levels have remained at 84% for a fourth consecutive year.

- **Mobile-only households continue to be younger consumers and from the DE socio-economic group.** The majority (79%) of households continue to own both a fixed line and a mobile phone, with a further 4% fixed-line only and 16% mobile-only. Just over a quarter (27%) of 16-24s and those in DE (28%) socio-economic group are in mobile-only households. Mobile-only households also continue to be more prevalent in urban (17%) than in rural areas (9%).

- **Take-up of the internet remains stable, with four in five (82%) households able to access the internet at home.** Seventy-eight per cent of households use either fixed and/or mobile broadband, 4% have access only via their mobile phone and 1% use a dial-up internet connection. Total use of fixed broadband remains unchanged at 74% of adults, with a further 4% using mobile broadband only.

- **There was a significant decrease in the number of consumers who ever use mobile broadband outside the home.** Ninety-five per cent of adults with mobile broadband via a dongle (or built-in connectivity in a laptop, netbook or tablet) say they use it at home. In 2013 there was a significant decrease in the number of consumers who ever use mobile broadband outside the home (60% versus 77%) and an increase in those who only use mobile broadband in the home (38% vs. 22%).

- **Around half of all UK adults access multi-channel television at home through Freeview.** Thirty-seven per cent of all adults only use Freeview to access multichannel television at home; this compares to 31% only using satellite and 14% only using cable.

- **Just under six in ten (58%) adults receive pay TV.** Following the slight decline in take-up of pay TV for some age groups in 2012, take-up has remained stable for all age groups.

- **Two-thirds of consumers claim to have access to digital radio services.** Take-up of digital services that can deliver digital radio (i.e. digital TV and/or internet) has increased to 100% of homes. Two-thirds (66%) of consumers claimed to have access to digital radio services at home (via DTV, internet or DAB radio set), as in 2012 – suggesting that around one in three are unaware that they can access digital radio services at home.
• Just under two-thirds (64%) of postal users claim to be reliant on the postal service. Levels of those claiming to be ‘very reliant’ on the postal service increased with age, with 18% of 16-24 year olds stating they were ‘very reliant’ on the postal service, compared to 30% of those aged 65-74 and 41% of those over 75 years old.

• The postal price increases in April 2012 have had no impact on the behaviour of almost three in five residential postal consumers. The claimed impact of the price rise increases with age, with over two-thirds (68%) of those aged 16-24 saying it had no impact. This compares to just over half of those aged 55 to 64 (54%), 65 to 74 year olds (52%) and those over 75 (56%).

• Over nine in ten consumers are satisfied with the ‘delivery to neighbour’ scheme for post. Of the 28% of postal users who had experienced the ‘delivery to neighbour’ scheme, more than nine in ten (94%) stated they were either satisfied, or very satisfied, with the scheme, with over three in four (77%) being very satisfied.

These key trends are explored in more detail below under these sub-headings; at a UK level, and internationally where possible:

• Take-up of communications services and devices across the UK
• Telecoms ownership (including broadband), in detail
• Digital broadcasting, in detail
• Postal users, in detail
• Ownership of connected devices
• Non-ownership of communications services

6.1 Take-up of communications services and devices across the UK

6.1.1 Digital TV take-up rose following the completion of digital switchover while other markets stabilised

Figure 28 shows that mobile phones and digital TV have the highest levels of penetration, with over nine in ten consumers having access to these services in their household. While most markets have stabilised, there has been an increase in the penetration of digital TV (to 98%, the remainder not having a TV) since the completion of digital switchover in 2012. Broadband ownership is at a similar level to 2012, with over three in four households (78%) now having this service.
Figure 28 Take-up of communications services in the household

Source: Ofcom communications tracking survey
*Note: Data for 2006-2013 based on Q2, all other data based on Q4

6.1.2 Over nine in ten households in the nations have at least one mobile phone and/or digital TV

Levels of digital TV and mobile phone ownership in the household are at similar levels for each nation (Figure 29), with over nine in ten households having these services. Other services see different levels of take-up across the nations. Scotland has a lower level of fixed-line ownership, at three in four households (77%) compared with over eight in ten households in the other nations. Home broadband ownership is lower in Scotland, with seven in ten (72%) stating they have this service, compared to eight in ten in England (78%) and Wales (79%), and three in four in Northern Ireland (76%). While overall broadband ownership is lower in Scotland, mobile broadband ownership in this nation is higher, whether as the only broadband service (7%) or alongside fixed broadband (12%). Consumers in England are less likely to have mobile broadband at home, either as the only broadband service (3%) or alongside fixed broadband (4%). Within the nations, England and Northern Ireland have the highest levels of claimed access to digital radio at home (both 67%).
Figure 29 Take-up of communications services in the household, by nation

<table>
<thead>
<tr>
<th>Service</th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed line</td>
<td>84%</td>
<td>85%</td>
<td>77%</td>
<td>85%</td>
<td>84%</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
<td>94%</td>
<td>95%</td>
</tr>
<tr>
<td>Digital TV</td>
<td>98%</td>
<td>98%</td>
<td>98%</td>
<td>99%</td>
<td>99%</td>
</tr>
<tr>
<td>Digital Radio*</td>
<td>66%</td>
<td>67%</td>
<td>59%</td>
<td>62%</td>
<td>67%</td>
</tr>
<tr>
<td>Broadband</td>
<td>78%</td>
<td>78%</td>
<td>72%</td>
<td>79%</td>
<td>76%</td>
</tr>
<tr>
<td>Mobile broadband ONLY</td>
<td>4%</td>
<td>3%</td>
<td>7%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Fixed broadband ONLY</td>
<td>69%</td>
<td>71%</td>
<td>53%</td>
<td>70%</td>
<td>66%</td>
</tr>
<tr>
<td>Fixed and mobile broadband ONLY</td>
<td>4%</td>
<td>4%</td>
<td>12%</td>
<td>2%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: Ofcom communications tracking survey  
Base: All adults 16+ (Q2 2013, 2879)  
* Claimed access to digital radio at home  
Note: UK data taken from Q2 2013 as opposed to Q1 2013 among the nations, therefore the figures are not directly comparable.

Figure 30 shows the take-up of devices across the nations. By household, the levels of personal ownership of a mobile phone are similar in each nation, but personal ownership of smartphones is lower in Scotland than the UK average (48% vs. 56%). Compared to other nations, England has higher levels of DAB ownership (43%) while Northern Ireland has lower personal use of e-readers compared to the UK average (8% vs. 15%). Take-up of tablet computers does not vary significantly from the UK average (29%) for any of the nations.
6.1.3 Satellite-only households have decreased in both Scotland and Wales

While the television service platforms used in England are broadly unchanged since 2012, each of the other nations experienced changes in the profile of multi-platform ownership in 2013. In Scotland there has been a decrease in the proportion using satellite-only (24% vs. 34% in 2012) and an increase in those using Freeview only (43% vs. 38%). Wales also saw a decrease in the proportion of the population using satellite-only (35% vs. 43% in 2012), with small increases for each of the other types of ownership. Northern Ireland differs from the other nations, with an increase in the proportion of the population using satellite-only (32% vs. 16% in 2012) and an increase in those using Freeview only (32% vs. 26%). Customers in Northern Ireland remain more likely than any of other nations to have both satellite and Freeview, rather than just one of those services (22%).

