The Communications Market 2015

The market in context

Contents

1.1 Introduction and structure

1.1.1 Introduction

This introductory section of the Communications Market Report 2015 is divided into six sections:

- **Key market trends** (Section 1.3, page 25)
  This section summarises developments in the UK's communications sectors during 2014 and 2015. It focuses on service availability, take-up, and industry revenues, as well as covering consumers' use of devices and household spending on communications services.

- **Changes in TV viewing habits** (Section 1.4 , page 37)
  This section of the report analyses the decline in broadcast TV viewing on the TV set, as measured by BARB. We begin with an examination of the decline and then move on to consider some of the potential explanatory factors for the decline.

- **Developments in viewing beyond traditional television** (Section 1.5, page 49)
  In this section, we explore changes in audio-visual content and delivery in recent years, to provide context to the changing viewing habits described in the previous section.

- **A smartphone society** (Section 1.6, page 63)
  This section explores the popularity and take-up of smartphones and their ever-increasing role in connecting consumers. It also considers those with 4G and those without, and looks at how their mobile phone and internet behaviour differs.

- **Communication with friends and family** (Section 1.7, page 85)
  This section reports consumer research into how the internet, and being online and connected, has influenced the ways in which people maintain their existing relationships, and build new contacts and friendships.

- **Social media developments** (Section 1.8, page 95)
  This section looks at use of and attitudes towards social media, drawing on new research and Ofcom's media literacy surveys.

- **Digital music and photograph collections** (Section 1.9, page 109)
  This section explores the extent to which consumers are using digital or physical media when listening to music and taking photographs, and their attitudes towards these different formats.

- **Media literacy: the past decade** (Section 1.10, page 119)
  This section draws on data from Ofcom's media literacy surveys, conducted since 2005, along with other contextual references, to demonstrate the key developments in the media literacy landscape over the past decade.

- **Developments in the nations** (Section 1.11, page 131)
  This section sets out a selection of the key facts and figures relating to communications markets across the UK's nations in 2015, comparing and contrasting each nation and highlighting changes that have taken place in the past year.

1.2 Fast facts

Figure 1.1 Unless otherwise stated, figures are from Q1 2015.

Digital TV	
Proportion of UK homes with digital TV [7]	97%
Minutes spent watching broadcast TV per day (per person aged 4+, average daily minutes across 2014)	220 (3hrs 40mins)
Proportion of TV homes with a DVR	64%
Radio	
Proportion of radio listeners with a DAB radio in their household	49%
Proportion of listener hours through a digital platform (DAB, online DTV	40%
Minutes spent listening to radio per day (among radio listeners)	183 (3hrs 3mins) (2014[8])
Number of local radio stations broadcasting on analogue (excluding community stations)	340 (May 2015)
Number of community radio stations currently on air	233 (May 2015)
Number of UK-wide radio stations (analogue and DAB)	25 (May 2015)
Internet	
Total household internet take-up	85%
Number of fixed broadband connections	23.7 million (end 2014)
Proportion of adults with broadband (fixed and mobile)	80%
Superfast broadband take-up (% of all connections)	30%
Average actual fixed broadband speed	22.8 Mbit/s (Nov 2014)
Proportion of homes with a tablet computer	54%
Proportion of people who use their mobile phone to access the internet	61%
Fixed and mobile telephony	
Number of residential fixed landlines	25.5 million (end 2014)
Number of fixed landlines in the UK, including ISDN channels	33.2 million (end 2014)
Proportion of adults who personally own/use a mobile phone	93%
Proportion of adults with a smartphone	66%
Proportion of adults who live in a mobile-only home[9]	15%
Number of mobile subscriptions (including M2M)	89.9 million (end 2014)
Post	
Addressed letter mail volume in 2014	12.7 billion
Approximate no. items received by residential consumers per week	8.5
Approximate no. items sent by residential consumers per month	6.0

[7] This figure is drawn from Ofcom's technology tracker. BARB's establishment survey measured digital TV take up at 93% of UK homes in Q4 2014 and is set out in the TV section of this report.
[8] Average week in 2014
[9] A household that solely uses mobile phones to fulfil its voice telephony requirements.

1.3 Key market trends

1.3.1 UK communications market revenue

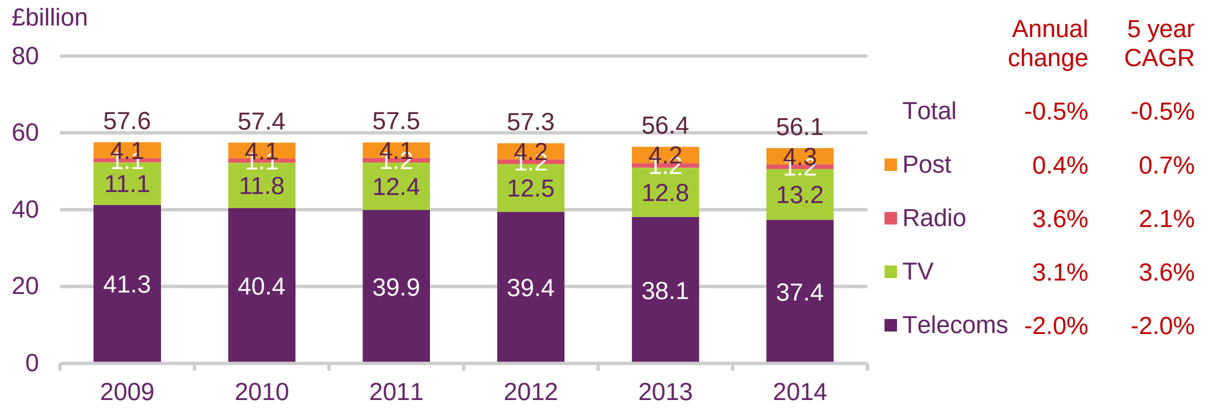
Total UK communications revenues stood at £56.1bn in 2014

Total UK communications revenues generated by telecoms, TV, radio and postal services decreased in 2014, falling by £0.3bn (0.5%) to £56.1bn. This overall decrease in revenues was due to a decline in total telecoms revenue,[10] which fell by £0.8bn (2.0%) to £37.4bn during the year, continuing the trend of the past five years.

The UK television industry generated revenue of £13.2bn in 2014, an increase of 3.1% on 2013. Addressed letter mail revenue increased slightly to £4.3bn in 2014 (up by 0.4%).

Total UK radio industry revenue increased by 3.6% year on year to reach £1.2bn in 2014, driven by increases in national advertising revenue for commercial stations as well as increased spend by the BBC on its radio services.

Figure 1.2 Communications industry revenue: telecoms, TV, radio, post



Source: Ofcom/ operators.
Note: Includes licence fee allocation for radio and TV; figures are in nominal terms. Post is addressed letter mail.

1.3.2 Household spend on communications services

Average monthly household spend on communication services has decreased in real terms over the past five years

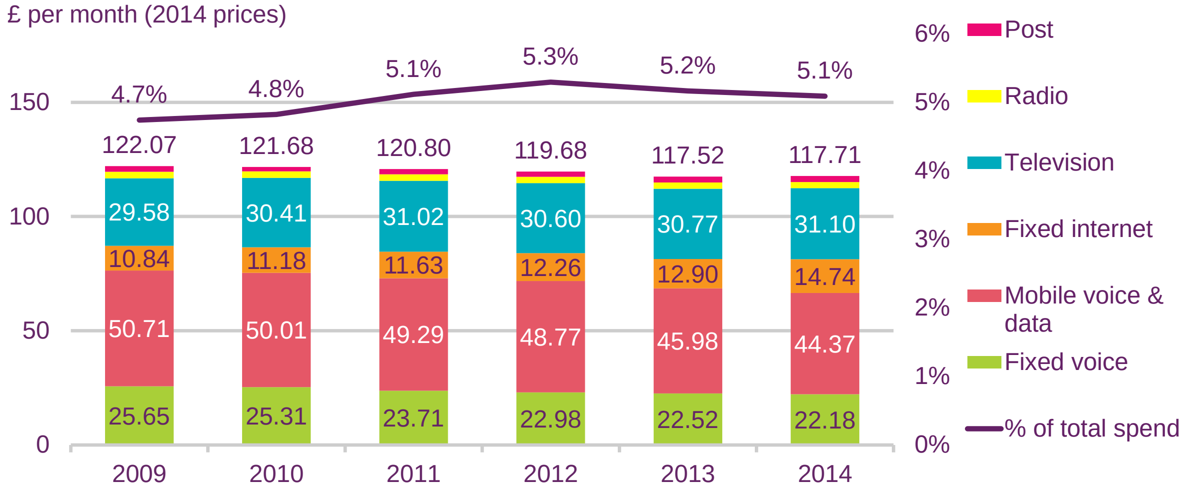
Although stable compared to 2013, average monthly household spend on communication services has decreased in real terms over the past five years (i.e. adjusted for inflation); from £122.07 in 2009 to £117.71 in 2014, representing a monthly decrease of £4.36, or £52.32 per year.

Average monthly household spend on telecoms services remained relatively stable at £81.30 per month in 2014. Within this, average spend on fixed voice and mobile voice and data services both fell during the year, while average fixed internet spend continued to increase, up by £1.84 per month (14.3%) to £14.74 as a result of increasing fixed broadband take-up and consumers switching to superfast broadband services.

[10] Comprised of revenues from retail and wholesale fixed and mobile voice and data services.

Household spend on television increased by 33 pence per month, from £30.77 in 2013 to £31.10 a month in 2014, mainly driven by an increase in spend on pay-TV subscriptions.

Figure 1.3 Average household spend on communications services



Source: Ofcom / operators/ ONS
Notes: Adjusted for CPI; historic telecoms figures have been re-stated, so are not comparable to those published in previous reports. Television excludes spend on subscriptions, download-to-own and pay-per-view online TV services.

1.3.3 Availability of communications services

By May 2015 83% of UK premises were able to receive superfast broadband

By May 2015, 82% of all UK premises (both residential and business) were able to receive fibre broadband over Openreach (a BT Group company) or KCom's fibre broadband networks, a 13 percentage point increase since June 2014 (Figure 1.4). Over the same period, the availability of Virgin Media's cable broadband services was unchanged at 44% of premises, and the availability of next-generation access (NGA) networks (calculated by combining Openreach, Kcom and Virgin Media's NGA network coverage data) increased by 12 percentage points to 90%.

However, not all NGA lines are capable of providing superfast broadband services (i.e. with an actual download speed of 30Mbit/s or more), and the availability of these services was lower, at 83% of UK premises.

As at May 2015, over 99% of UK premises had outdoor coverage for 2G and 3G mobile services from at least one operator. The outdoor coverage of 4G services, which are currently still being deployed by the UK's four national mobile network operators (MNOs), was lower, with 89.5% of premises having outdoor coverage from at least one 4G network, an increase of 17.7 percentage points compared to June 2014[11].

Ninety-nine per cent of the UK was able to receive digital terrestrial TV in 2014, although the figure was marginally lower in Wales (98%) and Scotland (97%). Availability of digital satellite television in the UK in 2014 stood at 98%, the same as in 2013. For radio, the availability of national DAB services increased slightly in 2014, with additional transmitters

[11] All 4G coverage comparisons between 2014 and 2015 are indicative only as coverage data for Three was not available in 2014, and 2014 figures are therefore based on three rather than four UK MNOs.'

being added to the BBC's national DAB multiplex and the Digital One commercial DAB multiplex. The BBC's DAB broadcasts are now available to 95.4% of UK households, and Digital One is available to 89.8% of UK households.

Figure 1.4 Digital communications services: availability

Platform	UK 2014	UK 2013	UK change		England	Scotland	Wales	N Ireland
Fixed line	100%	100%	0pp		100%	100%	100%	100%
2G mobile[1]	99.7%	99.7%	0pp		99.8%	99.5%	98.9%	98.9%
3G mobile[2]	99.3%	99.2%	0.1pp		99.6%	97.1%	97.9%	98.6%
4G mobile[3]	89.5%	71.8%	17.7pp		92.1%	79.7%	62.8%	91.1%
LLU ADSL broadband[4]	95%	95%	0pp		96%	89%	93%	89%
Virgin Media cable broadband[5]	44%	44%	0pp		47%	36%	21%	27%
BT Openreach/Kcom fibre broadband[6]	82%	69%	13pp		82%	75%	83%	92%
NGA broadband[7]	90%	78%	12pp		90%	85%	87%	95%
Superfast broadband[8]	83%	-	n/a		84%	73%	79%	77%
Digital satellite TV[9]	98%	98%	0pp		No data	No data	No data	No data
Digital terrestrial TV[10]	99%	99%	0pp		99%	99%	98%	97%
DAB BBC Network[11]	95.4%	94.0%	1.4pp		96.5%	92.3%	89.2%	85.4%
DAB commercial network (Digital One)[12]	89.8%	89.5%	0.3pp		91.3%	76.4%	64.1%	76.1%

Sources: Ofcom and operators:
1. Proportion of premises that have outdoor 2G mobile coverage from at least one operator, May 2015; 2. Proportion of premises that have outdoor 3G mobile coverage from at least one operator, May 2015; 3. Proportion of premises that have outdoor 4G mobile coverage from at least one operator, May 2015 (comparison with 2014 indicative only as Three data was not available in 2014); 4. Proportion of premises connected to an LLU-enabled BT local exchange area, December 2014; 5. Proportion of premises able to receive Virgin Media cable broadband services, May 2015; 6. Proportion of premises able to receive Openreach/Kcom fibre broadband services, May 2015; 7. Proportion of premises able to receive NGA broadband services, May 2015; 8. Proportion of premises able to receive superfast broadband services, May 2015; 9. Relates only to the ability to achieve a necessary line-of-sight path to the satellite and does not include other factors that can affect coverage including: access in multi-dwelling units where is not feasible to install a dedicated household satellite dish and there is no internal wired distribution system for satellite, and the need for planning permission in some locations.10. Estimated proportion of homes that can receive the PSB channels through DTT (3PSB Mux coverage). DTT Frequency Planning Group (Arqiva, BBC, Ofcom); Relates to an assumption that consumers will install, if needed, a good quality terrestrial TV aerial at a height of 10m to achieve reception.11. BBC National DAB network coverage as of end of 2014 12. Digital One coverage Note: Cable, fibre and NGA broadband availability figures have been calculated using a different methodology than in previous years

1.3.4 Take-up of services and devices

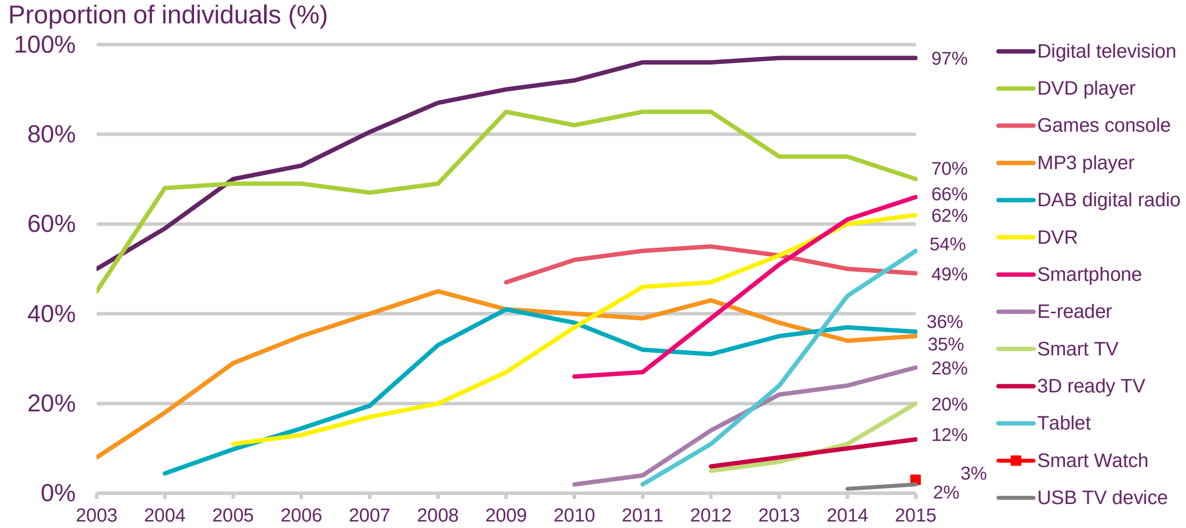
Increase in take-up of tablets and smartphones continues

Figure 1.5 shows take-up of a range of communications and audio-visual devices since 2003. Take-up of smartphones has continued to increase over the past year, with two-thirds of adults (66%) now owning one. Over half of households (54%) had a tablet computer (such as the Apple iPad or Amazon Kindle Fire) in early 2015, increasing from 44% in Q1 2014. Use of e-readers has also seen a significant increase, with 28% of individuals now owning one, compared to 24% in 2014.

Six in ten households (62%) owned a digital video recorder (DVR) in early 2015, and this has remained relatively stable since 2014. However, the decline in ownership of DVD players continues, with 70% of households owning one, compared to 75% in 2014.

Smart TV ownership continued to increase; 20% of homes are now reported to have a TV with an integrated internet connection.

Figure 1.5 Household take-up of digital communications/ AV devices: 2003-2015



Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756)
Note: The question wording for DVD player and DVR was changed in Q1 2009 so data are not directly comparable with previous years

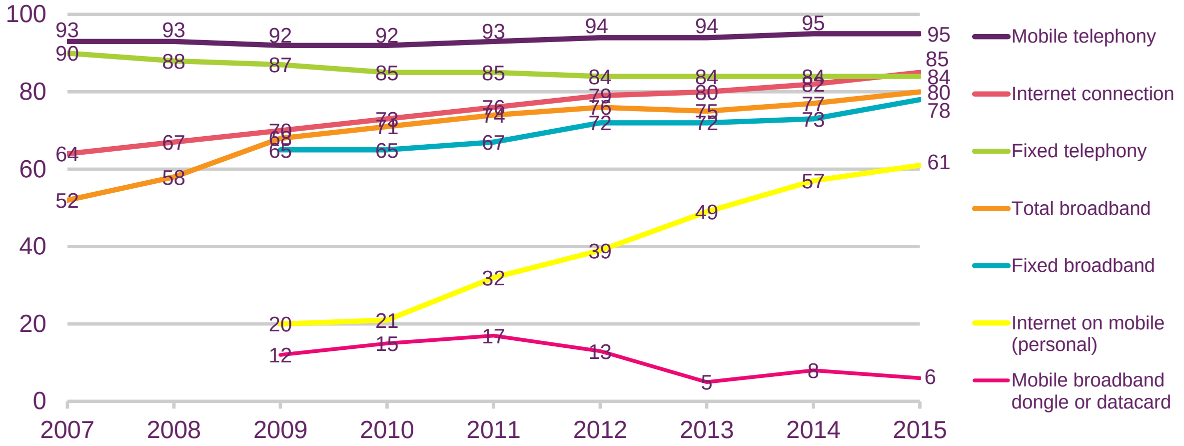
Four in five households now have fixed broadband and three in five adults access the internet through their mobile phone

The proportion of households with access to the internet has increased, driven by a boost in fixed broadband connections. Fixed broadband connections were reported in 78% of households in 2015, compared to 73% in 2014.

In addition, accessing the internet through a mobile phone continues to increase: three in five respondents (61% in Q1 2015) said they personally used their mobile phone to access the internet in 2015 (up from 57% in Q1 2014).

The proportion of households with fixed telephony and mobile telephony remained stable, at 84% and 95% respectively in 2015.

Figure 1.6 Take-up of communications services

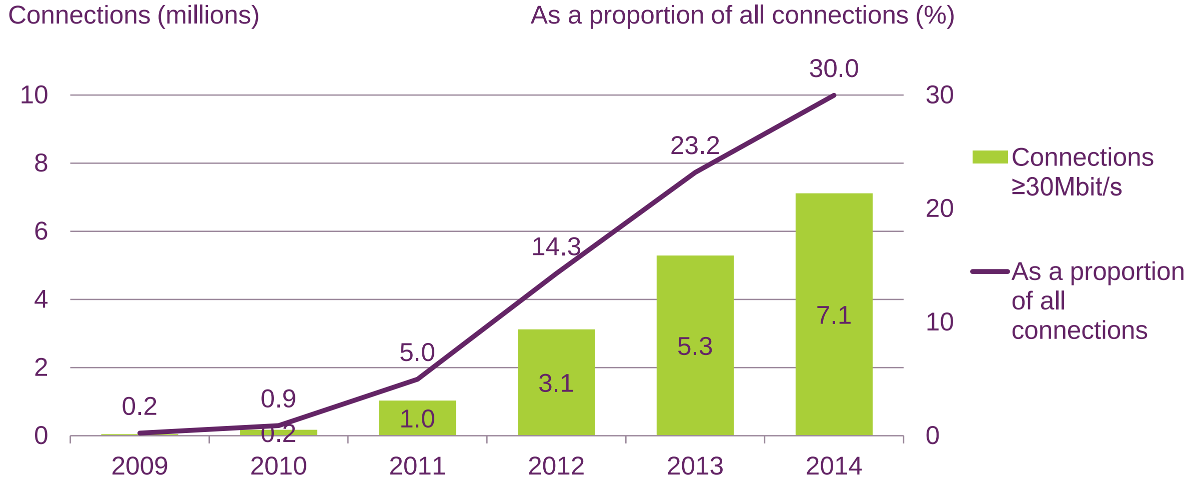


Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756)
QC1: Is there a landline phone in your home that can be used to make and receive calls? QE1: Does your household have a PC or laptop computer? / QE8 (QE2): Do you or does anyone in your household have access to the internet/ World Wide Web at home (on any device, e.g. PC, laptop, mobile phone etc.)? / QE12 (QE9): Which of these methods does your household use to connect to the internet at home? Use of internet on mobile is personal take-up measure, whereas the other data relate to household take-up.

Three in ten of all broadband connections are now superfast

By the end of 2014 there were an estimated 7.1 million UK superfast broadband connections[12], an increase of 1.8 million compared to the previous year. The proportion of all UK broadband connections that were classed as superfast increased accordingly over the same period, from 23.2% to 30.0%.

Figure 1.7 Take-up of superfast broadband services



Source: Ofcom / operator data
Note: Includes estimates where Ofcom does not receive data from operators; includes Ofcom adjustment to exclude FTTC connections delivering less than 30Mbit/s

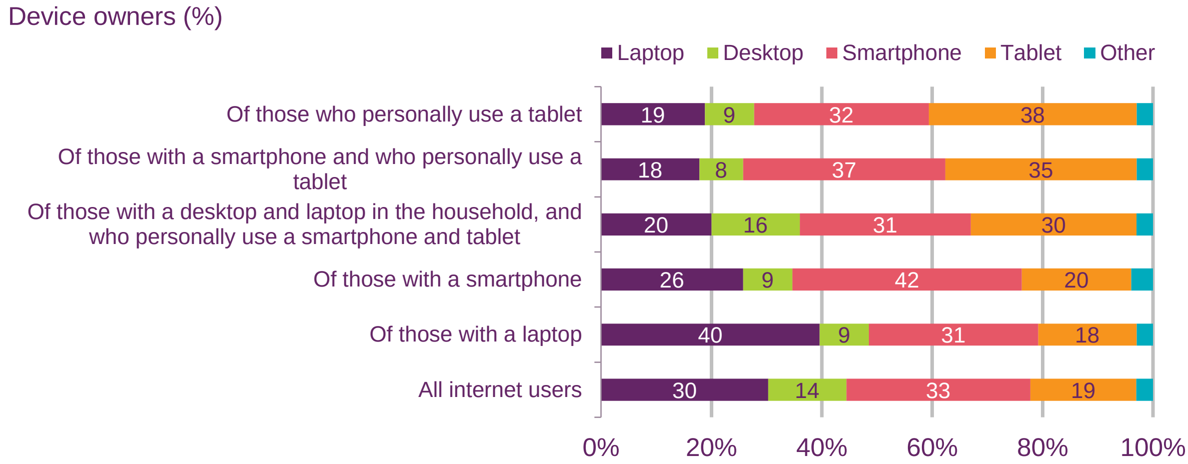
[12] Defined as connections with an actual speed of 30Mbit/s or higher

Smartphones overtake laptops as the most important device to connect to the internet

When respondents were asked which was their most important device for connecting to the internet (at home or elsewhere), 33% of internet users mentioned their smartphone, and 30% mentioned their laptop.

Among smartphone users this change was more pronounced; 42% cited this as their most important device for connecting to the internet, compared with 26% who cited a laptop. This is a change since 2014, when smartphone users were more likely to cite a laptop than a smartphone. Among tablet users, this device was the most important for connecting to the internet (cited by 38%). Among those who had all the devices (laptop, desktop, tablet and smartphone) in their household, smartphones and tablets were the most popular responses (at 31% and 30% respectively).

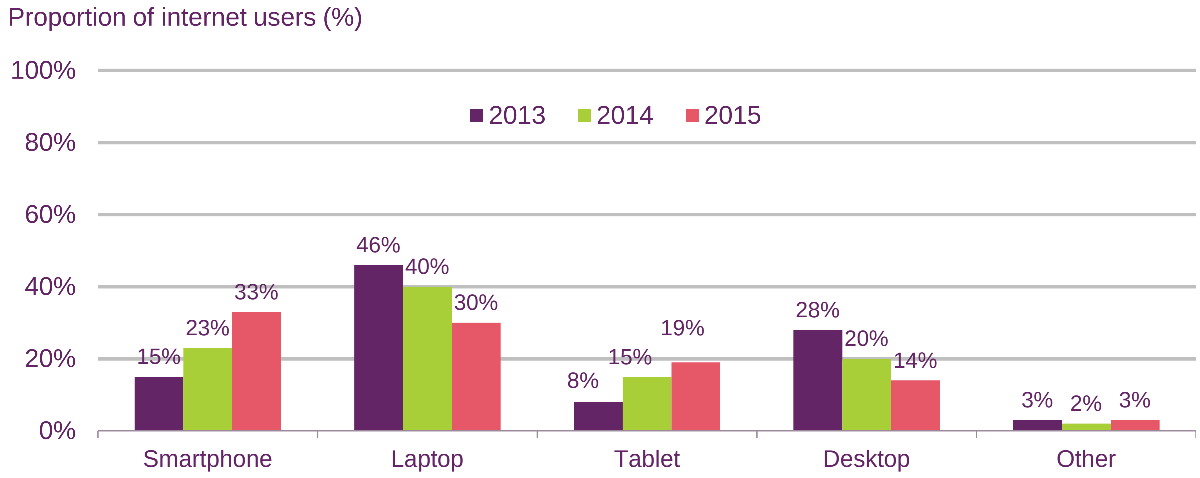
Figure 1.8 Most important device for connecting to the internet



Source: Ofcom Technology Tracker, Q1 2015
Base: Devices used by those who use the internet at home or elsewhere: Tablet (1528), smartphone & tablet (1276), desktop & laptop & smartphone & tablet (389), smartphone (2277), laptop (2214), All internet users (3095 UK).
QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? 'Other' includes: 'netbook', 'games console', 'other device', 'none' and 'don't know'.

Figure 1.9 shows how internet users' perceptions, as to which is their most important connected device, have changed over the past two years. In 2013, 46% of internet users said a laptop was the most important, compared to just 15% who cited the smartphone. Two years later, in 2015, the laptop has dropped by 16 percentage points as the most important connected device, while the smartphone has risen by18 percentage points.

Figure 1.9 Most important device for connecting to the internet: 2013-2015



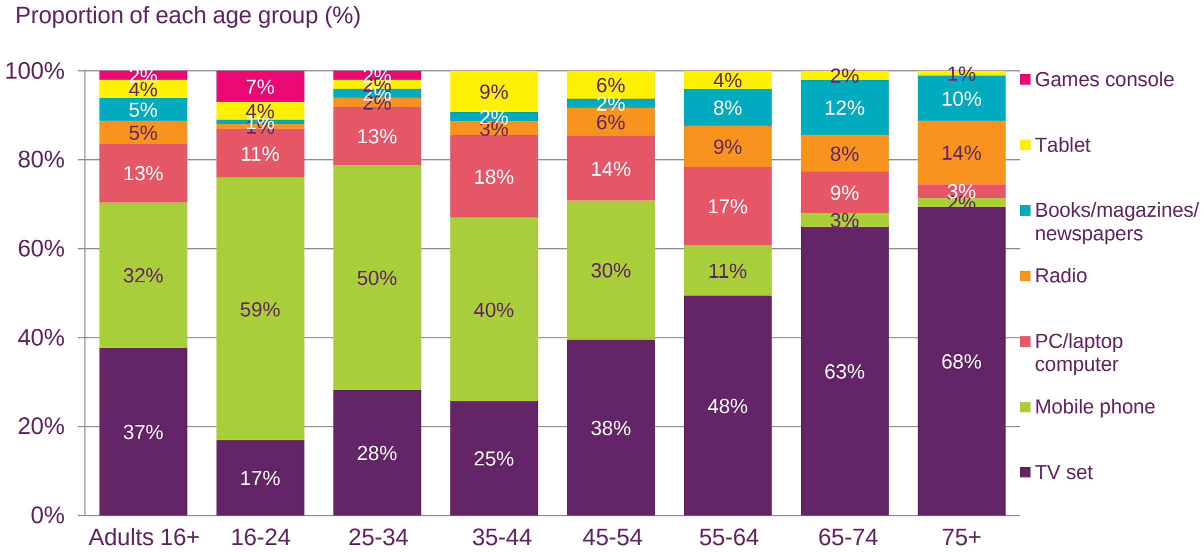
Source: Ofcom Technology Tracker, Data from Q1
Base: All adults aged 16+ who use the internet at home or elsewhere
QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? 'Other' includes: 'netbook', 'games console', 'other device', 'none' and 'don't know'. Ranked by 2015

Television sets are the most-missed media device among all adults, but the mobile phone is much more important to 16-24 year olds

As part of our media literacy research we asked research participants to indicate which single media device they would miss the most if it were taken away. Among adults as a whole, the TV set is the device people say they would miss the most, cited by close to four in ten (37%). This differs significantly by age; from 17% of 16-24 year olds to 68% of those aged 75+. Those aged 16-24 are much more likely to cite the mobile phone, at 59%, compared to just 2% of those aged 75+. The youngest age group has the highest proportion citing games consoles, at 7%, although this is their fourth preference, behind the mobile phone (59%), TV set (17%), and PC/laptop (11%).

One in ten adults said they would miss either radio or books/ magazines/ newspapers (both at 5%). But these figures are at least twice as high for those aged 75+, at 14% and 10% respectively.

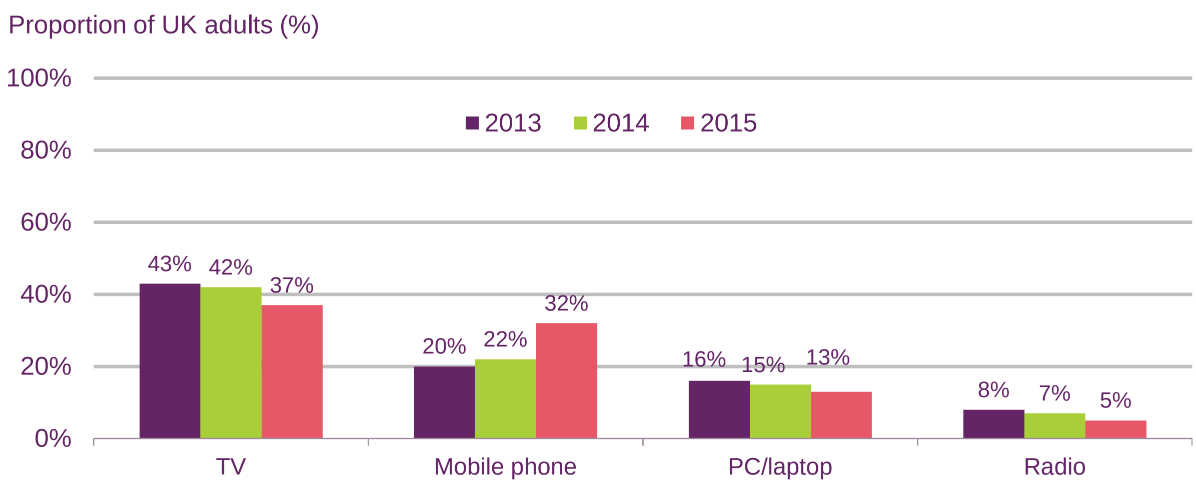
Figure 1.10 Most-missed media device, by age



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base
Base: All adults aged 16+ (1890 in 2014, 254 aged 16-24, 288 aged 25-34, 327 aged 35-44, 284 aged 45-54, 276 aged 55-64, 221 aged 65-74, 240 aged 75+).
A2 – Which one of these things you use almost every day would you miss the most if it got taken away?

Figure 1.11 shows how attitudes towards different media devices have changed over the past two years. In 2013, 43% of adults said they would miss the TV most, compared to just 20% who chose the mobile phone, a difference of 23 percentage points. Two years later, in 2015 that difference stands at just five percentage points.

Figure 1.11 Most-missed media device: 2013-2015



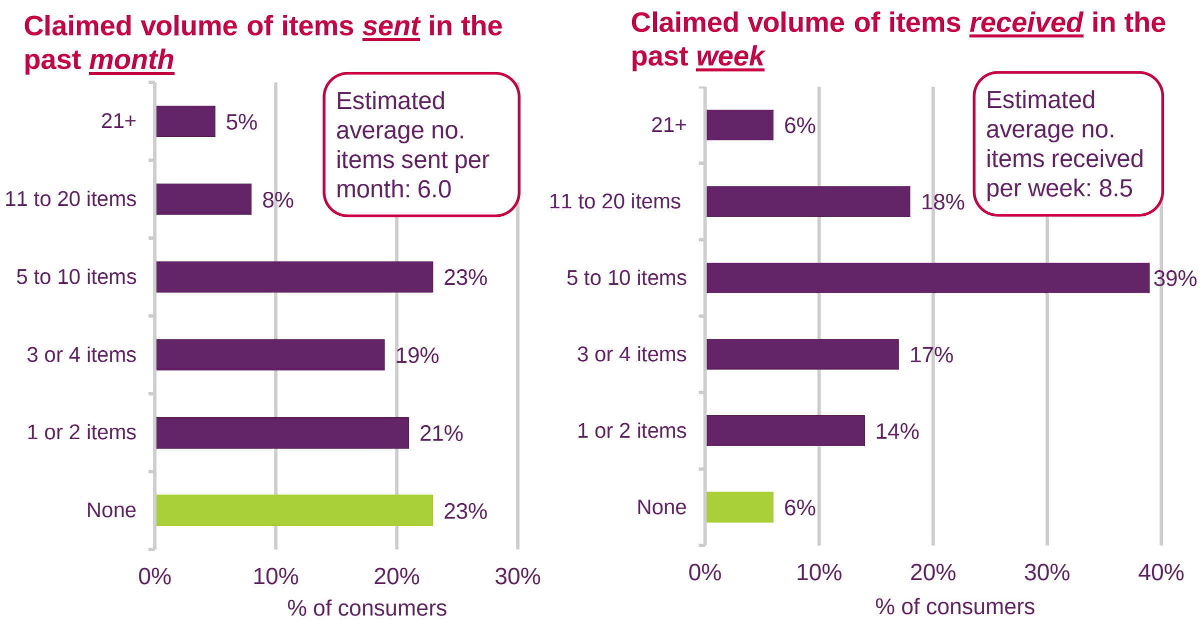
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base
Base: All adults aged 16+
A2 – Which one of these things you use almost every day would you miss the most if it got taken away?

Almost a quarter of consumers claimed to have sent no items of mail in the past month

Ofcom's residential postal tracking survey shows that adults in the UK claim to receive an average of 8.5 items of post – including letters, cards and parcels – in an average week (Figure 1.12). This compares to an average of approximately 6.0 letters, cards or parcels sent in an average month; slightly less than the reported average of 6.7 items sent per month in the previous year.

The difference between the volume of mail sent and received is due to the fact that the majority of UK mail is sent by businesses to households. Almost a quarter of consumers (23%) in 2015 reported having sent no items of mail in the past month. This appears to be part of a continuing trend; 20% of consumers claimed not to have sent any mail in the past month in 2014 (vs. 18% in 2013), both significantly lower than the figure for 2015.

Figure 1.12 Approximate number of items sent and received by post



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
Base: All respondents (n = 3557 adults 16+)
QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?/ QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

1.3.5 Time spent on communications services

Figure 1.13 shows how much time people spend consuming different types of media in a typical day.

On average, UK adults (16+) spend 239 minutes (3 hours, 59 minutes) each day watching broadcast TV[13]. Television has the highest consumption level of the communications services measured, although, as the television and audio-visual chapter shows, this has declined, and varies significantly by age.

Time spent listening to the radio accounted for 183 minutes (3 hours, 3 minutes) per day in 2014 among radio listeners aged 15 and over, although, as the radio and music chapter shows, this too has been declining and also varies by age; older people listen to considerably more radio than younger people.

Using a PC or laptop to access the internet at home and at work is the next most-used communications activity, with a daily average of 65 minutes. However, this does not account

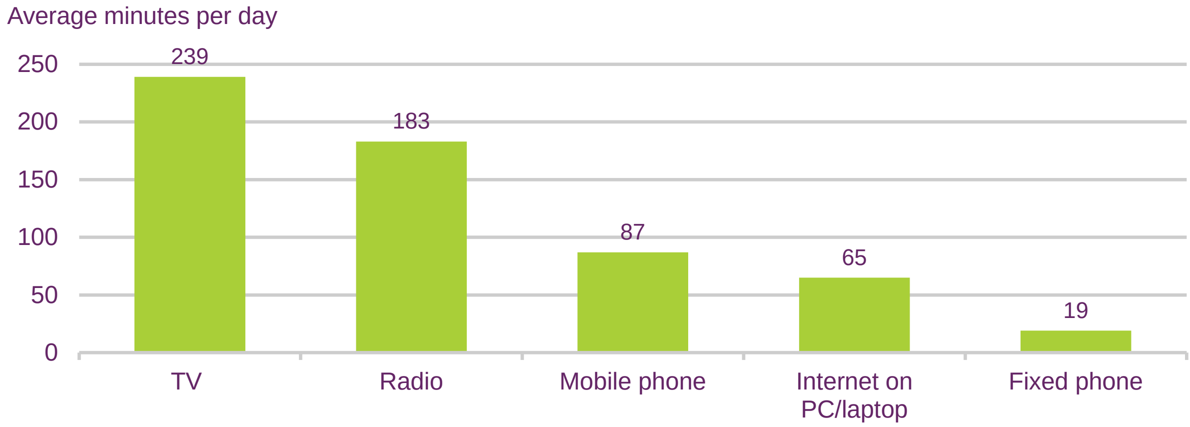
[13] Average time spent watching TV for children and adults (individuals aged 4+) is 220 minutes. This is the main demographic used in references to television consumption in this report.

for the total amount of time spent online, as consumers are increasingly using devices other than a PC or laptop to access the internet.

Adults aged 15+ in the UK spend an average of almost an hour and a half (87 minutes) using their mobile phones each day, with about half of this (43 minutes) spent on activities that require internet access. Forty-four minutes are spent on activities that do not necessarily require an internet connection (e.g. phone calls, listening to stored music, playing games).

Among smartphone users this increases to just over 2 hours (126 minutes) on their mobile phone, with again, just over half of this (65 minutes) spent on internet-based activities[14].

Figure 1.13 Average time per day spent using communications services: 2014



Source: BARB 2014 / RAJAR 2014 / comScore MMX, Home & work panel 2014 / Ofcom's Digital Day 2014
Base: BARB: Average minutes per individual aged 16+ in TV households; RAJAR: All radio listeners aged 15+; comScore: individuals online in month on desktop/laptop aged 15+; Digital Day: mobile phone / fixed phone: Total summed relevant activity minutes (weighted) / weighted base / 7, aged 15+
Note: BARB data throughout the rest of the CMR refers to individuals aged 4+
Note: comScore data throughout the rest of the CMR refers to individuals aged 6+

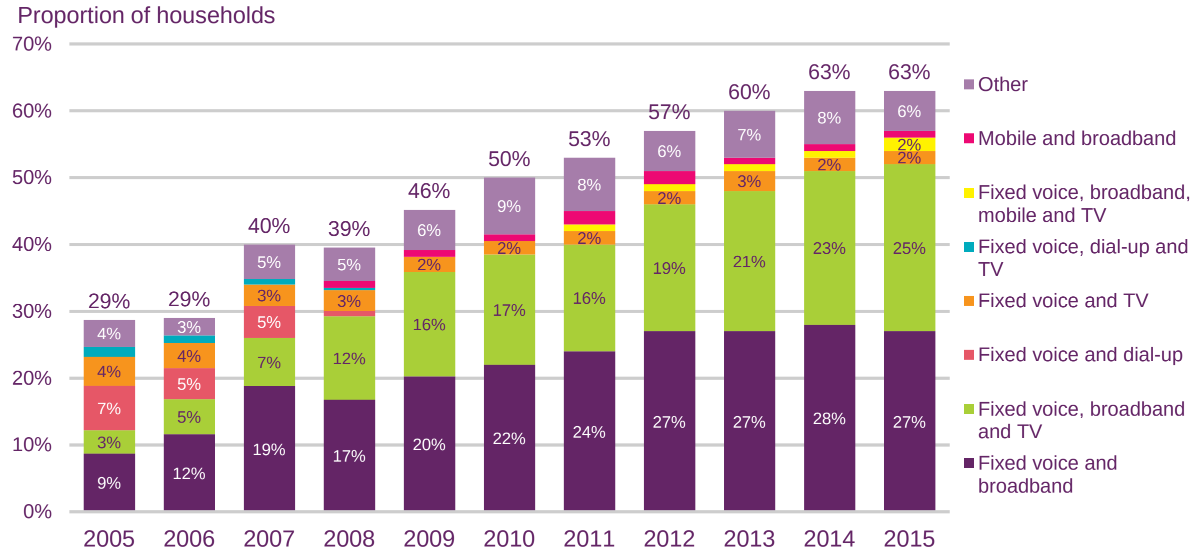
1.3.6 Purchasing communications services in a bundle

Reported use of bundled services remained stable from 2014 to 2015

Just over six in ten consumers (63%) reported that they had bought at least two of their communications services together in a bundle in Q1 2015, the same as the previous year's figure (60%). Dual-play packages of landline and broadband, and triple-play packages of landline, broadband and TV, were the most popular (reported to be taken up by 27% and 25% of households respectively).

[14] Data in this chart are from 2014 to allow comparison across communications services. 2015 data on using the internet via a desktop or laptop and via a smartphone are available in chapter 5, *Internet and online content.*

Figure 1.14 Reported take-up of bundled services



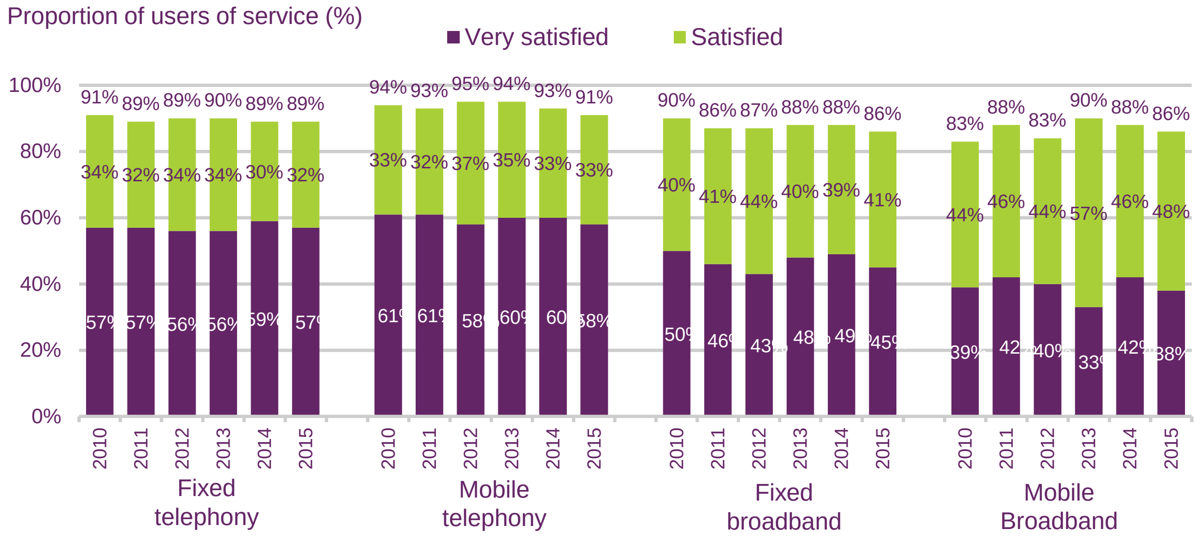
Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756)
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?

1.3.7 Satisfaction with communications services

Satisfaction levels remain high for telecoms services, although satisfaction with fixed broadband and mobile telephony has decreased

Consumer satisfaction remained relatively similar year on year for the communications services shown in Figure 1.15. In Q1 2015, around nine in ten adults were satisfied with the service asked about; 91% were satisfied with their mobile phone service, 89% were satisfied with their fixed-line telephone service, and a similar proportion (86%) with their fixed broadband and mobile broadband services. However, mobile services have seen small but statistically significant fall of two percentage points since 2014. This is part of a longer trend; satisfaction has fallen from 95% in 2012.

Figure 1.15 Overall satisfaction with communications services



Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+
Q: Thinking about your home phone/ mobile phone/ fixed broadband internet/ mobile broadband internet service only, please say how satisfied you are with the overall service provided by [main supplier]
Note: Shows the proportion of users with each service, includes only those who expressed an opinion.

1.4 Changes in TV viewing habits

1.4.1 Introduction

Average daily viewing on the TV set fell by 11 minutes in 2014 compared to 2013. This is the second consecutive year of decline, following a nine-minute decline in 2013 compared to 2012. This section of the report analyses the decline in traditional TV viewing on the TV set, as measured by BARB. We begin with an examination of the decline, and then move on to consider some of the potential explanatory factors. For discussion of audio-visual (AV) viewing on other devices see section 1.5: *Developments in viewing beyond traditional television*.

1.4.2 Key findings

- **In 2014 the average number of minutes of broadcast TV, watched on a TV set, was 220 minutes per person (aged 4 and above) per day; 11 minutes less than in 2013.** The fall, of 4.9% year on year, represents the second consecutive year of decline.

- **The entire year-on-year drop in viewing can be attributed to a decline in viewing of traditional TV (watching programmes at the time of broadcast).** Despite an increase in time-shifted viewing (+1 minute) this was not enough to compensate for the 12-minute decline in traditional TV viewing, resulting in an 11-minute decline in broadcast TV viewing overall.

- **The average proportion of the TV population who watch TV each week fell slightly year on year, from 93.4% to 92.4%.** However, in terms of volume, the number of people watching TV each week increased from 53.9 million to 54.1 million viewers between 2013 and 2014.

- **The decline was seen across all ages, but was more pronounced among the under-45 age groups,** with the greatest proportional drop among children aged 4-15 (-12.4%), followed by the 25-34 group (-8.8%) and 35-44s (-8.0%). Viewing among the over-65s fell the least; by 0.3%.

- **Among children, 16-24 year olds and 35-44 year olds, average daily viewing has fallen every year since 2010,** while viewing among other age groups has fluctuated across this period. Since 2012, however, all age groups have had year-on-year declines in daily TV viewing.

- **TV viewing fell across all channel groups between 2013 and 2014.** Viewing to ITV-owned channels fell the most; falling by 5 mins/ day (-3 mins to ITV and -1.8 mins to the ITV portfolio). In total, declines in viewing to ITV channels accounted for over 40% of the total fall in viewing.

- **BARB data suggest that about half of the decline in viewing may have shifted to 8-28 day catch-up and other (unknown) content on the TV set.** Analysis of viewing on the TV set shows that there was a one-minute increase in 8-28 day average daily time-shifted viewing per person (from four minutes to five minutes) and a three-minute increase in ‘unmatched’ viewing (this includes apps on smart TVs, gaming and subscription video on-demand services such as Netflix), from 26 to 29 minutes. [15]

- **A number of other factors may also explain the decline in traditional TV viewing.** These include rising employment, a lack of high-rating events programming as seen in 2011 and 2012, the weather, increase in take-up of non-broadcast on-demand services and increase in use of other devices to watch AV content.

Broadcast TV viewing
BARB analysis is based on viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPG)on TV sets. 'Broadcast TV viewing' refers to TV programmes watched on the TV set live at the time of broadcast (traditional TV viewing), recordings of these programmes or viewing of these programmes through catch-up player services (referred to as time-shifted) up to seven days after they were televised.

Traditional TV viewing
'Traditional TV viewing' refers to TV programmes watched live at the time of broadcast on the TV set.

Time-shifted viewing
'Time-shifted viewing' is defined by BARB as viewing of programmes recorded and subsequently played back on a television set within seven days of live broadcast, as well as viewing after pausing or rewinding live TV. Recording devices included in BARB analysis include video cassette recorders (VCR); DVD recorders (which store programmes on writable DVDs); digital video recorders (DVRs) which use a hard disk to store programmes chosen from an electronic programme guide, and combination devices (which use a combination of internal hard disk and removable DVDs to store programmes).

Viewing any catch-up TV player services through the television set is also captured if the content has been broadcast live in the last seven days. This includes catch-up player services accessed through apps on smart TVs and games consoles, and any viewing on a laptop or personal computer connected to the television set. Viewing outside the seven-day window, viewing catch-up services on devices that are not connected to the TV set, and video on-demand (VOD) services (such as Amazon Instant Video and Netflix) which have not been scheduled on a television channel, are not reported as time-shifted viewing.

BARB Gold Standard
The BARB Gold Standard refers to the consolidated data which incorporates traditional TV viewing (live) and time-shift viewing (viewed up to seven days after the initial broadcast). This is the official estimate of television viewing used in this report. It does not include time-shifted viewing between 8 and 28 days after the initial broadcast, or 'unmatched' viewing.

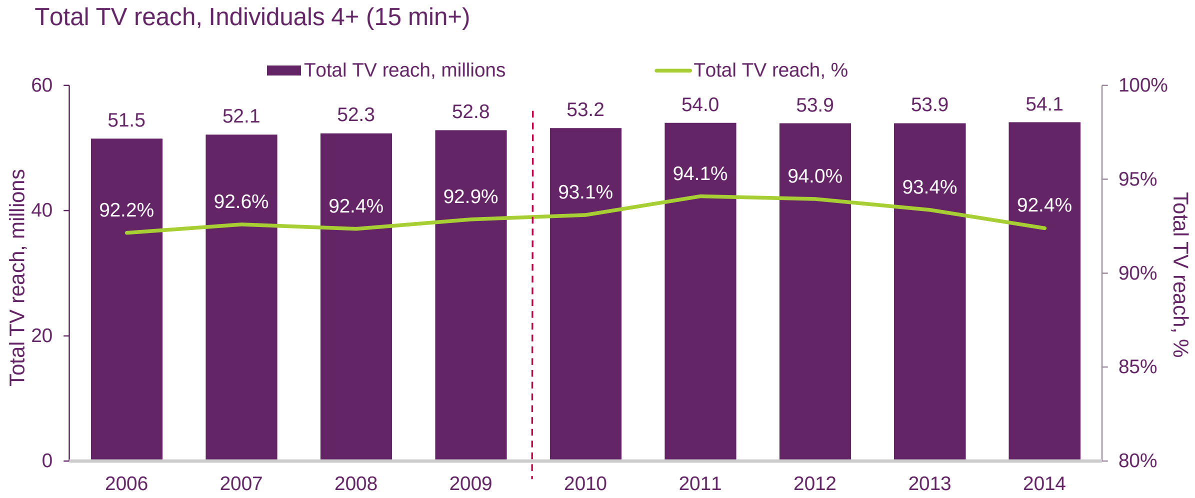
Unmatched viewing
'Unmatched viewing' refers to activities when the TV set is in use but the content cannot be audio-matched or otherwise identified. This would include the TV being used for gaming, viewing DVDs/ box-sets/ archives, subscription video-on-demand (SVOD), time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (these are reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013.

[15] This analysis compares Q4 2013 vs Q4 2014 data as *unmatched viewing* has only been reported by BARB since July 2013

The average proportion of the TV population who watch TV each week fell slightly year on year, from 93.4% to 92.4%

The average proportion of the TV population who watch TV[16] each week (average weekly reach) fell slightly year on year, from 93.4% to 92.4% (see green line in Figure 1.16). However, as estimates[17] indicate, the UK population has increased, and so too has the number of people watching TV each week. Therefore, expressed as a volume, average weekly reach increased from 53.9 million to 54.1 million viewers between 2013 and 2014. Overall, these findings (combined with the fall in average broadcast TV viewing minutes explained below), suggest that more people are watching TV but for less time.

Figure 1.16 Average weekly reach of total TV



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

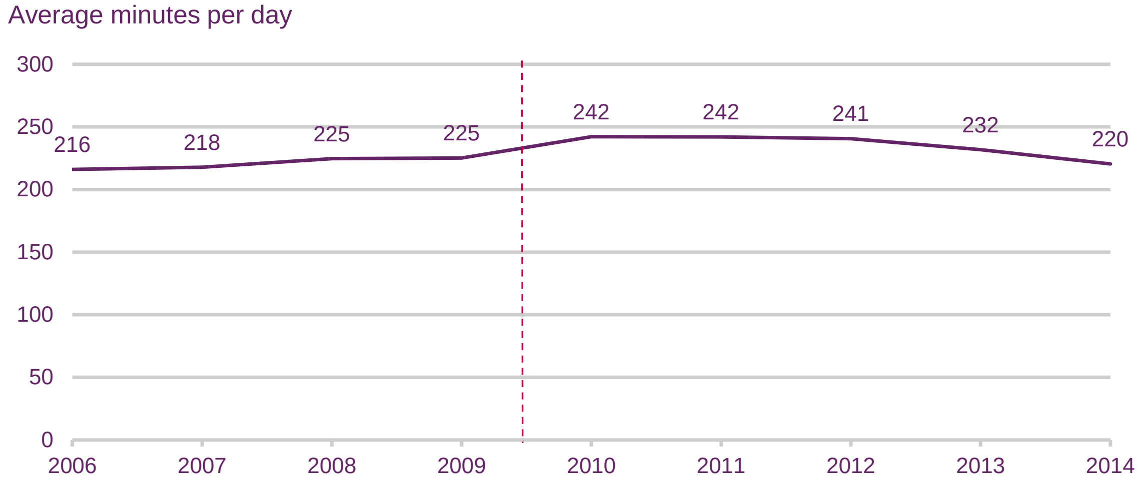
In 2014 the average number of minutes of broadcast TV, watched on a TV set, was 220 minutes per person (aged 4 and above) per day; 11 minutes less than in 2013

The average number of minutes watched by individuals[18] in 2014 was 220 minutes per person/per day (3 hours 40 minutes), 11 minutes per day less than in 2013. The fall, of 4.9% year on year, represents the second consecutive year of decline, following a nine-minute decline between 2012 and 2013. (Figure 1.17)

---

16 Broadcast TV viewing
17 http://www.ons.gov.uk/ons/rel/pop-estimate/population-estimates-for-uk--england-and-wales--scotland-and-northern-ireland/mid-2014/mid-year-population-estimates-for-the-uk-2014.html
18 BARB individuals refer to individuals aged 4+

Figure 1.17 Average minutes of broadcast TV viewing per person per day



Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line). Average minutes of broadcast TV viewing per day declined by 11 minutes year on year, although values appear not to equate to 11 minutes in the chart due to rounding.

The decline was seen across all ages, but was more pronounced among the under-45 age groups

Between 2013 and 2014 average viewing declined across all age groups, with the greatest proportional drop among children aged 4-15 (-12.4%), followed by the 25-34 group (-8.8%) and 35-44s (-8.0%). Viewing among over-65s fell the least, by 0.3%.

The decline in average viewing, in terms of actual minutes, was largest among children and 35-44 year-olds (both with a 17 minute/day decline). Those aged 25-34 followed, with a 16 minute/per day decline. There was a below-average fall of 9 minutes a day among 16-24 year olds. (Figure 1.18)

Figure 1.18 Change in average minutes per day of broadcast TV viewing, by age group, total TV: 2013-2014

Audience	Change in average minutes of viewing/day: 2013-2014	% change in average minutes of viewing/day: 2013-2014
All individuals aged 4+	11 minutes	-4.9%
Children 4-15	**17 minutes**	**-12.4%**
16-24	**9 minutes**	**-6.2%**
25-34	**16 minutes**	**-8.8%**
35-44	**17 minutes**	**-8.0%**
45-54	11 minutes	-4.4%
55-64	10 minutes	-3.4%
65+	1 minute	-0.3%

Source: BARB, network, total TV. Average minutes of viewing/ day.
Note: ***Bold text*** *in table indicates an above-average decline.*

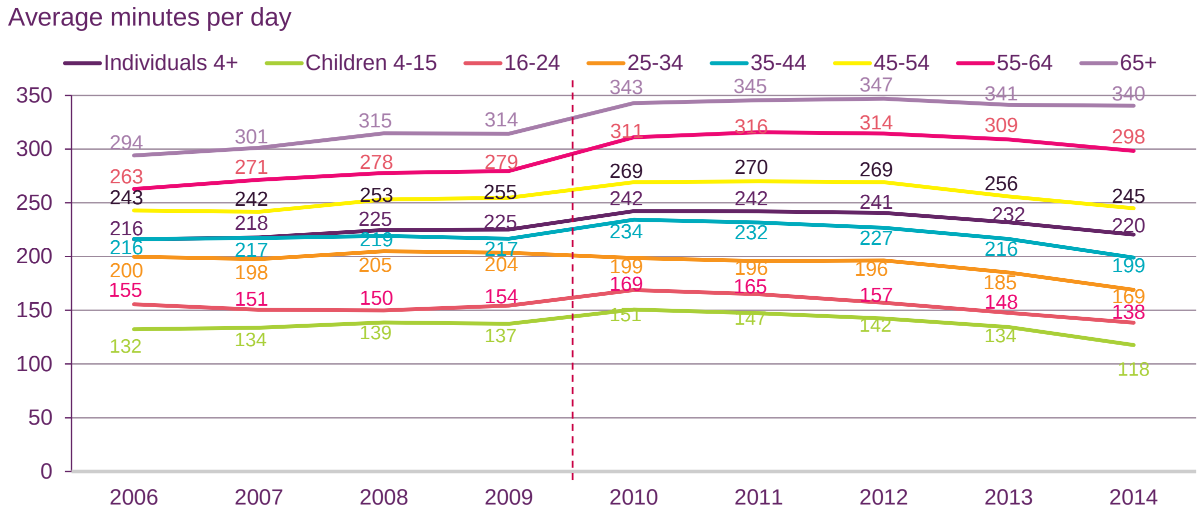
Among children, 16-24 year olds and 35-44 year olds, average daily viewing has fallen every year since 2010

Over the 2010-2014 period, average daily viewing fell across all age groups. Children (aged 4-15) had the greatest proportional drop, with average daily viewing falling by 22% (-33 minutes). Those aged 16-24 followed, with an 18% fall in viewing (-30 minutes) while the 25-34 and 35-44 age groups both fell by 15% (-30 minutes and -35 minutes respectively). The over-65 group has had the smallest decline in viewing since 2010, down by 1% (a decrease of two minutes).

Among children, 16-24s and 35-44s, average daily viewing has fallen every year since 2010; viewing among other age groups has fluctuated across this period. Since 2012, however, all age groups have had year-on-year declines in daily TV viewing (Figure 1.19).

Analysing the decline by socio-economic group, the decrease between 2013 and 2014 was two percentage points greater among C2DEs than among ABC1s. Viewing fell by 5.5% (-15 mins/day) among people in the C2DE group, compared with a 3.5% drop (-7 mins/day) among ABC1s.

Figure 1.19 Average minutes per day of broadcast TV viewing, by age group, total TV



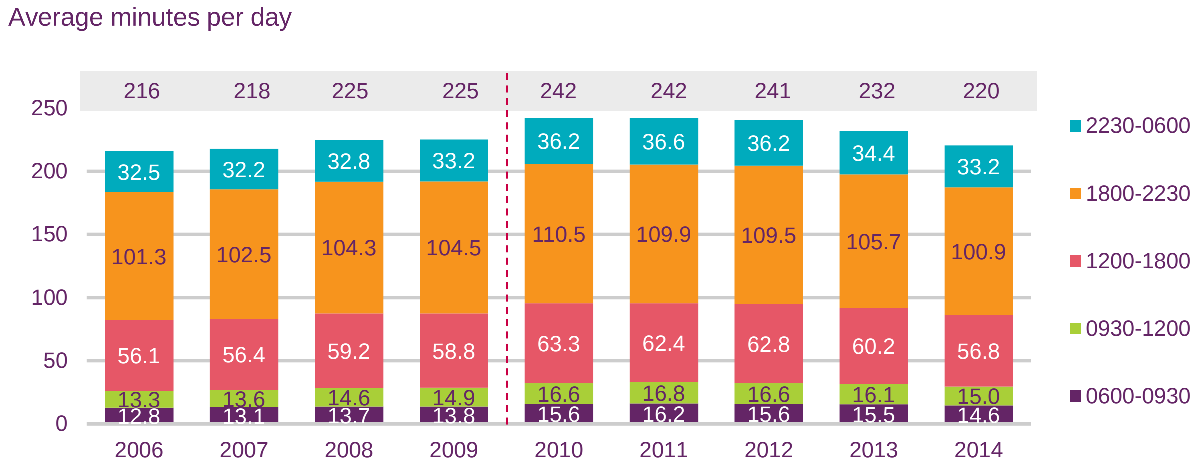
Source: BARB, network, total TV. Average minutes of viewing/day
New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Viewing between 9.30am and midday had the largest proportional decline year on year, at -5.7%

The average year-on-year decline in broadcast TV viewing was 4.9% (11 minutes), although the decline varied by time of day. Proportionally, there were above-average falls during the morning and daytime slots (6am-6pm). The largest proportional drop was seen between 9.30am and midday, with viewing falling by 6.6% (1 minute). Likewise, early morning (6am-9.30am) viewing fell by more than the average rate of decline; by 5.9% (-1 minute), as did viewing from midday to 6pm, at -5.7% (-3 minutes).

Although the fall in broadcast TV viewing minutes in peak time (6pm-10.30pm) was proportionately below average, at 4.5%, peak viewing had the greatest fall in total minutes (-5 min/day). Viewing in the 10.30pm-6am slot also fell by more than the average rate of decline, at -3.5% year on year (-1 min/day). (Figure 1.20)

Figure 1.20 Average minutes of viewing per day, total TV: by day part

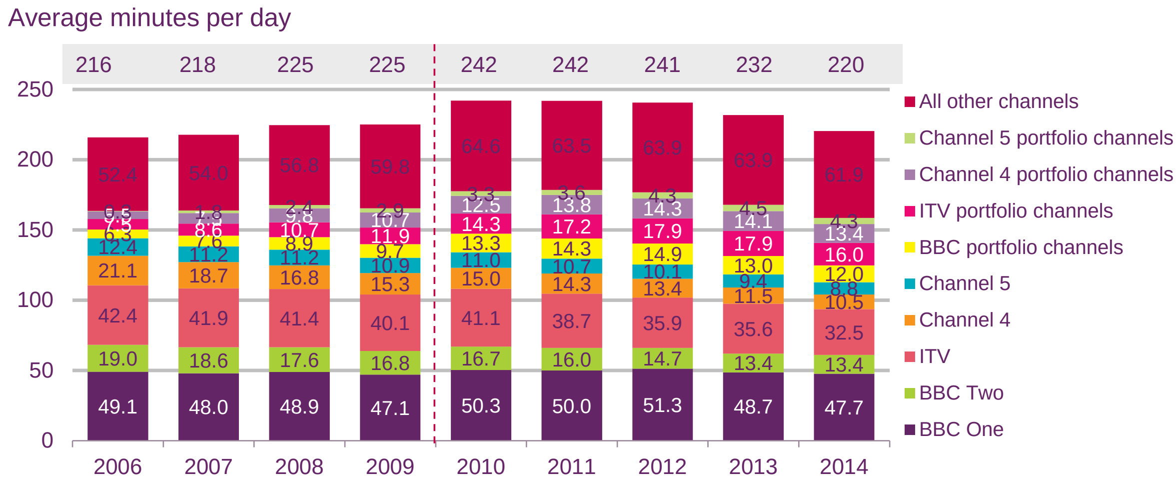


Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

TV viewing fell across all channel groups between 2013 and 2014

TV viewing fell across all channel groups (Figure 1.21) between 2013 and 2014. However, viewing to ITV-owned channels fell the most; falling by 5 min/day (-3 mins to ITV and -1.8 mins to the ITV portfolio). In total, ITV channels accounted for over 40% of the 11-minute-a-day fall in viewing. While it did not have the largest year-on-year proportional drop, there was a notable decline in viewing minutes to the collective group of all other non-PSB broadcaster channels; this represented a further 16.8% (-1.9 minutes) of the total annual fall in 2014.

Figure 1.21 Average minutes of viewing per day, total TV: by channel group



Source: BARB, individuals 4+, network, Total TV. Average minutes of viewing/day.
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

The entire year-on-year decline in viewing can be attributed to traditional TV viewing[19]

Figure 1.22 shows a 12-minute fall in traditional TV viewing between 2013 and 2014. Despite an increase in time-shifted viewing (+1 minute) this was not enough to compensate for the decline in traditional TV viewing at the time of broadcast, resulting in an overall 11-minute decline. Almost the whole of this decline took place on the main living room TV set rather than other TV sets in the home, such as in bedrooms or kitchens (9.5 minutes vs. 1.7 minutes).

Figure 1.22 Average minutes of viewing per day, total TV: by activity

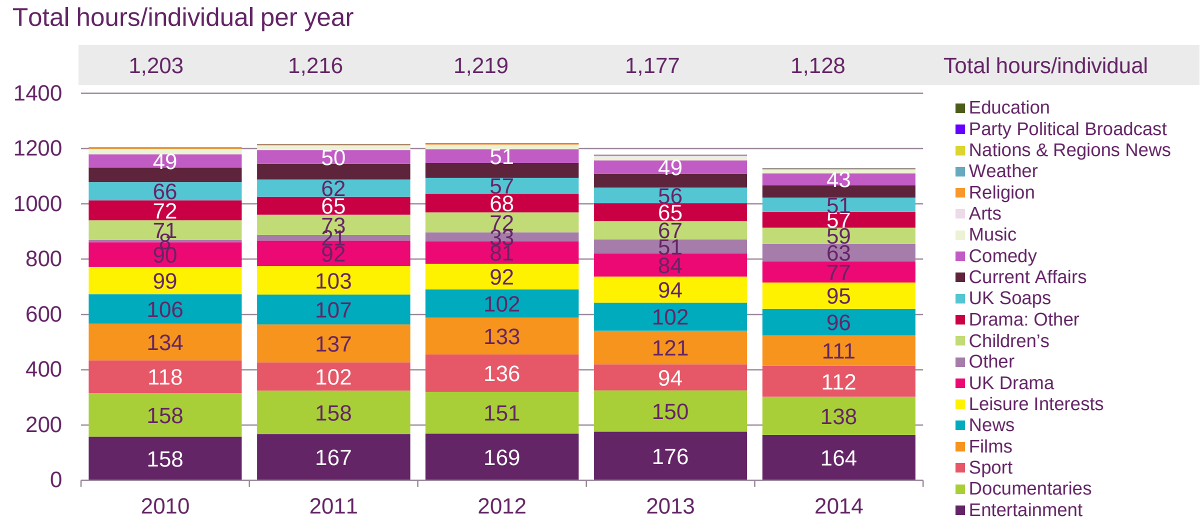
Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
Note: New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

Entertainment, documentaries, film and drama have seen the largest declines in volume of viewing

By programme genre, across all channels, the largest year-on-year decline in volume of minutes consumed was seen in entertainment, films and drama: other (non-UK) drama and UK drama, all content types associated with on-demand viewing.[20] News content also experienced a decline, and while not associated with on-demand, we have seen a shift to greater use of online services for news.

[19] Viewing of programmes live at the time of broadcast
[20] For discussion of time-shifted viewing by genre see page 159 in the *Television and audio-visual* section

Figure 1.23 Range of viewing by genre across all channels: 2010-2014



Source: BARB, individuals 4+, network programming based on 4+ area filter, total TV. Total hours of viewing/year.
Note: There have been very large increases in total viewing hours to the 'other: new programme' genre over the last few years (from 33.1 hours of viewing per person in 2012 to 62.6 hours in 2014). Programmes that may fall in other genres may therefore be coded as 'other: new programme' and this should be considered in any genre-based analyses.

There are a range of potential factors that may help to explain the recent decline in traditional viewing. The current signs of economic recovery may be a factor in the decline in viewing minutes. As people return to employment or have more disposable income, they may spend more time at work, or engaged in leisure activities outside the home. We explore some of the potential factors in more detail in the following sections.

Events programming in recent years may have masked a more gradual decline since 2010

Since 2010-2012, there has been a particular concentration of 'event' programming during the summer months – especially during 2012. These events include the World Cup in 2010, a royal wedding in 2011, and in 2012 the UEFA European Championships, the Queen's Jubilee and the Olympic and Paralympic Games. However, 2013 did not benefit from any such key events and although 2014 was a World Cup year, as a result of England's early departure from the tournament at group stages, matches during the later stages of the tournament did not attract particularly high ratings.

To expand on this, although the top-performing programme in 2014 was the World Cup final, (Germany vs. Argentina), it had only 15 million viewers. In contrast, when England reached the UEFA European Championship quarter-final in 2012, the match against Italy had an average audience of over 20 million[21].

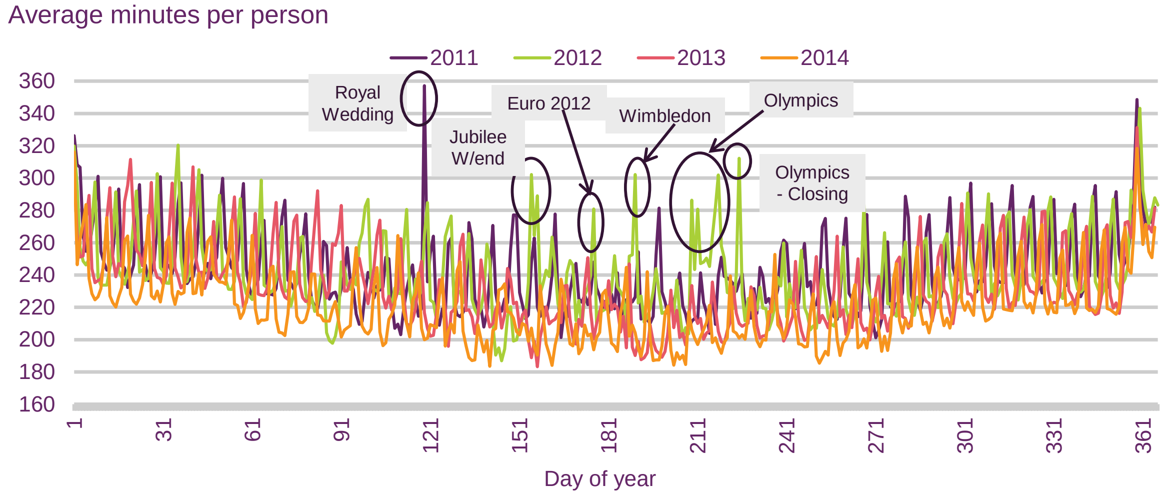
In addition, to demonstrate the impact of event programming in previous years, in 2012 the two top-performing programmes were the opening and closing ceremonies of the London Olympic Games, both of which drew in an average audience of over 24 million viewers[22]. The lack of significant event programming in 2013 may explain some of the decline in

[21] The Euro 2012 match ENG vs ITA had an average audience of 20.3 million viewers.
[22] The Olympics 2012 Closing Ceremony had an average audience of 24.5 million and the Olympics 2012 Opening Ceremony had an average audience of 24.2 million.

viewing since 2012, but arguably not the most recent decline, between 2013 and 2014, as 2014, with the FIFA World Cup, was also a major sports events year.

In addition to events programming, other types of programming may have had an impact on the decline; TV 'hit programmes' can substantially affect yearly viewing figures.

Figure 1.24 Average minutes of viewing per day, total TV: 2011-2014



Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.

The weather may explain some of the decline in television viewing

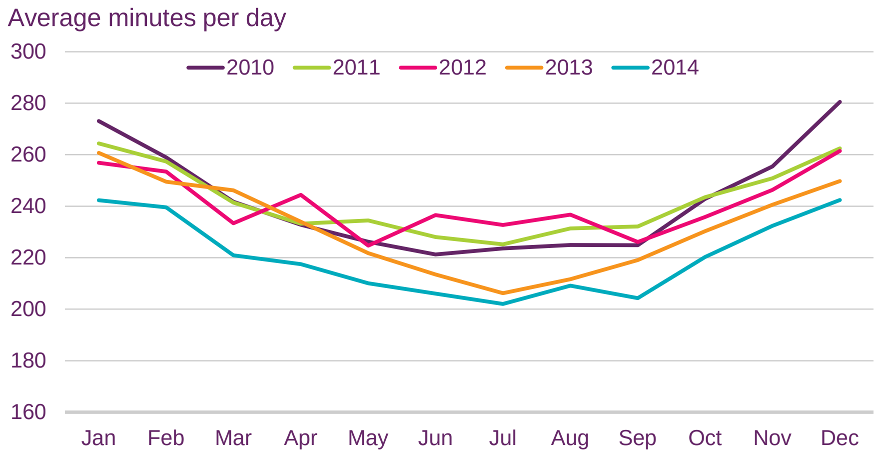
As shown in Figure 1.25, television viewing is affected by the season; viewing is lower during spring and summer than during autumn and winter. This chart also demonstrates the effect that event programming had on summer TV viewing in 2011 and 2012, and the knock-on effect of there being no significant high-rating event programming in 2013 and 2014.

Analysis of average temperatures shows warmer months through much of 2014; average temperatures in 2014 were higher in eight of the 12 months, compared to 2013. As there is a natural seasonality in television viewing, these trends may have affected leisure activities, including watching television, leading to a decline in viewing in the warmer months. To illustrate this point, the greatest year-on-year difference in mean temperatures was in March 2014 (+4.5C); this month also had the largest month-on-month viewing fall compared with March 2013 (-25 mins/day or -10.3%). Although we note the limitations of weather analysis, as it does not take account of many explanatory factors, the data suggest that the warmer weather may have led to people spending more time engaged in activities other than watching television[23].

Likewise, analysis of mean monthly rainfall shows lower levels of rainfall in September 2014 compared to September 2013, one of the months that had an above-average fall in viewing levels (15 mins or -6.7%). These climate-related findings may have influenced leisure activities, including television viewing.

[23] BARB has also produced analysis on the influence of the weather on TV viewing minutes: www.barb.co.uk/whats-new/370

Figure 1.25 Average minutes of viewing by month, total TV: 2010-2014



	% change: 2013-2014
Jan-Dec	-4.9 (-11min)
Jan	**-7.1% (-18min)**
Feb	-4.0% (-10min)
Mar	**-10.3% (-25min)**
April	**-7.0% (-16min)**
May	**-5.3% (-12min)**
Jun	-3.5% (-7min)
Jul	-2.0% (-4min)
Aug	-1.2% (-3min)
Sep	**-6.7% (-15min)**
Oct	-4.4% (-10min)
Nov	-3.4% (-8min)
Dec	-3.0% (-7min)

Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/month.
Note: i) ***Bold text*** *in table indicates an above average decline. ii) New BARB panel introduced 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution.*

BARB data suggest that about half of the decline in viewing may have shifted to 8-28 day catch-up and 'unknown' content on the TV set

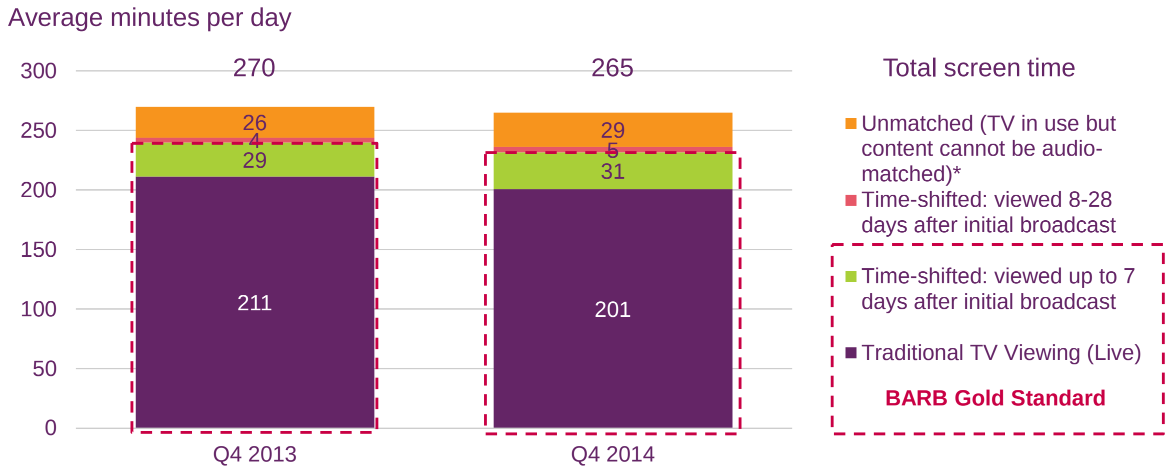
Figure 1.26 shows our indicative analysis of total TV screen time, broken down into average daily viewing minutes for broadcast TV (traditional TV and time-shifted viewing, up to seven days after broadcast) as well as 8-28 day time-shifted viewing minutes and unmatched viewing[24] minutes. Taken together, these four components allow us to look at the total number of minutes people spent viewing their TV screen, both to known programmes and to other, unknown content (referred to as 'unmatched viewing').

Our analysis of these types of viewing behaviour shows that between Q4 2013 and Q4 2014 there was an eight-minute decline in time spent watching broadcast TV, as measured using the BARB Gold Standard[25].

However, there was also a one-minute increase in 8-28 day average daily time-shifted viewing per person (from four minutes to five minutes) and a three-minute increase in unmatched viewing (from 26 to 29 minutes). Our indicative analysis therefore suggests that half of the decline can be explained in terms of migration to 8-28 day time-shifted viewing, as well as other activities on the TV set (such as subscription VoD like Netflix, apps on smart TVs and gaming).[26] The remaining four-minute decline might have been spent on AV activities on screens other than the TV set, or could be attributed to the factors mentioned above (such as the weather and a lack of events programming).

[24] 'Unmatched viewing' refers to time when the TV is in use but the content cannot be audio-matched or otherwise identified. This would include the TV being used for gaming, viewing DVDs/ box sets/archives, SVOD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013.
[25] The BARB Gold Standard refers to the consolidated data which incorporates traditional TV viewing (live) and time-shifted viewing (viewed up to seven days after the initial broadcast). This is the official estimate of television viewing used in this report.
[26] BARB's 'unmatched' viewing (excluded from Gold Standard reporting) includes viewing of games, DVDs/ box sets/archives, subscription VoD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPGs (where there is no in-picture linear broadcast).

Figure 1.26 Average daily minutes of TV screen time, total TV: by activity type



Source: BARB, individuals 4+, network, total TV. Average minutes of viewing/day.
**Note: Unmatched = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing to DVDs/ box sets/archives, SVOD, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture linear content. Digital radio stations are excluded (reported by RAJAR). Unmatched viewing has been reported by BARB since July 2013. At the time of writing, it is not possible to analyse unmatched content further by the type of device used. Dotted line marks difference between BARB gold standard industry data and the 8-28 day time-shifted and unmatched viewing.Chart figures may not add up due to rounding.*

The rise in take-up of on-demand services, and the increase in use of other devices to watch AV content, are likely to be contributory factors

The rise in take-up of on-demand services (such as Amazon Instant Video and Netflix) is likely to be a contributory factor to the decline. Similarly, take-up of smartphones has continued to increase over the past year, with two-thirds of adults (66%) now owning one, and over half of households (54%) owning a tablet computer (such as an iPad or Kindle Fire) (see Figure 1.5).

The increase in take-up of smartphones and tablets, and the increasing tendency to use these devices to watch on-demand services and broadcaster catch-up services (such as BBC iPlayer and All4), are likely to have had an impact on TV viewing, as people spend more time on devices other than the TV set. The wide range of online services competing for people's attention and leisure time (such as gaming and social media) are also potential contributory factors. The next section (1.5) explores these factors in further detail.

1.5 Developments in viewing beyond traditional television

1.5.1 Introduction

As we have seen in the previous section, traditional TV viewing has declined in recent years. Changes in audio-visual content and delivery in recent years mean that we now have access to a large amount of content almost anywhere we choose, both inside and outside the home. The viewing experience is now multi-faceted: viewers can access anything from big-budget drama productions to dedicated live sports broadcasts to video bloggers across a range of screens and in a range of locations.

In this section we draw on consumer research and other sources to demonstrate changing audio-visual viewing habits and the drivers behind them.

1.5.2 Key findings

- **Just under 70% of total time spent watching audio-visual content is to traditional (live) television, with marked differences between age groups.** Adults aged 16 to 24 spend 50% of their viewing time watching traditional television. This figure increases with age; over-65s spend 82% of their viewing time watching traditional TV. Viewing to VoD services represented 8% of total viewing among UK adults aged 16+, rising to 13% of viewing time among 16-24s.

- **Take-up and use of VoD services continues to grow, with almost six in ten adults saying that they have used at least one VoD service in the past 12 months**. BBC iPlayer remains the most popular of the VoD services provided by the major broadcasters and platforms, with around three in ten (31%) adults using it in the past year.

- **'Over the top' (OTT) services, providing content streamed over the internet, are increasing in popularity.** Since its launch in the UK in 2012, Netflix has increased its subscriptions to 4.4 million households, while 1.2 million households now have a subscription to Amazon Prime Instant (formerly LoveFilm). The most popular reason cited for using either of these subscription VoD services was to access the back catalogue of movies.

- **Viewing of short-form video is popular with many age groups.** Seventy-two per cent of people claimed to watch short-form video (such as clips and music videos on services such as YouTube), with 32% saying they watched either daily or at least weekly. This is now viewed by many as an important source of information as well as entertainment. Forty-seven per cent of internet users said they had used YouTube as a source when looking for information online, rising to 57% of 16 to 24 year-olds.

- **Ofcom's consumer research reported increases in non-traditional viewing; 33% of respondents claimed that they were using free catch-up and VoD services more than they did a year ago.** This compared to 7% saying they were doing this less, and resulted in net gains of +26% for watching non-subscription catch-up services such as the BBC iPlayer, ITV Player and All4 (formerly 4oD).

- **Ofcom's research also showed that 15% of respondents were using subscription on-demand services such as Netflix and Amazon Prime Instant**

Video more than they did last year, and that 7% of respondents were doing it less, resulting in a net gain of +8%.

- **Twenty-six per cent of respondents said that they were using a digital video recorder (DVR) more than in the previous year, and 13% said they were doing this less.** This equates to +13% net gain in watching content personally recorded from live television.

- **Computers and smartphones are more popular than set-top boxes among 16-24 year olds for accessing on-demand and catch-up services.** Thirty-five per cent of the online population claimed to use a set-top box for some form of on-demand or catch-up service at least once a month – the highest for any of our measured devices. In the 16-24 age group, however, respondents were more likely to claim use of a desktop/ laptop computer (57%) or a smartphone (45%) than a set-top box (40%) for viewing on-demand and catch-up services on a monthly basis.

1.5.3 Changes in the viewing landscape

Just under 70% of total time spent watching audio-visual content is to traditional (live) television, but with marked differences between age groups

A look at our 2014 *Digital Day* research published in the *Communications Market Report 2014* reveals the changing ways in which audiences are accessing audio-visual content (i.e. recorded, catch-up, on-demand services, DVDs and short-form content). The average UK adult spent 4 hours 18 minutes watching these types of content in 2014, but the variation between media sources across age groups is remarkable.

Among all UK adults aged 16+, 69% of their total time using audio-visual content was spent watching traditional television on a TV set, while for 16-24 year olds, half of this consumption was traditional television via a TV set. This figure increases with age; over-65s spend 82% of their viewing time watching traditional TV.

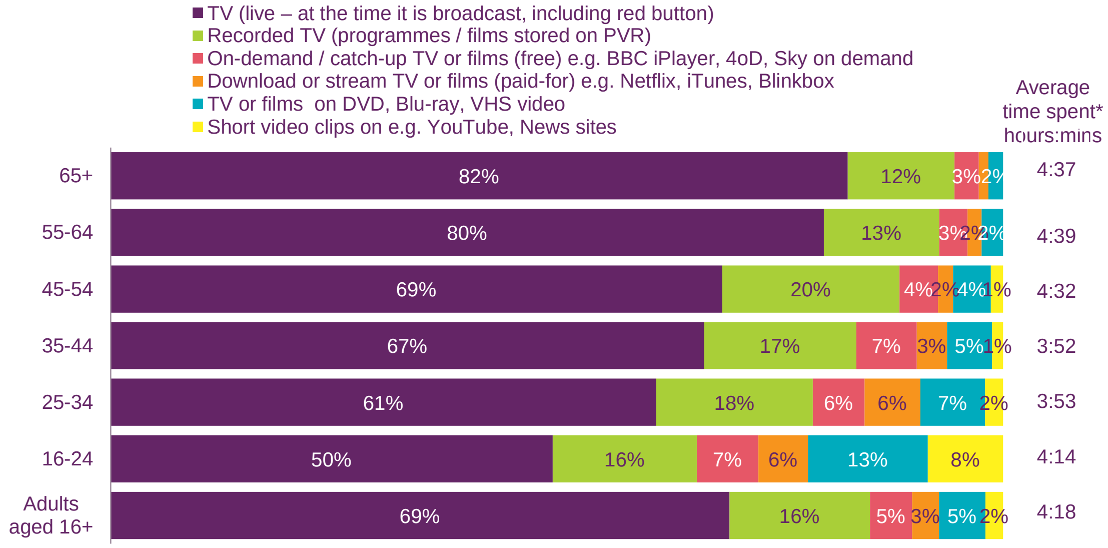
But although most viewing is still to traditional television, audiences are increasingly using many other forms of video. Recorded and on-demand viewing has gained traction across all age groups.

Recording broadcast television was most popular among the 45-54 year old age group (20% of their viewing time, compared to 16% of UK adults aged 16+). This might represent their loyalty to broadcast television, but with busy working lives, and perhaps children to care for, they are likely to be catching up with the traditional television schedule in their leisure time.

On-demand viewing represents 8% of total viewing among UK adults aged 16+, rising to 13% of viewing time among 16-24s and then decreasing with age.

Where the youngest adult age group differs the most from other groups is in DVD viewing (13% of total viewing time compared to an average of 5% across all UK adults) and watching short video clips (8% compared to an average of 2% across all UK adults). As we will see later, the devices used for viewing activities vary with age, and it may be that laptops, with their DVD functionality, and smartphones, which are more popular among younger age groups, are more suited to these types of viewing activities.

Figure 1.27 Proportion of watching activities, % of total viewing time, by age



Source: Ofcom Digital Day 7-day diary 2014
*Base: All aged 6-11 (186), 11-15 (173), 16-24 (101), 25-34 (225), 35-44 (348), 45-54 (400), 55-64 (311), 65+ (259). *Average time spent is the total average daily time spent watching media, including simultaneous activity*

Consumers have taken up a range of AV-capable devices

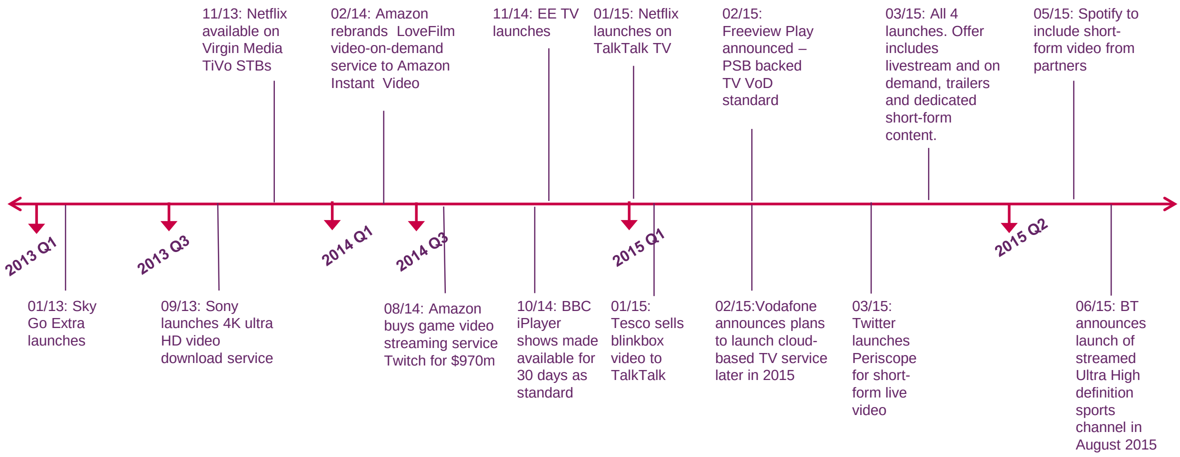
As can be seen in Figure 1.5 (p. 28) over the past five years there have been rapid increases in take-up of some AV-capable devices, and a steady rise in use of others. Perhaps the most striking is the growth in smartphone ownership (up from 26% in 2010 to 66% today) and tablets, which were virtually unheard of in 2010 but are now in over half of UK homes (54%). Over half (56%) of UK TV homes had a TV connected to the internet, either via a set-top box or a smart TV, at the end of 2014. This figure is likely to be higher when other third-party devices such as games consoles or streaming devices (e.g. Now TV or Chromecast) are included. Broadcast platform providers have also been steadily upgrading their set-top box offerings to include recording capability (DVR) as well as internet connectivity.

These developments are underpinned by increases in average fixed broadband speeds (see p. 314) and the roll-out of 4G mobile networks (p.257), as well as the continued increase in total broadband take-up, which reached 80% of homes in the first quarter of 2015 (p. 309).

The roll-out of VoD services has grown in recent years

Since 4OD launched in 2006 as the first on-demand service in the UK, there have been launches of on-demand services by all of the public service broadcasters, and by other broadcasters, TV platform operators, other non-broadcasters, and international content providers. Figure 1.28 shows some of the key developments in the past two years.

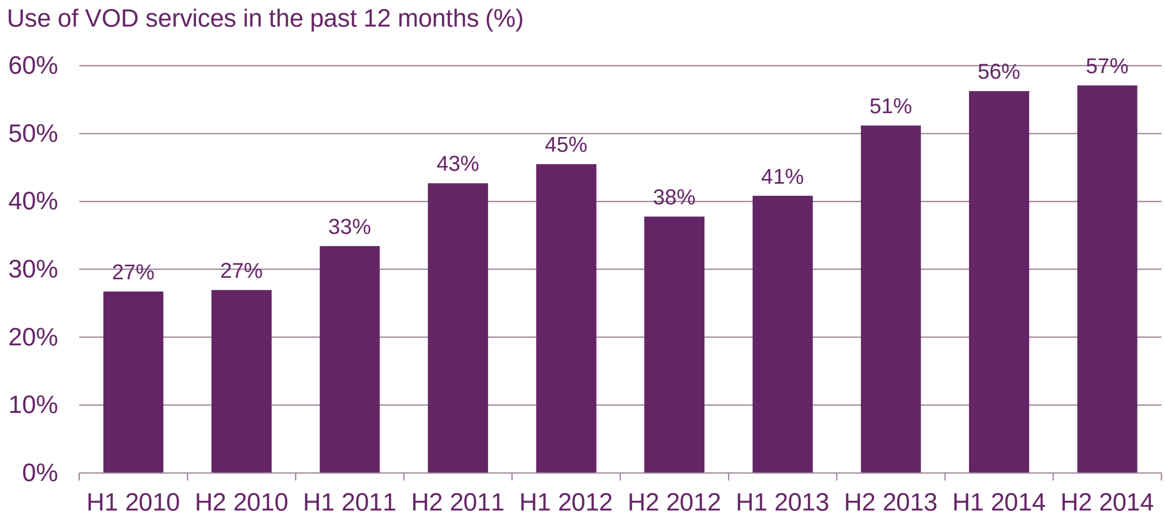
Figure 1.28 Selected on-demand and short-form service developments



Take-up and use of VoD services continues to grow, with almost six in ten adults saying that they have used at least one VoD service in the past 12 months

In the second half of 2014, 57% of all adults accessed at least one on-demand service, up from 27% in the first half of 2010.