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Figure 30 Take-up of devices in the household, by nation

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile phone take-up</td>
<td>93</td>
<td>93</td>
<td>94</td>
<td>92</td>
<td>93</td>
</tr>
<tr>
<td>Smartphone take-up</td>
<td>56</td>
<td>57</td>
<td>48</td>
<td>56</td>
<td>54</td>
</tr>
<tr>
<td>DAB ownership amongst radio listeners**</td>
<td>41</td>
<td>43</td>
<td>29</td>
<td>27</td>
<td>24</td>
</tr>
<tr>
<td>Smart TV ownership among TV homes**</td>
<td>7</td>
<td>8</td>
<td>4</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Tablet computer take-up</td>
<td>29</td>
<td>28</td>
<td>32</td>
<td>28</td>
<td>34</td>
</tr>
<tr>
<td>E-reader take-up (personal use)</td>
<td>15</td>
<td>15</td>
<td>13</td>
<td>12</td>
<td>8</td>
</tr>
</tbody>
</table>

Source: Ofcom communications tracking survey  
Base: All adults 16+ (Q2 2013, 2879)  
** Figures from Q1 2013 (Radio listeners 2910, TV homes 3661)
The following sub-sections highlight the trend in take-up of individual communications services across the UK, then compare the UK with other countries. This is followed by a more detailed look at the UK data by demographic.

### 6.2 Telecoms ownership in detail

#### 6.2.1 Fixed-line ownership has stabilised in the UK, with a smaller decline in take-up over the past five years than in other countries

Following the decline in fixed-line ownership noted in 2010 (from 87%), ownership has remained at 84% for the fourth consecutive year.
Data collected for Ofcom’s 2013 *International Communications Market Report* show that in the UK, as in all but one of the countries included in that report, the number of fixed lines per 100 people fell in the five years to 2012 (Figure 33). The sole exception was Brazil, where the number of fixed lines increased as a result of the deployment of fixed wireless access networks, which has increased the availability of fixed-line telephony services.

In the UK, the decline in the number of fixed lines over recent years has largely been the result of fixed-to-mobile substitution (as shown in Figure 36 of this report. Ofcom research suggests that 16% of UK homes were mobile-only in Q2 2013). More recently, there has also been an increase in the use of non-voice forms of communication (such as email, SMS messaging, instant messaging and the messaging facilities on social networking sites) as alternatives to both fixed and mobile voice calls. In the five years to 2012 the number of fixed lines per 100 people fell by four to 53 per 100 people in the UK, the joint smallest decline among the non-BRIC countries included in the report, along with Australia and Spain. Two key reasons for the resilience of the UK fixed-line market are the requirement for most UK homes to have a fixed line in order to access fixed broadband survives, and the UK’s comparatively low fixed voice prices.

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6.2.2 UK fixed-line take-up remains highest among older consumers and those in rural areas

There has been no significant change in fixed-line ownership across all age groups since 2012 (Figure 34), with fixed-line ownership increasing with age: over nine in ten consumers (95%) aged 65+ have a fixed-line service, compared to 72% of those aged between 16 and 24.

Figure 35 shows there has been very little change in take-up by socio-economic group, with AB socio-economic groups more likely to have fixed-line services than DE socio-economic groups. Those living in a rural environment are more likely than those living in an urban environment to have a fixed-line service (91% vs. 83%).
6.2.3 Most households continue to own both a fixed and mobile phone – one in six has only a mobile phone

Figure 36 shows that, as in 2012, the majority of households (79%) have both fixed-line and mobile phone services. A further 16% have mobile-only and 4% fixed-line only, both unchanged since 2012. Mobile-only households are discussed in more detail later in this section.
6.2.4 Over 90% of adults own a mobile; this compares favourably to the majority of countries

The following chart (Figure 37) illustrates the trend in mobile ownership among UK households and UK adults. ‘Mobile in household’ means at least one mobile phone within a household, and is compared to the proportion of adults who personally own and use a mobile at least monthly.

Take-up of mobile services remains stable: 95% cent of households have access to at least one mobile phone, with 93% of adults stating they personally use one. Over half of adults (56%) now use a smartphone, an 11 percentage point increase since 2012 (45%) which was in turn an 11 percentage point increase since 2011 (34%). Among smartphone owners 83% are on a monthly contract, unchanged since 2012.\textsuperscript{34}

\textbf{Figure 37 Take-up of mobile services: 2000-2013}

Source: Ofcom communications tracking survey


*Note: Data for 2006-2013 based on Q2, all other data based on Q4

There were 84 million active mobile connections in the UK at the end of 2012,\textsuperscript{35} equivalent to 132 connections per 100 people (Figure 38). This level of take-up was higher than in most of the countries for which data were available, but lower than in Germany, Italy, Australia, Sweden, Poland and Russia. In markets with high levels of mobile take-up, increases in the number of mobile connections are largely the result of consumers having more than one mobile; for example, one for personal use and another provided by an employer, a mobile handset along with a separate dedicated mobile data connection (such as a mobile broadband dongle, datacard or data-only SIM), and because some people use multiple SIMs to take advantage of different tariffs offered by mobile providers.

In the UK, there were seven dedicated mobile data connections per 100 people at the end of 2012, a slight fall compared to a year previously. This is likely to be because consumers are using smartphones for mobile internet access rather than dedicated mobile broadband dongles, datacards or data-only SIMs. UK take-up of dedicated mobile data connections was the sixth lowest among the countries for which comparable data were available, and

\textsuperscript{34} Further details on package types can be found in the ‘Consumer choices and value’ section of this report.

\textsuperscript{35} A mobile connection is considered active if it has been used in the previous 90 days.
significantly lower than in Sweden (19 connections per 100 people) and Australia (13 connections per 100 people), where take-up was highest.

**Figure 38 Take-up of mobile connections, by country**

![Take-up of mobile connections, by country](image)

Source: IDATE / industry data / Ofcom

6.2.5 Over nine in ten adults between 16 and 64 personally use mobile phone services

Figure 39 shows that mobile phone ownership among 16-44s remains almost universal (98% among 16-24s and 99% among 25-44s). Mobile phone ownership among 65-74s remains at eight in ten (80%) after the ten percentage point increase in 2011. Those aged 75+ are the least likely to personally use a mobile phone, with just over six in ten (62%) claiming to do so.