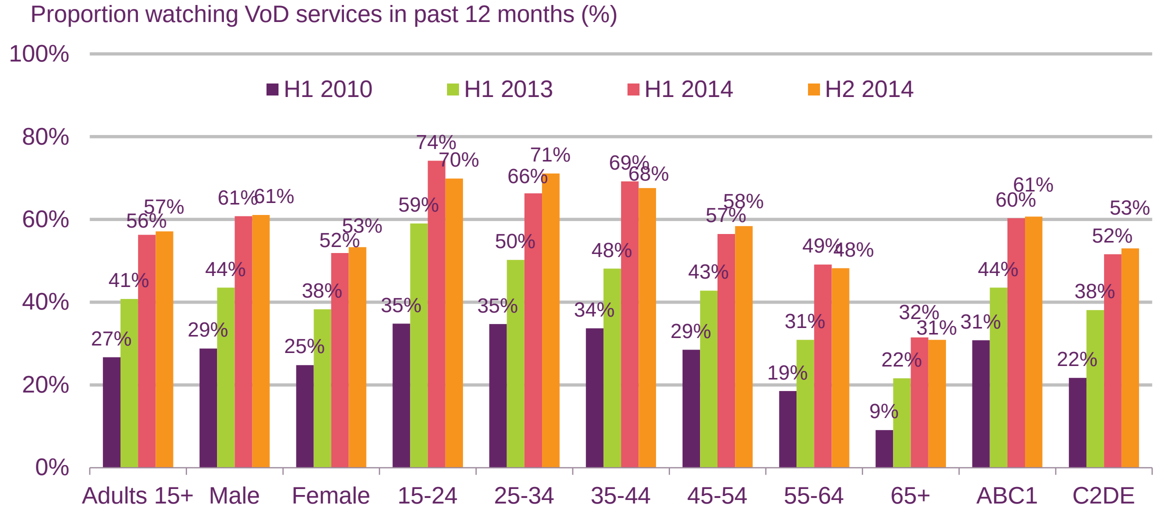
Figure 1.29 Use of VoD services in the past 12 months



Source: Kantar Media - TGI.
Base: GB adults aged 15+. H1 2010 n=12226, H2 2010 n=11794, H1 2011 n=12602, H2 2011 n=12915, H1 2012 n=11098, H2 2012 n=12495, H1 2013 n=11853, H2 2013 n=12570, H1 2014 n=11657,H2 2014 n=12849

Use varies by age, with more than two-thirds of all adults under 45 saying that they had used an on-demand service in the past 12 months.

Figure 1.30 Reach of VoD services, by age, gender and socio-economic group



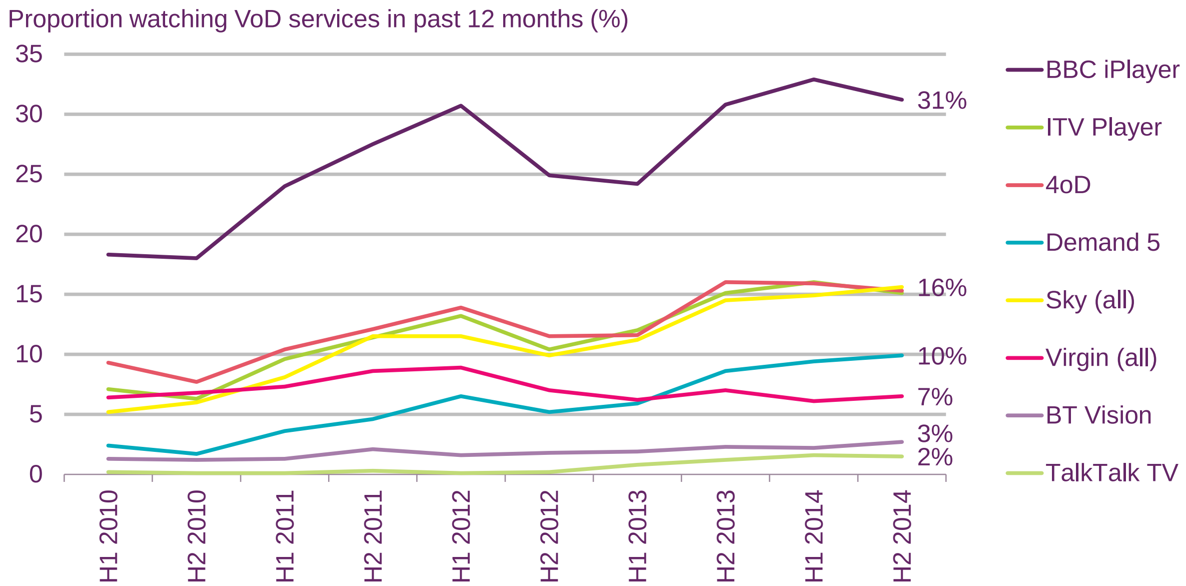
Source: Kantar Media - TGI.
Base: GB adults aged 15+. H1 2010 n=12226, H1 2013 n=11853,H1 2014 n=11657, H2 2014 n= 12849.

BBC iPlayer remains the most popular of the on-demand services provided by the major broadcasters and platforms

The BBC iPlayer remains the most popular of the VoD services provided by the major broadcasters and platforms; 31% of GB adults claim to have used it within the past year. It appears that the majority of homes that have access to the service are now using it. Free services provided by Channel 4 and ITV, as well as those included in Sky subscriptions, have shown very similar take-up over time. Take-up of all these three has consistently been 15%-16% since the second half of 2013, while take-up of Demand 5 has increased steadily since 2010 and reached 10% of GB adults in 2014.

Some Sky services are available on other platforms, whereas VoD offerings from Virgin, BT and TalkTalk are only available to each provider's customers, resulting in lower take-up.

Figure 1.31 Reach of selected VoD services over time



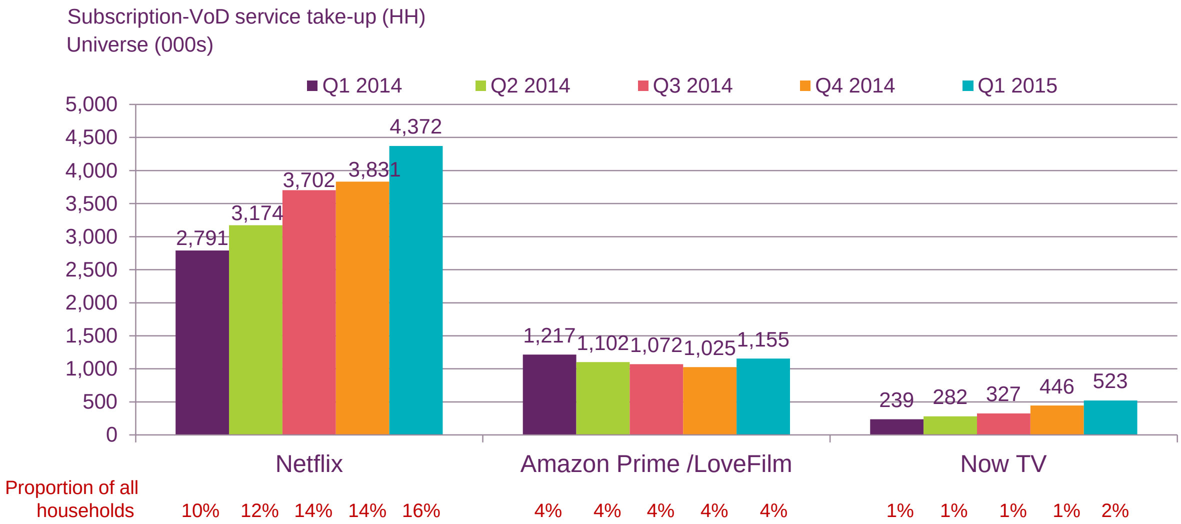
Source: Kantar Media - TGI
Base: GB adults 15+, all devices. Reach refers to use in previous 12 months H1 refers to January – June, H2 refers to July – December

'Over the top' (OTT) services, providing content streamed over the internet, are increasing in popularity

Also popular are the increasing number of 'over the top' (OTT) subscription VoD (SVoD) services. OTT services provide content streamed over the internet to any device capable of receiving them, or to a compatible web browser.

Figure 1.32 shows take-up of selected subscription VoD services among the UK population according to the BARB Establishment Survey. Since its launch in the UK in 2012, Netflix paid subscriptions have increased to 16% of UK households in Q1 2015. Amazon Prime Instant Video was rebranded in 2014 from LoveFilm, which may explain the apparent drop in reported take-up in 2014. Take-up of a paid subscription service stood at 4% of UK households in 2014. NowTV is a subscription service offered by Sky, which makes some Sky content, including films and sport, available to consumers who do not have a Sky set-top box. Launched in 2012, take up increased every quarter, to reach 523,000 households by Q1 2015.

Figure 1.32 Subscription-VoD service take-up, by household

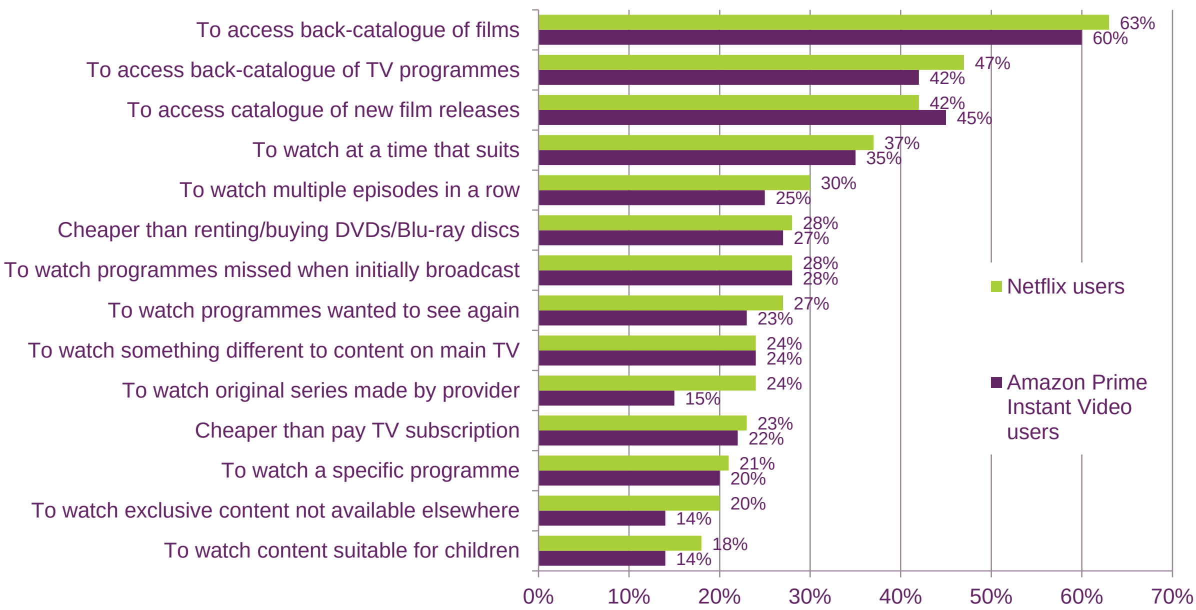


Source: BARB Establishment Survey Q1 2014 – Q1 2015
Q: Do you or anyone in your household, subscribe to any of the following…?

The most popular reason respondents give for using Amazon Prime or Netflix is to gain access to the back catalogue of films

Figure 1.33 below displays the reasons given for using Netflix and Amazon Prime Instant Video. The key drivers appear to relate to access to back catalogues of movies and programmes, as well as new film releases, rather than access to original or exclusive content. The most frequently cited reason, in both cases, is 'to access a back catalogue of movies'.

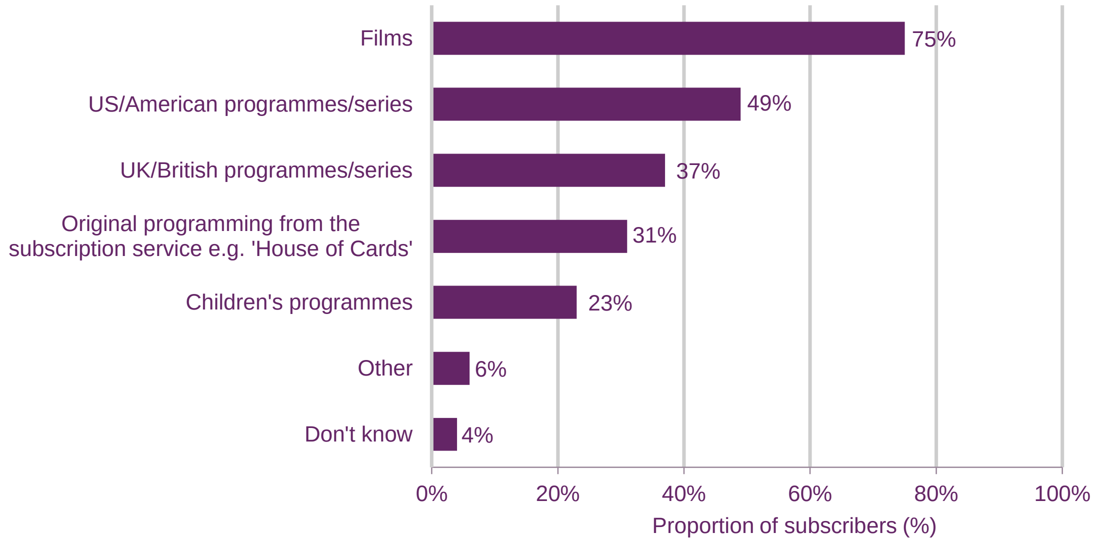
Figure 1.33 Reasons for using Amazon Prime Instant Video / Netflix



Source: GfK SVoD Tracker, Pilot Wave, Q1 2014
Base: All Amazon Prime Instant Video / Netflix users

Figure 1.34 shows the types of content that subscribers said they watched, led by films (75%) and US programmes/series (49%). In addition, 37% said they watched UK programmes/series, while 31% said they watched the original programming from the subscription service itself. Children's content was watched in 23% of all subscription on-demand households, increasing to 40% among those with children at home.

Figure 1.34 Programmes watched, among subscribers to on-demand services with a monthly subscription



Source: GfK NOP omnibus, April 2015. Base: All who have subscription to services (402) QH, Which of these types of programmes do you or your family watch through (name/s of on-demand subscription services). Viewing habits now involve a range of services beyond traditional broadcasting

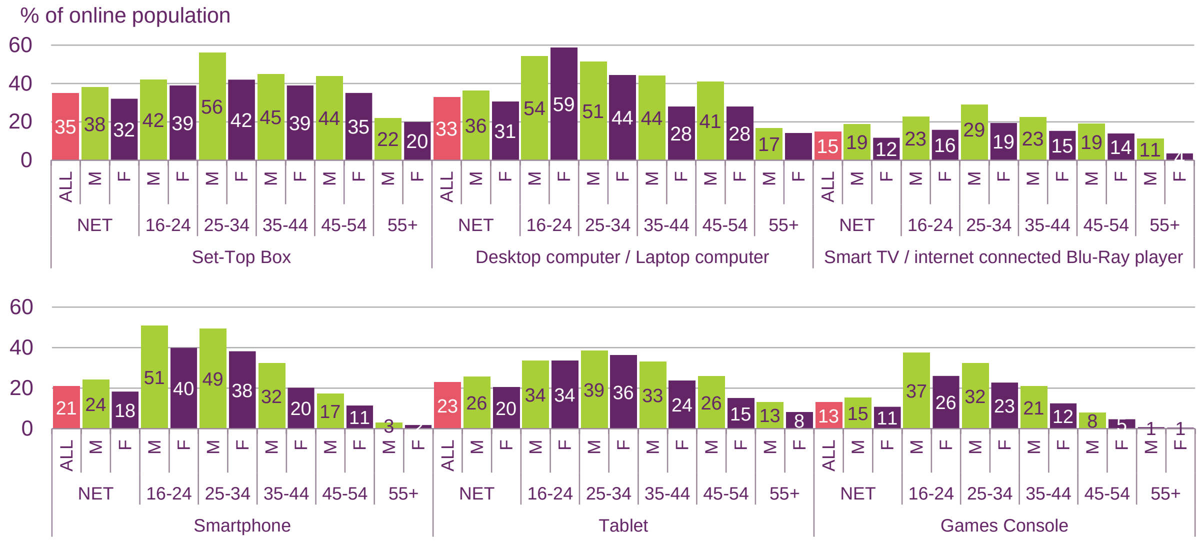
Computers and smartphones are more popular than set-top boxes among 16-24 year olds for accessing on-demand and catch-up services

Figure 1.35 shows the proportion of the UK online population who use any of the various devices now available to access video-on-demand and catch-up services on a monthly basis. A set-top box, such as those supplied by Sky or Virgin, is the most popular method, with 35% of the online population claiming to use one of these for on-demand or catch-up services at least once a month.

More men than women claimed to use each device, with the greatest difference being in smart TVs and internet-connected Blu-ray players. For these devices, 19% of men and 12% of women claimed to use them; this equates to 61% more men than women. The only group in which women claimed greater use than men was among the 16-24s who used desktop and laptop computers. Fifty-nine per cent of women aged 16 to 24 claimed to use either of these devices for on-demand or catch-up, compared to 54% of men.

The 16 to 24 age group was the only one for whom the set-top box was not the most frequently-cited device. Both men and women in this age group were more likely to claim use of both smartphones and desktop / laptop computers than set-top boxes for viewing on-demand and catch-up services.

Figure 1.35 Device used to watch catch-up and video on-demand services at least monthly



Source: Decipher MediaBug – Wave 6 Report. Base: UK online population Wave 6 (n=3088), March 2015
VOD / DTO refers to the following services: BBC iPlayer, ITV Player, 4oD, Demand 5, Sky Go, Netflix, Amazon Instant Video, Blinkbox.com, Now TV, Virgin TV Anywhere, Picturebox Films, Viewster, Channel Films, iTunes, Virgin Media Online Movies, Xbox Video, Playstation Video Store, Film 4oD, MUBI, Sainsbury's Entertainment, UKTV Play, Google Play, Curzon Home Cinema, Wuaki.tv, Sky Store and any other video on demand service accessed through a set-top box.

Viewing of short-form video is popular with many age groups

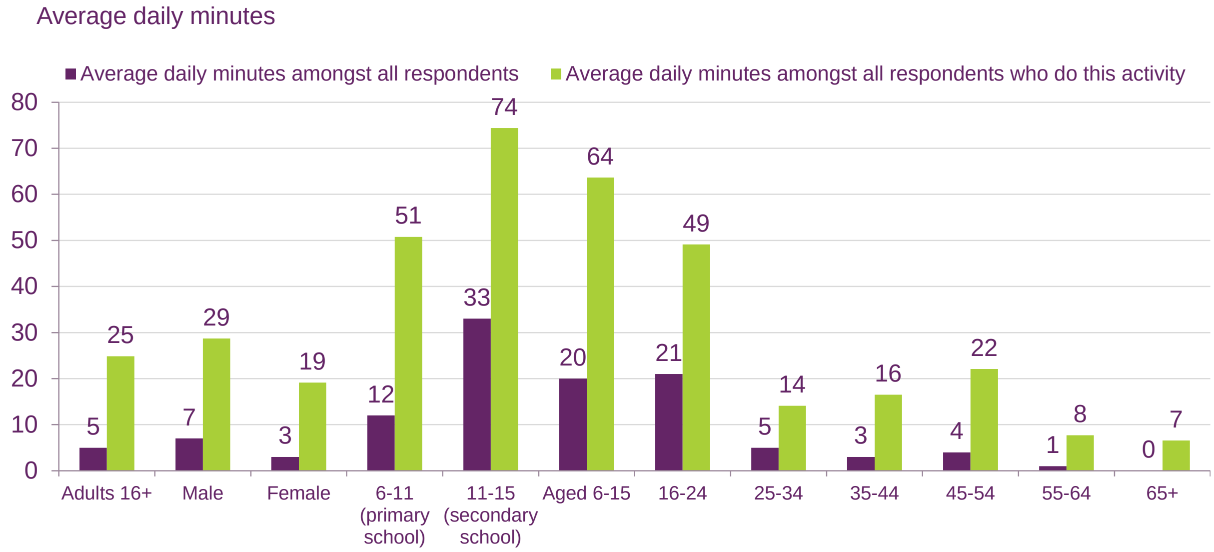
Figure 1.36 demonstrates the reach and claimed frequency of viewing short-form video such as clips and music videos on services such as YouTube. The reach of these services is high; overall, 72% of people claim to watch short-form video, and 32% of respondents claim to watch either daily or at least once a week. Young adults have adopted this activity most widely; over half of 16-24s (55%) claim to view short-form video either daily or at least once a week, and overall, 84% of this age group claim to have viewed short-form video at least once. These figures drop in successive age groups up to the over-55s; in this group, 16% claim to view daily or weekly, and 58% claim ever to view short-form video.

Figure 1.36 Viewing to short-form video clips

Source: YouGov Attitudes Towards Technology Survey 2015
Base: All adults aged 16+ (2,147); Age 16-24 (317), 25-39 (522), 40-54 (561), 55+(747)
Q20_13 - Thinking of what you do online for your personal use, how often do you do the following? - Watch online or download short video clips such as music videos or comedy clips (such as on YouTube)

Our *Digital Day* research in 2014 revealed that, on average, adults aged 16+ were spending five minutes per day watching short-form content. This is the mean average, including those who reported zero use (i.e. did not watch short clips at all during the research). This figure increases to 25 minutes per day if we exclude those who reported zero use. There was a clear difference between male and female participants; men averaged seven minutes per day compared to three minutes by women. Among adults (including those who reported zero use), those in the 16-24 age group reported the highest use by a considerable margin (21 minutes per day), followed by the 25-34 age group (5 minutes per day).

Figure 1.37 Daily minutes of viewing to short online video clips on sites such as YouTube, and news and social media sites



Source: Ofcom Digital Day research, 2014

Short-form is now viewed by many as an important source of information, as well as entertainment

In addition to offering entertainment, short-form videos are increasingly being used as information sources. The increase in the use of 'vlogging' (using video as the medium for an online blog or diary) in recent years has resulted in some 'vloggers' on YouTube now reaching audiences in the millions. In our most recent *Adult Media Literacy Survey* 47% of internet users said they had used YouTube as an information source when looking for information online, rising to 57% of 16 to 24 year olds. Of the 47%, three in ten (30%) classed it as a very important source of information and 38% classed it as a fairly important source.

Figure 1.38 Sources ever used when looking for information online, by age

	All internet users	16-24	25-34	35-44	45-54	55-64	65-74	75+
Base	**1609**	**240**	**277**	**319**	**265**	**228**	**150**	**130**
Search engines	95%	97%	96%	95%	95%	92%	96%	88%
Wikipedia	54%	60%	57%	58%	48%	52%	45%	30%
YouTube	47%	57%	54%	55%	43%	34%	32%	12%
Online recommendations from friends	40%	46%	41%	49%	35%	32%	26%	26%
Websites with user reviews	39%	37%	42%	44%	36%	41%	33%	22%
Reviews by critics/ journalists in articles in the wider media	30%	35%	29%	35%	27%	30%	20%	19%
Twitter	19%	30%	27%	22%	11%	10%	6%	4%

Source: Ofcom Media Literacy Tracker (Fieldwork carried out by Saville Rossiter-Base, Oct-Nov 2014) IN46 Please think about when you want to look for information about something online? Which, if any, of these sources have you ever used to look for information online (prompted responses, multi-coded)
Base: Adults aged 16+ who go online at home or elsewhere (1609)

1.5.4 Consumer research on changes in viewing habits

In order to better understand the decline in traditional TV viewing on the TV set, identified through the BARB analysis (see previous section 1.4 , page 37), Ofcom commissioned omnibus research in April 2015. The research was carried out by GfK NOP among 1,878 UK adults aged 16+.

The research asked consumers to identify which audio-visual activities they were doing more or less of, compared to a year ago[27]. The purpose of this was to provide a view of *changes* in behaviour across different features; e.g. screen used (TV vs. other), location of viewing (in home vs. out and about), traditional or non-traditional viewing (e.g. at time of broadcast vs. catch-up, personally recorded, subscription on-demand or pay-per-view), and content viewed (e.g. public service broadcasting, short clips, box sets/series, films).

As well as the percentages of respondents who said they did each activity more or less in April 2015 compared to the previous year, we report the 'net gain' or 'net loss' for an activity. For example, if 20% of respondents said they did an activity more and 5% said they did it less, the net gain would be +15% doing the activity more.

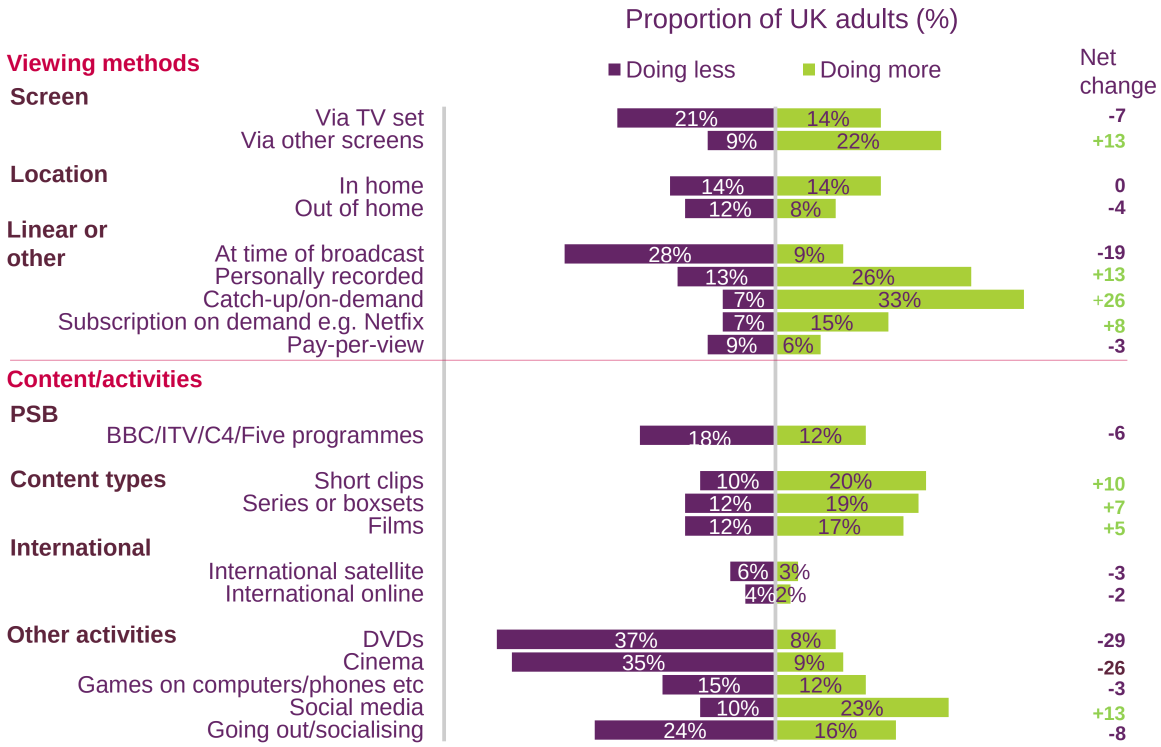
Ofcom's consumer research reported increases in non-traditional viewing; 33% of respondents claimed that they were using free catch-up and VoD services more than they did a year ago

Figure 1.39 shows claimed changes in audio-visual and related activities among the UK population. The activities with the biggest net gains (where a higher proportion of respondents said they did the activity more rather than said they did it less) were: watching any catch-up or on-demand TV (+26%), watching TV that they had personally recorded (+13%), using other screens (+13%), using social media e.g. Facebook (+13%), watching short clips e.g. YouTube, (+10%), watching series or box sets in any way (+10%), watching on-demand services that they had a monthly subscription for (+8%), and watching films in any way (+5%).

The activities with the biggest net losses (i.e. where a higher proportion of respondents said they did the activity less than said they did it more) were: watching DVDs (-29%), going to the cinema to watch films (-26%), traditional TV viewing (watching TV programmes as they are broadcast on TV) (-19%), going out and socialising (-8%), using a TV set to watch any content (-7%) and watching BBC, ITV/ STV/ UTV, Channel 4 or Channel Five programmes (-6%).

[27] The research identified respondents' own views on changes in their viewing and related behaviours. It should be noted that the data are self-reported and a retrospective view. The research does not indicate any magnitude of change.

Figure 1.39 Claimed changes in viewing method and content over the past year

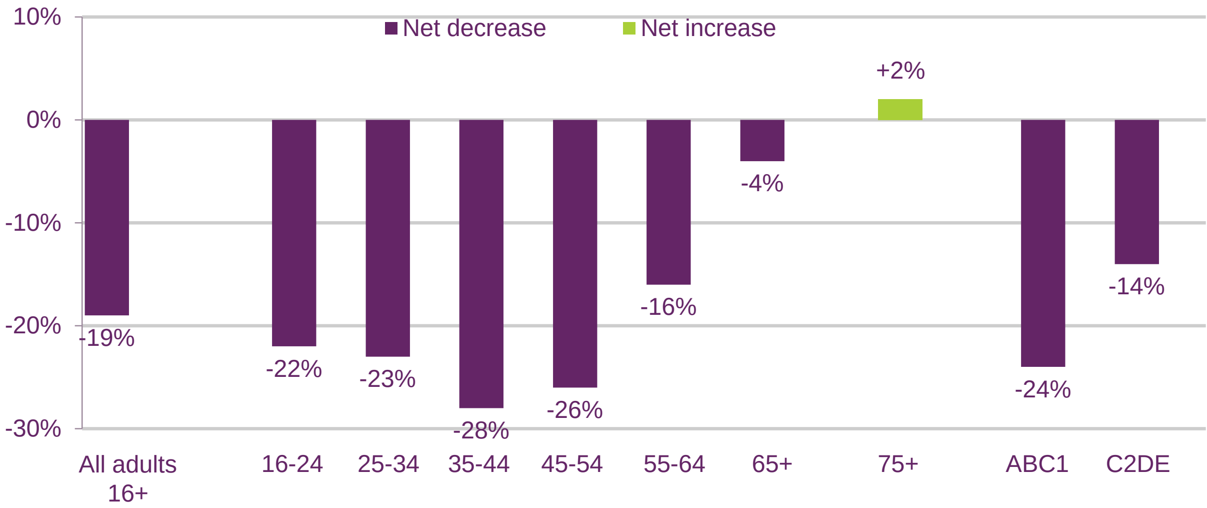


Source: GfK NOP omnibus, April 2015
Base: All adults (1878)
QA: For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago?

Decline in viewing 'at time of broadcast' was highest among 35-44 year olds and ABC1s

The data for viewing traditional versus non-traditional broadcast indicate that those in the 35-44 and 45-54 age groups were the most likely to claim that they were viewing less television at the time of broadcast than at the same time last year. As we saw previously, (Figure 1.27) these are the same age groups who reported the highest amount of recording live broadcast television to watch later. The subgroups who were least likely to claim to have decreased their viewing at the time of broadcast tended to be older (e.g. over 65), and in the C2DE socio-economic groups. Those aged over 75 actually reported that they felt they were viewing more traditional broadcast compared to a year ago – a net result of +2%.

Figure 1.40 Changes in viewing 'at time of broadcast'

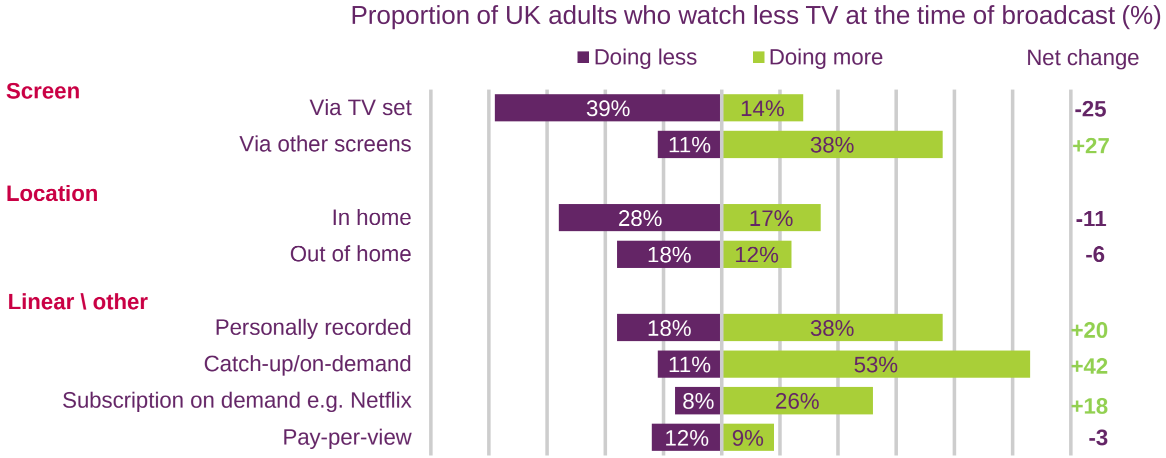


Source: GfK NOP omnibus, April 2015
Base: All adults 16+ (n=1878), 16-24 (236), 25-34 (318), 35-44 (293), 45-54 (282), 55-64 (244), 65+ (505), 75+ (226), ABC1 (739), C2DE (1,139)

Figure 1.41 shows that those who claim to be watching less TV at the time of broadcast now than a year ago were also likely to claim to do the following more: using catch-up (+42%), using other screens (+27%), watching content they had personally recorded (+20%) and using subscription on-demand services (+18%).

When asked directly why they watched less TV at the time of broadcast, the top spontaneous reasons given were: 'No time/ too busy/ doing other things when the programmes are shown live' (17%); 'I work on shifts/ work pattern/ I am at work/ working longer hours' (14%); 'More convenient/ easier/ can watch programmes when I want to watch them/ at a more suitable time' (14%) and 'I record programmes' (13%).

Figure 1.41 Claimed changes in viewing devices, location and means of viewing, among those watching less TV at the time of broadcast compared to a year ago



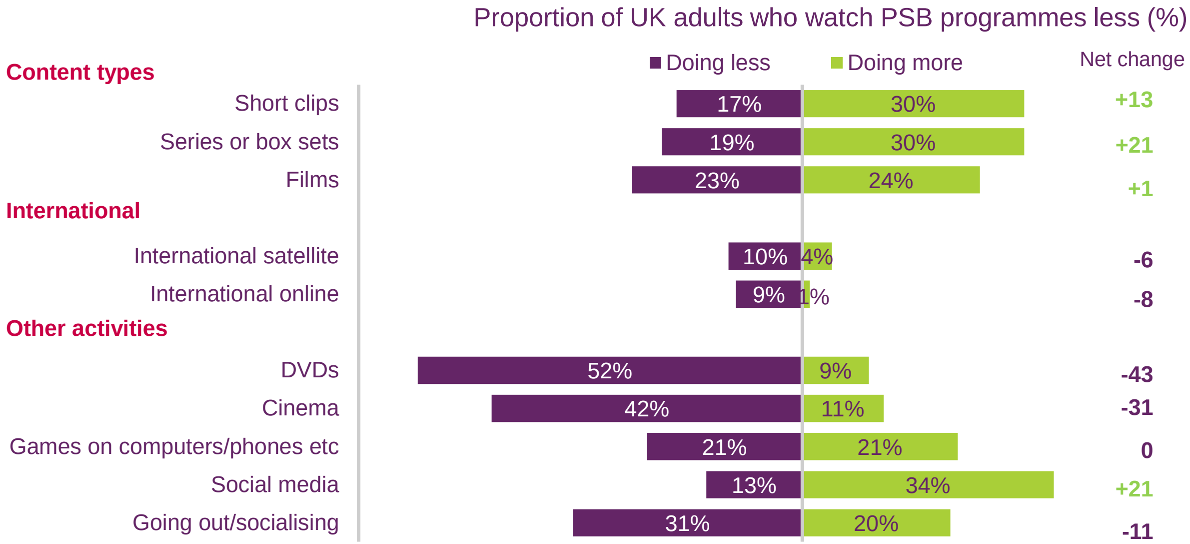
Source: GfK NOP omnibus, April 2015
Base: All adults who claim to watch less TV at the time of broadcast (475)
QA: For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago?

Those watching less PSB claimed to have increased other activities, e.g. short clips, social media and box sets/series

Looking at the claimed changes in viewing of BBC, ITV/ UTV/ STV, Channel 4 and Five programmes shows that the subgroups who were the least likely to have decreased their viewing of programmes on the PSB channels tended to be older (e.g. over 55).

Those who were watching less television on the PSB channels now, in comparison to a year ago, also claimed to be doing the following more: using social media (+21%); watching short clips (+13%) and watching series or box sets via any device (+21%) (Figure 1.42)

Figure 1.42 Claimed changes in viewing over the past year, among those watching PSB programmes less



Source: GfK NOP omnibus, April 2015
Base: All adults who say they are watching less BBC, ITV/ UTV/ STV, Channel 4, Channel Five programmes (334)
QA: For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago?

When asked why they had decreased their viewing of programmes on the PSB channels, the top reasons given spontaneously were: ‘More variety of programmes on other channels’ (22%), ‘Quality of programmes (programmes are boring/ not good/ a lot of repeats etc.)’ (21%), ‘I work on shifts/ work pattern/ I am at work/ working longer hours’ (11%) and ‘No time / too busy/ doing other things (when programmes are shown live)’ (11%).

The consumer research set out in this section has explored some reasons for the decline in viewing to traditional television. There are other factors which have affected the amount of time consumers now spend with traditional television. For example, social networking and online gaming have both increased in popularity in recent years. For a closer look at consumer habits in these areas, please refer to the section 5.3 in the Internet and online content chapter on page 355.

1.6 A smartphone society

1.6.1 Section overview

Smartphones are now prevalent in everyday life and provide consumers with access to a wide range of activities at their convenience. This section explores the increase in the take-up of this device and its ever-increasing role in connecting consumers.

In addition, drawing on new quantitative research[28], we also focus specifically on 4G users. ‘4G’ is the fourth generation of mobile phone technology, following 2G and 3G, and is capable of providing faster connection speeds on mobile devices. Developments in technology, and improvements in availability and affordability have made it easier for people to go online whenever they wish. These enhancements also have the potential to make the online experience more enjoyable for consumers, as internet connection speeds improve, particularly while on the move as the 4G network becomes more widespread. This chapter sets out the extent to which those consumers with access to 4G use their smartphones for more activities, and more frequently, than those who do not have 4G access.

1.6.2 Key findings

- **Two-thirds of adults have a smartphone.** Ninety-three per cent of UK adults said they had a mobile phone in the first quarter of 2015. Of these, 71% said they had a smartphone; 66% of the adult population. This has increased by 27 percentage points since 2012.

- **Young people are ten times as likely as older people to say their mobile phone is the device they would miss the most.** Three in five (59%) 16-24 year olds named their mobile phone as the device they would miss the most if it were taken away, compared to less than a fifth (17%) who cited a TV set. In comparison, just 6% of those aged 55 and over said they would miss their phone the most, while 57% of this age group said they would most miss the TV set.

- **For the first time, the smartphone has overtaken the laptop as the device internet users say is the most important for connecting to the internet**; in 2015 33% chose their smartphone, and 30% chose their laptop, compared with 23% and 40% respectively in 2014. Furthermore, smartphones are now the most widely-owned internet-enabled device (66%), on a par with laptops (65% of households).

- **Half of smartphone users say they are ‘hooked’ on their mobile phone**. About half of smartphone users (48%) score themselves at 7 or above when asked to describe how hooked they are on their mobile phone on a scale of 1-10, rising to three-fifths (61%) of young people aged 16-24.

- **Half of young people aged 18-24 check their phones within five minutes of waking and two-fifths check it less than five minutes before going to sleep.** Three in ten adults (29%) said they checked their phones within five minutes of waking up, increasing to about half of 18-24 year olds (48%). The first thing people are most likely to access is text messages (35% of adults, 38% of 18-24 year olds).

- **Despite its multiple uses, the smartphone remains primarily a communications device**. Almost three-quarters (72%) of the time spent on a smartphone is on

[28] The survey was conducted by YouGov in May 2015 using an online sample of 2,290 UK adults.

communications activities, including text messages, email, using social networks, instant messages and calls (voice or video).

- **While emailing is the most popular form of communications undertaken on a smartphone (81% of users)**, photo and video based forms of communication are used by some smartphone owners. Just over four in ten (42%) smartphone users send photos or videos via text, while18% use their phone for video internet calls.

- **Smartphones are twice as likely to be used for watching short video clips than for full-length programmes**. Although a smartphone can allow users to access any online film or television service, users are twice as likely to use their phones to watch short-form video clips than for streaming television programmes or films (42% vs. 21%).

- **A substantial proportion of smartphone owners also use their phones for transactional activities**, including making purchases online (45%) and online banking (44%).

- **A fifth of smartphone users admit to having used their phones in a cinema or theatre**. About three-fifths of smartphone users think it is unacceptable to use a mobile in cinemas or theatres (60%) or in restaurants with others (59%). Despite this, 45% of smartphone users admit to having used their device in a restaurant and a fifth (22%) admit to having used it when in a cinema or theatre.

- **One in four mobile phone users have donated to charity by text message**. A quarter (25%) of mobile phone users have texted a donation to charity. This is more likely to be done by those aged 25-54 (30%) than by older users (15%).

With reference to 4G users:

- **Nearly a third (30%) of UK adults say they now have access to 4G.** 4G stands for 4th generation, and relates to the 4th generation mobile communications standard, which allows internet access at higher speeds than previous standards. This equates to 45% of UK smartphone users, an increase of 28 percentage points since 2014.

- **4G users show significantly different online behaviour compared to smartphone owners without 4G access.** 4G users are more likely to go online more often, be more attached to their smartphones, do more ‘data-heavy’ activities online and do them more often.

- **4G users are more likely than smartphone owners without 4G access to use mobile internet outside the home.** Fifty-five per cent of smartphone users without 4G say they use WiFi to go online when they are away from home. However, this drops to 47% of 4G users, who are more likely to use their mobile network to go online (87% vs. 69% of those without access).

- **4G users are more likely to use their smartphones to access audio-visual content**[29]. Fifty-seven per cent of 4G users access audio-visual content on their smartphones compared to 40% of those without 4G access. There is a similar

[29] Audio-visual content probed in the survey includes watching streamed or downloading TV programmes or full-length films (e.g. Netflix, BBC iPlayer) and watching streamed or downloading short video clips (e.g. YouTube)

difference when considering audio activities with 47% of 4G users accessing this type of content on their smartphone compared to 28% of those without 4G access.

- **Over half of 4G users use their smartphone to make online purchases or use online banking**, compared to a third of those without 4G access. 4G users are more likely to use their smartphones for doing online banking (55% vs. 33% of those without 4G) and making online purchases (55% vs. 35%).

- **More than a quarter of 4G users say they access audio-visual content more often now that they have access to 4G**. The activity that 4G users are most likely to say they are doing more of, since they have had access to this network, is viewing / downloading audio-visual content, with 28% saying they do this more. A quarter (24%) also say they make internet calls more, and also do more general web browsing since having access to the 4G network.

1.6.3 Smartphone take-up

A smartphone is a mobile phone with advanced features: it has WiFi connectivity, web-browsing capabilities, a high-resolution touchscreen display and the ability to use apps.

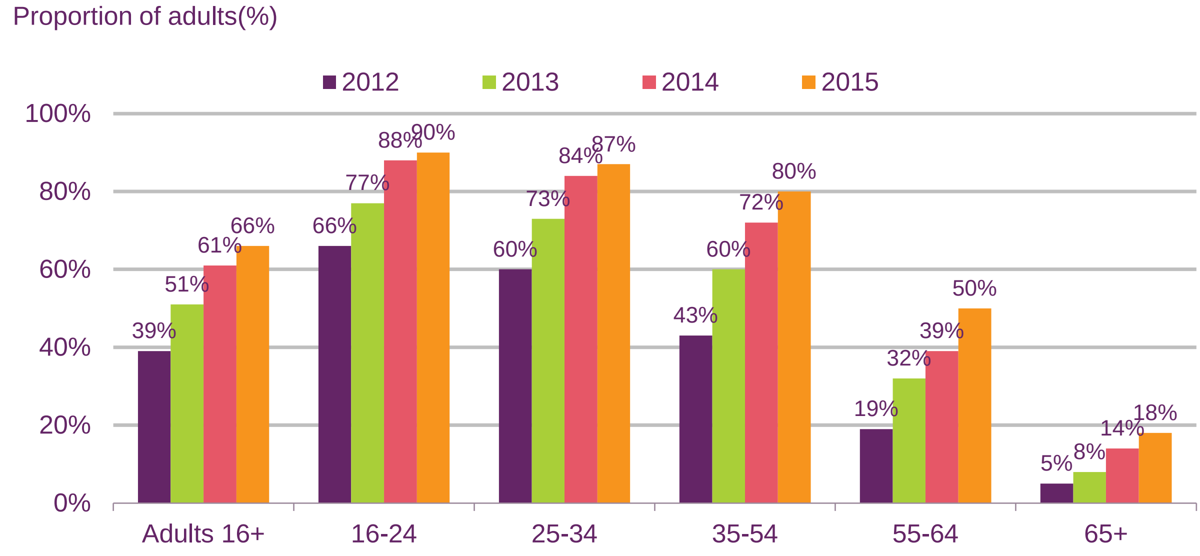
The majority use one of the following mobile operating systems: Android, Symbian, iOS, BlackBerry OS and Windows Mobile.