**Figure 39 Age and gender profile of those who personally use mobile phone services**

![Age and gender profile of those who personally use mobile phone services](image)

Source: Ofcom communications tracking survey

Base: All adults 16+ (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

* Caution: low base
Mobile use among all socio-economic groups and urban/rural locations has remained stable since 2012 (Figure 40).

**Figure 40 Socio-economic and urbanity profile of those who personally use mobile phone services**

Source: Ofcom communications tracking survey
Base: All adults 16+ (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

6.2.6 No change in proportion opting for mobile-only telephony: most common among younger adults and DE households

The following charts illustrate the changing profile of adults who live in a household with access to a mobile phone but no fixed line. The proportion of households using only mobile services has remained stable since 2010 and stood at 16% in 2013.

The profile of consumers who rely only on a mobile phone in the household remains unchanged and is most common among younger age groups and those in DE socio-economic groups. Around a quarter of each of these demographic groups have access only to mobile telephony at home.
**Figure 41 Age and gender profile of users of mobile-only telephony**

Source: Ofcom communications tracking survey  
Base: All adults 16+ (Q2 2008, 2019) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

Mobile-only telephony also continues to be higher in urban than in rural locations (17% vs. 9%).

**Figure 42 Socio-economic and urbanity profile of users of mobile-only telephony**

Source: Ofcom communications tracking survey  
Base: All adults 16+ (Q2 2008, 2019) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

6.2.7 Take-up of the internet continues to rise, with four in five households able to access the internet at home

It is possible to measure take-up of the internet in two ways. The first metric covers consumers who access the internet at home\(^{36}\), and the second measures the proportion of consumers who access the internet in any location.

\(^{36}\) Internet access at home includes access via a mobile phone
Take-up of the internet at home has continued to rise steadily (Figure 43), and now stands at four in five households (82%).

Among those with internet access, 1% of adults say they use a dial-up internet connection for their home internet and 4% have access only via their mobile phone. These sample sizes are too small to analyse data further.

**Figure 43 Take-up of the internet at home**

Source: Ofcom communications tracking survey
*Note: Data for 2006-2013 based on Q2, all other data based on Q4

### 6.2.8 Men are significantly more likely to know the speed of their home fixed broadband connection – on average seven in ten were unaware

In the fixed broadband market consumers are increasingly able to choose from a range of speed and pricing options for their broadband service. It is important for them to be aware of some of the technical aspects of their internet connections, such as speed, in order for them to make informed supplier and service choices.

Figure 44 shows that the proportion of broadband customers unaware of the advertised or connection speed of their broadband connection is unchanged since 2012. Close to seven in ten broadband customers are unaware of their advertised speed (67%) or are unaware of the actual connection speed (71%)\(^{37}\).

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\(^{37}\) Due to a change in question wording in 2012 differences between 2012-2013 and previous years should be taken as indicative only.
Older broadband customers, aged 65 and over, remain less likely to be aware of their connection speed. The proportion of broadband customers aged 75+ unaware of their connection speed stands at 87% (Figure 45).

While there was little difference in stated awareness of broadband connection speeds across other age groups, those aged 25-44 were more likely to know their connection speed (34% vs. 29% of all adults). Younger consumers (16-24) were almost as likely as older consumers (65-74) to say they did not know their internet connection speed (76% aged 16-24, 81% aged 65-74) (Figure 45). The lack of awareness in this younger age group may be due to these consumers not being the decision-maker (i.e. the person responsible for purchasing the service) in the household. There was however, a clear gender divide, with men significantly more likely than women to know their connection speed.
Those in DE socio-economic groups were more likely to be unaware of their broadband connection speed than were ABs (76% vs. 68%) (Figure 46). Unlike in 2012, consumers in urban locations were not more likely to be unaware of broadband connection speed than those in rural locations.
6.2.9 Take-up of broadband at home has stabilised in the UK, although there has been a decline in mobile broadband

Take-up of broadband as a method of internet connection at home is stable since 2012, and now 78% of households use either fixed and/or mobile broadband\(^38\). Use of fixed broadband has not changed significantly, with 74% of adults using a fixed connection, this includes 4% also using mobile broadband. Total use of mobile broadband has fallen for the second consecutive year, from 17% in 2011 to 12% in 2012 and 8% in 2013 (Figure 47). The decline is noted among those with only a mobile broadband connection (down to 4% from 6% in 2012) and those with both mobile and fixed broadband, also down to 4% from 6% in 2012.

Overall, broadband access, through fixed and/or mobile broadband, has not changed significantly for any age group or gender since 2012. Younger age groups continue to dominate ownership of broadband, while the over-75s remain the least-likely group to have broadband access at home, and also the least likely to own any connected device.

While mobile broadband continues to be most popular among younger age groups, there has been a decline in use of mobile broadband among 16-24s and 25-44s, where use fell from 14% to 9% and 15% to 12% respectively.

**Figure 47 Age and gender profile of those who have broadband access at home**

Overall, as with device ownership, broadband access levels, particularly for fixed broadband, are higher among ABC1s. Broadband access through either fixed and/or mobile platforms has not changed significantly for any socio-economic group since 2012.

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\(^{38}\) Note to participants in Ofcom's *Technology Tracker* defining mobile broadband: In addition to standard home fixed broadband connections, you can access broadband services on your PC or laptop using a mobile network. You plug in a USB modem stick sometimes called a 'dongle' or use a SIM card in your tablet or PC and you can then access broadband internet services ‘on the move’ using a mobile network.
Figure 48 Socio-economic profile of those who have broadband access at home

Source: Ofcom communications tracking survey, Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

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

Broadband access does not differ between those in urban/rural locations (77% urban, 79% rural), but levels are higher among households with children (88% with children in the home, 70% without children in the home).

Figure 49 Urbanity and presence of children in the household profiles of those who have broadband access at home

Source: Ofcom communications tracking survey, Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

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

6.2.10 Half of mobile broadband users use the service mainly, or always, in the home

Despite the ‘mobile’ functionality of mobile broadband, large amounts of use continues to take place in the home; 95% of adults with mobile broadband say they use it at home. In 2013 there was a significant decrease in the number of consumers who ever used mobile
broadband outside the home (60% vs. 77%) and an increase in those who only used mobile broadband in the home (38% vs. 22%). There is no statistically significant change in those using mobile broadband equally in and outside the home (46% vs. 38%) (Figure 50).

**Figure 50 Places where mobile broadband is used**

![Figure 50](image)

Source: Ofcom communications tracking survey
Base: All adults 16+ who use mobile broadband to access the internet (Q1 2011, 471) (Q1 2012, 394) (Q1 2013, 173)

QE22C. Which one of these best describes where you use mobile broadband to access the internet?