Two-thirds of adults have a smartphone

According to Ofcom's Technology Tracker, 93% of UK adults claimed to have a mobile phone in the first quarter of 2015. Of these, 71% said they had a smartphone, which equates to 66% of the adult population. This has increased by 27 percentage points in the past three years.

Younger age groups are the most likely to have a smartphone; 90% of 16-24 year olds and 87% of 25-34 year olds claim to have one. Although older people are less likely to have a smartphone, the largest increase in take-up over the past three years has been among those aged 55-64, where it has more than doubled (19% in 2012 to 50% in 2015), and among those older than 65, where it has more than trebled (5% in 2012 to 18% in 2015).

Figure 1.43 Smartphone ownership, by age: 2012-2015



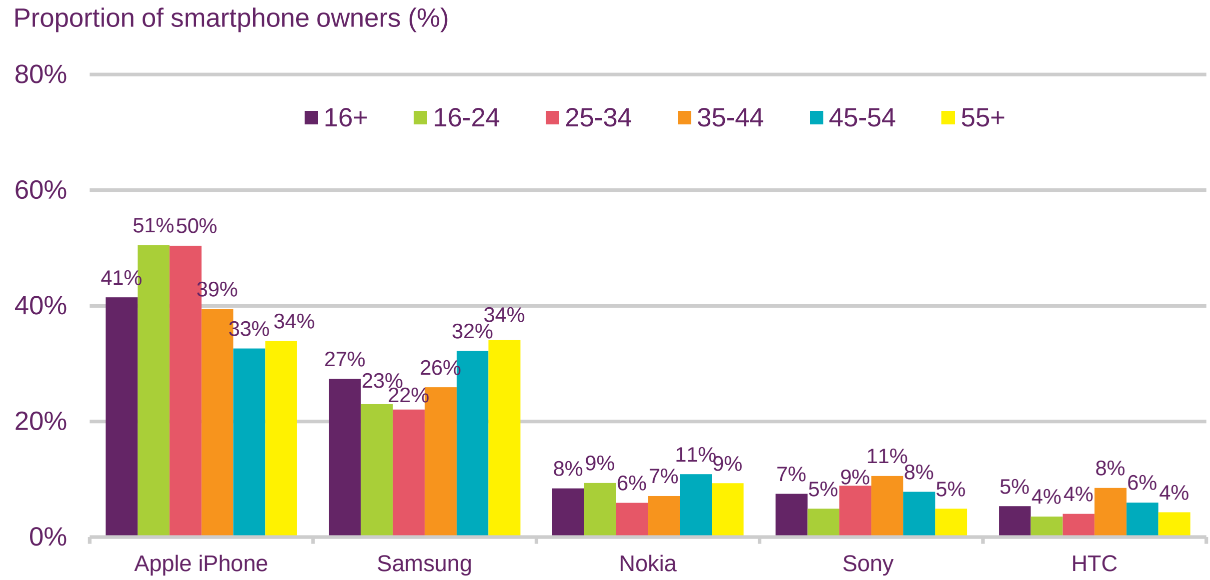
Source: Ofcom Technology Tracker. Data from Q1
Base: All adults aged 16+ (2015 n=3756)
QD4(QD24B): Do you personally use a smartphone?

Half of young smartphone users say they have an iPhone

When asked which smartphone they had or which they used most often, two-fifths (41%) of smartphone owners said they had an Apple iPhone. Despite the relatively high cost of these handsets, this increases to about half of younger smartphone users (50% of 16-24 year old smartphone owners and 51% of 25-34 year old users) and about a third of older owners (33% of those aged 45-54, 34% of those aged 55+).

Samsung handsets, however, have increasing popularity with age: about a quarter (23%) of those aged 16-24 have this type of handset, rising to 34% of those aged 55+.

Figure 1.44 Brand of smartphone owned



Source: Ofcom research, 'Connected Devices', May 2015
Base: All smartphone owners aged 16+ (n=1401)
Q7. You said you have a smartphone that you connect to the internet. Which of the following brand of phone do you use? If you use more than one please tell us the one you use most often.
Handsets with reach above 5% for adults 16+ shown on the chart

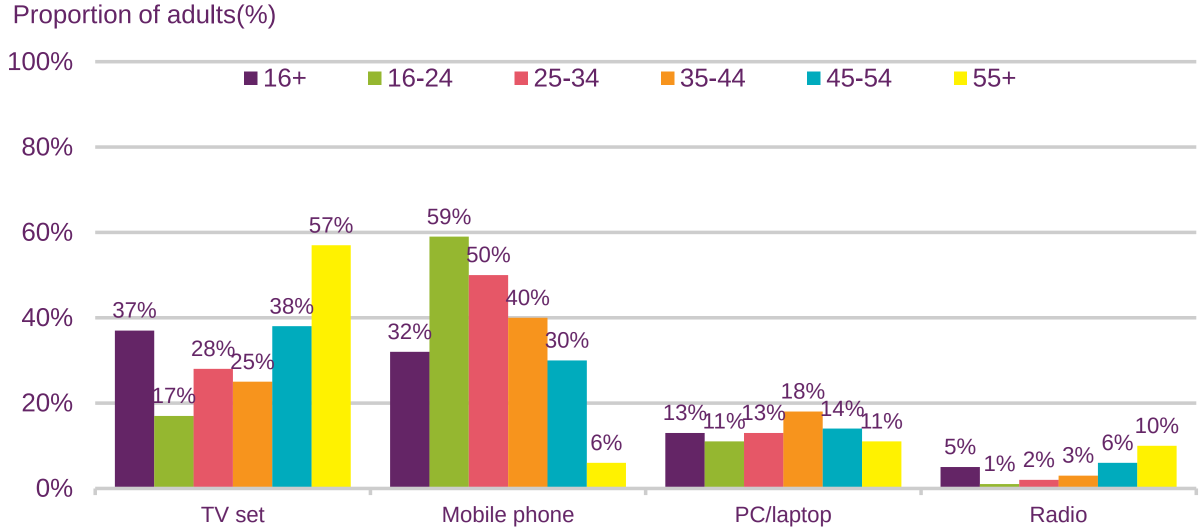
1.6.4 Smartphone: personal importance

Young people are ten times as likely as older people to say their mobile phone is the device they would miss the most

When asked to indicate which media and communications device they would miss the most if it were taken away, almost two-fifths (37%) of adults indicated a TV set and a third mentioned a mobile phone (32%).

However, there are some stark differences by age. Less than a fifth (17%) of 16-24 year olds named a TV set, but over three times as many (59%) said the thing they would miss most was their mobile phone, almost ten times as many as those in the 55+ age group who named this device (6%).

Figure 1.45 Most-missed device, by age



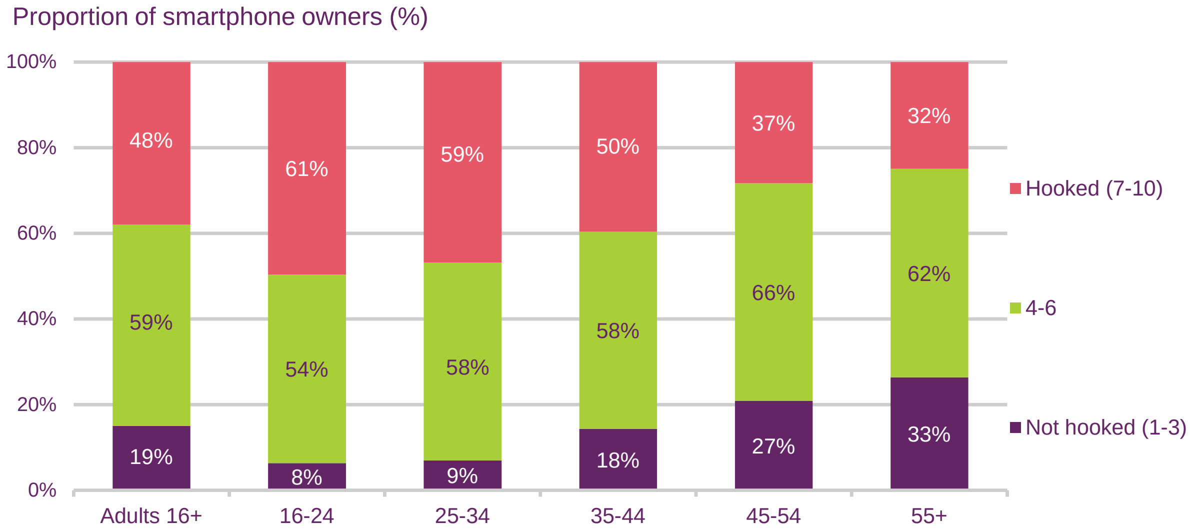
Source: Ofcom Media Literacy Tracker– adults
Base: All adults 16+
A2. (SHOWCARD) Which one of the things you use almost every day would you miss the most if it got taken away? (SINGLE CODE)
All with 5% or more of adults responding shown

Half of smartphone users say they are 'hooked' on their mobile phone

Respondents were asked to say, on a scale of 1 to 10, how hooked they were on their mobile phone, with 10 representing 'completely hooked' and 1 'not at all hooked'. Almost half of smartphone users (48%) claim high levels of attachment (7 or higher), which equates to 29% of all adults. This declines with age: three-fifths (61%) of smartphone users aged 16-24 claim they are 'hooked' on their mobile, compared to a third (32%) of those aged 55+. Although there are some methodological differences compared to previous surveys, this appears to be part of a continuing trend of increased dependency on the device, at 41% in 2012, and 37% in 2011[30].

[30] Studies in 2011 and 2012 asked people how 'addicted' they were to their mobile phones and found 37% and 41% accordingly scoring 7-10 out of 10.

Figure 1.46 Extent to which people say they are 'hooked' on their smartphone, by age



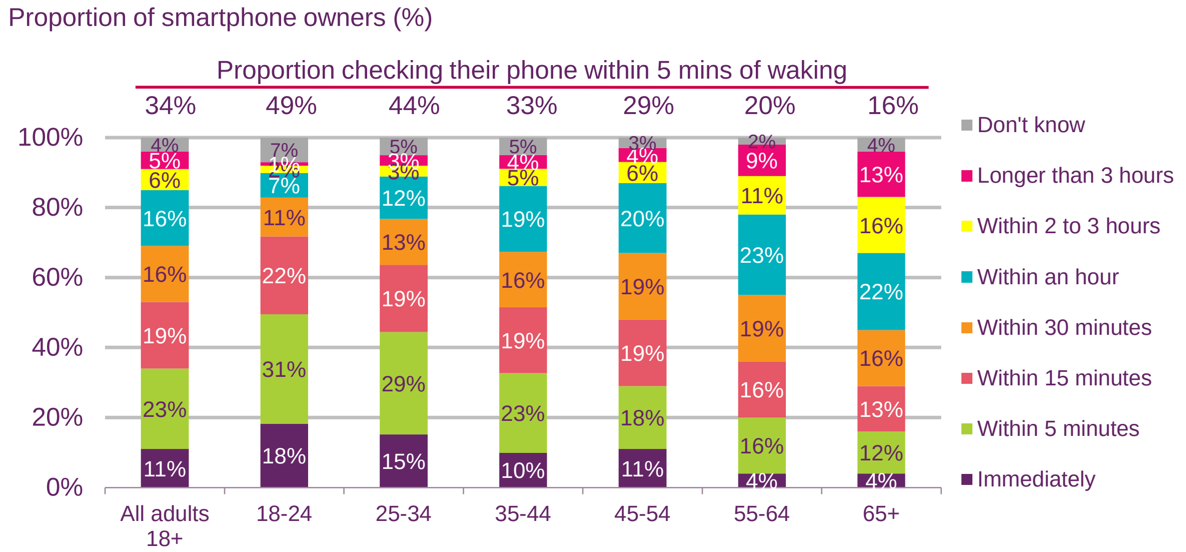
Source: Ofcom research, 'Connected Devices', May 2015
Base: All smartphone users aged 16+ (n=1401)
Q106. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on my mobile phone' and 10 represented 'I'm completely hooked on my mobile phone', which number would you choose for yourself?

Half of young people aged 18-24 check their phones within five minutes of waking and two-fifths check it less than five minutes before going to sleep

A recent survey commissioned by Deloitte asked smartphone users to estimate how soon after waking they checked their phones, excluding using the alarm clock function. A third of adults (34%) said they checked their phones within five minutes, increasing to about half of 18-24 year olds (49%). The first thing adults are most likely to access is text messages followed by emails (30% and 26% respectively). For young people aged 18-24 it is most likely to be text messages (29%) followed by social networks (26%).

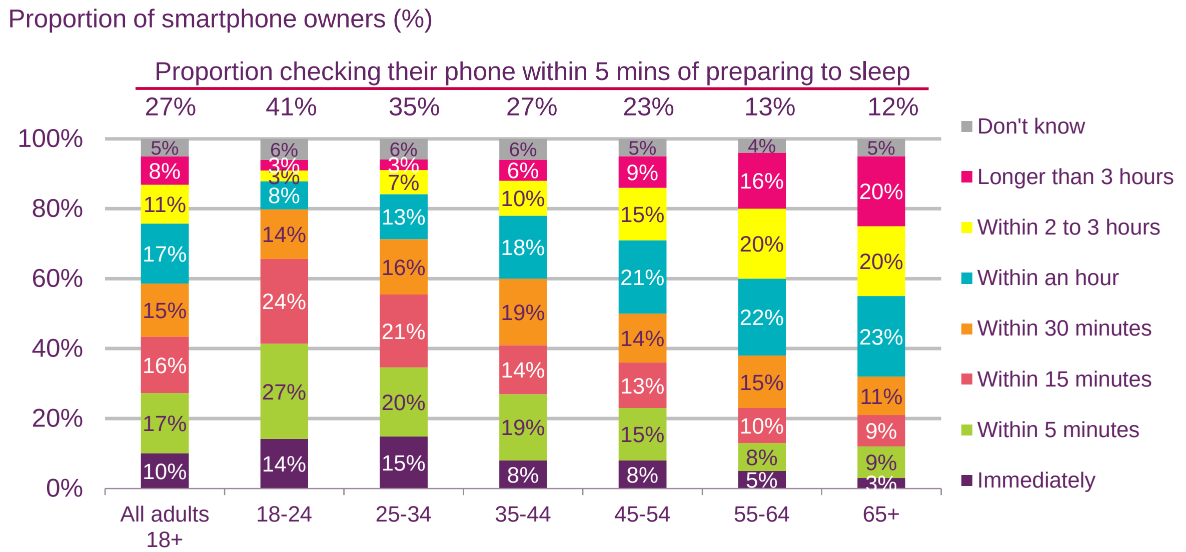
Figure 1.48 shows the estimated interval between the last time people check their phone and going to sleep. On average, one in four (27%) adults say they check their phones for the last time around five minutes before going to sleep, increasing to two-fifths of 18-24 year olds (41%).

Figure 1.47 Interval between waking up and looking at smartphone



Source: Deloitte Global Mobile Consumer Survey, UK edition, May-Jun 2015
Base: Smartphone owners: 18+ (3039), 18-24 (460), 25-34 (677), 35-44 (609), 45-54 (598), 55-64 (390), 65+ (304)
Q42 - Typically how long is the interval between you waking up and looking at your phone for the first time (not including turning off your phone's alarm clock)?

Figure 1.48 Interval between looking at smartphone and preparing to sleep



Source: Deloitte Global Mobile Consumer Survey, UK edition, May-Jun 2015
Base: Smartphone owners: 18+ (3039), 18-24 (460), 25-34 (677), 35-44 (609), 45-54 (598), 55-64 (390), 65+ (304)
Q44 - At the end of the day, typically how long is the interval between you looking at your phone for the last time and preparing to sleep (not including setting the phone's alarm clock)?

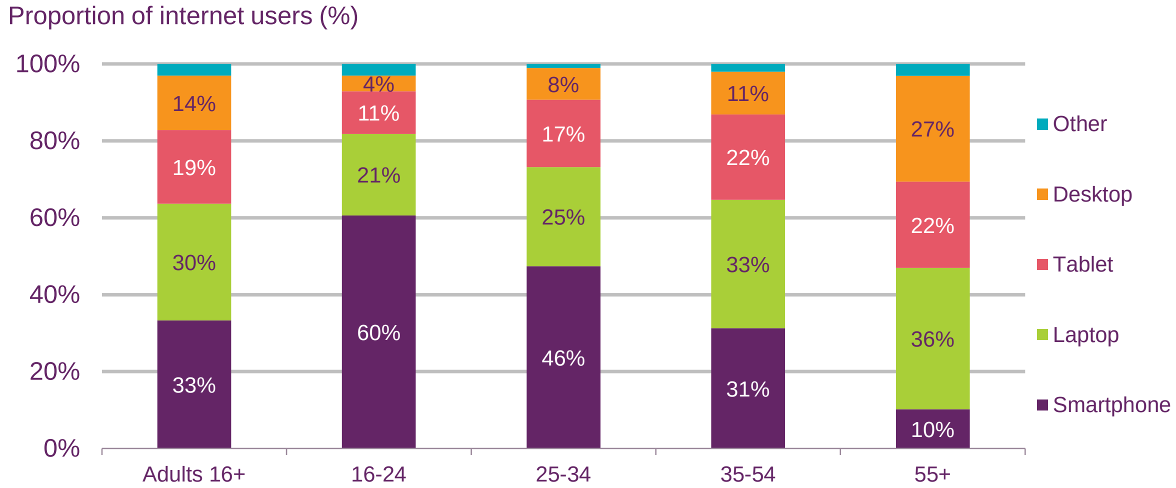
For the first time, the smartphone has overtaken the laptop as the device internet users say is the most important for connecting to the internet

Internet users were asked to indicate the most important device they used for going online. Smartphones are now considered the most important device for accessing the internet (33% of internet users) closely followed by laptops (30%). This has changed since 2014, when laptops were considered the most important (40% of internet users) and smartphones were cited by just 22% of internet users.

Young people are almost three times as likely to say their smartphone is the most important connected device (60%) as to choose a laptop, the next most important device (21%).

Among those with smartphones the figures are even higher: over two-fifths (42%) of adult smartphone users say this is their most important connected device, increasing to 65% of 16-24 year-old smartphone users.

Figure 1.49 Most important device for connecting to the internet, by age



Source: Ofcom Technology Tracker, Q1 2015
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK).
QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? 'Other' includes: 'netbook', 'games console', 'other device', 'none' and 'don't know'.

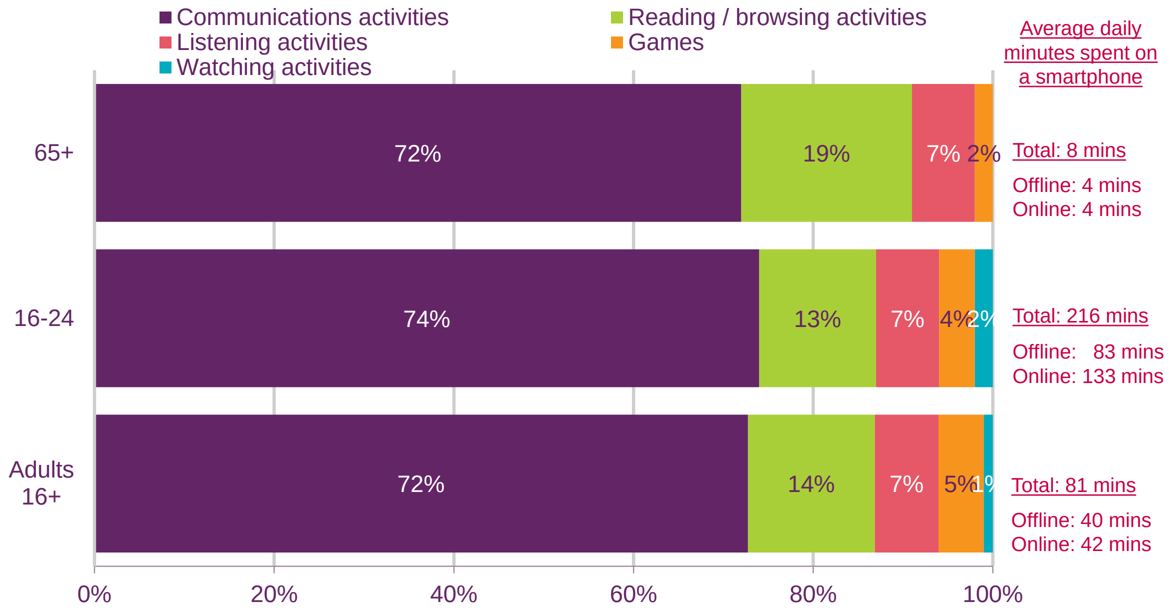
1.6.5 Smartphone activities

Despite its multiple uses, the smartphone is primarily a communications device

Smartphones are devices with a multitude of functionality, from texting, to playing games, to checking weather forecasts. Ofcom's *Digital Day* research in 2014 considered time spent on various activities on a smartphone, and Figure 1.50 shows that, despite the range of functionality, the smartphone is primarily a communications device. Almost three-quarters (72%) of time spent on a smartphone is on communications activities, including text messages, email, using social networks, instant messages and calls (voice or video).

There is little variance by age, although older people are more likely than younger people to use their smartphone for reading or for browsing the internet.

Figure 1.50 Proportion of time spent on activities on a smartphone in an average day, by age

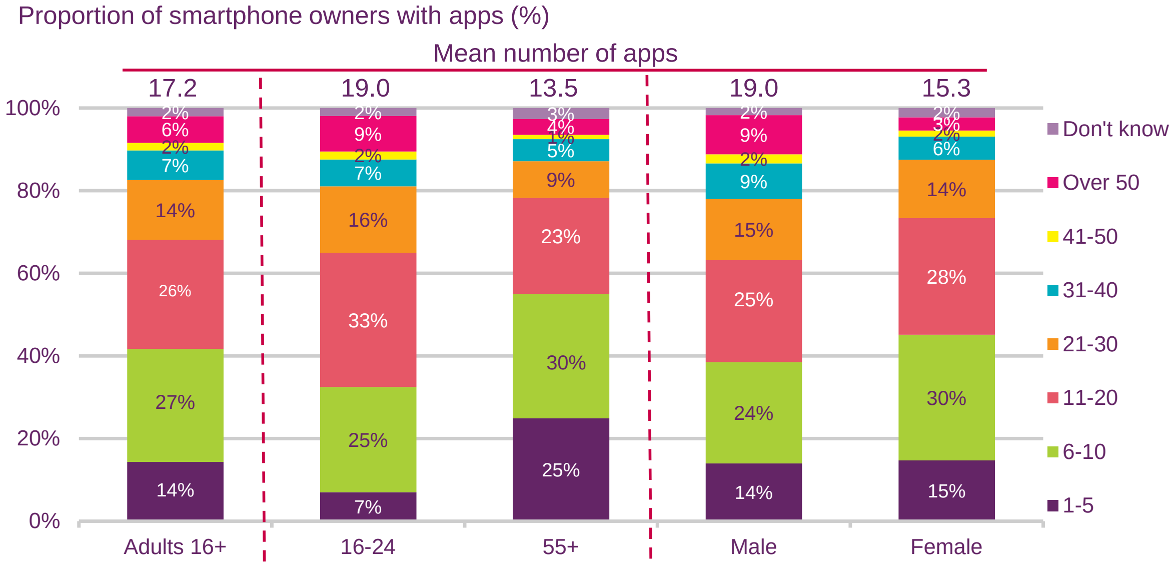


*Source: Digital Day 2014 7-*day diary
Base: All smartphone sessions for adults 16+ = 14659

On average, young people are more likely than older users to have downloaded apps to their smartphone

On average, smartphone users who have downloaded apps to their phone have 17 apps. Younger smartphone users with apps have an average of 19, compared to 13.5 for those aged 55+. Men are more likely than women to have a greater number of apps on their phones (19 vs.15.3 for women).

Figure 1.51 Number of smartphone apps downloaded



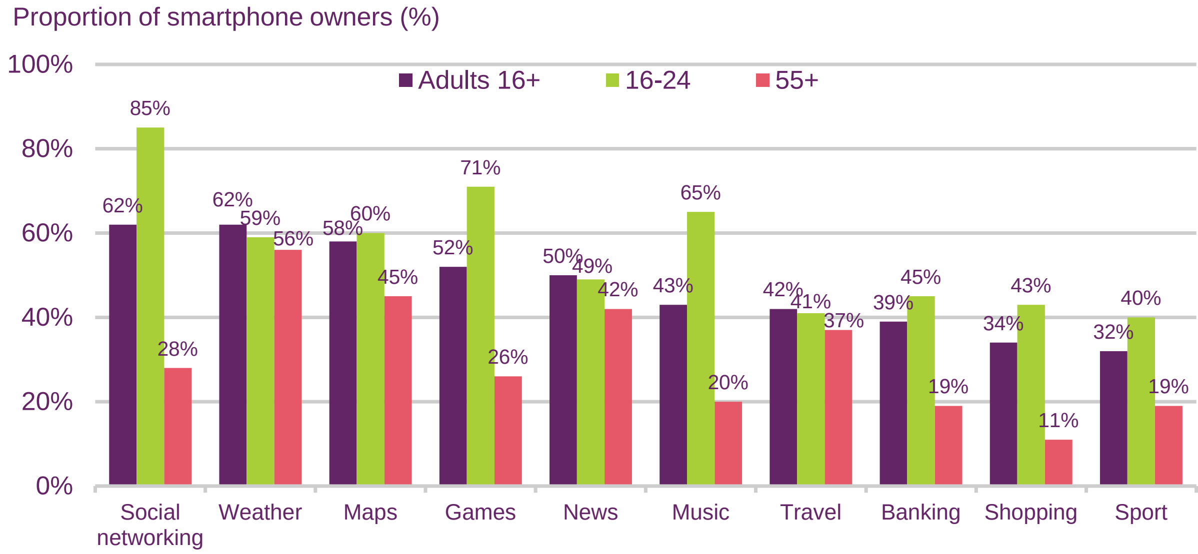
Source: Ofcom research, 'Connected Devices', May 2015
Base: All with apps on their smartphone (n=1378)
Q105a. How many apps have you downloaded on your current phone? An estimate is fine

Social networking and weather apps are the most common type of app to be downloaded to a smartphone

Over three-fifths (62%) of smartphone users have a social networking app and the same number have a weather-related app downloaded to their phone.

Younger smartphone users are more likely than older users to have a social networking app; 85% of 16-24 year olds say they have this type of app, compared to 28% of those aged 55+. Unlike all adults, the second most popular types of app for young people are games-related, with 71% having downloaded a games app (these are fourth most popular overall, at 52%). The third most popular type of app among young people is music apps; almost two-thirds (65%) have this kind of app. Music apps are the sixth most popular type of app overall.

Figure 1.52 Top ten types of apps downloaded, by age



Source: Ofcom Technology Tracker Q1 2015
Base: All with a smartphone (n=1766)
QD17 (QD28G). SHOWCARD Do you use any of the following types of apps or applications on your smartphone? (MULTI CODE)

Smartphones are twice as likely to be used for watching short video clips than for full-length programmes

Using email is the most popular online activity carried out on a smartphone (by 81% of users) followed by general web browsing (77%).

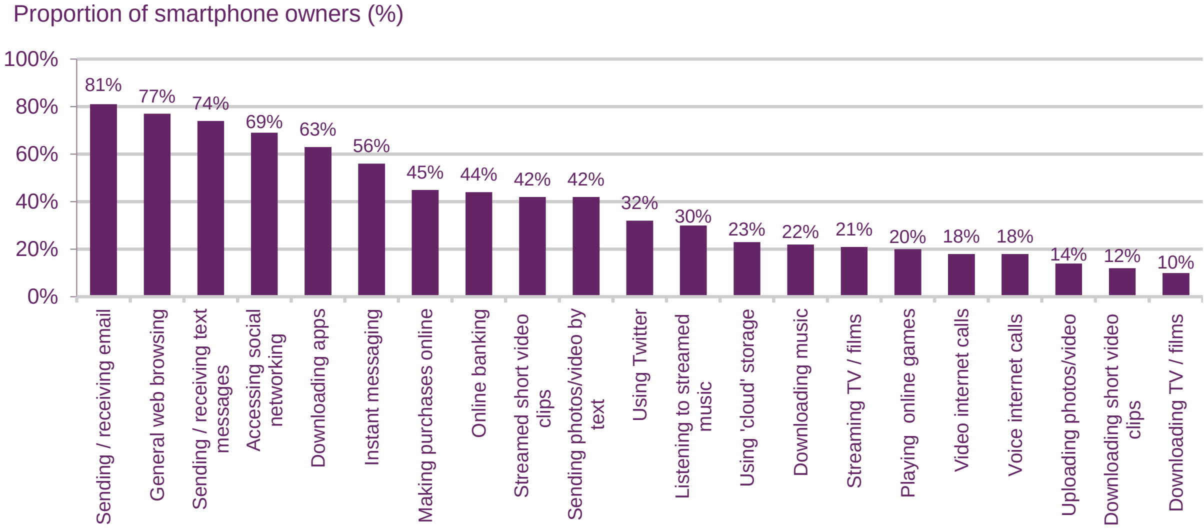
Photo and video based forms of communication are used by some smartphone users. Just over four in ten (42%) smartphone users send photos or videos via text, while a fifth (18%) use their phone for video internet calls.

Although a smartphone can allow users to access any online film or television service, users are twice as likely to use their phones to watch short-form video clips than to watch streamed television programmes or films (42% vs. 21%[31]).

[31] The 21% of smartphone users who use their phones to watch television programmes or films is comparable with the 21% of online adults who say they use their mobile phone to watch catch-up or on-demand services at least once a month, reported in section 1.5.3 of *Developments in viewing beyond traditional television.*

A substantial proportion of smartphone users also use their phones for transactional activities, including making purchases online (45%) and online banking (44%).

Figure 1.53 Claimed use of activities on a smartphone

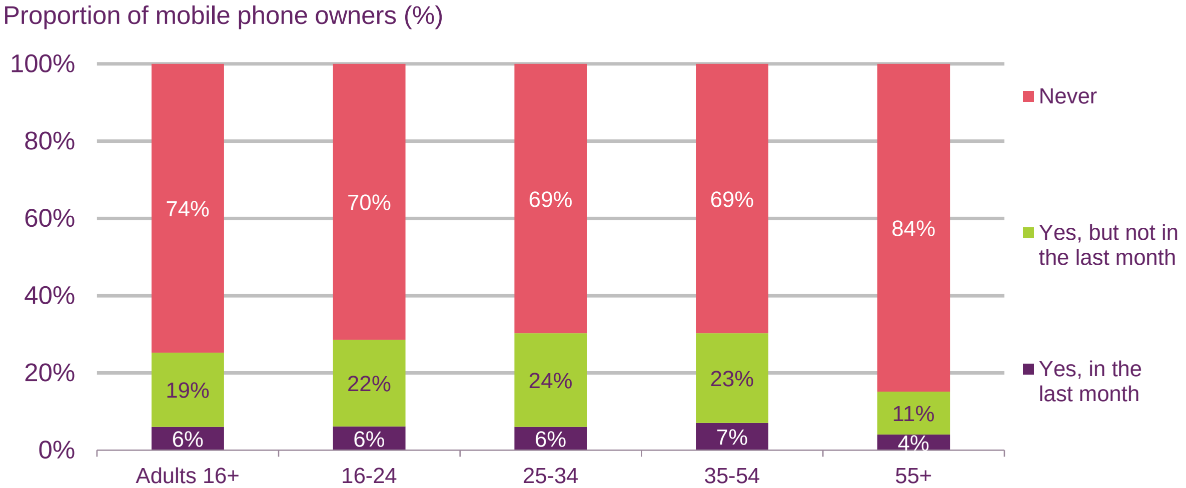


Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners (n=1401)
Q36B. And which of the following, if any, do you do on the below device(s)? Smartphone

One in four mobile phone users have sent a donation to charity by text message

In addition to communication and audio-visual activities, many people are also using their mobile phones for charitable giving. A quarter (25%) of mobile phone users have texted a donation to charity. This is significantly more likely to have been done by 25-54s (30%) than by older users (15%).

Figure 1.54 Making charitable donations by text message, by age



Source: Ofcom Technology Tracker, Q1 2015
Base: All mobile phone owners (n = 2475).
QD11 (QD44). Have you ever sent a donation to charity by a text message from your mobile phone? IF YES - Have you sent a text donation in the last month? (SINGLE CODE)

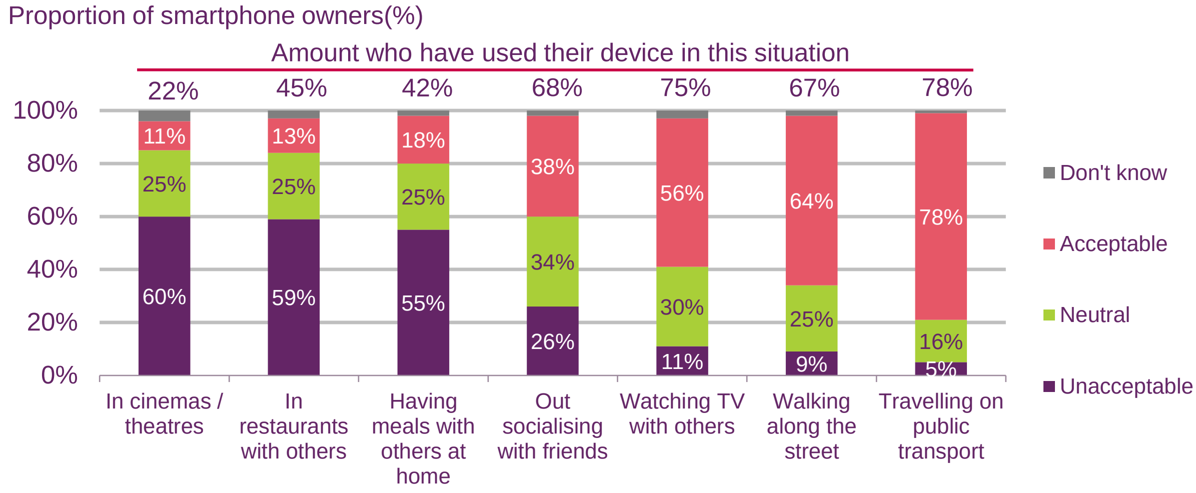
1.6.6 Smartphone etiquette

A fifth of smartphone users admit to having used their phones in a cinema or theatre

Although mobile phones seem to be a permanent fixture in people's daily lives, in some social situations many people feel that using a mobile phone is unacceptable. About three-fifths of smartphone users think it is unacceptable to use a mobile in cinemas or theatres (60%) or in restaurants with others (59%). Despite this, 45% of smartphone users admit to having used their device in a restaurant and a fifth (22%) admit to having used it when in a cinema or theatre.

Using a mobile phone on public transport is seen as the most acceptable social situation, with only 5% believing this to be unacceptable. Almost four-fifths (78%) of smartphone users say they have used their mobile in this situation.

Figure 1.55 Level of acceptability of mobile phone use in social situations



Source: Ofcom research 'Connected Devices', May 2015
Base: All smartphone owners aged 16+ (n=1401)
Q110. Thinking about the use of mobile connected devices in general, such as smartphones or tablet computers. For each of the following occasions, please indicate if you have personally used a mobile connected device at this time and/or have been with others when they have used a device on this occasion
Q111. And for each occasion, could you indicate the extent to which you think using a mobile device at this time is acceptable?

1.6.7 4G: summary of coverage and take-up

This section considers in more detail smartphone users who use 4G. '4G' is the fourth generation of mobile phone technology, following 2G and 3G, and is capable of providing faster connection speeds on mobile devices. It is therefore better suited for services which demand more capacity, like video/music streaming or uploading files.

As set out in the 'Telecoms and Networks' chapter, the mobile market is changing rapidly, with 4G coverage increasing across the UK. All four mobile network providers operate 4G networks; the most widely available 4G service is from EE, which in March 2015 covered 81% of premises outdoors. As at March 2015, Vodafone covered 65% of premises, O2 64% and the recent roll-out from Three covered 53% of premises. The most recent available data showed that in May 2015, 89.5% of UK premises were in a 4G coverage area of at least one operator.

For the majority of this analysis, we define 4G users as those who say they have 4G on their smartphones and who use it to access the internet. The comparative group are those who have a smartphone but who say they do not have access to 4G on this device.

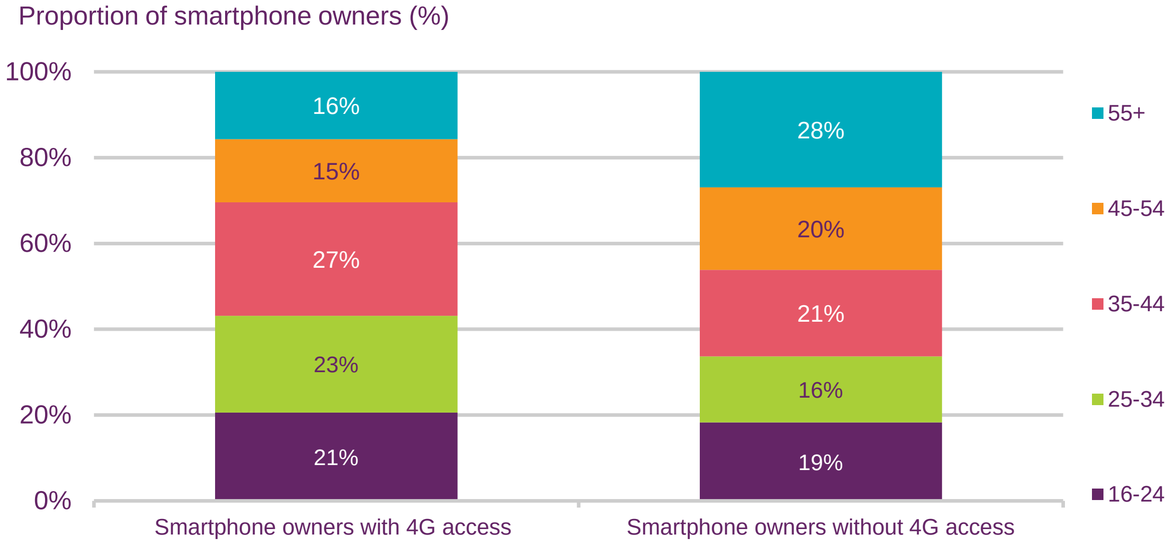
Nearly a third (30%) of UK adults say they now have access to 4G

According to Ofcom's Technology Tracker, 66% of the UK population are smartphone users (see Figure 1.43 in 'A smartphone society'). The Technology Tracker also shows that 30% of UK adults have access to the 4G network, while 45% of smartphone users say they have 4G.

Comparing age profiles, 4G users tend to be younger than non-4G smartphone users, and our latest survey shows that 71% of smartphone users with access to the 4G network are aged between 16 and 44, compared to 56% of smartphone users without 4G access.

However, not all of those with 4G access use that network, so for the purposes of the remainder of this analysis, and in order to understand whether those who use 4G behave differently to those who do not use it, we will focus on those with access to 4G and who use 4G services ('4G users') and on smartphone owners without 4G access.

Figure 1.56 Age profiles of smartphone users with and without 4G access



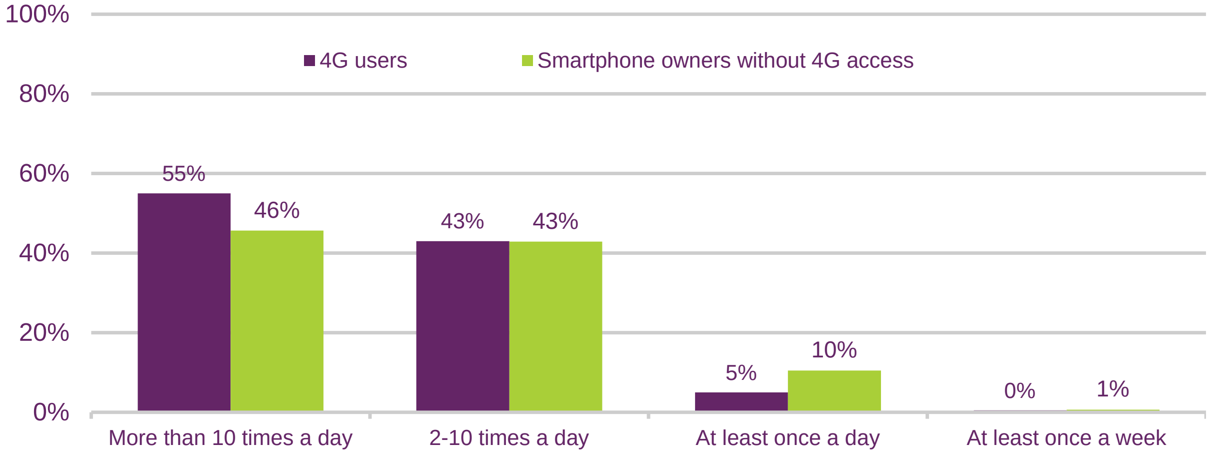
Source: Ofcom research, 'Connected Devices', May 2015
Base: All smartphone owners aged 16+ (n=1401)
Q101: 4G is the fourth generation of mobile phone technology and follows on from 2G and 3G. It should make it much quicker to access the internet on mobile devices. Can you access the 4G network service on any of your devices?

1.6.8 4G: online access

4G users show significantly different online behaviour compared to smartphone owners without 4G access

Those who claim to use 4G access the internet (including both fixed and mobile) significantly more often than the average online user, and also more often than smartphone users who do not have access to 4G: just over half of 4G users (55%) go online more than ten times a day, compared to 46% of those without 4G access.

Figure 1.57 Frequency of online use



Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q10. How often do you personally go online nowadays either at home or elsewhere? By this we mean the amount of times you go online to browse the internet or use online apps.

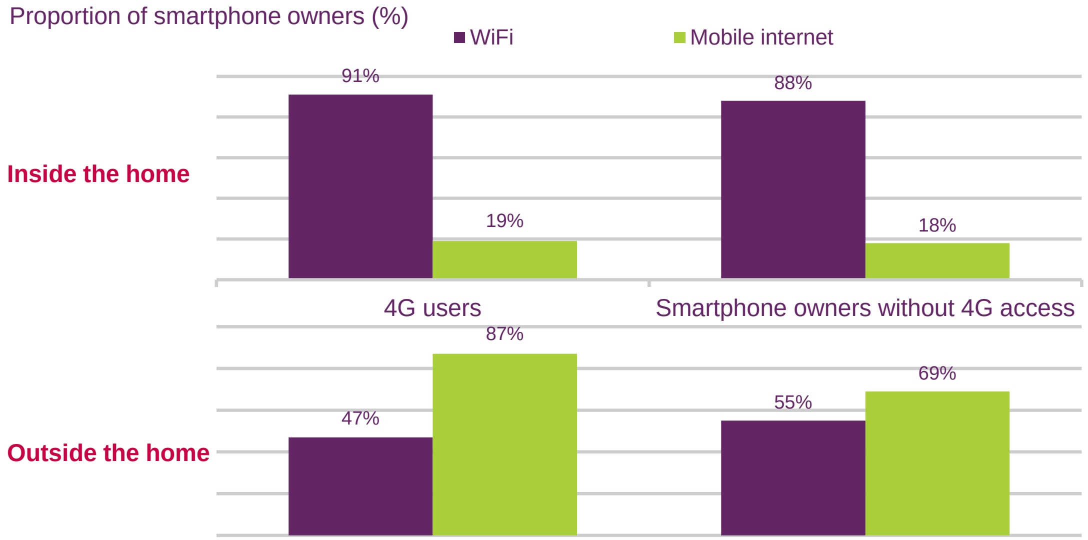
4G users are more likely than smartphone owners without 4G access to use mobile internet outside the home

Smartphone users are accessing the internet on their phones through both WiFi and 3G or 4G networks. Around nine in ten (89%) smartphone users use WiFi to connect to the internet when at home, with around one in five (18%) using 3G or 4G. Out of the home half (50%) of smartphone owners use WiFi to connect to the internet and almost four in five (78%) connect via a 3G or 4G network.

Looking specifically at 4G users we see that although over three-quarters (77%) say they can access their service when they are at home, there is no significant difference between this group and those without 4G access, in terms of how they go online at home using their smartphone: 19% of 4G users access the internet using mobile internet at home, compared to 18% of smartphone owners without 4G access.

However, there are different ways of going online using smartphones when away from the home. Fifty-five per cent of smartphone owners without 4G access use WiFi to go online when not at home, dropping to 47% of 4G users. 4G users are more likely to use their mobile network to access the internet (87% of 4G users vs. 69% of those without 4G access).

Figure 1.58 Type of internet access on a smartphone, by type of mobile network



Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone users who use 4G (n=641); smartphone users without 4G access (n=641)
*Q11TT. And thinking specifically about when you use your **smartphone** to access the internet at home, which of these methods do you use? Please select all that apply.*
Q12_rc_6. And, which of these methods do you use to connect your portable devices to the internet when outside of the home/when you are out and about? - Smartphone

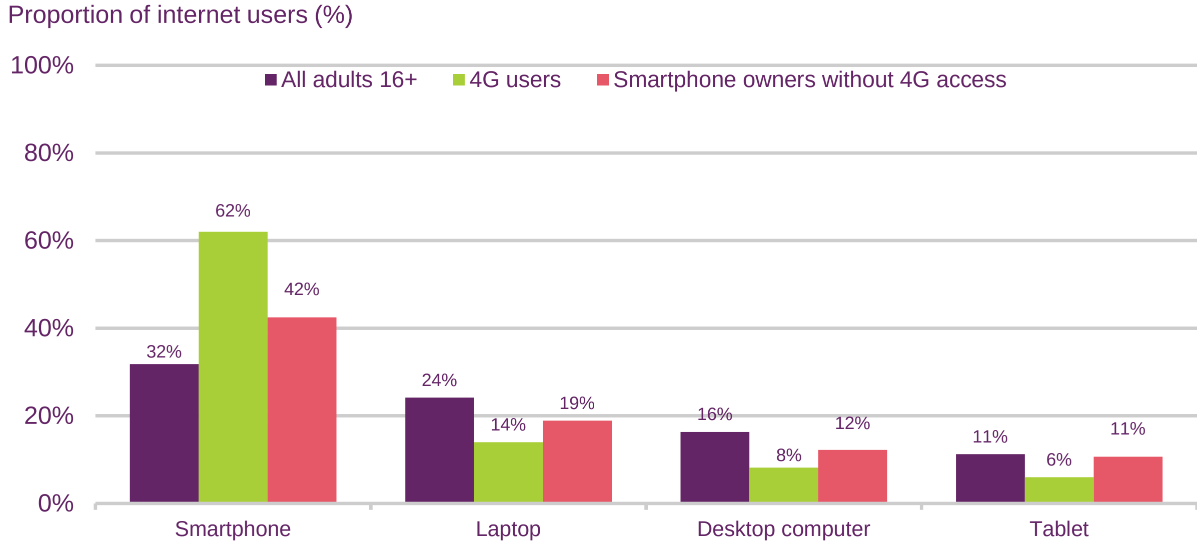
1.6.9 4G: smartphone use

Six in ten (62%) 4G users say the one connected device they couldn't live without is the smartphone

As seen earlier, when asked to nominate the one connected device they couldn't live without, a third of online adults chose the smartphone (32%). This increases to 52% of smartphone users and 62% of 4G users.

Although the smartphone is still the most important device for smartphone owners without 4G access, this trend is much more pronounced among 4G users.

Figure 1.59 Connected device couldn't live without



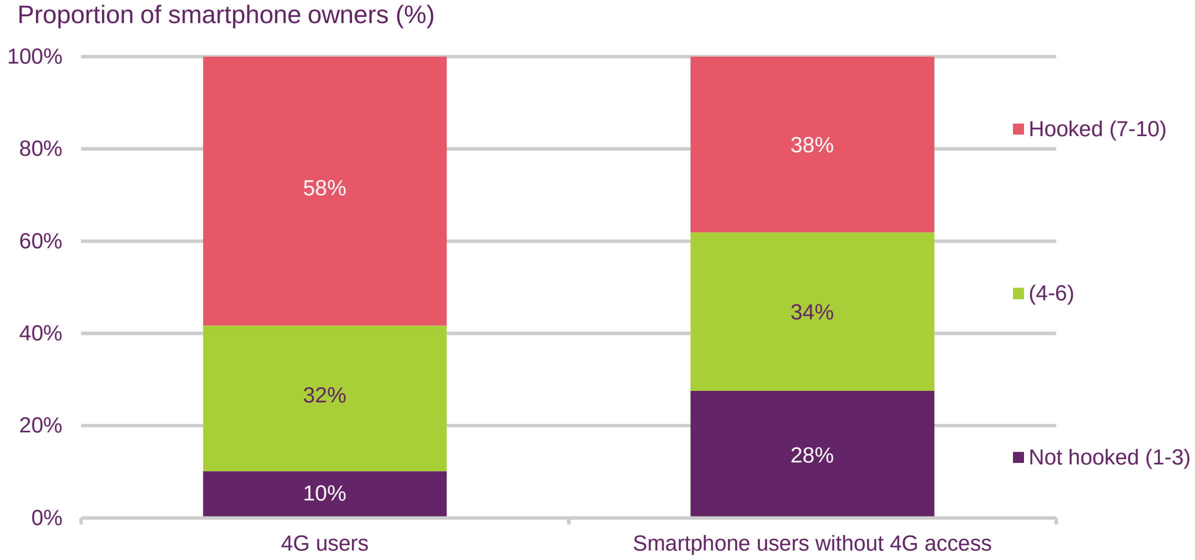
Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290); smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q14a. How often would you say you use 4G to access the internet or use online services on any of your mobile device(s)?
Q5. Which is the one connected device you would say you couldn't live without?
Ranked by all online adults

Almost three in five 4G users say they are 'hooked' on their mobile phone, compared to nearly two in five of those without 4G access

As noted above, almost half of smartphone owners (48%) say they are hooked on their mobile phone. When we look at how this breaks down between 4G users and those without 4G access, we can see that almost three in five (58%) of 4G users describe themselves as 'hooked', compared to just under two in five (38%) of those without 4G access.

Considering each end of the scale, 12% of 4G users say they are 'completely hooked' on their mobile (a rating of 10), compared to 4% of those without 4G access. Conversely, almost one in ten smartphone owners without 4G access (9%) say they are 'not at all hooked' on their mobile phone, compared to 3% of 4G users.

Figure 1.60 Extent to which smartphone owners say they are 'hooked' on their device, 4G users vs. those without 4G access



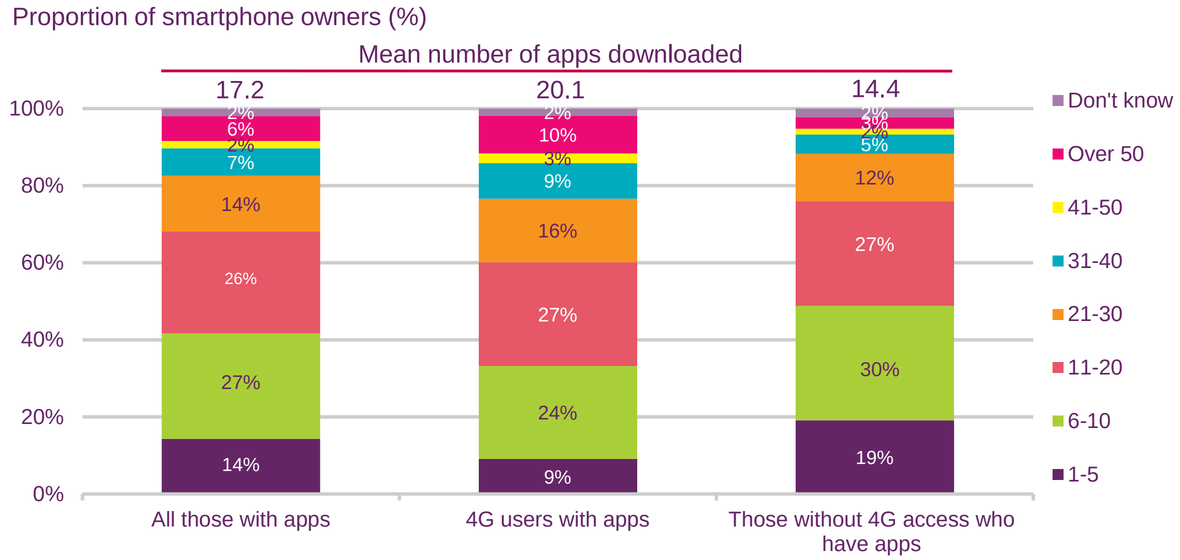
Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q106. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on my mobile phone' and 10 represented 'I'm completely hooked on my mobile phone', which number would you choose for yourself?

4G users are likely to have more apps downloaded to their smartphone than those without 4G access

As seen above, the average smartphone user says they have downloaded 17.2 apps to their phone. This increases to 20.1 for 4G users and decreases to 14.4 for those without 4G access.

Thirty-eight per cent of 4G users have more than 20 apps on their phone. This compares to 22% of those without 4G access and 29% of smartphone owners overall. Three-quarters (75%) of those without 4G access on their smartphone have only free apps on their device, compared to two-thirds (66%) of those who use 4G.

Figure 1.61 Number of apps downloaded to a smartphone



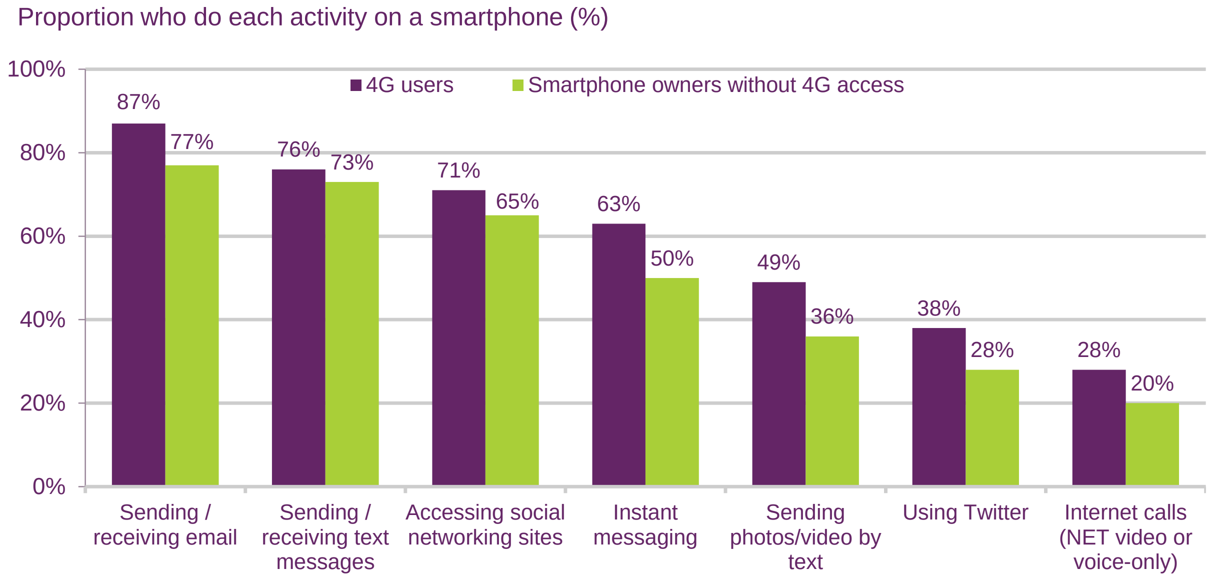
Source: Ofcom research, 'Connected Devices', May 2015
Base: All with apps on their smartphone (n=1378); 4G users with apps (n=636); smartphone owners without 4G access and who have apps on their phone (623)
Q105. Which of these type of app have you downloaded on your smartphone?

1.6.10 4G: online activity

4G users are more likely to use their smartphones for sending photos or videos by text and for instant messaging

Considering the various online communication activities that can be carried out on a smartphone, Figure 1.62 shows that those who use 4G are more likely to use a smartphone for communicating via email compared to those without 4G access (87% vs. 77%). The greatest differences between 4G users and those without 4G access when considering the use of communications activities on a smartphone are for instant messaging (63% vs. 50%) and sending photos or videos by text (49% vs. 36%). Other significant variations are in using Twitter (38% vs. 28%) and making internet calls (28% vs. 20%).

Figure 1.62 Communication activities carried out using a smartphone



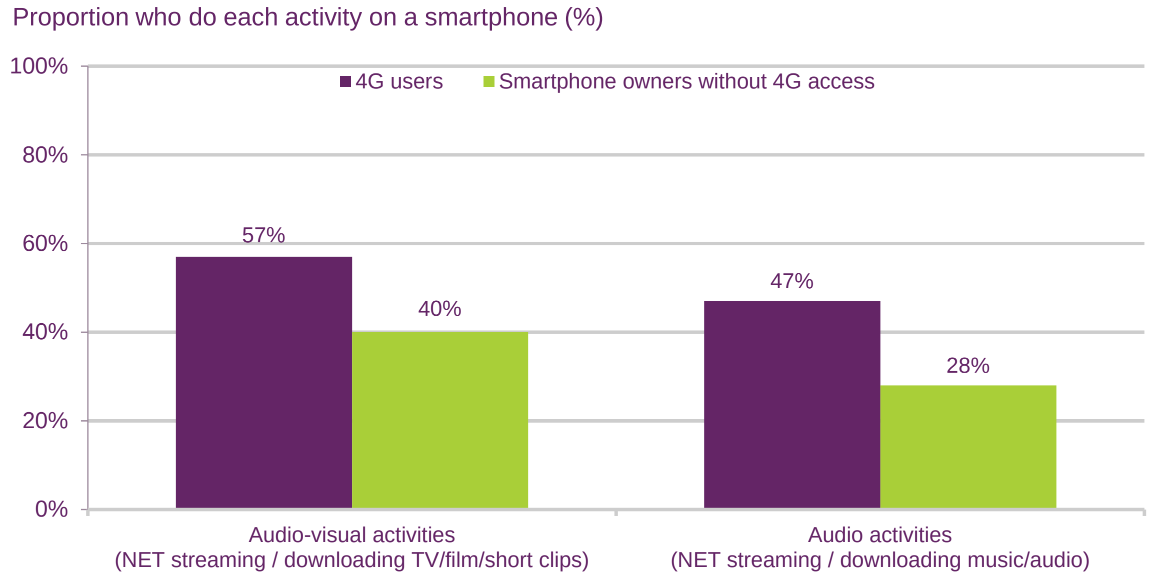
Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q36B. And which of the following, if any, do you do on the below device(s)? - smartphone.

4G users are more likely to use their smartphones to access audio-visual content

For those activities that require a larger amount of data, such as watching or downloading audio-visual content like television programmes or films, or even audio content such as music, those who use 4G are much more likely than those without 4G to do this on their smartphones[32]. Fifty-seven per cent of 4G users access audio-visual content on their smartphones compared to 40% of those without 4G access. There is a similar difference when considering audio activities with 47% of 4G users accessing this type of content on their smartphone compared to 28% of those without 4G access.

[32] Note: Internet access for these online activities is not necessarily through a 4G connection.

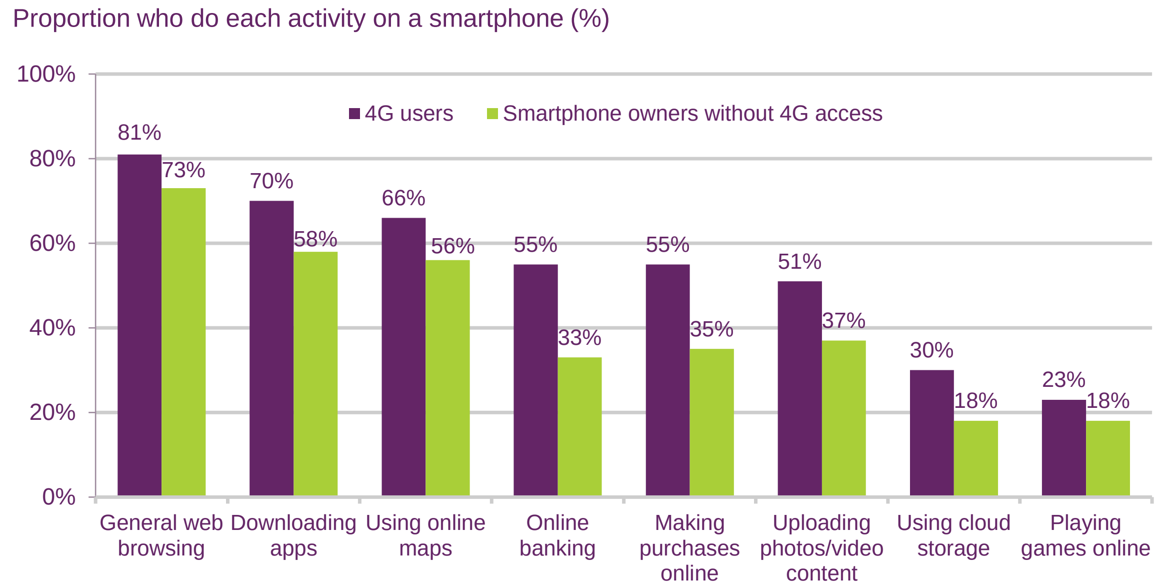
Figure 1.63 Audio / audio-visual activities carried out using a smartphone



Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q36B. And which of the following, if any, do you do on the below device(s)? – smartphone
Over half of 4G users use their smartphone to make online purchases or use online banking, compared to a third of those without 4G access

Figure 1.64 shows the proportion of adults who carry out other types of online activity; again, we see differences in use. For example, 4G users are more likely to use their smartphones for doing online banking (55% vs. 33% of those without 4G) and making online purchases (55% vs. 35%).

Figure 1.64 Other online activities carried out using a smartphone

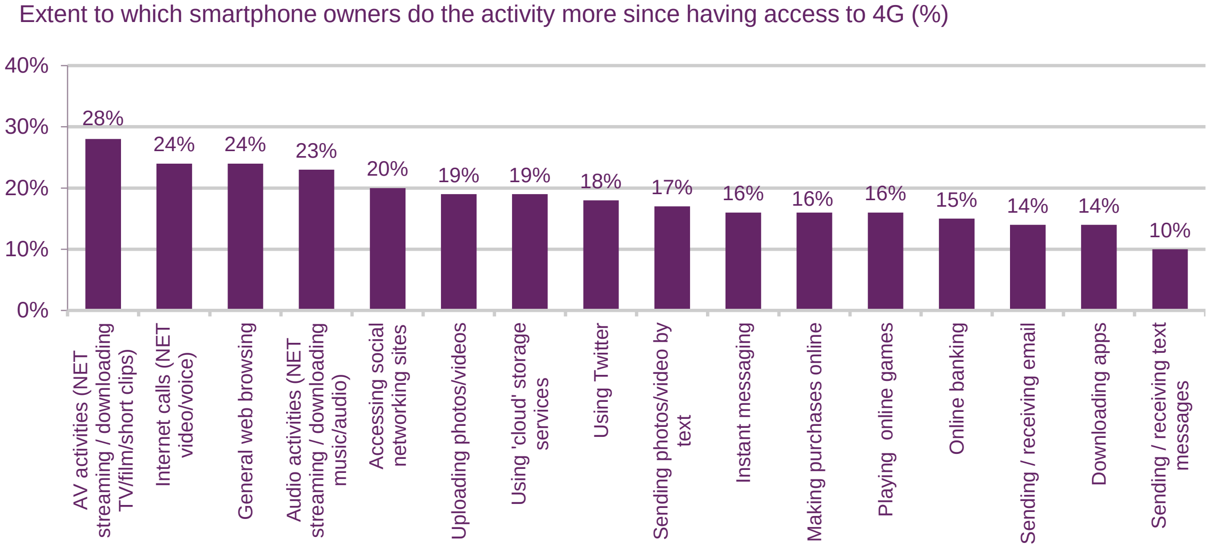


Source: Ofcom research, 'Connected Devices', May 2015
Base: Smartphone owners who use 4G (n=641); smartphone owners without 4G access (n=641)
Q36B. And which of the following, if any, do you do on the below device(s)? - smartphone

More than a quarter of 4G users say they access audio-visual content more often now that they have access to 4G

4G users were asked whether having 4G had influenced their use of each type of online activity. The activity that 4G users are most likely to say they are doing more of since having 4G is streaming/downloading audio-visual content; 28% say they do this more. A quarter (24%) say they make internet calls more and also do more general web browsing since having access to the 4G network. For additional information about activities carried out using 4G, see ‘4G growth accelerates’ in the Telecoms and networks chapter (p. 256).

Figure 1.65 Smartphone activities: 4G use compared with previous 3G use



Source: Ofcom research, ‘Connected Devices’, May 2015
Base: Smartphone owners who use 4G (n=641)
Q36BB. Compared to 3G, do you do more or less of the following activities now that you have access to 4G on your smartphone?

1.7 Communication with friends and family

1.7.1 Introduction

The internet has transformed the ways in which many people communicate. The increase in the use of email, social media and instant messaging, combined with the rising take-up of connected portable devices, means there is now much greater choice in how to communicate with others.

To explore this topic in detail, Ofcom commissioned an online survey among internet users to investigate how the internet, and being online and connected, has influenced the way in which people maintain their existing relationships, as well as build new contacts and friendships. The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults.

1.7.2 Key findings

- **Seven in ten (69%) internet users say that technology has changed the way they communicate** and six in ten (59%) say these new communications methods have made life easier. Levels of agreement for all statements are higher among 16-24 year olds and lower among those aged 55+.

- **A fifth of all online adults agree that they spend too much time online, compared with spending actual time with friends and family**, and young people are almost three times more likely than older adults to agree with this. Half of all online adults (51%) agree that being online interrupts face-to-face conversations, and a fifth (20%) agree that they spend too much time online compared with spending actual time with friends and family. 16-24 year olds are almost three times as likely as those aged 55+ to agree they spend too much time online compared with time they spend with their family (32% vs. 11%).

- **People use a mix of communication methods, both new and old, to make contact with family and friends.** Email (85%) and text messaging (84%) are the two most common methods of contact used to communicate with family and friends on a monthly basis. However, meeting face-to-face (80%) and voice calls (75%) are also used by a majority.

- **Newer online methods of communication are gaining significant levels of reach among online adults.** Social media (62%), instant messaging (57%) and VoIP calls/video (34%) are used by many people as part of their communications repertoire with family and friends. Picture messaging services are used by a third of online adults (34%) and a quarter use Twitter (24%).

- **There are significant generational differences in the use of communications services.** The biggest differences between the younger age groups and the older generation are in the use of instant messaging services (77% weekly use among 16-24s compared to 28% among over-55s) and picture messaging services (39% weekly use among 16-24s compared to 8% among over-55s)

- **Two-fifths of online adults prefer to use post for sending a birthday or congratulations greeting** although a substantial minority prefer to use social media (15%), rising to a quarter (25%) among 16-24 year olds.

1.7.3 Attitudes to online communications

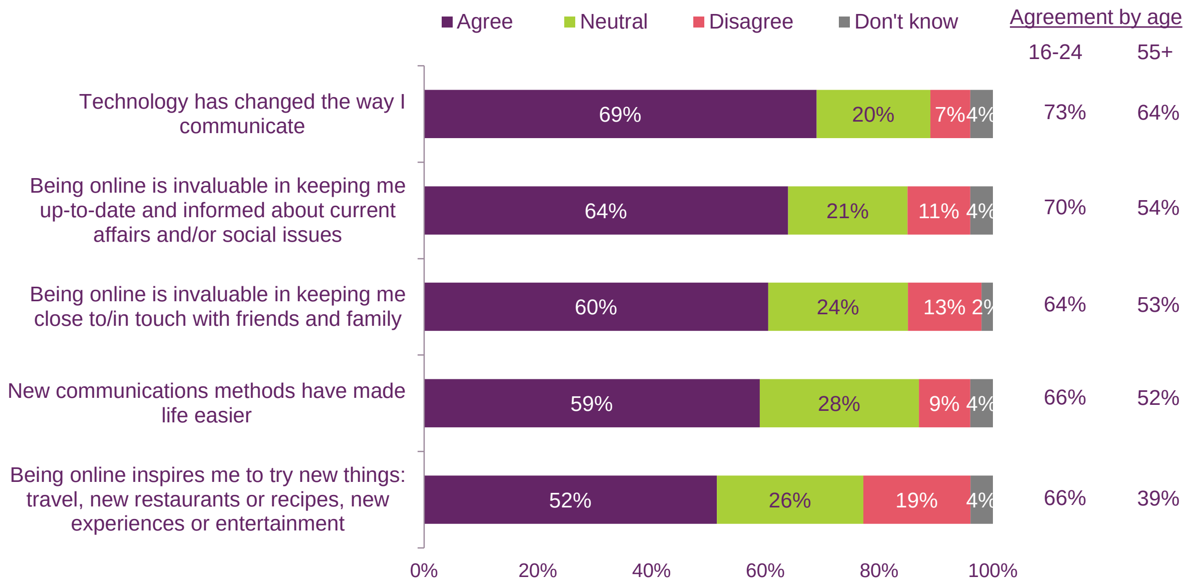
Seven in ten (69%) internet users say that technology has changed the way they communicate, and six in ten (59%) say these new communications methods have made life easier

Technology has changed the way we communicate, and for the most part is making life easier. Seven in ten (69%) internet users agree that '*technology has changed the way I communicate*' and six in ten (59%) agree that '*new communication methods have made my life easier*'.

Digital communications are seen to bring benefits. Almost two-thirds (64%) of online adults agree that being online is '*invaluable for keeping me informed about current issues'*, and six in ten (60%) agree that it helps them keep in touch with close family and friends. Just over half (52%) agree that it '*inspires me to try new things'*.

Levels of agreement for all statements are higher among 16-24 year olds and lower among those aged 55+.

Figure 1.66 Level of agreement with positive statements about online communications



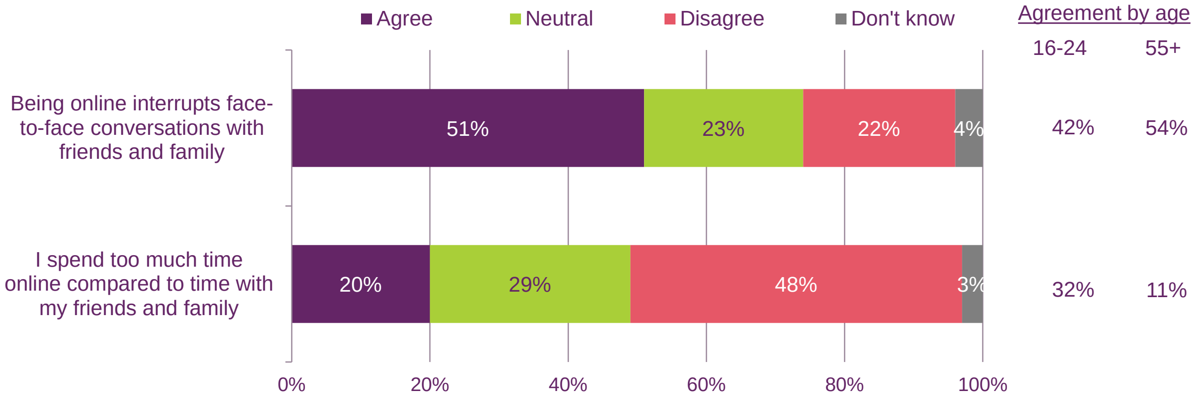
Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290)
Q115. How much do you agree or disagree with the following statements?

A fifth of all online adults agree that they spend too much time online, compared with spending actual time with friends and family

Despite the benefits seen in Figure 1.66, new communication methods also have some downsides. Half of all online adults (51%) agree that being online interrupts face-to-face conversations, and a fifth (20%) agree that they spend too much time online compared to spending actual time with friends and family.

Attitudes differ by age. Those aged 16-24 are the least likely to agree that being online interrupts conversations with family and friends (42% of 16-24s compared to 54% of over-55s), and are almost three times as likely as those aged 55+ to agree they spend too much time online compared to time spent with friends and family (32% vs. 11%).

Figure 1.67 Level of agreement with negative statements about online communications



Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290)
Q115 How much do you agree or disagree with the following statements?

1.7.4 Communication methods: close personal networks

Newer online methods of communication are gaining significant levels of reach among online adults

Figure 1.68 shows that email (85%) and text messaging (84%) are the two most common methods of contact used to communicate with family and friends on a monthly basis. However, meeting face-to-face (80%) and voice calls (75%) are also used by a majority.

Newer online methods of communication such as social media (62%) instant messaging (57%) and VoIP calls/video (34%) are also used by many people as part of their communications repertoire. Picture messaging services are used by a third of online adults (34%) and a quarter use Twitter (24%).

Postal communications such as sending letters or cards are used by one in three (32%) online adults.

A similar pattern, but with overall lower levels for each method, is seen when considering communications on a weekly basis.

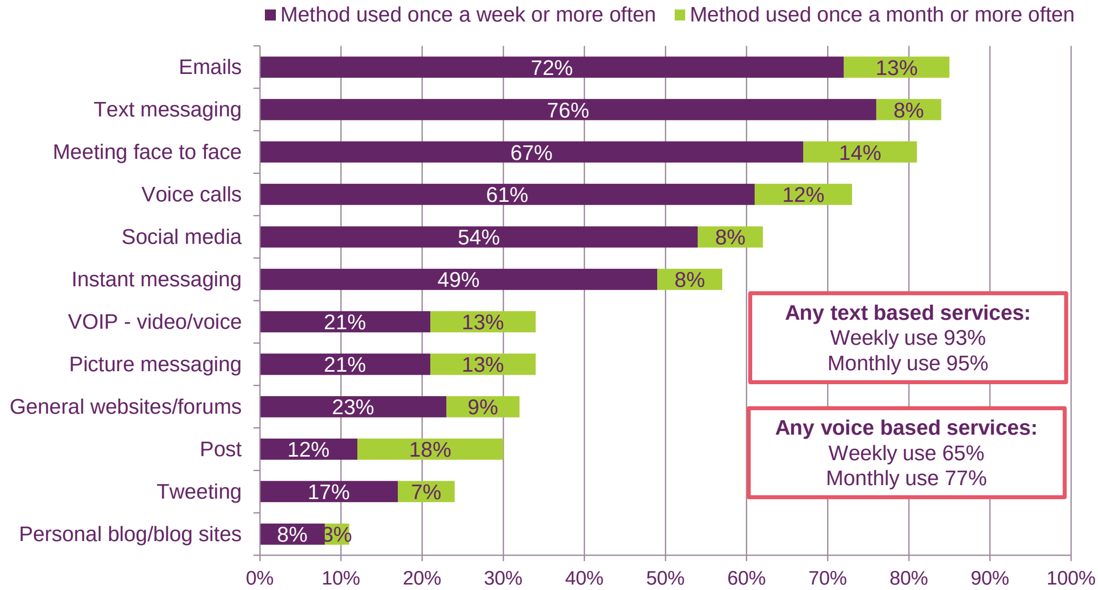
A survey conducted for Ofcom's *Communications Market Report* in 2012[33] had similar findings. While direct comparisons cannot be made, due to questionnaire changes, broad comparisons highlight the significantly increased reach of newer online communications services such as instant messaging and VoIP services into people's communication repertoires. The use of email as a method of communicating with family and friends has also increased. In 2012 it was used by just under half of adults (47%) to communicate with family and friends on a weekly basis, and is now used by seven in ten (72%). Newer services such as picture messaging were not recorded in 2012, but have already established a foothold among a third of online adults.

Overall, the use of *any* text-based service is fairly ubiquitous, with 93% of UK online adults claiming to use these on a weekly basis. This indicates an increase on the 2012 findings

[33] http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr12/CMR_UK_2012.pdf

(80%). Voice-based services are used weekly by three-quarters (65%) of UK online adults; this is a decrease compared to the 2012 findings (88%).

Figure 1.68 Methods of communicating with friends and family, all adults 16+



Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290)
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?
Any text-based services: email, text messages, social media, instant messaging, general websites, tweeting, blogs, post
Any voice-based services: voice calls, VoIP video/voice

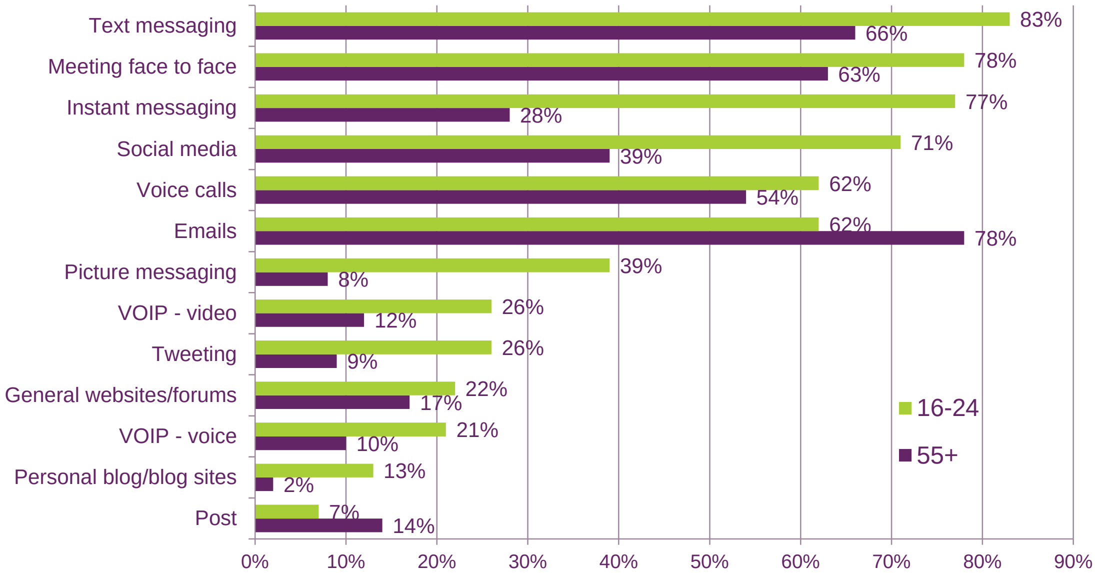
There are significant generational differences in the use of communications services

Figure 1.69 shows that there are differences in how older and younger generations are communicating on a weekly basis. Generally, older adults aged 55+ do not use the breadth of communications methods available to the same extent as younger adults, with the exception of email (78%) and post (14%). The top four methods of weekly communication for the 55+ age group are email (78%), text messaging (66%), meeting face-to-face (63%) and voice calls (54%).

The 16-24s are much more likely to use text messaging (83%), instant messaging (77%) and social media (71%) to communicate with family and friends. Meeting face to face (78%) is also popular. Social media replaces voice calls as the fourth most common (weekly) method for the younger age groups, compared to those aged 55+.

The biggest differences between the younger age groups and the older generation are in their use of picture messaging and instant messaging services.

Figure 1.69 Methods of communicating with friends and family (once a week or more often), by older and younger age groups



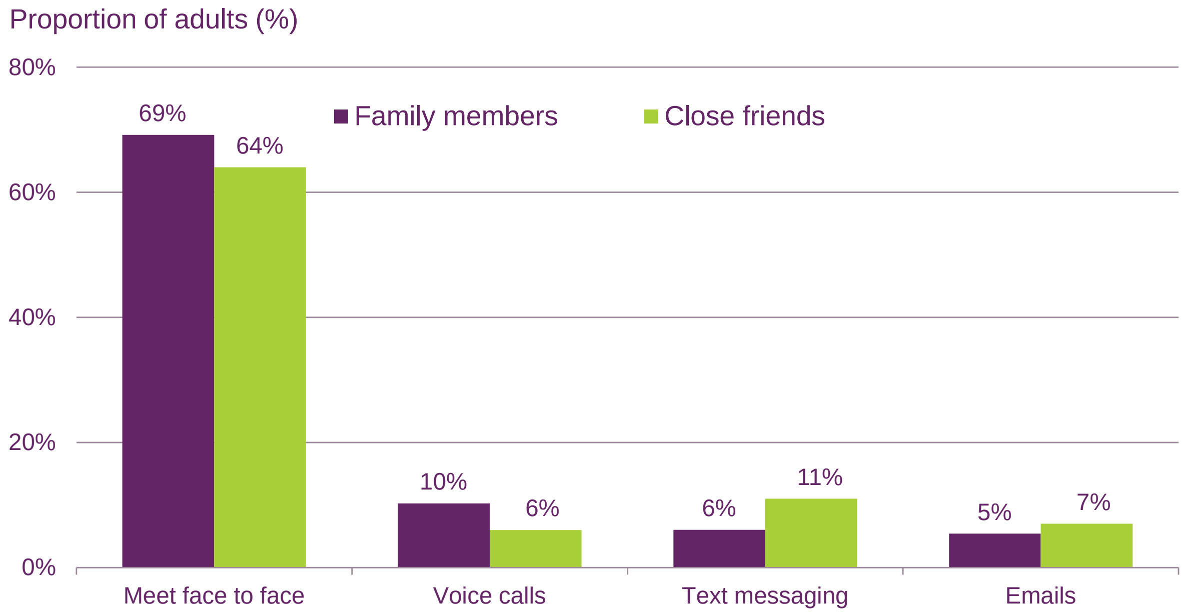
Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16-24 (n=321), 55+ (n=1019)
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

Despite the proliferation of online communications methods, meeting face-to-face is still the preferred way to communicate with friends and family, regardless of age

Figure 1.70 indicates that the preferred way of communicating with family and friends, individually or in groups, is very clearly face-to-face; almost seven in ten adults prefer this method for family (69%) and slightly less for friends (64%). There are no differences across age groups in preferences for face-to-face communication.

Social media is notable for its absence as a preferred method of communication with family members and close friends. It is preferred by only 1% of online adults for communicating with family members, and by 3% for communicating with close friends.

Figure 1.70 Preferred methods of communicating with friends and family



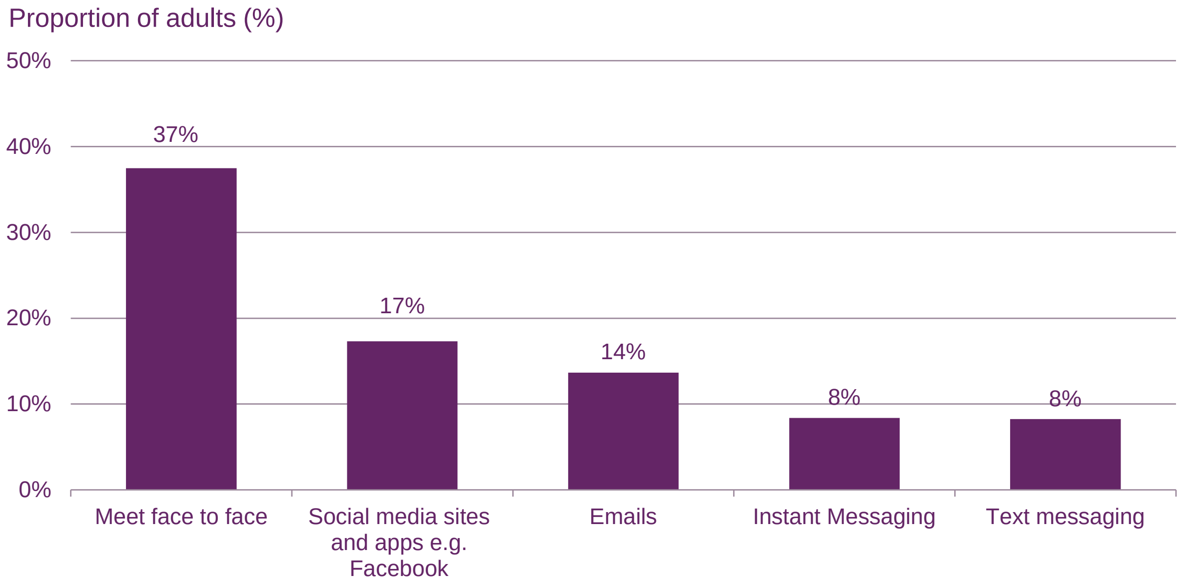
Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290) Q52. And which of these methods do you prefer to communicate with?
Chart includes data for all responses 5% or over.

Social media is becoming more prominent as a method of communicating with groups of friends and family

Figure 1.71 shows the preferred method for communicating with groups of family and friends. While meeting face-to-face remains a preference for many (37%), social media is preferred by about one in five (17%) of online adults. This is followed by email (14%), instant messaging (8%) and text messaging (8%).

There are some notable age differences. Email is significantly more popular for those aged 55+ (22%) and instant messaging is preferred by a quarter (23%) of 16-24 year olds.

Figure 1.71 Preferred methods of communicating with groups of friends and family



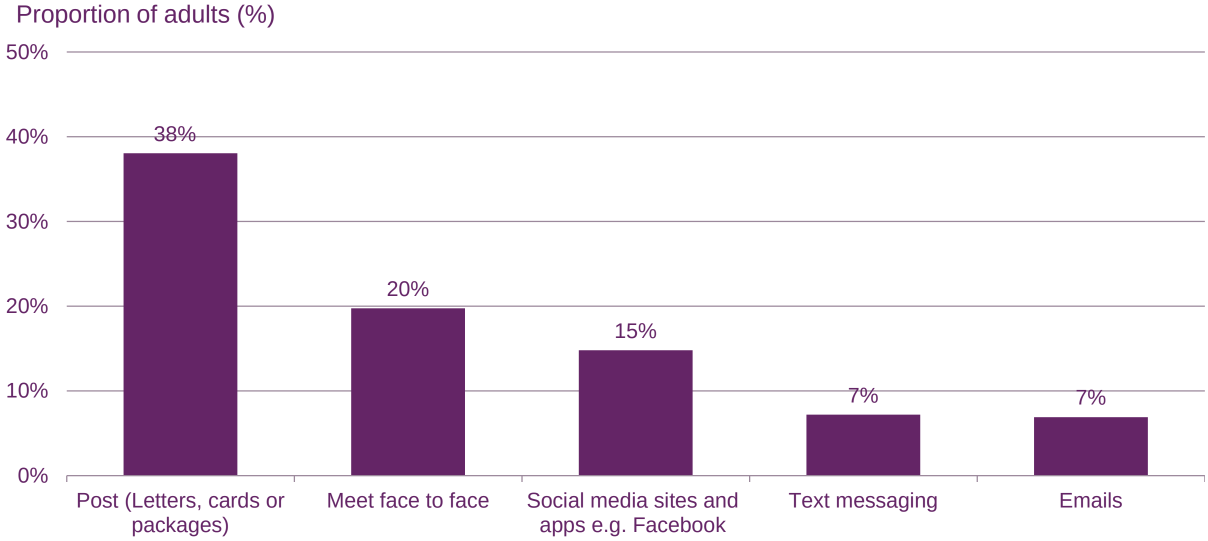
Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290)
Q52. And which of these methods do you prefer to communicate with …… ?
Chart includes data for all responses 5% or over.

Two-fifths of online adults prefer to use post for sending a birthday or congratulations greeting

Figure 1.72 shows that two-fifths of online adults (38%) prefer to use the postal service to send letters, cards or packets when they wish to send a greeting. A significant proportion prefer to meet face-to-face (20%) and one in seven (15%) use social media.

Again, there are some notable age differences. Post is a significantly higher preference for those aged 55+ (51%) and using social media has the highest level of preference for 16-24 year olds (25%). Those aged 16-24 also have a high preference for texting to send greetings (11% vs. 7% for all adults).

Figure 1.72 Preferred method of sending birthday greetings and congratulations



Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290)
Q52. And which of these methods do you prefer to communicate for …… ?
Chart includes data for all responses 5% or over.

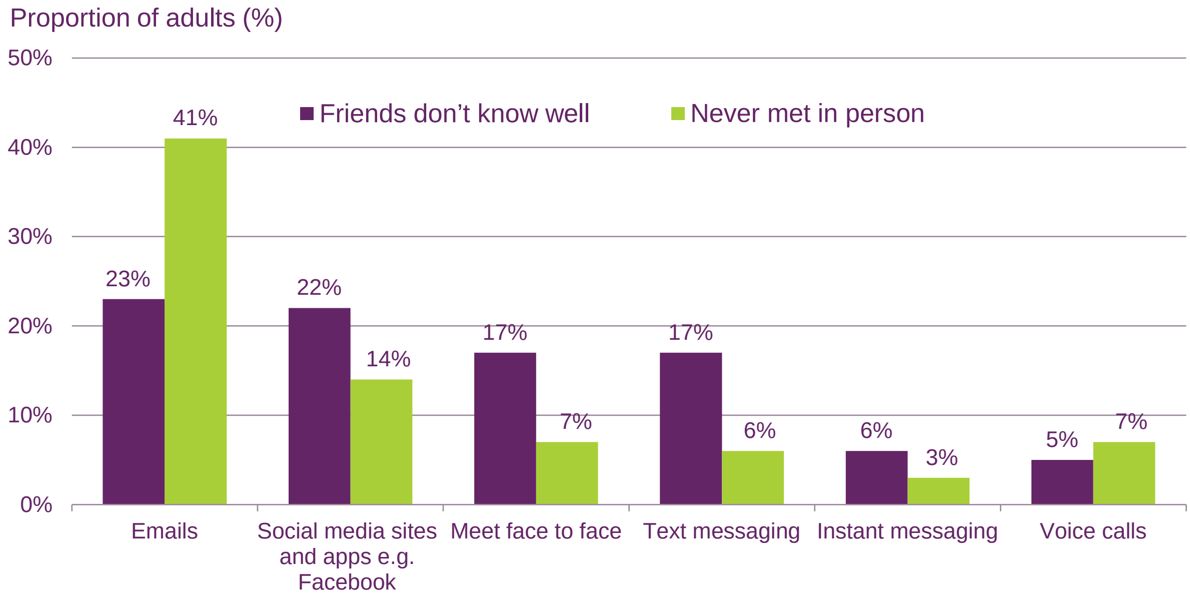
1.7.5 Communication methods: more distant contacts

Many people prefer methods such as email and text messaging for communicating with people they don't know well or have never been met in person

Figure 1.73 shows that meeting face-to-face loses its dominance as a preferred method when communicating with people not known well. Preferences become spread across email (23%), social networking (22%), meeting face-to-face (17%) and texting (17%).

There is, however, a clear preference for emailing people never met in person; 41% preferred this method.

Figure 1.73 Preferred method of communicating with more distant acquaintances



Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290)
Q52. And which of these methods do you prefer to communicate with …… ?

1.8 Social media developments

1.8.1 Introduction

Ofcom conducted a survey in May 2015 among internet users to investigate their use of social media and their attitudes towards it. The data are sourced from the same questionnaire that was used in the previous section on personal communication networks. The survey was conducted by YouGov among an online sample of 2,290 UK adults, with an additional sample of 500 teenagers aged 12-15. This section also contains data from Ofcom's *Adults' Media Use and Attitudes Report 2015* as context to some of the findings[34].

1.8.2 Key findings:

- **More than seven in ten adult internet users (72%) have a social media profile, and social media use is correlated to age**. A majority of internet users aged 16-24 (93%), 25-34 (90%), 35-44 (80%) and 45-54 (68%) have a social media profile, such as a Facebook or Twitter account. This compares to half of 55-64s (49%) and three in ten aged 65+ (28%).

- **In addition to having the highest reach, Facebook has the highest frequency of use.** A fifth of Facebook users (19%) claim to go on the site more than ten times a day. Over 10% of Snapchat, Twitter and WhatsApp users also claim to use these sites more than ten times a day.

- **Young adults aged 16-24 have a more extensive breadth of use of social media** and are adopting newer sites and services such as Twitter (40%), WhatsApp (37%), YouTube (32%), Instagram (35%), Snapchat (26%), Tumblr (8%) and Vine (4%). However, the majority (97%) of all adults aged 16+ with a social media profile say they use Facebook, and close to half (48%) of those with a profile say they have one only on Facebook.

- **There is significant take-up of social networking sites and apps among 12-15 year olds**. A significant proportion of teens aged 12-15 have 'ever used' YouTube (81%), Facebook (72%), Instagram (55%), Snapchat (53%) and WhatsApp (48%). When asked which they used the most, Facebook (30%), YouTube (27%), Instagram (17%) and Snapchat (13%) were the most commonly cited.