6.2.11 Broadband ownership has increased internationally since 2007, with the UK comparing favourably to other countries

Figure 51 compares the number of fixed broadband connections per 100 people in the UK with take-up in other countries. The number of fixed broadband connections per 100 people increased in all of the countries for which data were available in the five years to 2012, with the increase during this period ranging from one connection in India (where take-up was lowest in 2012 due to relatively low GDP per capita, poor fixed-line infrastructure and a fast-growing mobile infrastructure) to 15 connections in Russia.

The Netherlands had the highest take-up at the end of 2012, at 41 connections per 100 people. The high population density in the Netherlands makes the deployment of fixed broadband services relatively cheap, and 95% of households are able to receive cable broadband services, which are keenly priced. In the UK, there were 34 fixed broadband connections per 100 people at the end of 2012, the joint fourth highest figure (along with Sweden and Canada) and lower than in the Netherlands, France (with 36 connections per 100 people) and Germany (35 per 100). The comparatively high level of fixed broadband take-up in the UK reflects high availability (almost all UK premises are able to receive ADSL broadband services) and low fixed broadband pricing, particularly when bought as part of a bundle.

The UK also has high availability of superfast broadband services (i.e. those with a headline speeds of ‘up to’ 30Mbit/s or higher), and by June 2013 73% of UK premises were in a postcode that was served by the next generation access (NGA) networks that are used to
provide superfast services. By the end of 2012 15% of UK fixed broadband connections were superfast, the highest proportion among the EU5 countries.

**Figure 51 Take-up of fixed broadband, by country**

The second method of assessing internet access is to look at the proportion of adults who use the internet in any location. Figure 52 shows that use of the internet has remained stable at an overall level, at 82%. There has been just one significant rise since 2012: among those aged 45-64 (85% vs. 81% in 2012). Those aged 65-74, or 75 and over, remain less likely than the overall population to use the internet in any location, at 53% and 29% respectively.

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Use of the internet anywhere, by socio-economic group and by urban / rural location, (Figure 53) remained stable, with no significant movements since 2012. Those in the AB group remain the most likely to use the internet anywhere (92%) and those in the DE group the least likely (69%).

Source: Ofcom communication tracking survey
Base: All adults 16+ (Q1 2008, 5812) (Q1 2009, 6090) (Q1 2010, 9013) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750)
QE2. Do you or does anyone in your household have access to the Internet/ World Wide Web at home? And do you personally use the internet at home?
IN6. Do you ever access the internet anywhere other than in your home at all?
6.3 Digital broadcasting in detail

Digital switchover completed in the UK at the end of 2012, so we are no longer reporting demographic analysis of digital TV take-up, although in this section we will continue to look at the different platforms.

6.3.1 The UK leads the way in digital conversion and was one of only three countries to have 100% of all main TV sets receiving DTV in 2012

The chart below (Figure 54) shows results from GfK consumer research. It highlights the continued growth of digital TV take-up, which is currently at 98% of households. The remaining 2% represents households without a working television. Take-up has risen consistently year on year since 2001, and although this increase slowed in 2011, it increased by a further 5% in 2012 as the digital switchover from analogue terrestrial was completed. The previous growth was driven by the increase in digital terrestrial (Freeview) penetration, which has remained stable since 2010. Satellite ownership has remained at just over four in ten since 2011, while cable has also remained steady at 13% since 2003.

Figure 54 Take-up of digital TV services, by platform

Source: Ofcom Digital Television Update, figures rounded up to a whole %. Ofcom / GfK NOP consumer research from Q1 2007. Sample GB only. Previous quarters include subscriber data and Ofcom estimates for digital terrestrial and free-to-view satellite.

Note: 1% of GB homes do not have a working television and 1% use their main TV only for gaming or DVDs and do not receive a TV signal.

Among TV households, the UK leads the way in digital conversion and was one of only three countries to have 100% of all main TV sets receiving DTV in 2012 (Figure 55). Spain reached full conversion in 2011, and since Italy’s switchover in 2012, the remaining 7% of analogue households have also converted to digital.

GfK consumer research is based on a panel of 12,000 households in Great Britain (not including Northern Ireland) surveyed quarterly via the internet and telephone.
Figure 55 Take-up of digital television, by country: 2012

Figure 55 shows that digital satellite is the largest platform in the UK, with 47% of TV households using it on their main television set at the end of 2012. Digital terrestrial (37%) is the second most popular television platform, and take-up is higher than in any other comparator country except Spain (73%) and Italy (64%). Digital cable services are received in 15% of households in the UK, and unlike some comparator countries, the upgrade from analogue to digital cable is virtually complete. However, the UK has comparatively low take-up of internet protocol TV (IPTV).

Source: IDATE / industry data / Ofcom

Figure 56 Take-up of digital television: international comparisons, by platform, 2012

Figure 56 shows that digital satellite is the largest platform in the UK, with 47% of TV households using it on their main television set at the end of 2012. Digital terrestrial (37%) is the second most popular television platform, and take-up is higher than in any other comparator country except Spain (73%) and Italy (64%). Digital cable services are received in 15% of households in the UK, and unlike some comparator countries, the upgrade from analogue to digital cable is virtually complete. However, the UK has comparatively low take-up of internet protocol TV (IPTV).

Source: IDATE / industry data / Ofcom
6.3.2 Around half of UK adults access multi-channel television at home through Freeview

Figure 56, above, shows household data provided by industry. It is not possible to derive demographic information from these data, so consumer data are used in the following figures. Penetration figures differ between the two data sources, as one is by subscription (industry) and the other is claimed (survey figures).

The digital switchover process completed in October 2012: it is no longer possible to receive an analogue TV signal in the UK. Figure 57 shows that the profile of multi-platform ownership is relatively stable; with just under four in ten adults (37%) using Freeview only, just over three in ten using satellite only (31%) and 14% using only a cable service. Older consumers, those aged 65 and over, remain more likely than younger consumers to use only Freeview. In 2013, there was an increase in Freeview-only ownership among consumers aged 75 and over (65% vs. 52%). There were no significant differences to the average trend by gender.

**Figure 57 Trend in multi-platform ownership, by age**

Source: Ofcom communications tracking survey
Base: All adults 16+ (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)
QH1A. Which, if any, of these types of television does your household receive at the moment? Note: Remaining percentages are those who own other types of TV (e.g. via broadband DSL)

The increase in take-up of digital TV among DE groups, following digital switchover, has resulted in an increase in those taking Freeview only (48% vs. 41%) (Figure 58).
Both rural and urban areas have seen an increase in multichannel ownership since 2008, driven by Freeview (Figure 59). Freeview ownership is higher among consumers in rural locations than among those in urban locations. Cable is used by only 2% of adults in rural areas, compared to 17% in urban areas. Since 2012, consumers in rural locations are more likely to use a satellite service (55% vs. 44%), while satellite ownership remains stable in urban locations (40%).
6.3.3 Take-up of pay TV stabilised

The proportion of adults receiving pay TV remained stable at 58% in 2013. Following the slight decline in take-up of pay TV for some age groups in 2012, take-up remained stable for all age groups in 2013. The overall pattern is unchanged; with those aged 64 and over less likely than those under 64 to have pay TV (Figure 60).