- **Snapchat was cited by 19% of website users aged 12-15 as 'their most recent addition'**. Instagram (12%) and Facebook (11%) were cited as recent additions for just over one in ten (12%).

- **A quarter of adults with a Twitter account use it to air complaints or frustrations.** Aside from 're-tweeting', 'news' is the topic that people are most likely to 'tweet' about, with a third (33%) doing this. This is followed by complaints or frustrations, with almost a quarter (24%) tweeting in this way. Tweeting information on celebrities is most likely to be by 12-15 year old account holders, with 30% doing so, almost four times as many as among all adult account holders (8%).

- **Twitter users are equally as likely to follow celebrities as they are to follow friends.** When asked about the type of Twitter feed that they followed, the most

[34] http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/

popular type was ‘news’ at 50% of account holders. A similar proportion of people followed ‘friends’ (45%) as followed ‘celebrities’ (44%).

- **Almost a fifth of adults say they are ‘hooked’ on social media.** Overall, one in five online adults (22%) indicated a rating of between 7 and 10 on a 10-point scale (where 1 equated to ‘I’m not at all hooked on social media’ up to 10 ‘I’m completely hooked on social media’). Dependency on social media is correlated to age, with two in five (41%) 16-24 year olds giving a 7-10 ‘hooked on’ rating, falling to 6% among over-55s.

- **One in five adults (19%) have posted things online they wish they hadn’t.** In contrast, almost three-quarters of adults (72%) agreed that they ‘*can’t understand why people share personal information with people they don’t know well or at all*’, increasing to 82% of those aged 55 and over. Similarly, almost six in ten online adults (57%) disagree about being ‘*happy to share information online that a wide audience can see*’.

1.8.3 Adult social media use

More than seven in ten adult internet users (72%) have a social media profile, and social media use is correlated to age

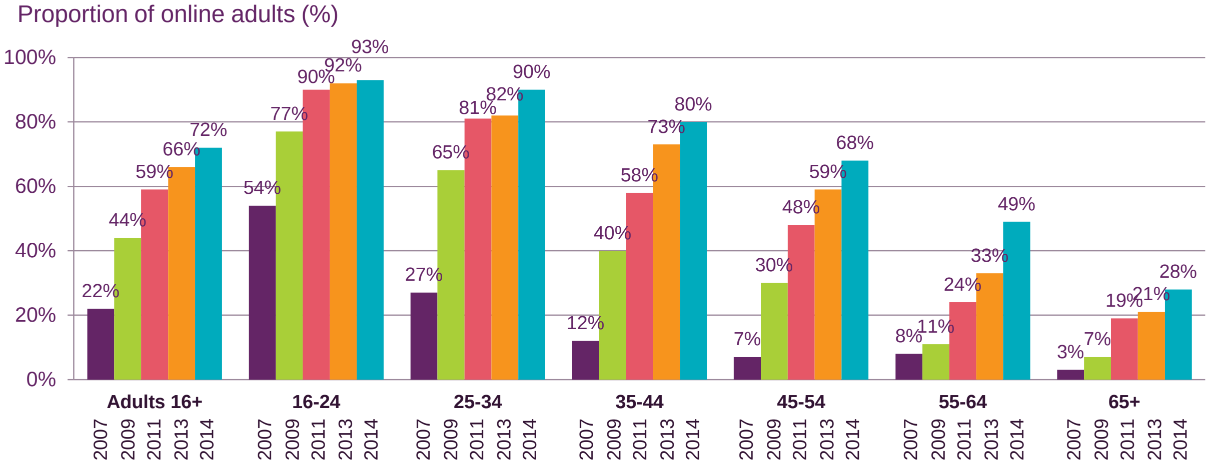
Ofcom’s *Adult Media Use and Attitudes Report*[35] reports that more than seven in ten adults in the UK who go online (72%) have a social media profile, such as a Facebook or Twitter account. (Figure 1.74)

Age is a core discriminator, and social media use is correlated to age. A majority of internet users aged 16-24 (93%), 25-34 (90%), 35-44 (80%) and 45-54 (68%) have a social media profile, compared to half of 55-64s (49%) and three in ten over-65s (28%).

When looking at changes over time, the proportion of UK adults who have a social media profile has increased dramatically, rising by 50 percentage points (from 22%) since 2007. In terms of recent growth, internet users aged 55-64 are significantly more likely to have a profile in 2014 than they were in 2013 (49% vs. 33%).

[35] http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/

Figure 1.74 Incidence of having a social media profile, by age: 2007-2014



Source: Ofcom's Adult Media Use and Attitudes Report 2015
Base: All adults aged 16+ who go online at home or elsewhere (1609 in 2014)
*IN24. I'd now like to ask you some questions about social media (*description of social media). Do you have a social media profile or account on any sites or apps

Facebook continues to be the most popular social media site

As shown in Figure 1.75, almost all (97%) adults with a social media profile say they use Facebook. No other site/service is used by a majority of those with a social media profile. Close to half (48%) of those with a profile say they have one only on Facebook.

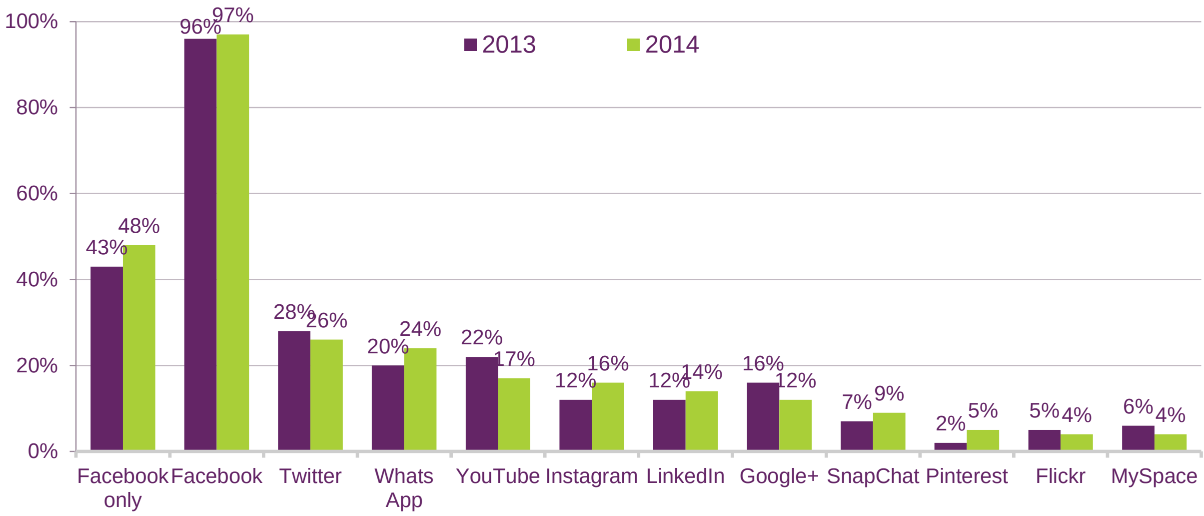
A quarter of those with a social media profile have one on Twitter (26%) or WhatsApp (24%), with lower proportions for YouTube (17%), Instagram (16%), LinkedIn (14%), Google+ (12%) and Snapchat (10%). All other prompted social media sites were used by less than one in ten.

There is only one significant change since 2013: adults with a social media profile are more likely to say they use Pinterest (5% vs. 2%).

Although not featured in the chart below, there are differences by age. Compared to all adults with a profile, 16-24 year olds are more likely to have a profile on Twitter (40%), WhatsApp (37%), YouTube (32%), Instagram (35%), Snapchat (26%), Tumblr (8%) and Vine (4%). This age group are less likely to have a profile on LinkedIn (8% vs. 14%), whereas 35-44 year olds are more likely (22%).

Those aged 55 and over are less likely than all adults using social media to have a profile on Facebook (93%), Twitter (13%), WhatsApp (7%), YouTube (9%), Instagram (3%), LinkedIn (8%) and Snapchat (0%).

Figure 1.75 Social media sites used by those with a social media profile: 2013 and 2014



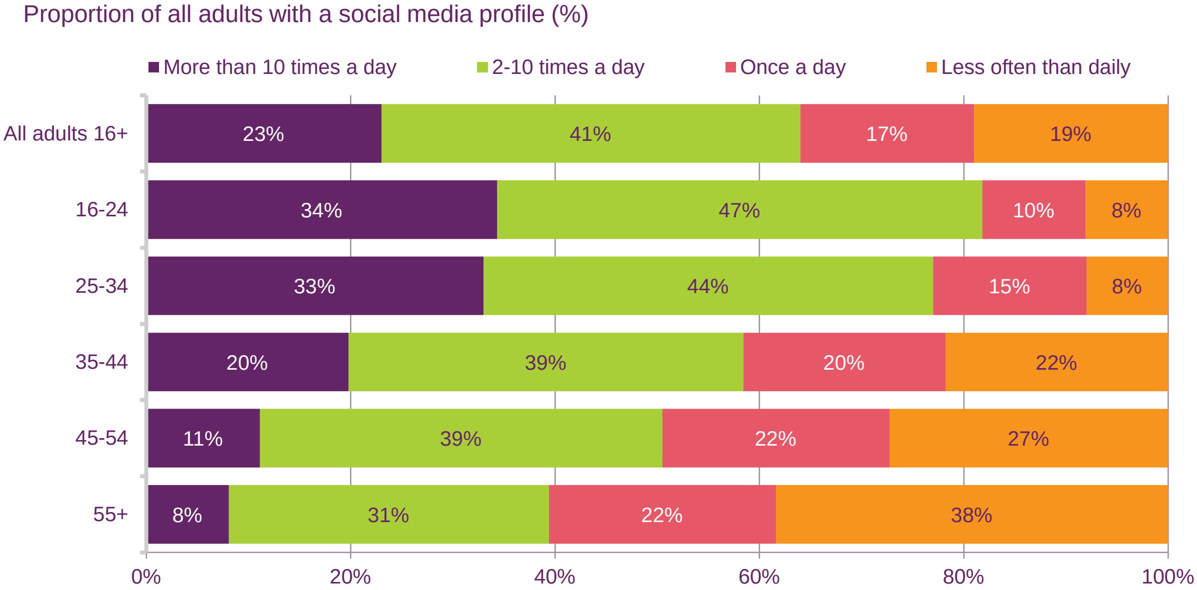
Source: Ofcom's Adult Media Use and Attitudes Report 2015
Base: All adults aged 16+ with a social media profile (1093 in 2014).
IN25 – Which sites or apps do you have a page or profile on?
Responses of 3% or more shown
Arrows show significant changes (99% level) between 2013 and 2014

Two-thirds of adults with a profile use social media more than once a day

Ofcom's Media Literacy data show that close to one in four (23%) say they visit social media sites more than ten times a day, higher than in 2013. Eight in ten (81%) do so at least daily (Figure 1.76)

A third of those aged 16-24 (34%) and 25-34 (33%) with a social media profile claim to visit more than ten times a day; this is higher than the average (23%). Those aged 45-54 (11%) and 55+ (8%) are less likely.

Figure 1.76 Frequency of visiting any social media sites or apps, by age



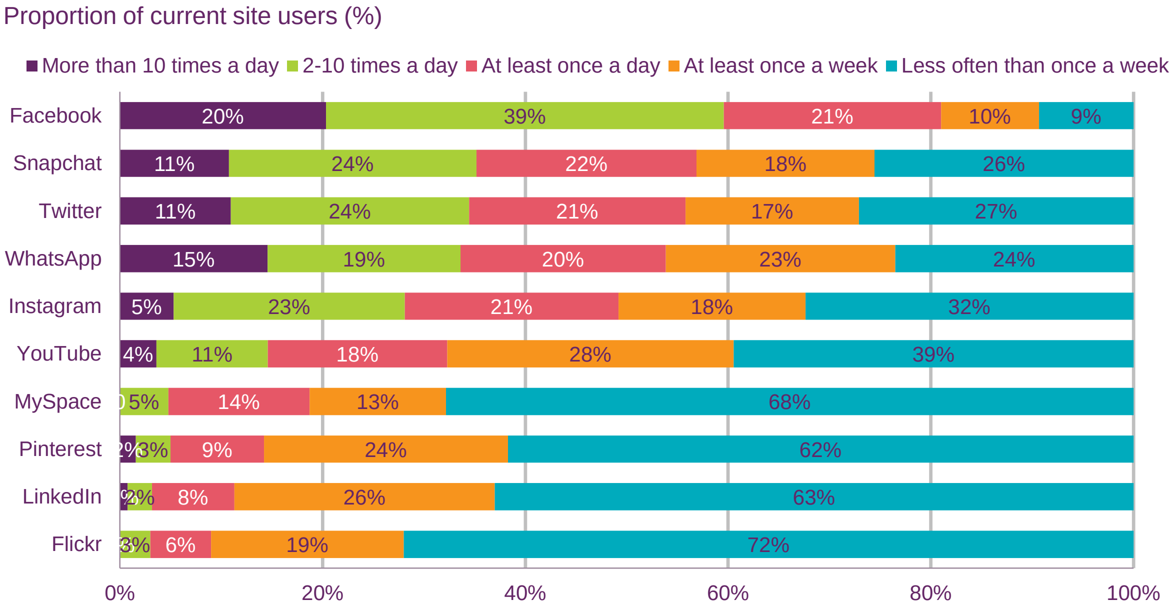
Source: Ofcom's Adult Media Use and Attitudes Report 2015
Base: All with social media profile (1093 in 2014)
IN27– How often do you visit any social media sites or apps, using any device?

In addition to having the highest reach, Facebook has the highest frequency of use

Figure 1.77 shows the frequency of claimed site/app use among users of each of the sites/apps. The chart is ranked by frequency of use. Among Facebook users, a significant majority (80%) claim to use it at least once a day or more often, and one in five (20%) say they use it more than ten times a day. Snapchat (57%), Twitter (56%), WhatsApp (54%) and Instagram (49%) are also used at least daily by a significant proportion of their users.

Pinterest, LinkedIn and Flickr are used least frequently.

Figure 1.77 Frequency of social media or app use: all adults aged 16+ who have ever used each site



Source: Ofcom research, 'Connected Devices', May 2015
Base: All adults who have ever used each site from Q60 (various)
Q65. And how often do you use the following ….?
Note: Selected on the top ten sites used from the prompted list at Q60 and ranked on 'at least once a day'

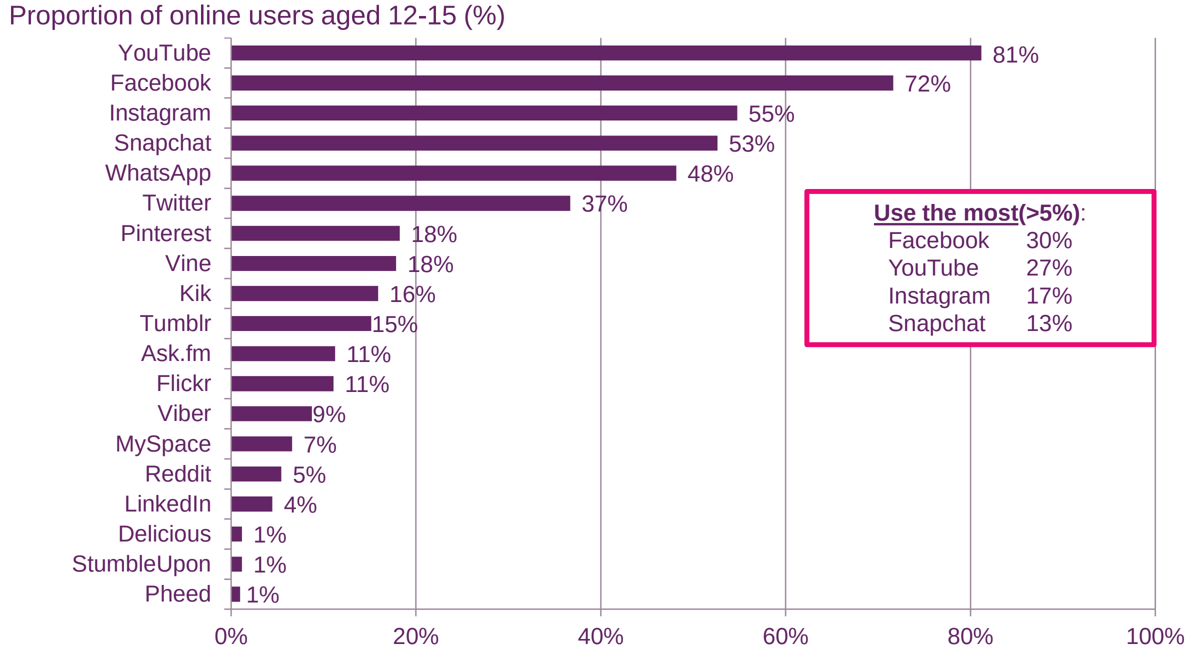
1.8.4 Teenagers aged 12-15: social media use

There is significant take-up of social networking sites and apps among 12-15 year olds

The online survey asked about site and app use, using a prompted list. The resulting data show that a significant majority of teens aged 12-15 claim to have 'ever used' YouTube (81%) and Facebook (72%). Instagram (55%), Snapchat (53%) and WhatsApp (48%) have also been used by significant proportions of 12-15 year olds.

Facebook (30%), YouTube (27%), Instagram (17%) and Snapchat (13%) are used the most.

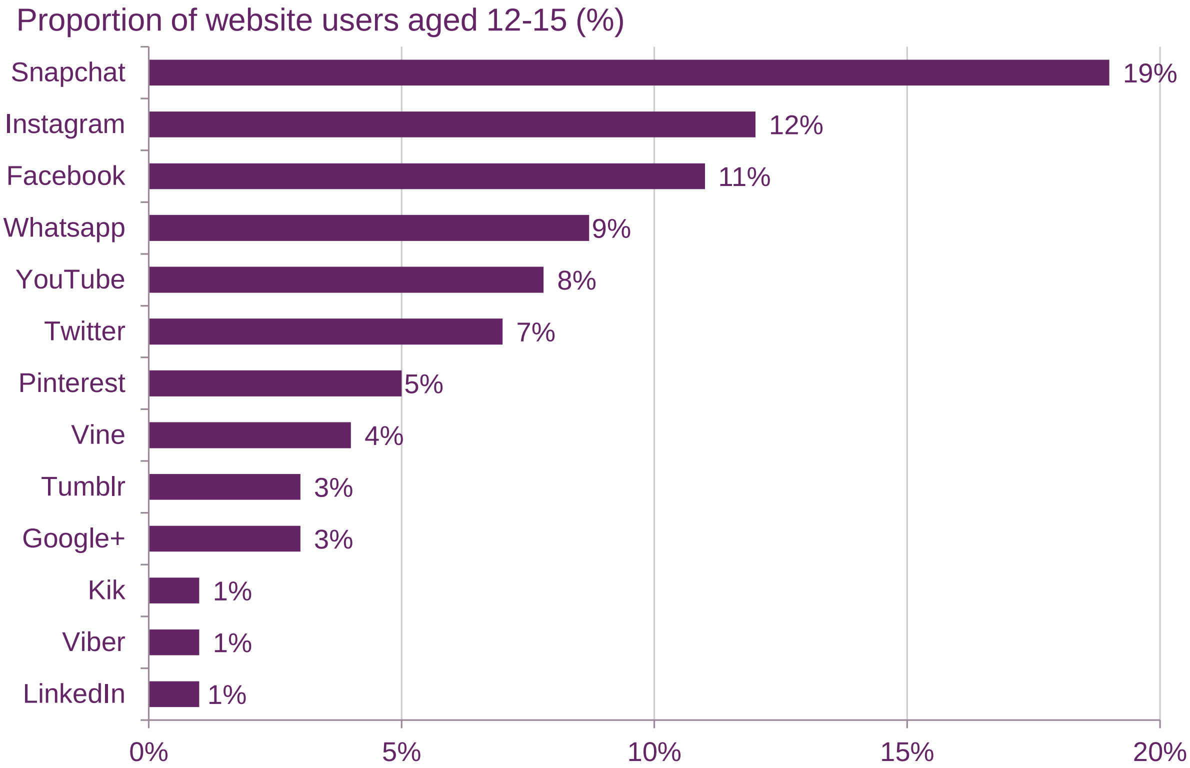
Figure 1.78 Site and app use among 12-15 year olds



Source: Ofcom research, 'Connected Devices', May 2015
Base: All respondents aged 12-15 = 515
Q60. Which of the following have you ever used? Select from prompted list.
Q61a. Which one do you use the most? Select from prompted list.
Snapchat is cited as the most recent addition for one in five online users aged 12-15

As a method of identifying recent trends in site and app use, a question was asked regarding the most recent addition. Among those who claimed to use any of the social networking /communication portals with which they were prompted (see Figure 1.79), Snapchat was cited by 19% of website users aged 12-15 as 'the most recent addition'. Instagram (12%) and Facebook (11%) were cited as recent additions for just over one in ten (12%) and WhatsApp by just under one in ten (9%).

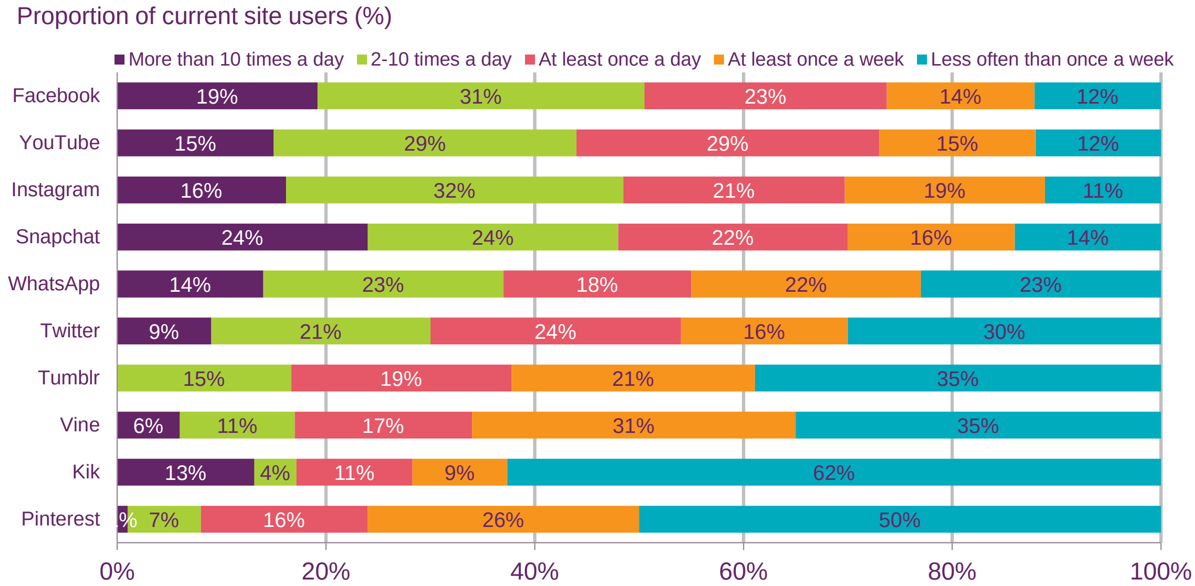
Figure 1.79 Site or app most recently added: 12-15 year olds



Source: Ofcom research, 'Connected Devices', May 2015
Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).
Q61d. Which one is your most recent addition?

Figure 1.80 shows the frequency of using those sites included in the survey. Compared to use by adults, shown previously in Figure 1.77, frequency of using these sites and apps is higher among 12-15 year olds. Snapchat has the highest frequency of use, with a quarter (24%) claiming to use it more than ten times a day.

Figure 1.80 Frequency of social media or app use: 12-15 year olds



Source: Ofcom research, 'Connected Devices', May 2015
Base: All teens aged 12-15 who have ever used each site from Q60 (various)
Q65. And how often do you use the following ….?
Note: Selected on the top ten sites used from the prompted list at Q60 and ranked 'at least once a day'

1.8.5 Twitter use

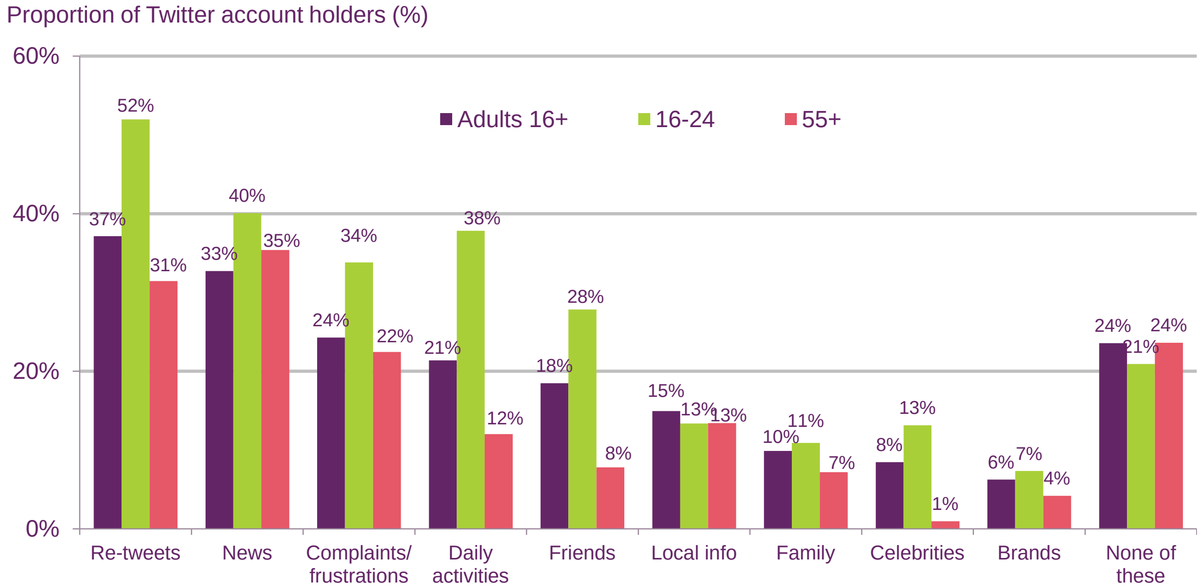
A quarter of adults with a Twitter account use it to air complaints or frustrations

Data from the previous sections shows that a quarter of adults (26%) with a social media profile use Twitter. This rises to two-fifths (40%) among younger adults aged 16-24. More than half of Twitter users (56%) use it daily, and one in ten (11%) use it more than ten times a day.

Among the 40% of online adults who claim to use Twitter, the majority of them (90%) have created an account. Apart from 're-tweeting' (when a user re-posts content from another Twitter account holder), news is the topic that people are most likely to 'tweet' about, with a third (33%) doing this. This is followed by complaints or frustrations, with a quarter (24%) 'tweeting' about this.

Tweeting is more prevalent among younger adults than older adults on all topics except local information, where the levels are equal at 13%.

Figure 1.81 Type of topics 'tweeted' about, all adult account holders compared to younger and older account holders



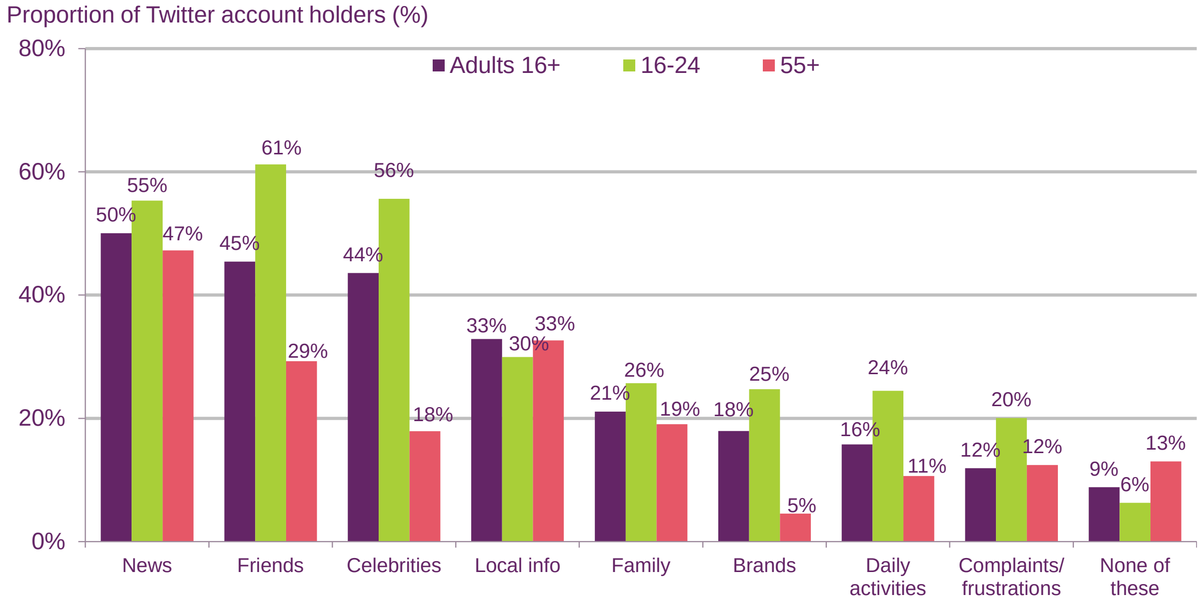
Source: Ofcom research, 'Connected Devices', May 2015
Base: All Twitter account holders 16+ =822, 16-24= 191, 55+=151
Q69a. What do you usually post your tweets about? Please select all that apply

Twitter users are equally as likely to follow celebrities as they are to follow friends.

When asked about the type of Twitter feeds (other accounts) that they follow, the most common category selected was 'news' (50% of Twitter account holders follow news feeds). Friends' (45%) and celebrities' (44%) feeds are also commonly followed.

Again, the data show that larger proportions of 16-24 year olds follow all Twitter topics, with the exception of local news where their level of interest is similar to that of the over-55s (30% compared to 33%).

Figure 1.82 Type of Twitter feeds followed, by all adult account holders, and by younger and older account holders



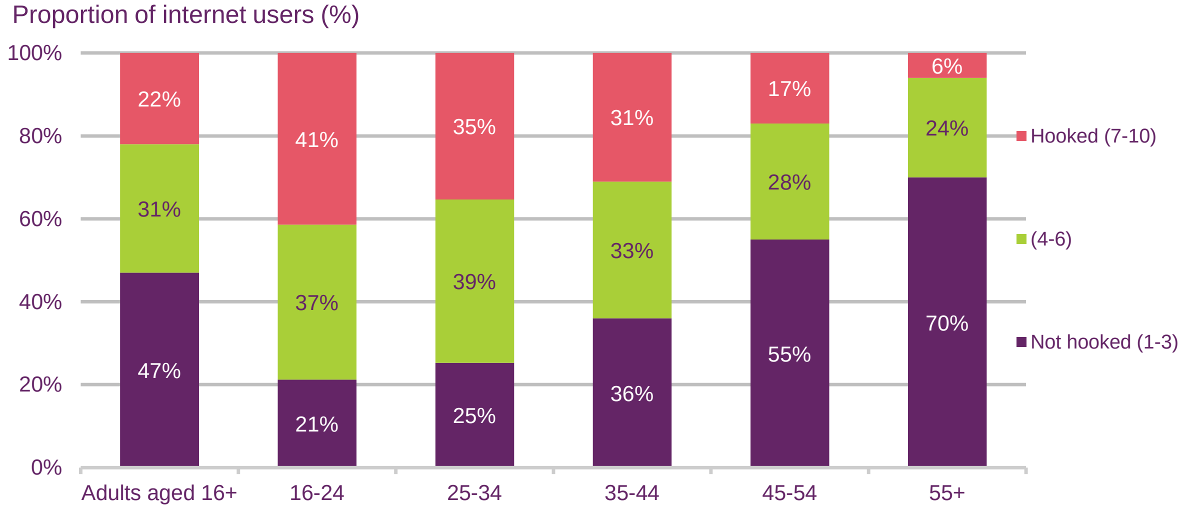
Source: Ofcom research, 'Connected Devices', May 2015
Base: All Twitter account holders 16+ =822, 16-24= 191, 55+=151
Q71. And what types of Twitter feeds do you follow? Please select all that apply

1.8.6 Attitudes towards social media

Almost a fifth of adults say they are 'hooked' on social media

In order to understand the extent to which social media is a part of people's lives, we asked people to indicate a number on a scale, where 1 equated to 'I'm not at all hooked on social media' and 10 equated to 'I'm completely hooked on social media'. Overall, one in five adults (22%) indicated a rating between 7 and 10. (Figure 1.83) This increases to one in four among those aged 12-15 (40%) and 16-24 (41%) and declines with age thereafter.

Figure 1.83 Extent to which people are 'hooked' on social media, by age



Source: Ofcom research, 'Connected Devices', May 2015

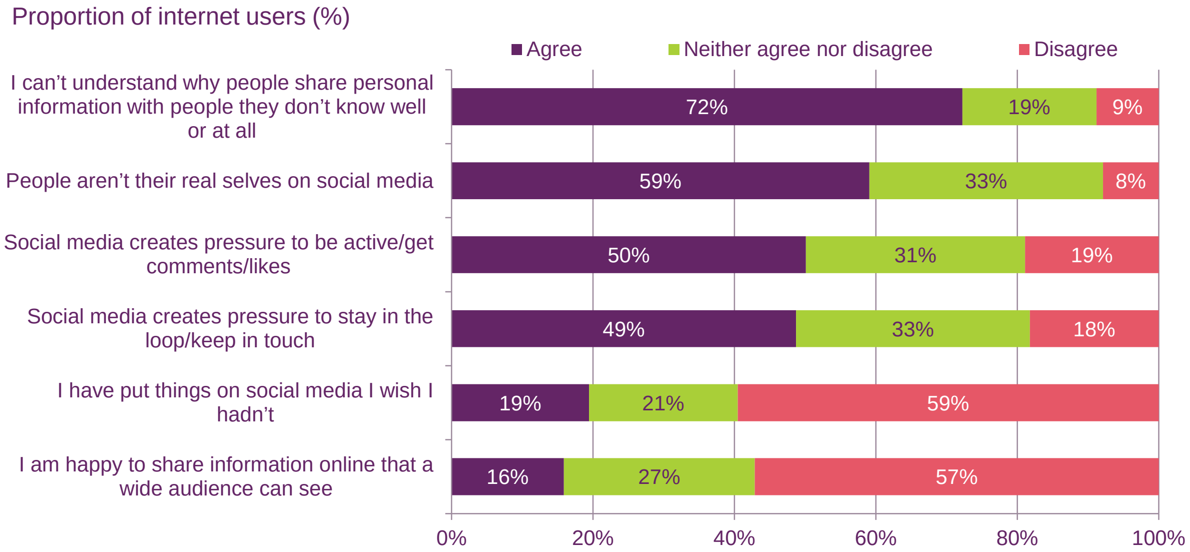
Base: All online adults 16+ =2290, 16-24= 321, 25-34= 223, 35-44= 334, 45-54= 393, 55+= 1019 Q91. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on social media' and 10 represented 'I'm completely hooked on social media', which number would you choose for yourself?

One in five (19%) adults have posted things online they wish they hadn't

We asked people in the survey to give their views on a range of statements relating to the role of social media. Responses indicated mixed views as to its value and purpose. Despite social media's popularity and ever-increasing use, seen in previous charts, there are concerns about privacy. Figure 1.84 shows that almost three-quarters of adults (72%) agree that they '*can't understand why people share personal information with people they don't know well or at all*', increasing to 82% of those aged 55+ (not shown on chart). Similarly, only one in seven adults (16%) agree that they are *'happy to share information online that a wide audience can see'*; this rises to a quarter (23%)of 16-24s.

One in five (19%) also agree that they have put things on social media they wish they hadn't. Agreement levels for this statement are highest among 16-24 year olds (37%) and lowest among those aged 55+ (8%).

Figure 1.84 Level of agreement with statements about social media



Source: Ofcom research, 'Connected Devices', May 2015
Base: All internet users 16+ =2290
Q90 How much do you agree or disagree with the following statements regarding social media?

1.9 Digital music and photograph collections

1.9.1 Introduction

The increasing use of digital media formats is changing the way in which we use and interact with media. This is particularly evident in the ways in which different groups of consumers engage with listening to music and taking photographs. This section will explore the extent to which consumers are using digital media to engage with these pursuits, and their attitudes towards these different formats. It will also look at how many of those who use digital formats are concerned about storage, and are taking action to back up or preserve their material.

1.9.2 Key findings

- **There is heavy use of digital formats for both music and photos, particularly among young people,** although some people are retaining physical formats. There is no clear preference as to the type of digital music used (stored or streamed) or where to store digital photos (cloud, device, etc).

With reference to music formats:

- **Just over half of all adults have ever had a music collection in a digital format, and they are more likely than those with music in physical formats to still listen to it.** Fifty-one per cent of adults have ever had a digital music collection, and they are significantly more likely to still listen to it than the 70% who hold their collection in physical formats (96% of those who have music in a digital format still listen to it compared to 84% of those who have music in a physical format).

- **Three-quarters of those who have stopped listening to their CD collections now listen to music in digital formats.** Those who no longer listen to their CD collection are much more likely to listen to music in a digital format (74%) than in an alternative physical format (8%): two-thirds (65%) listen to digital music they have stored on a device, and over a quarter (27%) listen to music through a streaming service.

- **Half of those with music in digital formats appreciate its portability and perceive it to be better value for money.** The portability of digital music formats is valued by many; 50% agree that they like being able to carry their music with them, enabled by the convenience of smartphones or MP3 players. Similarly, 49% agree that these types of music format are more convenient.

With reference to photo formats:

- **16-24 year olds are more likely than those aged 65 and over to have digital photo collections and older adults are twice as likely to have photo albums.** Those aged 16-24 are significantly more likely than those aged 65 and over to have digital photos or videos, stored either on a personal device (75% vs. 39%), in online storage (40% vs. 10%) or shared on photo-sharing sites (29% vs. 5%). In contrast, those aged 65 and over are significantly more likely to have framed photos on display (74% vs. 49%) and to have boxes or albums of printed photos (65% vs. 33%).

- **Young people are six times as likely as older people to mainly use a mobile phone to take photos.** Seven in ten (70%) adults say they 'ever' use a use a mobile phone to take photos. This is the device most likely to be used to take photos; 60% of UK adults say they use it most often, followed by one in five (22%) who say they mainly use a digital camera. Eighty-nine per cent of 16-24 year olds mainly use a mobile phone, compared to 22% of over-55s.

- **More than a third of 16-24 year olds take more than ten photos each week and 8% take more than 50.** Just over half (53%) of adults take between one and ten photos each week, with almost one in five taking more than this (19%). Younger adults are more likely than older adults to take more photographs each week: 34% of those aged 16-24 say they take more than ten photos each week with 8% claiming to take more than 50.

- **Nearly a third of UK adults ever take 'selfies'.** Friends and family are the most popular subjects for photographs, with 83% of UK adults ever taking these kinds of photos and 34% taking them either daily or weekly. Nearly a third (31%) of UK adults ever take selfies while over a third (36%) take photos of their pets.

- **Over three-fifths of younger adults often use social media to share photos, compared to just over a third of older adults.** More than two in five adults (44%) agree that '*I often use social media to share photos with friends and family'*, and there are significant age differences; 62% of those aged 16-34 agree compared to only 34% of those aged 35 and older.

1.9.3 Take-up of digital and physical formats: music

Just over half of adults have ever had a music collection in a digital format, and they are more likely than those with music in physical formats to still listen to it

Figure 1.85 shows the extent to which people have ever had music collections in a particular format, the likelihood of their still having music in that format, and whether they still listen to that music. Just over half of adults (51%) have ever had music in a digital format and they are significantly more likely to be still listening to it than the 70% who have music in physical formats (96% of those who have music in a digital format still listen to it, compared to 84% of those who have music in a physical format).

In particular, just under half of adults (47%) have ever had a personal collection of stored digital music (e.g. stored on a PC, laptop or MP3 player) and the majority of these (96%) continue to have a music collection in this format. Of these, 93% still listen to their music this way. In contrast, almost two-fifths of adults (38%) say they have ever owned vinyl. Of these, two-thirds (67%) still have this collection, but only 36% of those who still have their collection still listen to it in its original format.

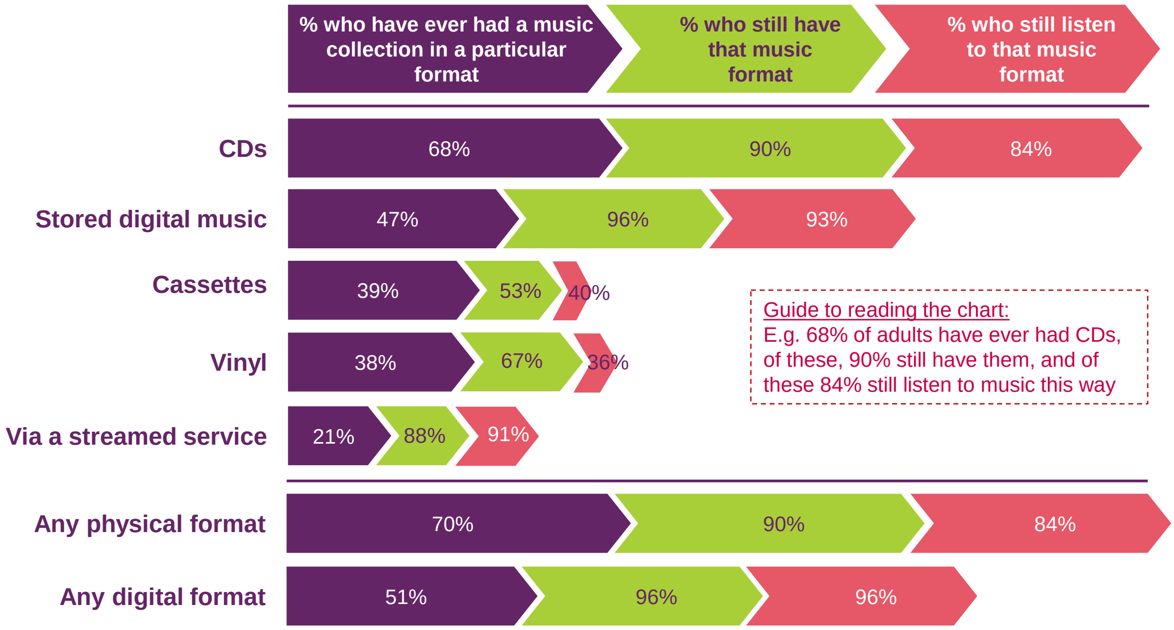
There are some differences by age: while 54% of those aged 16-24 have ever had music in a physical format, the proportion is highest, at 81%, among those aged 45-54. And while 78% of 16-24 year olds have ever had music in a digital format, this compares to just 14% of over-65s.

Broadening the age groups to enable us to look at specific formats[36], 72% of those aged over 35 have ever had a CD collection, compared to 60% of 16-34 year olds. And over-35s are more likely than the younger age group to still have music in that format (94% vs. 80%) and to still be listening to it (86% of over 35s who still have CDs vs. 79% of those under 35).

[36] Sample sizes are too small to examine specific formats by smaller age bands

Only 10% of those aged 16-34 have ever had a vinyl collection, compared to 51% of over-35s. However, among those who still have that collection (69% of under-35s and 67% of over-35s), the younger age group are more likely to currently listen to music on vinyl (66% of those who still have their collection, compared to 33% of those aged over 35)[37].

Figure 1.85 Retention and use of music collections, by format



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who have ever had each format (CDs = 1390, digital music = 895, cassette tapes = 799, vinyl records = 803, on a music streaming service = 387)
Base: All adults 16+ in the UK who still own each format (CDs = 1274, digital music = 857, cassette tapes = 455, vinyl records = 555, on a music streaming service = 341)
Q1. Have you ever had a personal music collection in any of the following formats, Q2. Which of these collections do you still have, Q3. Which of these collections do you still listen to?

Three-quarters of those who have stopped listening to their CD collections now listen to music in digital formats

Just under three-quarters (72%) of those who still have physical formats but no longer listen to them say they now listen to collections in a digital format. However, over-55s who no longer listen to their physical music collections are more likely to have stopped listening to music collections in any format (69%) compared to just 6% of those aged 16-34.

Those who no longer listen to their CD collection are much more likely to listen to music in a digital format (74%) than any other physical format (8%): two-thirds (65%) listen to digital music they have stored on a device and over a quarter (27%) listen to music through a streaming service.

Those who have stopped listening to their vinyl or cassette collections are more likely to still be listening via another physical format: CDs. Seventy-six per cent of those who no longer listen to their vinyl collection still listen to CDs, as do 80% of those who no longer listen to their cassette collections.

[37] Note: small sample sizes for the 16-34 age group so figures should be treated with caution and used as an indicative measure only

Figure 1.86 Music formats listened to instead of physical formats

% of those who still own each physical format but no longer listen to it

Music format still listened to	Physical music format owned but no longer listened to that way: Vinyl	Cassette	CD
Vinyl	-	11%	7%
Cassette	9%	-	3%
CD	76%	80%	-
Stored digital music	51%	53%	65%
Streamed music service	17%	18%	27%
Any physical format	77%	81%	8%
Any digital format	54%	57%	74%

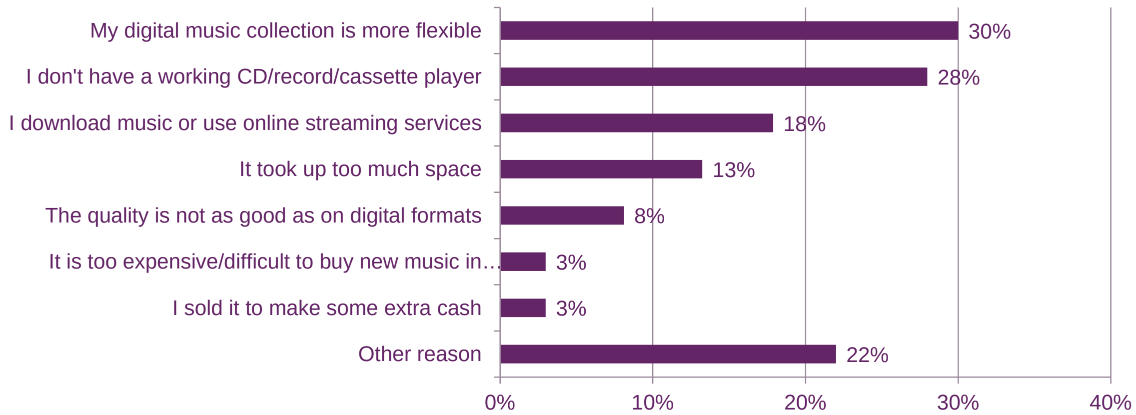
Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever owned a personal music collection but no longer listen to it (Vinyl records = 340, cassette tapes = 258, CDs = 207)
Q3. Which of these collections do you still listen to?