Figure 60 Age and gender profile of consumers receiving pay TV

Source: Ofcom communication tracking survey
Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)
QH1A. Which, if any, of these types of television does your household receive at the moment?

Take-up of pay TV was stable for each of the socio-economic groups in 2013, with consumers in the DE group remaining the least likely to receive paid-for channels (49%). Those in an urban location (59%) are more likely to receive pay TV than those in a rural location (52%), which is consistent with the higher use of cable TV in urban areas (Figure 61). The increase in take-up of pay TV in rural areas since 2012 is not significant.

Figure 61 Socio-economic group and urbanity profile of consumers receiving pay-TV

Source: Ofcom communication tracking survey
Base: All adults 16+ (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)
QH1A. Which, if any, of these types of television does your household receive at the moment?
6.3.4 **BBC iPlayer was the most popular on-demand TV/film service accessed via a laptop or desktop computer**

In October 2013, 6.6 million people visited the BBC iPlayer website, the most popular online television and film website, on a laptop or desktop computer (Figure 62). Channel 4’s 4oD service was the second most popular (2.9 million unique visitors), followed by Netflix (2.6 million).

Despite their popularity, the unique audiences of BBC iPlayer and 4oD both declined in the year to October 2013, by 19%. By contrast, the unique audience of Netflix grew by 61% in the same period. The declining popularity of BBC iPlayer and 4oD on a laptop and desktop computer probably reflects a shift in the use of these services onto other devices such as tablets, smartphones and video-on-demand set-top boxes.

![Figure 62 Unique audience for selected online film and TV sites on a laptop and desktop computer](image)

Source: comScore MMX, UK, home and work panel, October 2012 to October 2013, Persons 6+

6.3.5 **All households now have access to digital radio, but only two-thirds are aware**

Take-up of digital services that can deliver digital radio (i.e. digital TV and/or the internet) has increased to reach 100% of homes (Figure 63). Two-thirds (66%) of consumers claimed to have access to digital radio services at home (via DTV, internet or DAB radio set), as in 2012. This suggests that around a third of consumers are unaware that they have access to digital radio services at home, or are perhaps simply unaware that the radio services they have are ‘digital’.

Households in the DE socio-economic group are the least likely to say they can access digital radio services in the home (53%), and households in the AB socio-economic group are the most likely to say they can do so (79%).
DAB set take-up varies across the UK, as Figure 64 shows. DAB set take-up is highest in south-east England generally, and particularly in Surrey (54.4%), Salisbury (53.5%) and Sussex (53.4%). Set ownership is lowest in the Scottish Borders (18.1%) and Northern Ireland (24.3%), where the choice of stations on DAB is less than average.
6.4 Residential postal users in detail

6.4.1 A quarter of adults claimed that their use of the postal service has decreased in the past two years, compared to 15% who claimed their use has increased in the same period

Just under a quarter of adults (24%) claimed that their use of post had decreased in the past two years. Of those who said this, 45% stated they were sending fewer personal letters; this was followed by just under two in five claiming to send fewer formal letters to organisations and individuals (38%) and invitations, greetings and postcards (37%).

Figure 65 Decrease in postal use/ fewer items being sent by post than two years ago

Source: Ofcom post tracking survey
Base: All adults 16+ (4844)

Fifteen per cent of adults stated they now sent more items than in the past two years, of whom around a third (35%) claimed they were sending more formal letters, one in five (22%) said they were sending more personal letters and 28% claimed they were sending more invitations/greetings and postcards.
6.4.2 Just under two-thirds of postal users claim to be reliant on the postal service

Regardless of how frequently people are using post, there is evidence that consumers remain reliant on postal services as a means of communication. Just under two-thirds (64%) stated they were either ‘very’ or ‘fairly’ reliant on the postal service. Furthermore, half (51%) said that they would feel cut off from society if they could not send or receive post.

Figure 67 illustrates consumers’ stated reliance on post as a way of communicating. Levels of reliance on the postal service increased with age, particularly the proportion claiming to be ‘very reliant’, with 18% of 16-24 year olds stating they were ‘very reliant’ on the postal service, compared to 30% of those aged 65-74 and 41% of those over 75 years old.
6.4.3 Older consumers send the most post

As shown in Figure 68, consumers were asked how many items they had sent by post in the previous month. About four in five (81%) claimed to have sent at least one item, with a claimed average of seven items sent in the past month (this includes letters, cards and parcels). The claimed number of items sent increased with age; those aged over 75 sent on average 8.8 items, more than any other age group. Those aged between 16 and 24 sent significantly fewer (3.1 items) than any of the other age groups.

Overall, almost one-fifth (18%) of participants said they had not sent any items of post in the past month. This rises to a third (34%) of those aged 16-24.
Consumers in socio-economic group AB claimed to have sent an average of 9.3 items in the past month, compared to an average of 5.2 items for those in socio-economic group DE (Figure 69). There was no significant difference in the amount of post claimed to have been sent by people living in urban, or rural, areas.
6.4.4 There is a seasonal spike in the number of items sent, and postal spend

As Figure 70 shows, there is a sharp rise in the number of items sent in November (an average of 12 items) and December (an average of 16 items). This increase can be accounted for by the seasonal post sent during the Christmas period, when consumers are sending greetings cards and presents. The volume of parcels and packets sent remained relatively flat through the year and made no significant contribution to the spike during December and January.

Figure 70 Claimed average number of items of post sent, by type of item sent: by month

Source: Ofcom post tracking survey
Base: All adults 16+ (4844).

QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?
QC2. And how many of these items sent in the last month were parcels rather than letters or cards?

6.4.5 Residential consumers receive more post than they send in a month

Given that consumers tend to receive more mail than they send, the following analysis is based on mail received ‘in the past week’ as opposed to the amount sent ‘in the past month’, as reported above.

Figure 71 shows that the average consumer claimed to have received 8.4 items of post in the past week, with more than nine in ten (91%) claiming to have received at least one item in the past week. This equates to an average of about 36 items received in the previous month.

Twenty-four per cent of all adults claimed to have received over ten items of post in the past week. Those aged 16-24 claimed to receive less post, on average, than those in other age groups (4.0 items in the past week), whereas those in the 55-64 age group claimed to receive the most post, with an average of 10.7 items received in the past week.
Consumers in socio-economic group AB claimed to receive significantly more post than those in DE households (10.8 vs. 6.8 items). There is no significant difference in the amount of post received by people living in urban and rural areas.
6.4.6  The price rises in April 2012 have had no impact on the behaviour of almost three in five residential postal consumers

As shown in Figure 73 below, when asked about their reaction to the rise in the price of First and Second Class stamps, three in five (60%) claimed that the rise had had no impact on their behaviour. The claimed impact of the price rise increased with age, with more than two-thirds (68%) of those aged 16-24 saying it had had no impact. This compares to just over half of those aged 55 to 64 (54%), of 65 to 74 year olds (52%) and those over 75 (56%).

Overall just over one in ten (12%) said they now bought more Second Class stamps than before the price rise. Those aged over 75 (19%) were the most likely to say they had done this.

Just over one in ten (11%) claimed that they bought more stamps than usual before the price went up. Those aged 65 to 74 (16%) were the most likely to say this, with those aged between 16 and 24 the least likely to have done this (7%).

![Figure 73 Impact of rise in stamp prices in April 2012, by age and gender](image)

Source: Ofcom post tracking survey

Base: All adults 16+ (4844)

QF8: As you know the price of First and Second Class postage stamps increased on 30th of April 2012, which, of these statements best describes the impact if any of this rise on stamps you have bought since then? (Multicode)

Note: Totals do not add to 100% as ‘don’t know’ responses are not shown on the chart.

6.4.7  The price rise had a greater impact on those living in rural areas than on those in urban areas

Fifty-two per cent of those living in a rural area claimed that the increase in the price of stamps had had no impact on their behaviour, compared to 62% of those living in an urban area. Among those in rural locations, 14% claimed that since the price rises they had bought fewer stamps than they did before the price rise, and now use other communication methods such as phone and email. This is significantly higher than in urban locations (Figure 74).
Figure 74 Impact of rise in stamp prices in April 2012, by socio-economic group and urbanity

Source: Ofcom post tracking survey  
Base: All adults 16+ (4844)  
QF8: As you know, the price of First and Second Class postage stamps increased on 30th April 2012. Which of these statements best describes the impact, if any, of this rise on stamps you have bought since then? (Multicode)  
Note: Totals do not add to 100% as ‘don’t know’ responses are not shown on the chart.

Data from Royal Mail indicates that the price rises in April 2012 may have had an impact on use of its First and Second Class products. In our Annual monitoring update on the postal market we include information on Royal Mail’s volumes by product. This shows that the year-on-year fall in Second Class volumes were significantly less than the fall in First Class volumes for 2012-13. The rate of decline for Second Class single piece items also slowed considerably in 2012-13. Although this does suggest some switching from First Class to Second Class, it is more likely that it is businesses rather than consumers that are choosing Second Class products over First Class products. It is not possible to separate business use from consumer use in the industry data. Other research also indicates that the proportion of business mail in Second Class single piece products is higher than the comparative First Class products.

6.4.8 Older consumers are more likely than younger consumers to use Second Class

Three in five consumers (59%) said they bought First Class stamps all or most of the time, and just under one in five (18%) said they bought Second Class postage stamps all or most of the time. Second Class stamps are used most frequently by consumers aged over 75 (31%) (all consumers: 18%).

42 Ofcom, Annual monitoring update on the postal market, 22 November 2013  
http://stakeholders.ofcom.org.uk/post/monitoring-report-12-13
Figure 75 Types of stamps used when sending letters or cards, by age and gender

Source: Ofcom post tracking survey
Base: All adults 16+ (4844)

6.4.9 A quarter of postal service users have experienced the ‘delivery to neighbour’ scheme

Following a trial in a number of cities, Royal Mail rolled out its ‘delivery to neighbour’ scheme across the UK in October 2012. Under this scheme, Royal Mail can leave some mail items with a neighbour in the event that the mail recipient is not at home at the time of the delivery attempt, although an addressee may choose to opt out of the scheme. The scheme was introduced to reduce the need for consumers to collect items from Royal Mail delivery offices or Post Offices, or for items to be re-delivered.

As Figure 76 illustrates, just over a quarter (28%) of consumers have experienced the ‘delivery to neighbour’ scheme in the last three months, with similar levels taking in post, or having post left with a neighbour.
Significantly fewer consumers in Scotland have experienced both aspects of the ‘delivery to neighbour’ scheme, compared to the average for all adults, with 16% having post left with neighbours and 13% having been asked to take post for a neighbour, versus 28% overall for either element of the scheme (Figure 77).
6.4.10 Over nine in ten consumers are satisfied with the ‘delivery to neighbour’ scheme

For those users that had experienced the ‘delivery to neighbour’ scheme, when asked how satisfied they were with the scheme (Figure 78), more than nine in ten (94%) stated they were either satisfied, or very satisfied, with the scheme, with over three in four (77%) being very satisfied. This applied both to having post left with a neighbour and receiving post for a neighbour.

Figure 78 Overall satisfaction with ‘delivery to neighbour’, by age, gender and socio-economic group

Source: Ofcom post tracking survey
Base: All those who had left post with a neighbour (934), All those who received post for a neighbour (908)
QD12. Overall, how satisfied were you with having your post left with a neighbour by Royal Mail?
QD14. Overall how satisfied were you with receiving post from Royal Mail for a neighbour?

6.5 Ownership of connected devices

6.5.1 Ownership increased for all connected devices with the exception of PCs, which declined significantly in 2013

Ownership of any connected device remained stable in 2013; at 80%. This follows a steady increase in ownership between 2000 and 2012.

Figure 79 shows a steady increase in laptop ownership and a decline in PC ownership since 2009. Laptops are now the most popular connected device in the household, two-thirds (66%) of adults having one in the household, an increase from 62% in 2012. Desktop PC ownership shows a steady decrease since 2009, with just over a third (36%) of adults having one in the household, a decrease from 46% in 2012.

We are also able to compare the trends in ownership of smartphones, netbooks and/or tablet computers (such as an iPad). Smartphone ownership continued to rise significantly in
2013, with 56% of UK adults now stating that they personally own a smartphone device, up from 46% in 2012. Ownership of a netbook remains static at 8%, with the growth in ownership of tablet computers more than doubling; from 12% to 29% in 2013. Ofcom’s *Communications Market Report 2013* identified that one in ten households (9%) have more than one tablet computer, with tablet owning homes having, on average, 1.5 tablets, 37% having more than one.

**Figure 79 Ownership of connected devices in the home**

Source: Ofcom communications tracking survey  
Note: Data for 2006-2013 based on Q2 data, all other data based on Q4. **Data for ‘any’ for 2000-2010 refers to PC or laptop computers. Data for ‘any’ for 2011-2013 also includes netbook or tablet computers but not smartphones.**

Connected device ownership remains most popular among the under-65s, among whom over four in five have access to at least one of these devices at home. However, since 2010 there have been significant levels of growth in ownership among the over-65s; two-thirds (66%) of 65-74 year olds now have access to at least one of these devices at home, as do just over a third (33%) of those aged 75+.