Nearly a third of those who no longer have, or listen to, their music collections say they no longer have the equipment to play them on

Those who said they no longer had, or no longer listened to, a music collection in a particular format were prompted for a reason. The most common reason given was that their '*digital music collection is more flexible'* (30%). A similar number (28%) said they did not have the right equipment, citing a lack of a working CD player, record player or cassette player as the reason for getting rid of, or not listening to, that particular format. Downloading or streaming music is replacing physical formats for some, with nearly one in five (18%) citing this as a reason for them not using older formats.

Figure 1.87 Reasons no longer have / listen to particular music collections

% of those who ever had particular music formats and no longer have / or no longer listen to music that way



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever owned a personal music collection. Data re-based to exclude those who answer 'I still own/listen to my music collection' (N = 569)
Q4. If you no longer own or listen to your music collection, can you please tell me?

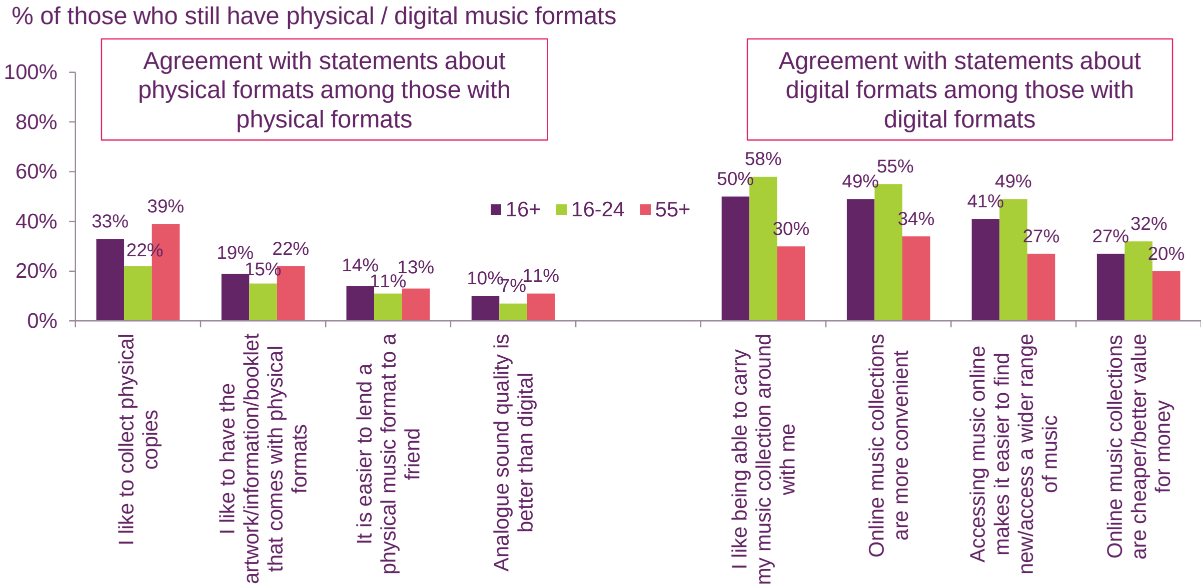
1.9.4 Attitudes to digital and physical formats: music

Half of those with music in digital formats appreciate its portability and perceive it to be better value for money

To gauge attitudes towards different kinds of formats, we asked respondents whether they agreed with a range of statements about digital and physical music formats. The portability of digital music is valued by many of those who have this type of collection, with 50% agreeing that they liked being able to carry their music with them, enabled by the convenience of smartphones or MP3 players. Similarly, 49% agreed that these types of music format are more convenient.

Among those with physical collections, many valued the tangible nature of this type of format; a third (33%) agreed that they liked to collect physical copies, increasing to 39% of over-55s with this kind of music.

Figure 1.88 Level of agreement with statements about music formats, by age



Source: Kantar Media Omnibus
Base: All adults in the UK who still own a physical music collection (16+ = 1321, 16-24 = 133, 55+ =620)
Base: All adults in the UK who still own a digital music collection (16+ = 925, 16-24 = 229, 55+ = 190)
Q5. Thinking about different ways of listening to music, which of the following do you agree with?

1.9.5 Take-up of digital and physical formats: photos

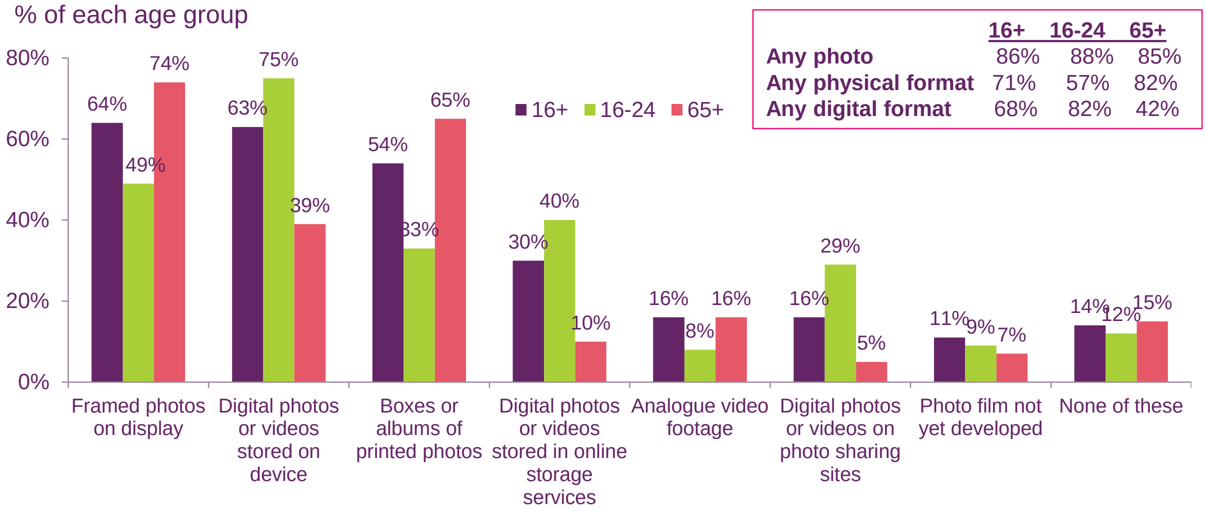
16-24 year olds are more likely than those aged 65 and over to have digital photo collections and older adults are twice as likely to have photo albums

Eighty-six per cent of adults have photos/videos in some format: 71% have them in a physical format, such as photo albums; 68% have them in digital formats. Framed photos (64%), followed by digital photos stored on a device (63%), are the two most popular ways for adults to store their photos.

Those aged 16-24 are significantly more likely than those aged 65 and over to have photos or video in a digital format (82% vs. 42%). In particular, young people are more likely than the older age group to have digital photos or videos stored either on a personal device (75% vs. 39%), in online storage (40% vs. 10%) or shared on photo sharing sites (29% vs. 5%).

Those aged 65 and over are significantly more likely to have framed photos on display (74% vs. 49%) and to have boxes or albums of printed photos (65% vs. 33%)[38].

Figure 1.89 Use of different photo formats



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N = 2100)
Q6. Do you have any of the following?

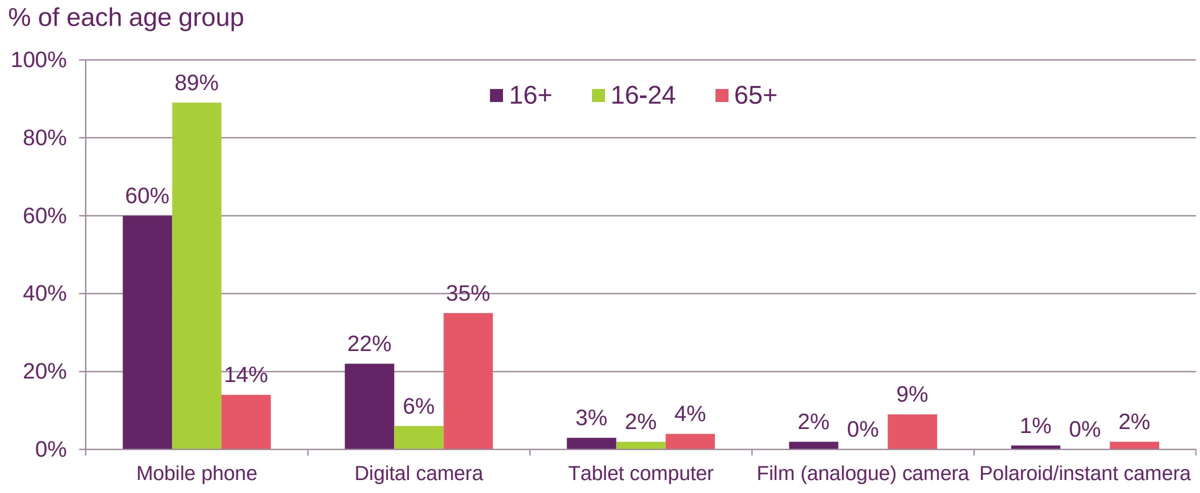
Young people are six times as likely as older people to mainly use a mobile phone to take photos

Seven in ten (70%) adults say they 'ever' use a mobile phone to take photos. As shown in Figure 1.90, this is the device most likely to be used to take photos; 60% of UK adults say they use their phone most often. This is followed by one in five (22%) who say they mainly use a digital camera.

There is a stark contrast, however, by the age of those taking the photos; 89% of 16-24 year olds mainly use a mobile phone, compared to 22% of over-55s. The older age group are more likely to say they mainly use a digital camera to take photos (35%).

[38] Among those aged 35 and over, 70% have photos on display

Figure 1.90 Device most often used to take photos



Source: Kantar Media Omnibus
Base: All adults in the UK who ever take photos: 16+ = 1841, 16-24 = 287, 65+ = 262
Q8. And which do you use most often?

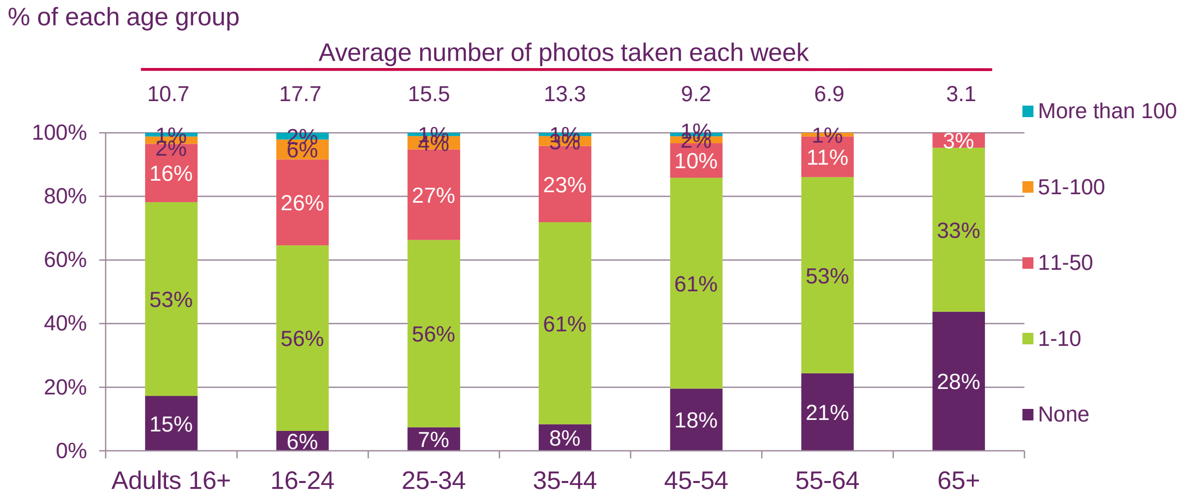
1.9.6 Frequency of taking photos

More than a third of 16-24 year olds take more than ten photos each week and 8% take more than 50

The average number of photos taken by UK adults in a week is 10.7. Just over half (53%) of adults take between one and ten photos each week, with almost one in five taking more than this (19%).

There is considerable variation by age, with younger adults taking more photographs each week than older adults. Thirty-four per cent of those aged 16-24 say they take more than ten photos each week, with 8% claiming to take more than 50. On average, 16-24 year olds take about 18 photos each week, six times as many as those aged 65 and over (3.1).

Figure 1.91 Number of photos taken in an average week

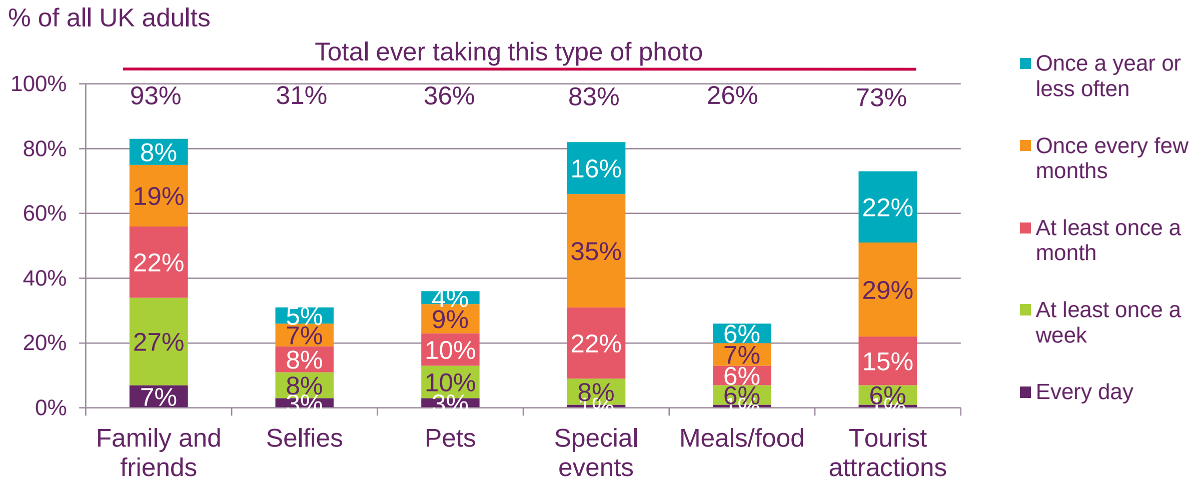


Source: Kantar Media Omnibus
Base: All UK adults = 2100 (rebased): 16-24 = 296, 25-34 = 3801, 35-44 = 357, 45-54 = 337, 55-64 = 322, 65+ = 406)
Q9. On average, how many photos would you say you take a week?

Nearly a third of UK adults ever take 'selfies'

Friends and family are the most popular subjects for photographs, with 83% of UK adults 'ever' taking these kinds of photos and 34% taking them either daily or weekly. Special events are the next most popular category, with 81% ever taking these photographs, followed by tourist attractions, taken by 73%. Nearly a third (31%) of UK adults have ever taken 'selfies' and more than a third (36%) take photos of their pets.

Figure 1.92 Frequency of taking different types of photo

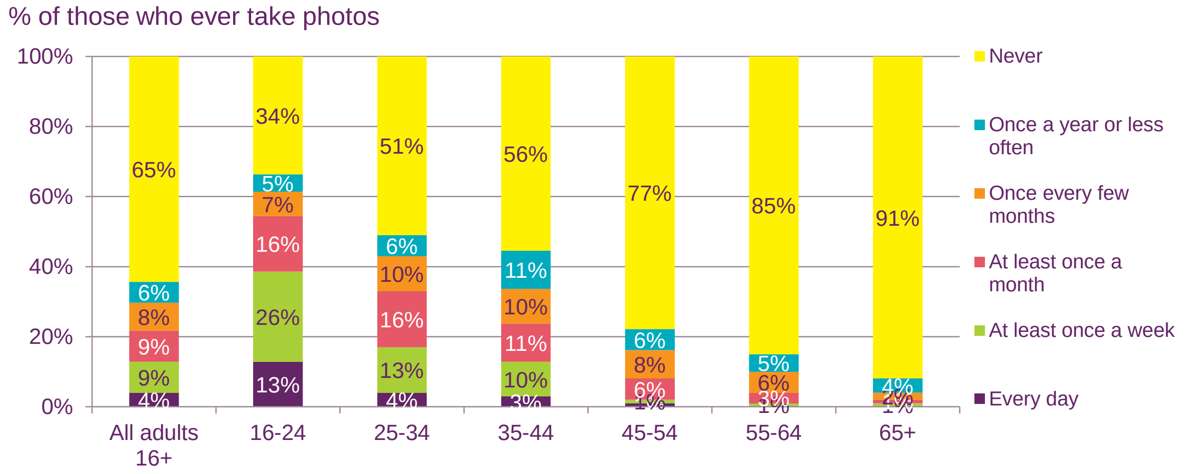


Source: Kantar Media Omnibus
Base: All adults 16+ in the UK (N = 2100)
Q10. When taking photos, how often do you take photos of the following?

Two-fifths of 16-24 year olds take selfies at least once a week

There are differences in age in tendencies to take photos of different subjects. For example, Figure 1.93 shows that among those who ever take photos, 39% of young people take a selfie at least once a week, compared to just 1% of those aged over 45.

Figure 1.93 Frequency of taking selfies, by age



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever take photos (All UK adults = 1784: 16-24 = 298, 25-34 = 291, 35-44 = 270, 45-54 = 287, 55-64 = 252, 65+ = 386)
Q10. When taking photos, how often do you take photos of the following?

Over three-fifths of younger adults often use social media to share photos, compared to just over a third of older adults

Those who have ever used digital devices to take photos (a digital camera, smartphone or tablet) were asked about their attitudes to different features of digital photography. Just over half (54%) stated that they '*often delete unwanted photos*'. This indicates that nearly half (46%) of those who take digital photos do not regularly purge their digital collections. Figure 1.95 shows no variation here by age.

The next most agreed-with statement that people using digital photography choose is: '*I often use social media to share photos with friends and family'.* Here there are significant age differences; while 44% of those aged 16+ agree with this statement, this increases to over three-fifths (62%) among those aged 16-34, and is their most popular choice. However, only 34% of those older than this selected this statement, reflecting the younger profile of social media users.

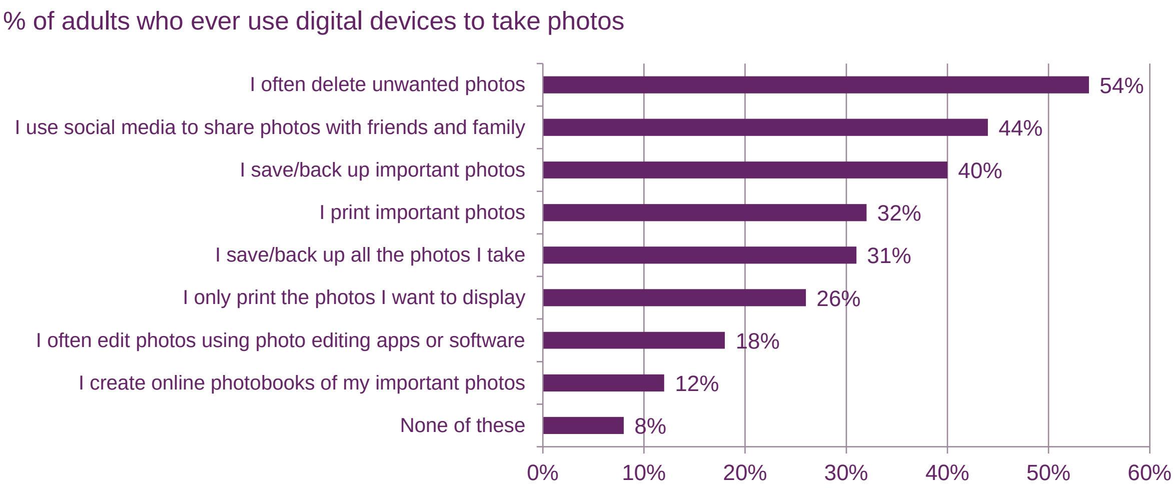
Taking back-ups of all digital photos is also a feature that splits the age groups. Among all adults who use digital photography, three in ten (31%) say they do this. This increases to 36% of those aged 16-34 and decreases to 29% of those aged 35 and older.

The relatively small proportion who back up digital photos is reflected in other research on online storage habits. For example, YouGov reports[39] that photos are the type of content most likely to be stored by people who use online storage (74% of those who use online

[39] YouGov, Attitudes Towards Technology 14 April – 17 April 2015
Base: Online UK adults 16+ who use online data storage services (773)

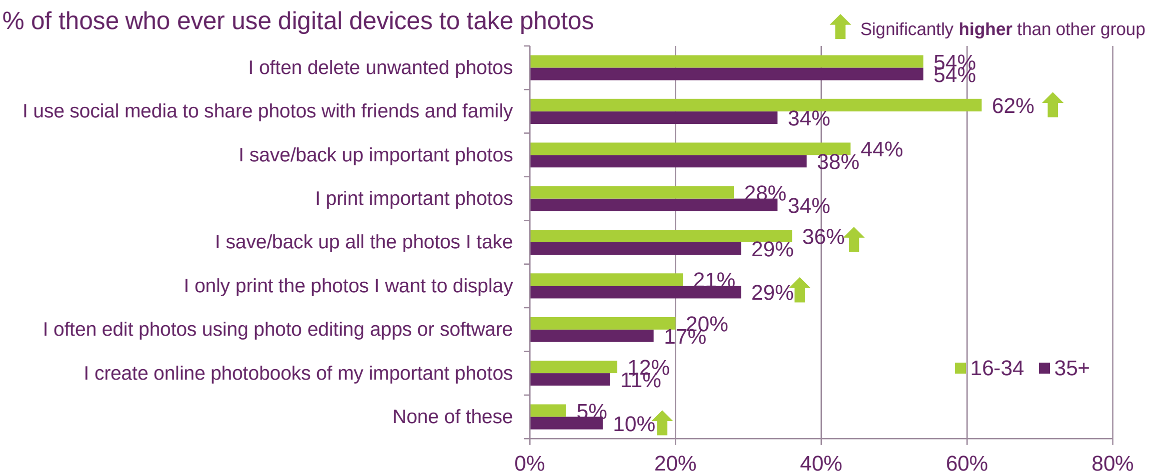
storage use it for photos). Similarly, ‘photos I have taken’ was ranked as the most important medium to keep or save (47% ranked it as most important), followed by ‘documents I have created myself’ e.g. CVs, schoolwork (14% ranked this as most important) and personal official documents e.g. health records (7% ranked this as most important). Despite this, 10% have never backed up the data on their PCs/laptops, and the most common approach is to rely on automatic back-ups. More detail on use of, and attitudes towards, online storage can be found in section 5.1.2, ‘Digital storage and digital preservation.’

Figure 1.94 Agreement with statements about digital photography



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever use digital devices to take photos (N = 1717)
Q11. Thinking about the digital photos you take, which of the following applies to you?

Figure 1.95 Agreement with statements about digital photography, by age



Source: Kantar Media Omnibus
Base: All adults 16+ in the UK who ever use digital devices to take photos (16-34 = 587, 35+ = 1130)
Q11. Thinking about the digital photos you take, which of the following applies to you?

1.10 Media literacy: the past decade

1.10.1 Introduction

This section draws on data from our adults' media literacy surveys[40] conducted since 2005, along with other contextual references, to draw out some of the key observations over the past decade. In particular, it focuses on attitudes to, and understanding of the online environment, rather than consumption and take-up, which are covered in the relevant chapters throughout the report.[41]

1.10.2 Key findings

- **Over the past ten years the time adults spend using the internet has increased substantially, both at home and elsewhere.** The estimated number of hours spent online per week has more than doubled since 2005, from about ten to over 20 hours.

- **Take-up of most online activities has increased since 2005.** For example, there has been a noticeable increase in the use of the internet at least weekly for news (25% to 42%), and for banking and paying bills (31% to 42%).

- **There is less concern about online content than ten years ago, but concerns remain more evident than for other media, and apps are posing a new challenge.** The proportion of internet users citing internet-related concerns has decreased from seven in ten (70%) in 2005 to half (51%). However, concerns with apps have increased from 20% in 2013 to 28%, mainly driven by security/fraud or privacy issues (20% from 14%).

- **Internet users under the age of 65 are more inclined to care about who owns websites, or how they are funded, than they were in 2007[42]:** 35% disagree with the statement *'As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded'* compared to 23% in 2007.

- **A majority of internet users claim confidence in finding information on the internet, and understand how search engines operate.** The proportion of internet users who agree that they are confident at finding things online has remained the same since 2007 (91% vs. 92%)**.** Six in ten (60%) adults believe that some websites will be accurate and unbiased, while others won't be, close to the 2009 figure (54%).

- **Although overall agreement that internet users must be protected from inappropriate or offensive content is similar to 2005, opinions are stronger than in 2013.** Six in ten (60%) internet users strongly believe this, compared to 51% in 2013.

- **The majority of internet users say they would share personal information online, but there is evidence of added caution in doing this over the ten years of tracking.** For example, six in ten (60%) internet users say they would give out

[40] http://stakeholders.ofcom.org.uk/market-data-research/media-literacy-pubs/
[41] In addition, commentary on long term trends in digital media take-up can be found in the most recent *Media Use and Attitudes Report 2015* http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/
[42] It is important to note that there has been a large increase in the number of internet users aged 65+ since 2005 (See 2015 report as per link above). As this question is asked of internet users, the base of the question is more robust in 2014 than it was in 2007.

their home address online but have concerns about doing so, compared to 46% in 2005.

- **The majority of internet users are using technical indicators such as padlocks and system messages to measure website safety**, and this has increased among over-25s since 2005. Use of these indicators has increased among all internet users; from 43% in 2005 to 55% in 2014. The change has been driven by those aged 25 and over. For example, the figure for adults aged 45-54 has increased by 15 percentage points (from 43% to 58%).

1.10.3 The media landscape in 2005

In 2005, many of the types of media and technology service that are widespread today: smartphones, VoD catch-up TV services and social media had yet to become established.

Every year since 2005, there have been high-profile launches of products or services geared towards internet-based delivery, and all playing a part in the current media and communications landscape:

2006	2007	2008	2009	2010	2011	2012	2013/14
Twitter	iPlayer	Android	WhatsApp	iPad	Google +	Netflix UK	Xbox One
Blu-ray	iPhone	Sky+ HD	Angry Birds	Instagram	Raspberry Pi	Smart TV	PS4
BT Vision	Kindle	Spotify	Windows 7	3D TV		4G	Chromecast
	Virgin Media	Chrome		Kinect		YouView	

Source: Ofcom analysis

In 2005 television was the dominant medium

In 2005 nearly all adults (95%) watched TV regularly, and 44% (52% of those aged 65+) cited it as the media activity they would miss the most, compared to about one in ten for other activities, including listening to music on hi-fi/CD or tape (13%), listening to the radio (12%), using a mobile phone (10%), and using the internet (8%). This was consistent across all age groups except for the youngest (16-24s); for them, the mobile phone was most important, at 28%, compared to 22% for TV.

The majority (85%) of adults still had a video cassette recorder (VCR) attached to a TV set, with a lower proportion (80%) owning a DVD player. Just one in ten had a digital video recorder (DVR).These types of device were the prominent methods of time-shifting TV, and were all reliant on planning and manual recording by the user (on-demand was in its infancy). When asked how they found what to watch on TV, half said they used the guide in newspapers, followed by 19% using an electronic programme guide (EPG).

Just over half of adults had internet access, with over a third using dial-up. It was used mainly for email and browsing information

In 2005 the internet was being used at home by 51% of UK adults, ranging from 21% of 65+ year olds to 70% of 35-44s. Close to two-thirds (64%) of adults with home internet access had broadband, with the remaining 36% still using dial-up; a fifth (19%) used a wireless (WiFi) connection. Outside the home, 36% of adults accessed the internet.

The main reason for getting the internet was to access information, cited by 46% of those who already had it, and 43% of those who were planning to get it in the future. Communication was the second highest reason (28% and 20% respectively), while entertainment was cited by just 16% and 13%. This was reflected in the popularity of activities that people used the internet for at least once a week; the highest response was 70% for email, followed by finding information for work/ study (52%), and finding information for leisure time or holidays (34%).

The majority of adults regularly used a mobile phone, but they were mainly used for calls and texts

Nearly three-quarters (73%) of UK adults said they regularly used a mobile phone in 2005. While this figure was close to universal among 16-24s (92%), it decreased by age, to 33% of those aged 65+. Just 7% and 5% of mobile users said they used their device for the internet and email respectively.

The most popular motivation for getting a mobile phone in the first place was reported to be ‘for emergencies’ (56%, rising to 82% among those aged 65+).

The landline phone was still a very prominent part of social communication, but the mobile phone was already taking precedence for younger adults

When asked about their preferred contact method when arranging to meet, exactly half nominated the landline, compared to 27% text messaging, and 19% a mobile phone call. However, again highlighting the increased importance of the mobile phone among 16-24 year olds, 57% of this age group cited text messaging, and 29% a mobile phone call, compared to 13% for landline. This contrasted with those aged 65+; the landline was cited by 89%, the mobile phone by 5% and text messages by 2%.

1.10.4 Changes since 2005

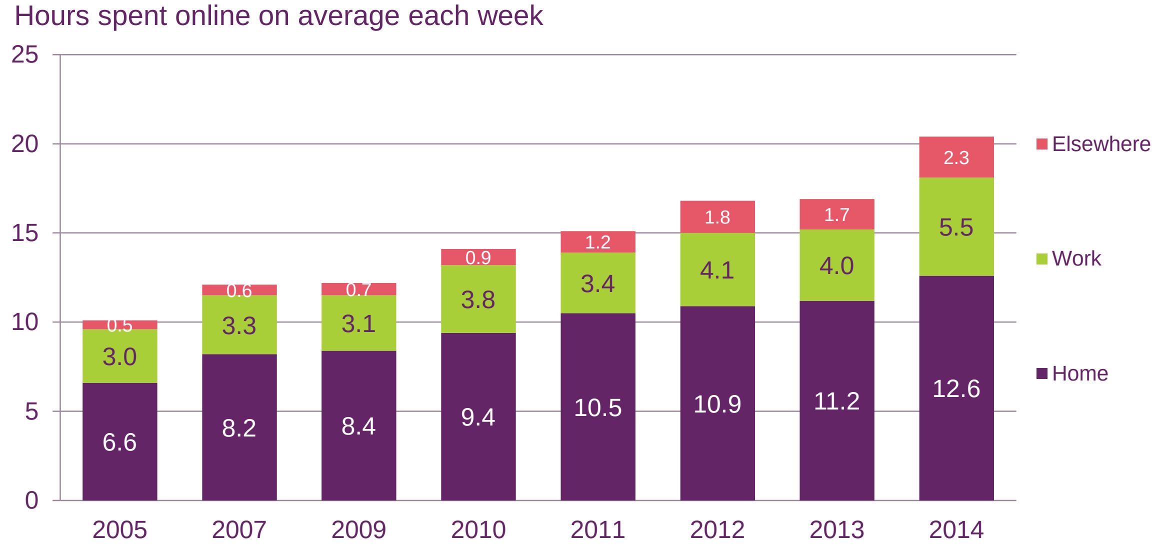
As well as more people accessing the internet, the time they spend online has more than doubled since 2005

One of the most noticeable changes over the past ten years has been the way in which people access the internet and consume online content, driven by several inter-related factors including evolution in technology, infrastructure, cost/price, attitudes, etc. Alongside this, internet take-up has continued to increase, and these increases have been particularly prevalent among older age groups[43].

As shown in Figure 1.96, the claimed weekly hours of internet use among all adults has increased year on year since 2005; from 9 hours 54 minutes to 20 hours 30 minutes on average. Time spent online at home (12 hours 36 minutes) and at work/ place of study (5 hours 30 minutes) have both nearly doubled, from 6 hours 36 minutes and 3 hours respectively; out-of-home use has increased five-fold from half an hour in 2005 to 2 hours and 18 minutes in 2014. The total among 16-24 year olds has increased substantially from 10 hours 24 minutes to 27 hours 36 minutes, while the increase has been much lower among 65+ year olds[44] (6 hours 30 minutes to 9 hours).

[43] See section 5.2.4, Figure 5.22, ‘The internet audience and time spent online’
[44] Note: the base for online users aged 65+ was fairly low in 2005 (78) so should be treated with some caution

Figure 1.96 Hours spent online in a typical week, by location: 2005-14



Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All adults who go online in any location on any device (1609 in 2014)
IN6A/IN6B/IN6C: How many hours in a typical week would you say you go online at <location>?

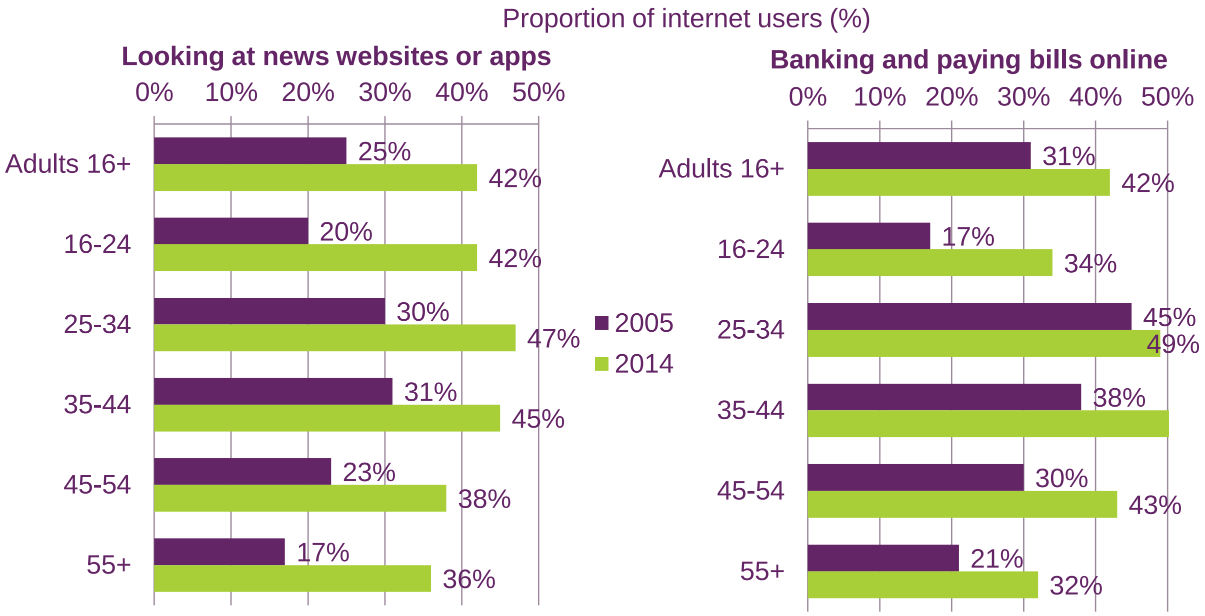
Popular offline activities are increasingly being done online

Consumption of news on any online platform has seen a large increase since 2005, from 25% to 42%. Figure 1.97 breaks this down further by age, and demonstrates that it is most prevalent at either end of the age scale; the figures for 16-24 year olds (20% to 42%) and over-55s (17% and 36%) have more than doubled.

Banking and paying bills online has also increased since 2005, from 31% to 42% in 2014. As shown in Figure 1.97, the most substantial increase has been among 16-24 year olds, where the weekly figure has doubled from 17% to 34%. For over-55s it has increased from 21% to 32%[45].

[45] Note: we don't break it out further to include 65+ year olds, as the base of internet users was too low in 2005 for this age group.

Figure 1.97 Weekly internet activities: 2005 vs. 2014

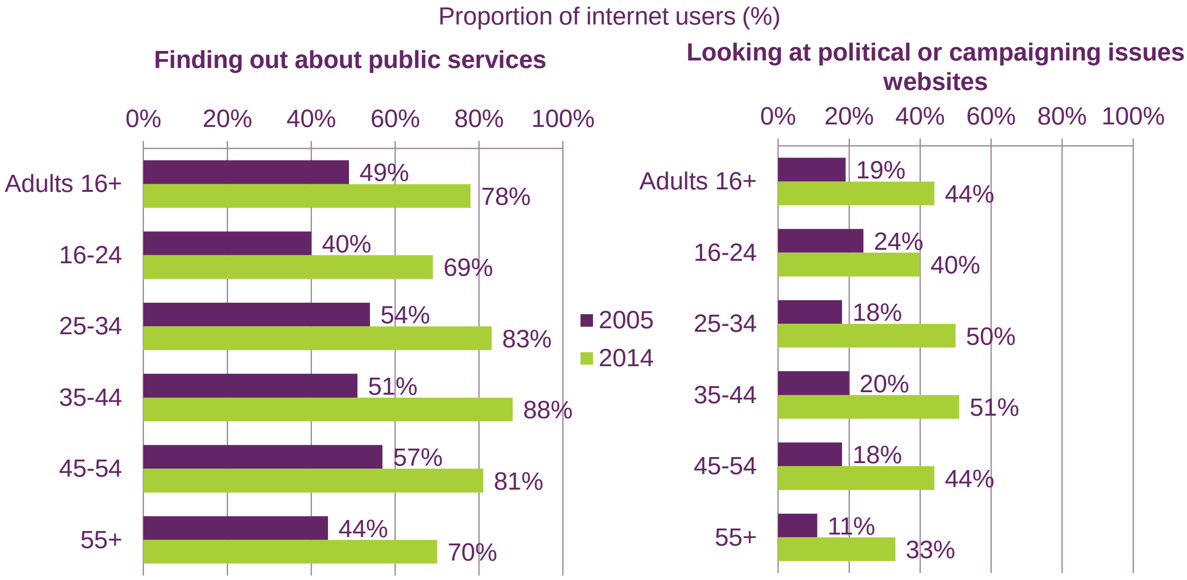


Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All adults who go online in any location on any device (1609 in 2014)
IN15L/M: How often do you use the internet to <activity>. Answer – at least once a week

Public/civic activities are also increasingly being done online. Two individual activities in this category have been included in the survey since 2005, and both have increased in terms of weekly use: *finding out about public services* has increased from 12% to 18%, and *looking at political or campaigning issues websites* from 4% to 11%.

However, since this category of activity is generally less likely to be done regularly, it is also useful to assess to what extent it is done at all. As shown in Figure 1.98, both activities have increased substantially: *finding out about public services* from 49% to 78%, and *looking at political or campaigning issues websites* from 19% to 44%. In addition to this (not shown in the chart), seven in ten (69%) internet users now say that they complete government processes online.

Figure 1.98 Use of the internet for public/civic activities: 2005 vs. 2014



Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All adults who go online in any location on any device (1609 in 2014)
IN15L/M: How often do you use the internet to <activity>. Answer – daily, weekly or less often

There is less concern about online content than ten years ago, but concerns remain more prominent than for other media, and apps are posing a new challenge

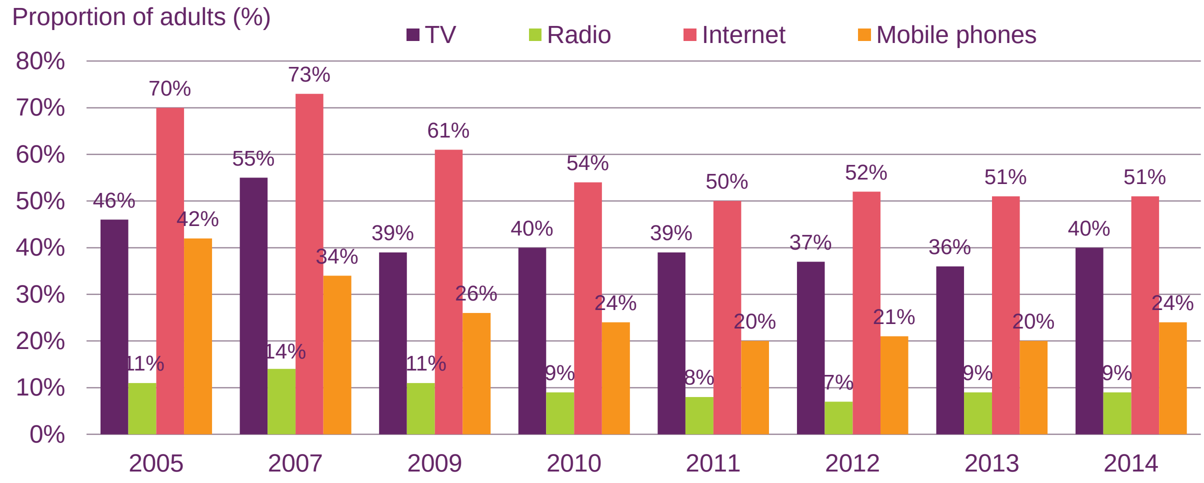
Since 2005 the internet has had the highest levels of stated concern across the types of media measured (including TV, radio, mobile phones and gaming), as shown in Figure 1.99.

The most-cited concerns regarding internet content are currently 'offensive/ illegal content' (38%) and 'risk to others/society (28%). The former was also the prime concern in 2005 when 54% cited a concern relating to 'offensive content'; the latter has increased from 15% in 2013. Despite this, the proportion citing any concerns with online content has decreased since 2005; from seven in ten (70%) to half (51%) of internet users, and the decrease has been particularly substantial among 35-44s (from 80% to 54%).

However, the recent surge in app use appears to be accompanied by increased concern about apps. In 2013 we asked app users[46] if they had any concerns about apps, and one in five (20%) indicated some form of concern. In 2014 this increased to 28%, primarily driven by issues relating to security/ fraud or privacy (up to 20% from 14% 2013) and offensive content (up to 9% from 4% in 2013).

[46] Defined as those who go online on either a smartphone, tablet or smart TV and say they use apps on any of these devices

Figure 1.99 Proportion of adults who have any concerns about media: 2005-14

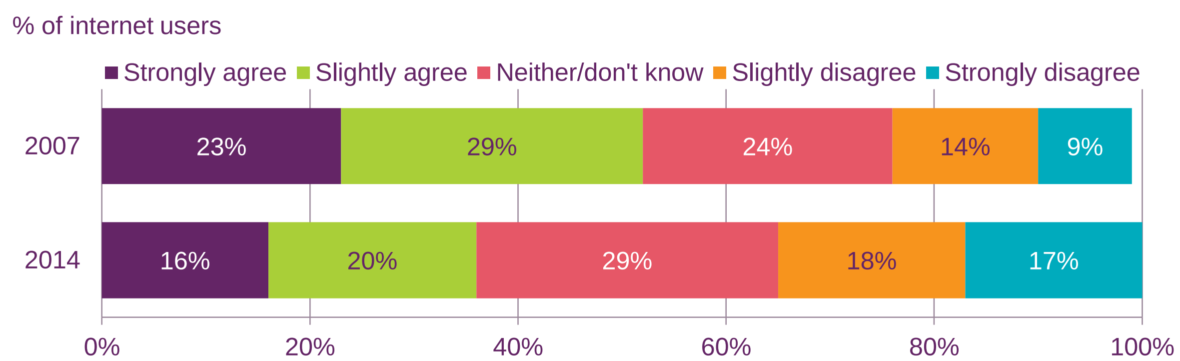


Source: Ofcom research, Adults Media Use and Attitudes Report
Base: Adults aged 16+ who use each platform (variable base).
IN34/ T5/ R3/ G3/ M3/ IN23 – Can you tell me if you have any concerns about what is on the internet/ TV/ radio. Do you have any concerns about gaming/ mobile phones/ apps?

Internet users under the age of 65 are more inclined to care about who owns websites, or how they are funded, than they were in 2007

In 2007 we started gauging the extent to which adults agreed with the statement: *'As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded'.* As shown in Figure 1.100, more than half agreed (52% either strongly or slightly agreed), a quarter had a neutral view (24% neither/don't know), and the same proportion (24%) disagreed strongly or slightly. In 2014, when we asked the same question, 36% either strongly or slightly agreed and 35% either strongly or slightly disagreed, with more neutrality evident. Among those aged 55-64, the proportion who said they strongly or slightly disagreed with this statement has almost doubled, from 24% to 42%.

Figure 1.100 Agreement with statement: "As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded": 2007 vs. 2014

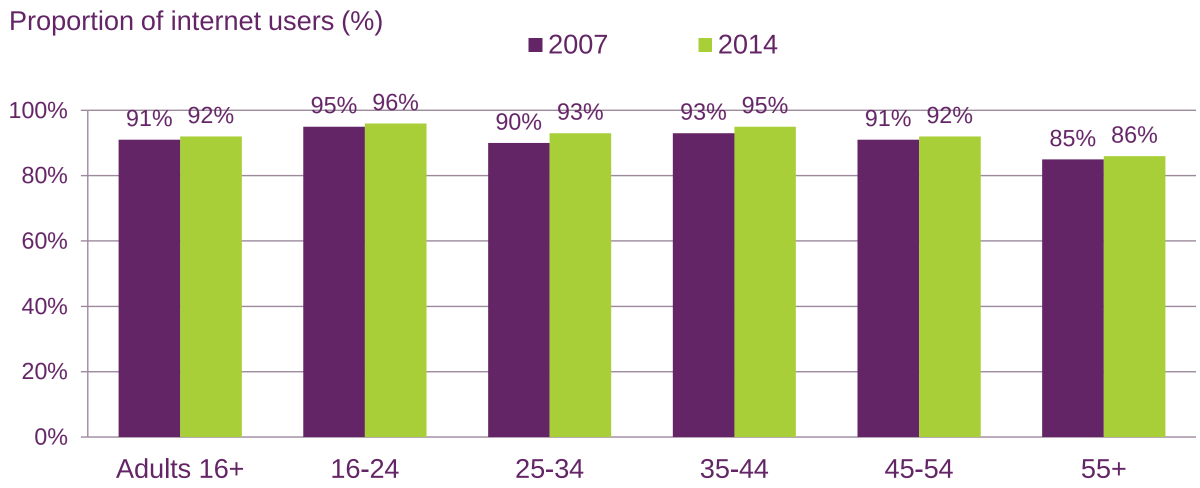


Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All who go online at home or elsewhere on any device (1609)
IN35F. As long as the internet provides good websites it doesn't really matter who owns the websites or how they're funded?