Ownership of these devices at an overall level remains highest in the AB socio-economic group (93%). The presence of children in the household has a large impact on ownership, with just over nine in ten (91%) owning devices, compared to three in four households without children.

Figure 80 shows that the increase in ownership of laptops since 2012 is largely driven by take-up among those aged 45 and over, although the highest levels of laptop ownership remains among those aged between 16 and 44 (over 7 in 10).

The decrease in ownership levels of desktop PCs since 2012 is largely driven by decreases among those aged 16-64, with the highest level of ownership remaining among those aged 45-64.

The growth in tablet ownership since 2012 is seen across all age groups, with those aged between 16 and 44 being the most likely to have a tablet, at around a third.
While the highest level of laptop ownership continues to be among ABs, the overall rise in ownership is largely driven by take-up among those in the C1 and C2 socio-economic groups. Similarly, the highest level of desktop PC ownership is still among ABs, at just over half (52%), with the overall fall in ownership largely driven by decreases among the C1 and C2 socio-economic groups.

The rise in tablet ownership is driven by ABs, with just over four in ten (42%) owning a tablet, and by C1s, with a third (34%) owning a tablet. Tablet ownership remains lowest among those in the DE group, at around half the average level (14%) (Figure 81).

6.5.2 Smartphone ownership growth continues to be driven by younger consumers

There has continued to be growth in smartphone take-up in the past 12 months (Figure 82). Ofcom’s Communications Market Report 2012 reported that by the first quarter of 2013, just under three in four (74%) new handsets sold were smartphones (defined by the operating system); an increase from 64% in the first quarter of 2012.
Ofcom research has monitored take-up of smartphones since the start of 2011, and as Figure 82 below shows, between 2012 and 2013 there was a continued growth in smartphone ownership. Fifty-six per cent of all UK adults now claim to own a smartphone. This growth has been driven mainly by younger mobile customers. Smartphone ownership among 16-24s rose by 12 percentage points to 82% and by 16pp to 76% among those aged 25-44. This level of ownership of smartphones is not reflected among the older population. Less than one in five of those aged 65-74 (17%) have a smartphone, an 11% increase since 2012. Smartphone ownership among those aged 75 and over is unchanged since 2012, at 4%. Smartphone ownership remains higher among men than women (58% versus 54%) and higher than average in socio-economic groups AB and C1 (both 63%).

Figure 82 Age, gender, socio-economic and urbanity profile of smartphone owners

Smartphone growth looks likely to continue over the next 12 months, although the rate is beginning to slow; 3% of non-smartphone users say they are certain to get a smartphone in the next 12 months and a further 11% say they are likely to get one. Just under a quarter (23%) of mobile phone owners who do not have a smartphone say they are very unlikely to get one, and 34% say they are certain that they will not.
Reasons for choosing particular devices

Ofcom recently commissioned an online survey to understand more about why people choose different technology devices (such as smartphones or tablet computers) and their attitudes to, and use of, different types of online services (such as email, search engines and web browsers). Using an online questionnaire, we surveyed 1,829 adults aged 16+, nationally representative of the UK population who use the internet. The fieldwork took place in August 2013. This section presents key findings from this survey and highlights differences observed according to the age of the participant.

While for all consumers price dominates the purchasing decision for a laptop, screen size is more likely to be considered by older people than by those aged 16-24

Figure 83 shows that two-thirds (66%) of those who own a laptop/netbook said that price was a factor when they made the decision about which one to buy, peaking at 73% of 45-54 year olds and dropping to 59% of those aged 16-24. Other factors were considered, depending on the age of the participant. For younger people, the battery life was more likely to be a consideration than among older users (47% vs. 34% of 55+) along with the design (40% vs. 21%). However, older people with a laptop/netbook were more likely than younger people to consider the size of the screen (51% vs. 43% of 16-24 year olds), along with brand reputation (49% vs. 44%), ease of use (41% vs. 37%) and screen quality (36% vs. 29%).

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Source: Ofcom research, August 2013
Base: All adults 16+ with laptop/netbook (1381); 16-24 (567); 25-34 (296); 35-44 (259); 45-54 (248); 55+ (307)
Q51. Thinking about when you chose your laptop/netbook, what factors did you consider? (multicode from prompted list)
Note: percentages highlighted in green and red indicate significant differences compared to all adults

When respondents were asked to indicate the most important factor after price, technical specification (e.g. memory, processor speed, drive capacity) was the most likely response across all age groups (27% of all adults, 31% of 16-24s, 23% of 55+). Fourteen per cent of those aged 55+ said that ease of use was the most important factor in their decision-making, compared to just 9% of all adults and 6% of those aged 16-24.
The size of a tablet computer is more of a consideration than the cost, for all adults

When those who own a tablet computer were asked to think about the factors that influenced their decision, the size of tablet (46%), followed by the cost of the device (42%) were the factors most often mentioned. Among younger people (aged 16-34), a similar amount mentioned the brand reputation and the size of the tablet (42% and 41%). For over half (52%) of people aged 55+ the size of the tablet most influenced their decision, followed by cost, and ease of use (both 48%).

**Figure 84 Factors considered when choosing a tablet computer, by age**

When choosing a smartphone, brand reputation is likely to be considered rather than functionality

Unlike laptops or tablet computers, where functionality and design are important factors in the decision-making process, when choosing a smartphone the brand reputation of the device is the most likely to be a consideration. Although this does not appear to be especially driven by age, over half (53%) of those aged 25-34 indicate this as a factor when they buy a smartphone, compared to just 41% of 35-44 year olds.

Other factors are also taken into account, depending on the age of the potential smartphone purchaser (Figure 85). Younger people, particularly those aged 16-24, are more likely than older people to consider how it looks (46% vs. 26%) and its additional features (46% vs. 29%).
### Figure 85 Factors considered when choosing a smartphone, by age

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</table>

Source: Ofcom research, August 2013
Base: All adults 16+ with smartphone (1229); 16-24 (257); 25-34 (288); 35-44 (255); 45-54 (212) 55+(217)
Q5s. Thinking about when you chose your smartphone, what factors did you consider? (multicode from prompted list)
Note: percentages highlighted in green and red indicate significant differences compared to all adults

**When choosing an e-reader, the cost of e-books is more likely to be a consideration for young people than for those aged 55+**

In contrast to other devices, e-readers are more likely to have been given as gifts rather than chosen by the user (21% vs. 11% tablet, 7% laptop/netbook, 6% smartphone). People aged 55+ are more likely than other age groups, particularly younger people (29% vs. 17% of 16-34) to have been given an e-reader. Young people choosing an e-reader are more likely to consider the cost of e-books than the cost of the actual device (40% vs. 37%) (Figure 86).

The cost of e-books is also more likely to be a consideration for young people than for those aged 55+ (40% vs. 35%). Similarly, battery life, screen quality and storage capacity are more likely to be considered by those aged 16-34 than by older people. However, ease of using the device is more of a factor for older people (38% vs. 31% of 16-34s).
Figure 86 Factors considered when choosing an e-reader, by age

<table>
<thead>
<tr>
<th>Factor</th>
<th>16+</th>
<th>16-34</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of device</td>
<td>38%</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Ease of use</td>
<td>36%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Cost of ebooks</td>
<td>36%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Brand Reputation</td>
<td>36%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Availability/range of choice of e-books</td>
<td>35%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Size of the device</td>
<td>29%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Battery Life</td>
<td>36%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Quality of screen</td>
<td>34%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Storage Capacity</td>
<td>29%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Size of screen</td>
<td>29%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Weight</td>
<td>21%</td>
<td>25%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Ofcom research, August 2013
Base: All adults 16+ with e-reader (421); 16-34 (135); 55+ (147)
Q5e. Thinking about when you chose your e-reader, what factors did you consider? (multicode from prompted list)
Note: Sample sizes are too small to look at some age groups so only the wider age bands are highlighted here

When asked to indicate the most important factor other than cost, the range of e-books available was referenced by all e-reader users when choosing a device (24% of all adults, 30% of 16-34s, 23% of over-55s).

6.6 Non-ownership of communications services

6.6.1 Non-ownership of broadband remains high, at around a fifth of households

Understanding non-ownership and the reasons for it tells us whether there are any problems that need to be addressed to enable consumers to access communication services.

There are many reasons for not owning a particular communications service, and these generally fall into one of two categories: voluntary and involuntary. Voluntary non-ownership is where potential consumers do without services because they perceive they do not need them, or because they are satisfied with alternative services. Involuntary non-ownership is where potential consumers do without services but not through choice; this is mainly due to affordability.

The following figures show non-ownership of communications services in general, before looking specifically at voluntary and involuntary reasons.
Figure 87 shows that non-ownership of communications services has not changed significantly since 2012, with the exception of digital TV, where non-ownership has fallen from 5% to 2% due to digital switchover.

**Figure 87 Non-ownership of communications services**

Source: Ofcom communication tracking survey  
Base: All adults 16+ (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

6.6.2 Two per cent of households now do not have access to a mobile phone service

Among those living in a household without access to a fixed line, as in each year since 2008, the majority (94%) personally own a mobile phone and 98% have access to at least one mobile in their household (Figure 88).

**Figure 88 Access to mobile services among those who do not have access to a mobile phone**

Source: Ofcom communication tracking survey  
Base: All adults 16+ who do not own a fixed-line (Q2 2008, 261) (Q2 2009, 274) (Q2 2010, 340) (Q2 2011, 400) (Q2 2012, 446) (Q2 2013, 458)
6.6.3 Levels of those not intending to take up communications services remain unchanged

The number of consumers who do not intend to take up services remained unchanged in 2013, at just over one in ten (12%) without a fixed line and just over one in ten (12%) without the internet at home (Figure 89).

Figure 89 Do not intend to take up communications services in the next 12 months

Source: Ofcom communication tracking survey
Base: All adults 16+ (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)
*Data for mobile and digital TV not available in 2013. Data for broadband not available for Q2 2010 and 2011 although responses for 'internet' will largely relate to take-up of broadband.

6.6.4 Voluntary non-ownership of internet services highest among those aged over 75

This section assesses the numbers, and profiles, of consumers who do not have internet services for voluntary reasons.

Voluntary non-ownership is where potential consumers have not taken up services, primarily due to their perceived lack of need for a service, or their satisfaction with alternative services. Where both voluntary and involuntary reasons were stated, involuntary non-ownership is reported. This assumes that involuntary reasons take precedence over voluntary reasons (although this is not always the case). It should also be noted that some consumers may give ‘voluntary’ non-ownership reasons because they do not wish to disclose financial/affordability issues to the researcher.

The percentage of consumers who do not have internet services for voluntary reasons has declined steadily since 2008 (Figure 90). Just over one in five (21%) of over-75s voluntarily do without internet services. Since 2012, consumers aged 65-74 have been more likely to choose not to take up internet services (15% vs. 9%).
6.6.5 Involuntary non-ownership of internet has fallen significantly among those aged over 75

Involuntary non-ownership is where potential consumers have not taken up a service, but not through choice. Involuntary non-ownership is primarily due to affordability. A few consumers gave reasons that were both voluntary and involuntary; these responses have been reported under ‘involuntary’ non-ownership.

Figure 91 shows a decline in the overall level of involuntary non-ownership of the internet since 2012 (from 9% to 7%). The level has remained relatively stable over time for those aged from 16 to 64. Although involuntary non-ownership remains significantly higher among those aged 65-74, and over 75, the levels have fallen for these older consumers since 2012 (from 22% to 15% and from 42% to 33% respectively); this trend is in line with previous years.
The overall decline in involuntary non-ownership of the internet since 2012 is also driven by a decline among the DE socio-economic group (from 22% to 16%). Other socio-economic groups remain relatively unchanged. Both urban and rural locations also saw a decline in involuntary non-ownership of the internet (Figure 92). It remains higher among C2DEs, accounting for just under one in five (16%) DEs. Involuntary non-ownership was higher in urban (8%) than in rural locations (4%) in 2013.

**Figure 92 Involuntary non-ownership of internet services, by socio-economic group and urbanity**

Source: Ofcom communication tracking survey
Base: All adults 16+ (Q2 2008, 2109) (Q2 2009, 2085) (Q2 2010, 2106) (Q2 2011, 2862) (Q2 2012, 2893) (Q2 2013, 2879)

6.6.6 Mobile phones and PCs are the devices that over-65s find most difficult to use

Difficulty using communications technology can affect people’s ability to make the most of the services that are available to them.

The proportion of consumers saying they have difficulty using communications services has remained stable, with just under one in ten mobile phone owners claiming to have difficulty using their phone (Figure 93).
Figure 93 Difficulties using communications services

Older consumers, particularly the over-75s, are the most likely to state that they have difficulties using each of the communications services. Forty-five per cent of this age group said they had difficulty using their PC, followed by 39% saying they had difficulty using their mobile phone (Figure 94). The level of difficulty using their PC reported by those aged over 75 is lower than that reported in 2012 (45% vs. 54%).

Those in socio-economic group DE appear to have the most difficulty using the various communication services. The level of difficulty using their PC, reported by DEs, is lower than in 2012 (10% vs. 15%). In 2013, those in urban locations were more likely than those in rural locations to report any difficulties using their PC, while those in rural locations were more likely to report any difficulties using their mobile phone.

Figure 94 Difficulties using various communications services, by age and gender

Source: Ofcom communications tracking survey
Base: All adults 16+ with a fixed line (Q2 2013, 2421). Mobile (Q2 2013, 2595). PC (Q2 2013, 2102). Television (Q2 2013, 2820)