A majority of internet users claim confidence in finding information on the internet, but the levels have changed little over the years

We started to notice signs of confidence in using the internet among a majority of users in 2007. Our research that year showed that about six in ten considered themselves very confident in finding things online (58%), with nine in ten (91%) at all confident (i.e. they were 'confident' or 'fairly confident'). As shown in Figure 1.101 , this figure has remained similar over time and across all ages.

Figure 1.101 Proportion of adults confident of finding the content or information they want when they go online: 2007 vs. 2014

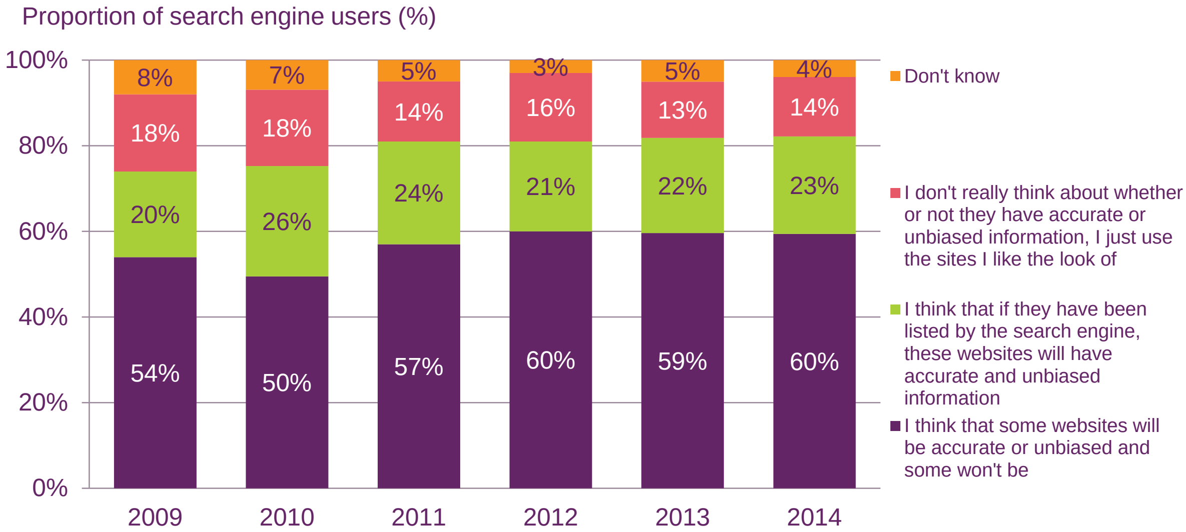


Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All internet users (1609 in 2014)
IN13B: How confident are you that you can find the content or information you want when you go online

Opinions about the potential for inaccuracy or bias of search engine results have remained similar over time, with little variation by age

Since 2009 we have measured opinions on the potential for inaccuracy or bias in the results that users get from search engines. These results have also changed little over time, as displayed in Figure 1.102; six in ten (60%) search engine users believe that some results will be accurate and unbiased, while others won't be. This is not significantly different to the 2009 level (54%). In contrast to most of the measurements assessed so far in this section, this is consistent across younger and older demographics (e.g. 56% of 16-24s and 62% of over-65s).

Figure 1.102 Opinions on the accuracy of search engine results: 2009-14



Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All online adults aged 16+ who ever use search engines (1516 in 2014).
IN45. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages?

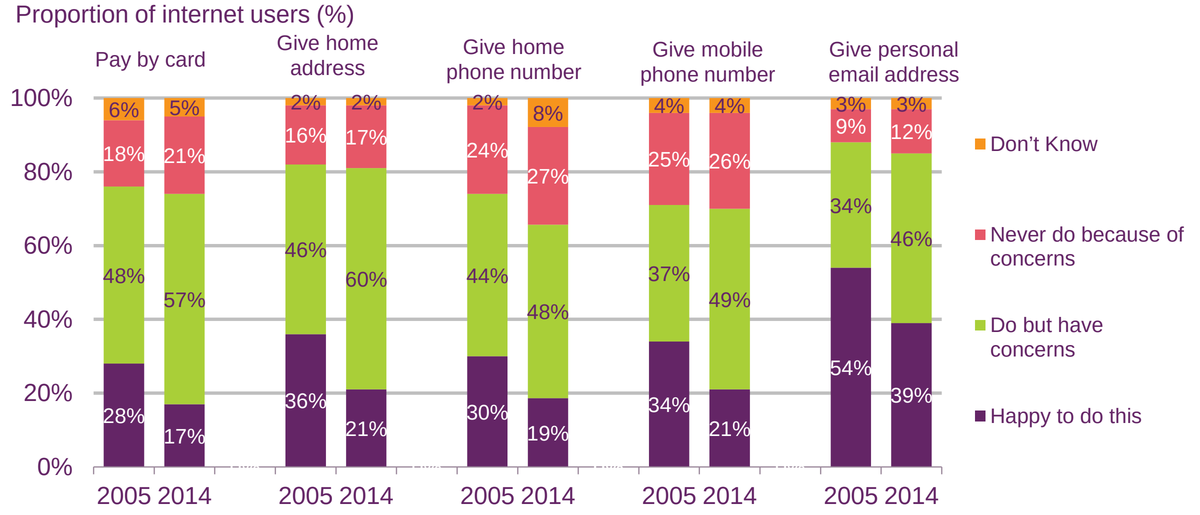
The majority of internet users say they would share personal information online, but there is evidence of added caution in doing this over the ten years of tracking

Since 2005 we have asked adults if they ever provide different types of personal information online (paying by credit or debit card online, giving home address details, home number, mobile number and personal email address), and if so, whether they do so with or without concerns.

The majority of online users say they do provide the information. For example, in 2014 81% of adults said they gave out their home address details online; this has remained virtually unchanged since 2005 (82%). However, the proportion who are happy to give out their information has fallen since 2005 for all of the types of personal information. Thirty-three per cent were happy to give out their home address details in 2005, and this figure is now 21%.

Consequently, it appears that more caution has crept in over time, highlighted by the fact that 60% of internet users have concerns about giving out their home address details online, compared to 46% in 2005. As shown in Figure 1.103, steady (but not significant in all cases) increases are spread across all ages, and this trend is mirrored for all other types of personal information we asked about. Despite this, four in ten (43%) of internet users say they only skim-read website terms and conditions / privacy statements.

Figure 1.103 Attitudes to giving out personal details online: 2005 vs. 2014

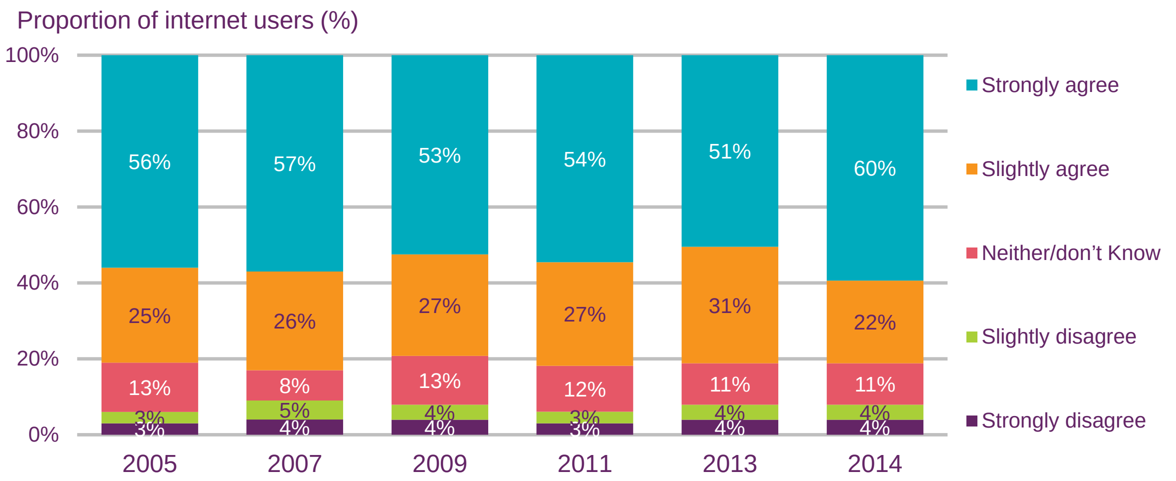


Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All who use the internet at home (2005) / All who go online at home or elsewhere on any type of device (1609 in 2014)
IN38. …I'd like you to say how you would feel about doing this in terms of any security concerns…. Entering your home address details? Answer - Have some security concerns about doing this, but would do it

Overall agreement that internet users must be protected from inappropriate or offensive content is similar to 2005, but opinions are stronger than in 2013

Respondents have been asked since 2005 the extent to which they agree that internet users must be protected from seeing inappropriate or offensive content online. As shown in Figure 1.104, this has remained fairly consistent over the years, and overall agreement (82%) has not changed since 2005 (81%). Similarly, six in ten (60%) strongly agree with the statement; again, this is close to the level seen in 2005 (56%), although it is a significant increase on 2013 (51%).

Figure 1.104 Extent of agreement with the statement: "Internet users must be protected from seeing inappropriate or offensive content": 2005-14



Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All who go online at home or elsewhere on any type of device (1609 in 2014)
IN35E: Internet users must be protected from seeing inappropriate or offensive content

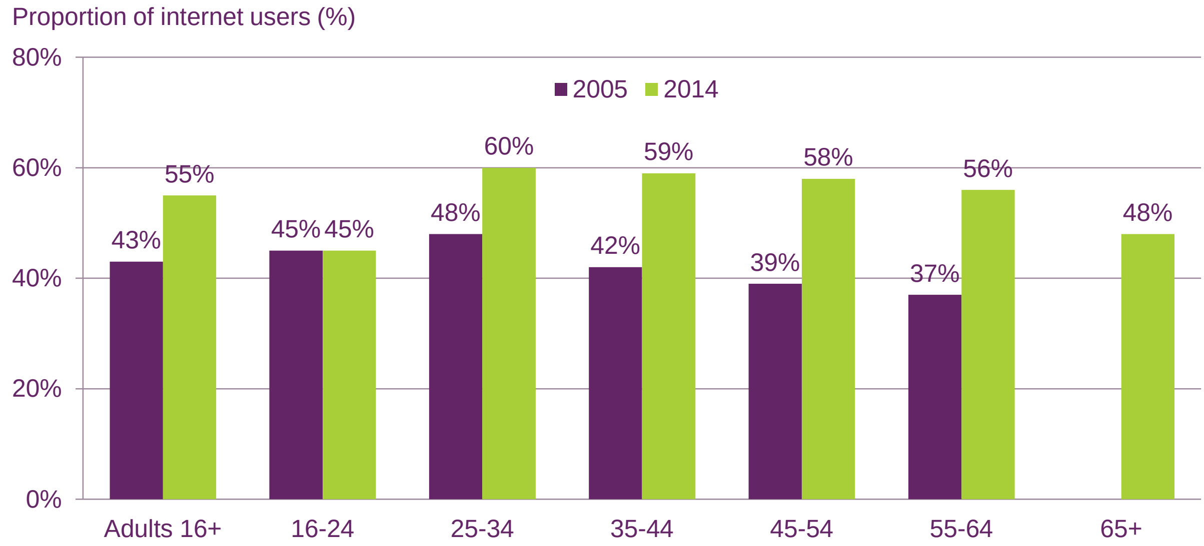
The majority are using technical indicators such as padlocks and system messages to measure website safety, and this has increased among over-25s since 2005

In 2005 six in ten (59%) internet users said they could block computer viruses with confidence (rising to 67% of 25-34 year olds). A further 9% of internet users said they did it with difficulty, and 17% said they got someone else to do it for them. So in total 86% of internet users said they were adopting security measures when online.

Although we no longer measure this type of confidence, a similar proportion (88%) of internet users said in 2014 that they adopt any security measures, ranging from a third (33%) who deleted web-browser cookies to three-quarters (75%) who used anti-virus software. In addition, eight in ten (80%) cite being 'very' or 'fairly' confident of staying safe online. As a result, or in spite of this, two-thirds (64%) use the same password for most or all websites.

In terms of the ways in which people actively evaluate whether it is safe to provide personal details, the use of 'formal judgements' *(e.g. padlocks or system messages)* has increased, from 43% to 55%. Although this has not changed among 16-24 year olds (45% in 2014 vs. 46% in 2005), it is greater among those aged 25 and over. For example, for adults aged 45-54 it has increased by 19pp (from 39% to 58%), as displayed in Figure 1.105 below.

Figure 1.105 Use of formal judgements before entering personal details



Source: Ofcom research, Adults Media Use and Attitudes Report
Base: All who use the internet at home (2005) / All who go online at home or elsewhere on any type of device (1609 in 2014)
IN39…tell me whether you would make a judgement about a website before entering these types of details?

1.11 Developments in the nations

1.11.1 Introduction

This section sets out a selection of key facts and figures relating to communications markets across the UK's nations in 2015, comparing and contrasting each nation. It demonstrates that while there are similarities between the nations, there are also important differences in the availability, use and take-up of communications services and devices. The section covers TV, radio, post, telecoms, and internet and online content. Information in this section was compiled using a number of sources including BARB, RAJAR, information provided by operators, and Ofcom research.

1.11.2 Key findings

- **On average, people in Wales watch the most TV in the UK (251 minutes per day).** There has been a decline in TV viewing in Scotland, Wales and Northern Ireland, in line with the rest of the UK.

- **Across all the devolved nations, there were claimed increases in non-traditional viewing compared to the previous year**. This includes catch-up on-demand services e.g. BBC iPlayer, watching content that has been personally recorded e.g. using a DVR, and using subscription on demand e.g. Netflix). Increases for all of these non-traditional viewing activities were higher in Scotland and Wales than in the UK overall. In Wales, the increase in using catch-up on-demand services was higher than in the UK.

- **Smartphone take-up is lower in the nations.** Sixty-seven per cent of adults in England have a smartphone, compared to 63% in Wales, Scotland and Northern Ireland.

- **Household take-up of tablet devices across the UK stands at 54%.** It is highest in Wales at 60%, followed by England at 54%, Northern Ireland at 54%, and Scotland at 52%.

- **4G coverage is highest in England, covering 92% of premises, and lowest in Wales (62.8%).** Almost half of premises in England (46.2%) have coverage from four operators, compared to just 18.3% in Wales.

- **4G take-up has increased significantly in all four nations over the past year.** By Q1 2015, 30% of UK adults said they were 4G users, with take-up highest in Scotland (34%, up by 15 % points compared to 2014), followed by England at 30% (an increase of 18 % points), Northern Ireland (26%, an increase of 17 % points), and Wales (23%, an increase of 12 % points).

- **The proportion of premises able to receive superfast broadband services (30Mbit/s or higher) is highest in England (84%), followed by Wales (79%), Northern Ireland (77%), and Scotland (73%).** Across the UK and in each of the nations, superfast broadband availability is considerably higher in urban than in rural areas.

- **People in Scotland listen to radio less than those in other nations of the UK.** People in Scotland spend the least amount of time listening to radio (19.9 hours on average per week), while people in Wales spend the most (22.4 hours).

- **Over a third of adults in Scotland (36%) said they had not sent any post in the past month,** the highest across all the nations. This compares to 33% in Northern Ireland, 25% in Wales and 22% in England.

Nations' fast facts: wave 1 2015 (%)
Unless otherwise stated, figures relate to household take-up

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural
Digital TV take-up	97	97	96	98	97	96 -	98 +
Pay-digital TV	59	58	58 -10	67[1] + +10	63	59 +	55 -
Freeview-only TV	30	30 -3	35[2] +10	24 - -9	28	30 -	35 +
Smart TV take-up (among TV homes)	21 +9	21 +9	19 +11	17 +8	15 - +8	20 +8	23 +12
HDTV service (among those with an HDTV)	75 +5	75 +5	75	69 -	75	74 - +4	81 +
DAB ownership (among radio listeners)[3]	43	44	37	47	29 -	42 -	50 +
Catch-up TV/ film viewing online/ on-demand (on any device, among those who use the internet)	56 +5	56 +5	62	57	42 -	56 +4	56 +10
Total internet access at home (by any device)	85 +3	86 +4	78 -	86 +6	79 -	85 +3	85
Broadband take-up at home (fixed or broadband)	80 +3	81 +4	73 -	78 +7	72 -	79 +3	82
Use mobile to access internet	61 +4	62 +5	59	59	60 +9	62 + +4	55 -
Mobile phone take-up (personal use)	93	93	91	90	91	92	93
Smartphone take-up (personal use)	66 +5	67 +6	63	63	63 +8	67 + +5	59 -
4G service take-up	30 +18	30 +18	34 +15	23 +12	26 +17	n/a	n/a
Fixed landline take-up	84	85	82	83	84	84 -	90 +
Desktop PC take-up	34	37	22 -	26 -	28 -	34	35
Laptop take-up	65	66	55 -	65 +8	55 -	64	67
Tablet computer take-up	54 +10	54 +10	52 +10	60 + +15	54 +9	54 +11	55 +8
E-reader take-up (personal use)	20 +3	20 +3	14 -	19	15 -	19 +3	22
Households taking bundles	63	64	61	67 +8	61 +7	63	67
Fixed telephony availability	100	100	100	100	100		

Fixed broadband availability[4]	99.98	100	99.86	100	100
LLU ADSL broadband availability[5]	95	96	89	93	89
Virgin Media cable broadband availability[6]	44	47	36	21	27
BT Openreach / Kcom fibre broadband availability[7]	82	82	75	83	92
NGA broadband availability[8]	89	90	85	87	95
Superfast broadband availability	83	84	73	79	77
2G mobile availability[9]	99.7	99.8	99.5	98.9	98.9
3G mobile availability[10]	99.3	99.6	97.1	97.9	98.6
4G mobile availability[11]	89.5	92.1	79.7	62.8	91.1
DTT availability[12]	98.5	98.6	98.7	97.8	97.4
TV consumption (minutes per day) (2014)	220	221 *	239	251	227
Radio consumption (minutes per day)	183	184	171	138	185

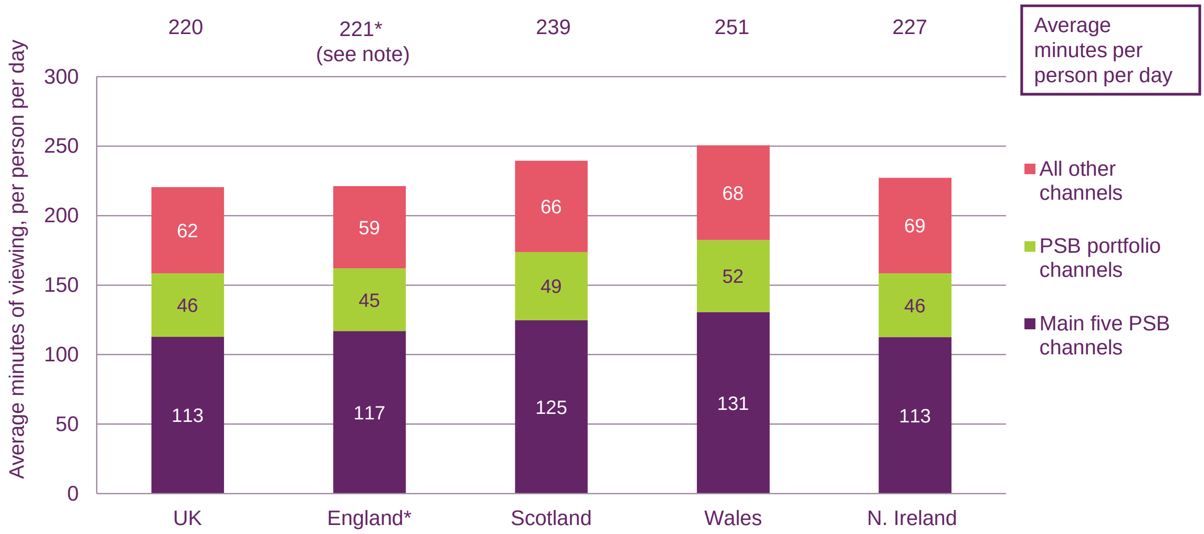
Key: $^{+}$Figure is significantly higher for nation than UK average or significantly higher for nation's urban/ rural than for nation's rural/ urban; $^{-}$Figure is significantly lower for nation than UK average or significantly lower for nation's urban/ rural than for nation's rural/ urban; +xx Figures have risen significantly by xx percentage points since W1 2014; +xx Figures have decreased significantly by xx percentage points since W1 2014;
Source: Ofcom Technology Tracker Q1 2015, BARB 2014, RAJAR, industry data
Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 1974 England urban, 290 England rural, 246 Scotland urban, 246 Scotland rural, 249 Wales urban, 247 Wales rural, 249 Northern Ireland urban, 255 Northern Ireland rural)
1. This increase may be attributable to an anomalous decline in Wales cable TV as main television set in 2014 - In 2015 cable take-up in Wales increased by 6 pp to 10% over the previous year, returning it to 2013 levels. Market research surveys are subject to sample error and will occasionally report anomalous results.
2. In 2014 the survey data indicated a decline in use of Freeview as a main television service in Scotland. The 2015 measure is similar to the previous measure from 2013. This may suggest that the apparent decrease in 2014 could have been accounted for by sample error.
3. DAB ownership in the nations and UK as reported here is sourced from Ofcom research. The UK CMR uses RAJAR data for DAB ownership
4. Proportion of premises connected to an ADSL-enabled BT local exchange based on BT data, December 2014
5. Proportion of premises connected to an LLU-enabled BT local exchange based on BT data, December 2014
6. Proportion of premises able to receive Virgin Media cable broadband services, May 2015
7. Proportion of premises able to receive BT Openreach/ KCom fibre broadband services, May 2015; under regulatory rules other providers can provide retail fibre broadband services to consumers using these networks.
8. Proportion of premises able to receive NGA broadband services, May 2015
9. Proportion of premises that have outdoor 2G mobile coverage from at least one operator, May 2015
10. Proportion of premises that have outdoor 3G mobile coverage from at least one operator, May 2015
11. Proportion of premises that have outdoor 4G mobile coverage from at least one operator, May 2015
12. Estimated proportion of homes that can receive the PSB channels through DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom).
** This figure reflects the average across the English regions with the highest in Border at 250 minutes (4 hours 10 minutes) and lowest in West at 197 minutes (3 hours 17 minutes) respectively.*

1.11.3 Television and audio-visual content

On average, people in Wales watch the most TV in the UK (251 minutes per day)

On average, people in Wales watch the most traditional TV (live content, viewed at the time of broadcast) in the UK (at 251 minutes per day) while people in England watch the least (221 minutes per day). The biggest decline was in Northern Ireland (-6.1%), followed by Wales (-4.7%), and Scotland (-2.7%).

Figure 1.106 Average minutes of television viewing per day, by nation: 2014



*Source: BARB, individuals (4+). main five PSB channels = BBC One, BBC Two, ITV, Channel 4 and Channel 5, including HD variants but excluding +1s. *Note: This figure reflects the average across the English regions with the highest in Border (250) and lowest in West (197) respectively.*

Across all the devolved nations, there were claimed increases in non-traditional viewing compared to the previous year

To better understand the decline in traditional TV viewing, Ofcom commissioned omnibus research[47] in April 2015. Consumers in each nation were asked how their viewing activities had changed over the previous year. Across all of the devolved nations, there were claimed increases in non-traditional viewing (using catch-up on-demand services e.g. BBC iPlayer, watching content that had been personally recorded e.g. using a DVR, or using subscription on demand e.g. Netflix).

Viewers in Wales were the most likely to say that they were watching more catch-up/on-demand services, with 46% claiming they had used them more and only 6% claiming they had used them less, resulting in a net increase of 40%. Northern Ireland and Scotland had similar net increases of 39% and 36% respectively.

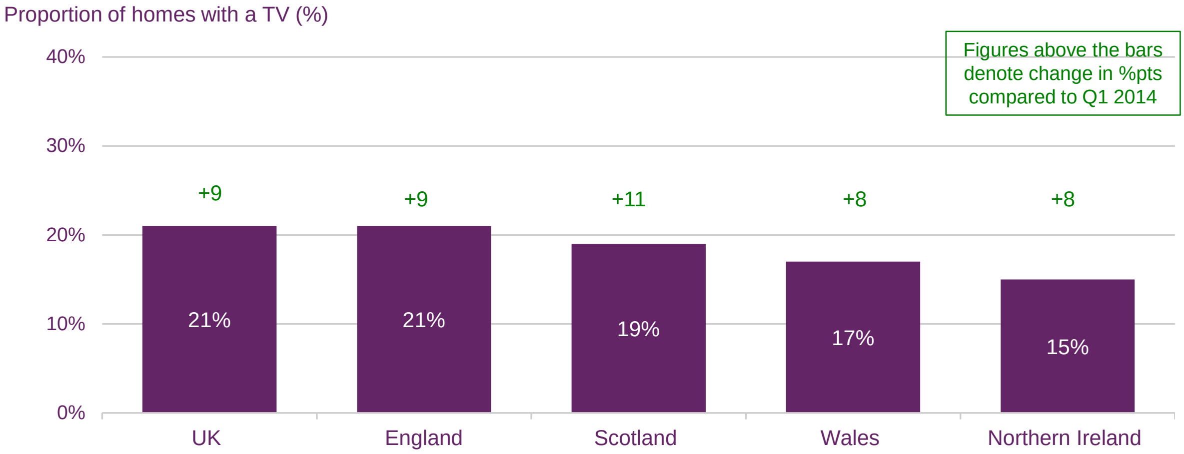
Claimed viewing of personally recorded content increased over this period, with Northern Ireland seeing a net increase of 32%, Scotland 24%, and Wales up by 18%. In addition, claimed viewing of subscription services increased, with Northern Ireland up by 22% and Scotland and Wales up by 15% and 13% respectively.

[47] Source: GfK NOP omnibus, July 2015. Base: All adults 16+, Northern Ireland (110), Scotland (163), Wales (99)

Increases for all of these non-traditional viewing activities were higher in Scotland and Wales than in the UK overall. In Wales, the increase in using catch-up on-demand services was higher than in the UK.

As we saw in section 1.5.3, over half (56%) of UK TV homes had a TV connected to the internet, either via a set-top box or a smart TV, at the end of 2014, and smart TV take-up has increased across the UK. Take-up is highest in England; 21% of households in England have a smart TV, followed by Scotland at 19%, Wales 17% and Northern Ireland 15%.

Figure 1.107 Smart TV take-up across the UK

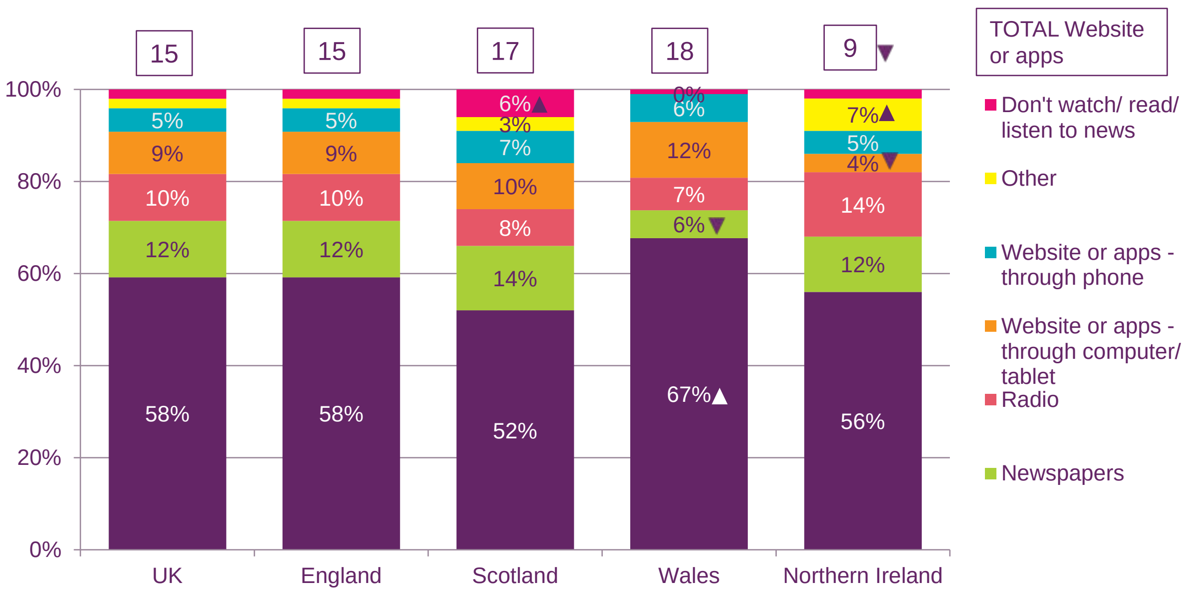


Source: Ofcom Technology Tracker, Q1 2015
Base: All online adults aged 16+ with a TV in the household (n = 3616 UK, 462 Northern Ireland, 2197 England, 472 Scotland, 485 Wales, 230)
QH18. Are any of your TV sets 'smart TVs'? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

TV remains the most important source for news across the UK

Despite the decline in viewing to traditional TV, TV remains the most important source of news for adults across the UK. It is most important in Wales, where 67% of adults said it was their main media source, followed by England (58%), Northern Ireland (56%), and Scotland (52%). Adults in Wales are the least likely to use newspapers.

Figure 1.108 Main media source for UK and world news, by nation: 2014



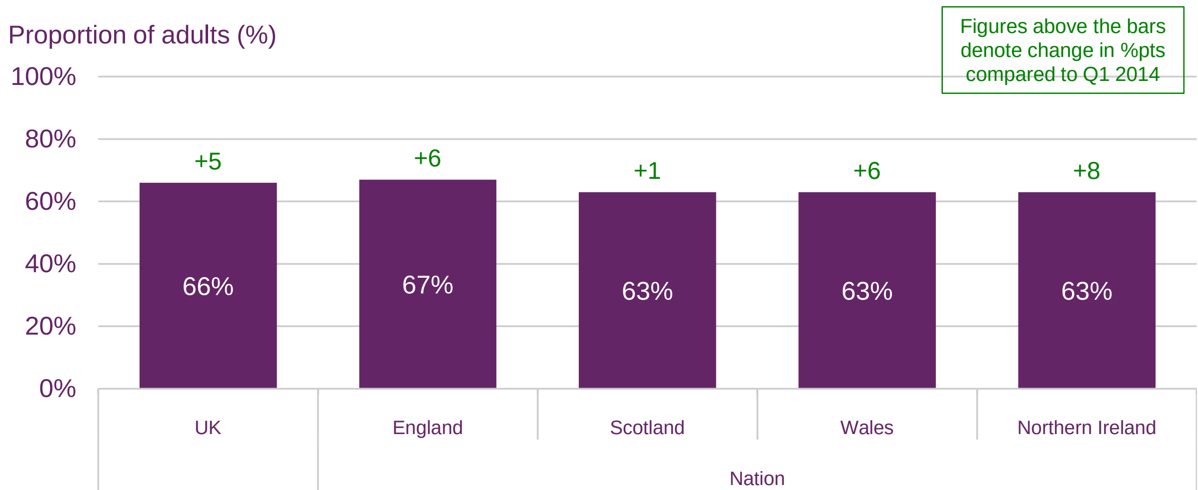
Source: Ofcom Media Tracker 2014
Base: All (2,074); England (1,577); Scotland (183); Wales (154); Northern Ireland (160). Significance testing (indicated by a triangle) shows any difference in the main source of news between any nation and all adults.

1.11.4 Internet and online content

Smartphone take-up is lower in the nations

Smartphone ownership is lower in Scotland, Wales and Northern Ireland than it is in England. It has increased to 66% of adults across the UK (67% in England and 63% in Wales, Scotland and Northern Ireland).

Figure 1.109 Take-up of smartphones across the UK

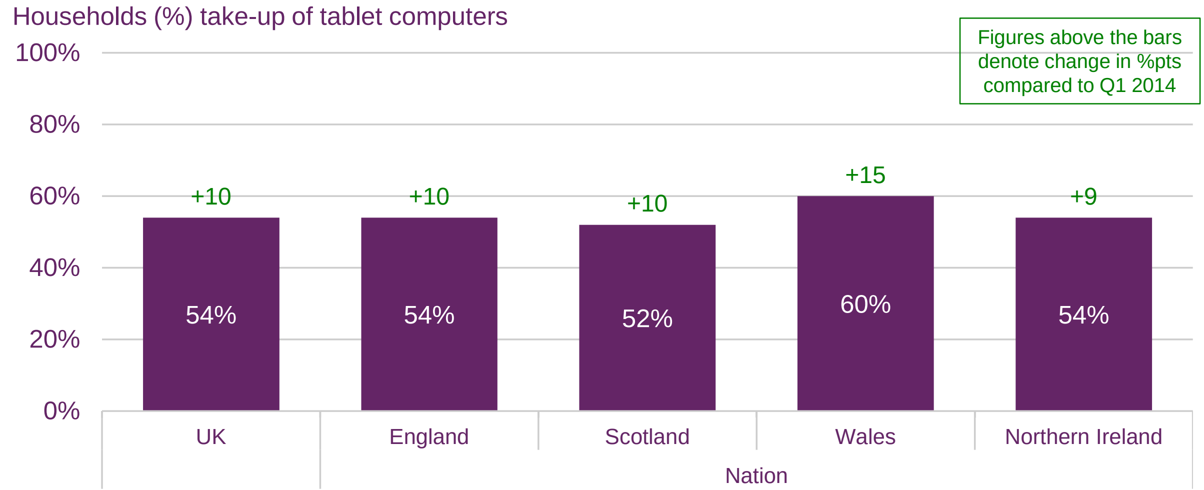


Source: Ofcom Technology Tracker, Q1 2015
Base: All online adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249) QD24B. Do you personally use a smartphone? A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

Household take-up of tablet devices across the UK stands at 54%

There has been another large increase in tablet ownership across the UK. More than half of all households now own a tablet, up from 44% in 2014, a rise of ten percentage points. Households in Wales are most likely to own a tablet (60%), up from 45% in 2014, followed by England (54%), Northern Ireland (54%) and Scotland (52%).

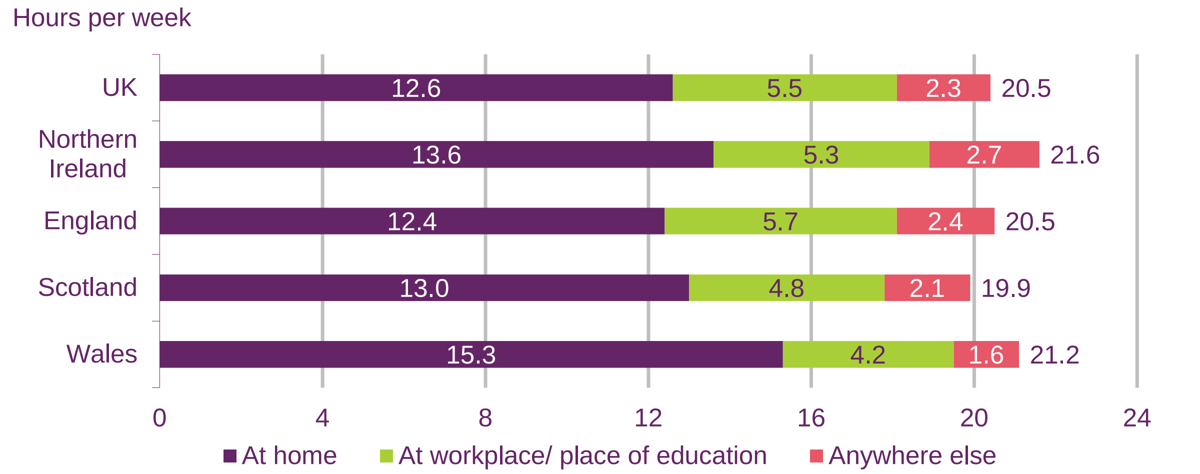
Figure 1.110 Take-up of tablet computers



Source: Ofcom Technology Tracker, Q1 2015
Base: All online adults aged 16+ (n = 3756 UK, 504 Northern Ireland, 2264 England, 492 Scotland, 496 Wales, 249)QE1. Does your household have a PC, laptop, netbook or tablet computer?

Internet users in Northern Ireland say they spent significantly more time online in 2014 than they did in the previous year, up from 13.8 to 21.6 hours in a typical week. This is the highest of the four nations, followed by Wales (21.2 hours, an increase from 15.5 hours), England (20.5 hours, up from 17 hours), and Scotland (19.9 hours, up from 16.5 hours).

Figure 1.111 Claimed time spent on the internet in a typical week



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014
Question: IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
Base: All online adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland).

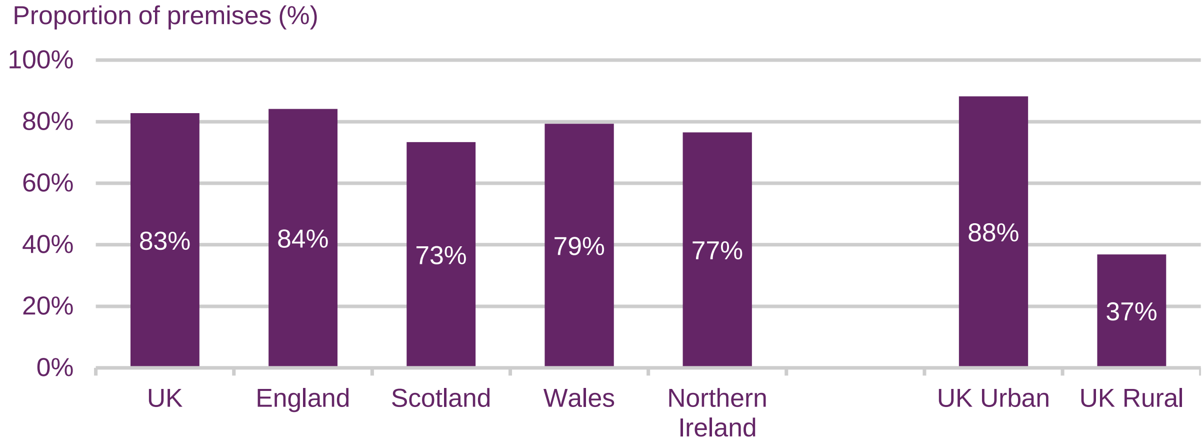
1.11.5 Telecoms and networks

The proportion of premises able to receive superfast broadband services (30Mbit/s or higher) is highest in England (84%), followed by Wales (79%), Northern Ireland (77%), and Scotland (73%).

The proportion of premises able to receive superfast broadband services (defined as those with an actual speed of 30Mbit/s or higher) is highest in England (84%), followed by Wales (79%), Northern Ireland (77%), and Scotland (73%). Across the UK and in each of the nations, superfast broadband availability is considerably higher in urban than in rural areas.

Broadband take-up (at home) is highest in England at 81%, followed by Wales (78%), Scotland (73%) and Northern Ireland (72%). Total internet access at home (on any device) is highest in Wales and England (both at 86%), followed by Northern Ireland (79%) and Scotland (78%).

Figure 1.112 Proportion of premises able to receive superfast broadband services

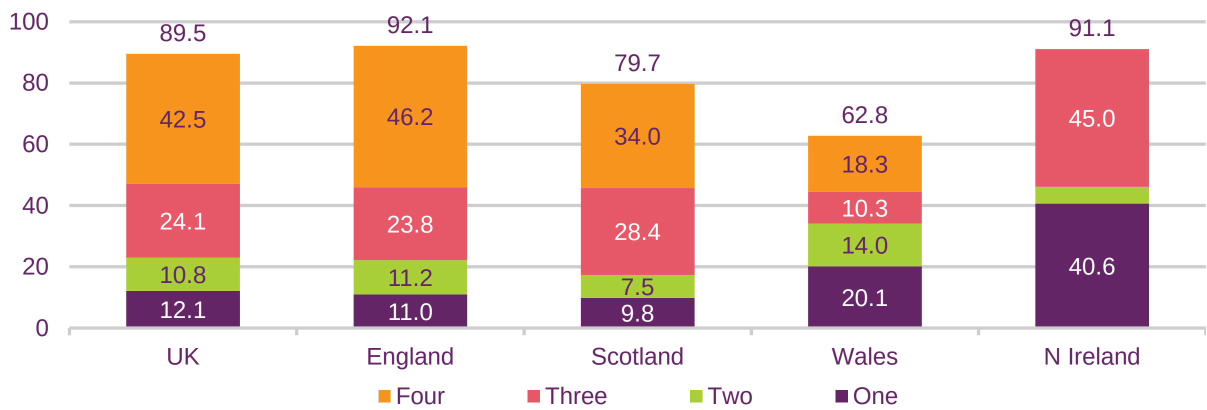


Source: Ofcom / operators, June 2015 data

4G coverage is highest in England, covering 92% of premises, and lowest in Wales (62.8%)

Among the UK nations, 4G coverage is highest in England, where it covers 92% of premises, and lowest in Wales (62.8%). Almost half of premises in England (46%) have coverage from four operators, compared to 34% in Scotland and just 18% in Wales. While Northern Ireland has relatively good 4G coverage (at 91%), choice is more limited because mobile operator Three has yet to launch its 4G service there.

Figure 1.113 4G mobile premises coverage, by number of operators



Source: Ofcom based on operator data, May 2015 data
Note: Coverage is based on 100m² pixels covering the UK using an enhanced methodology. Mobile operator Three has yet to launch 4G services in Northern Ireland.

4G take-up has increased significantly in all four nations over the past year. 4G take-up is highest in Scotland 34%, an increase of 15 percentage points since 2014, followed by England at 30% (up by 18 percentage points), Northern Ireland at 26% (up by 17 percentage points), and Wales at 23% (up by 12 percentage points).

Northern Ireland had the highest proportion of mobile phone users among the UK nations whose main service was pre-pay in Q1 2015 (43%), ten percentage points higher than the UK average of 33%. Pre-pay take-up is broadly similar in Scotland (34%), Wales (33%), and England (32%).

1.11.6 Radio and audio content

People in Scotland listen to radio less than those in other nations of the UK

People in Scotland spend the least time (19.9 hours on average per week) listening to radio, while people in Wales spend the most time (22.4 hours) listening to radio.

Figure 1.114 Average weekly reach and listening hours: 2014

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening	21.5 hours	19.9 hours	22.4 hours	21.6 hours	21.4 hours
Reach	89.4%	86.9%	94.5%	88.9%	89.5%

Source: RAJAR, All adults (15+), year ended Q4 2014. Reach is defined as a percentage of the area's adult population who listen to a station for at least five minutes in the course of an average week.

People in Northern Ireland listen to the most local radio

The share of listening hours to local and nations' services in Northern Ireland is higher than in any other part of the UK. Local commercial and BBC local and nations' services together accounted for 55% of total listening hours in 2014. The majority of this listening was to local commercial stations, with a 35% share of total listening hours. This is 5pp above the UK average and higher than in any other nation.

Wales has the highest share of listening to BBC network services. BBC network radio stations represented almost half (49%) of all listening hours in Wales in 2014. This was the highest share of listening for this sector compared to the other nations.

People in Scotland spend more time with commercial stations than in the other nations. Commercial stations accounted for almost half (48%) of listening hours in Scotland in 2014. This is the highest share for commercial radio across the UK nations.

DAB ownership is highest in Wales

DAB ownership (among radio listeners) remains below 50% across all four nations of the UK. It is lowest in Northern Ireland (29%) and Scotland (37%), and highest in Wales (47%).

Figure 1.115 Ownership of DAB digital radios

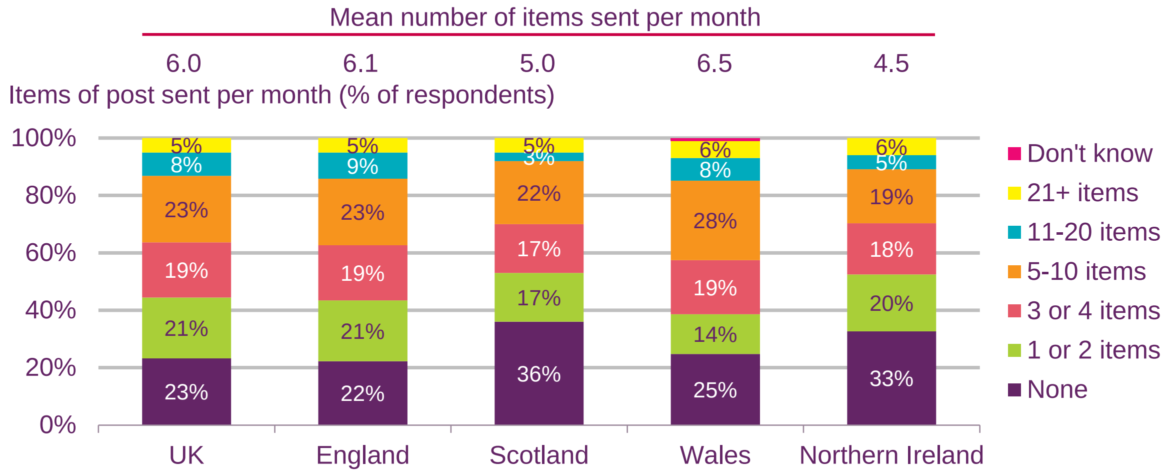
Source: Ofcom Technology Tracker, Q1 2015
QP9. How many DAB sets do you have in your household?
Base: Adults aged 16+ who listen to radio (n = 2934 UK, 406 Wales, 1735 England, 386 Scotland, 407 Northern Ireland, 205)

1.11.7 Post

Over a third of adults in Scotland (36%) said they had not sent any post in the past month, the highest across all the nations

Adults in Wales send more items of post than those in other UK nations. They claim to send 6.5 items of post per month, on average, compared to 4.5 in Northern Ireland. More than a third of adults in Scotland (36%) had not sent any post in the past month, the highest among the UK nations.

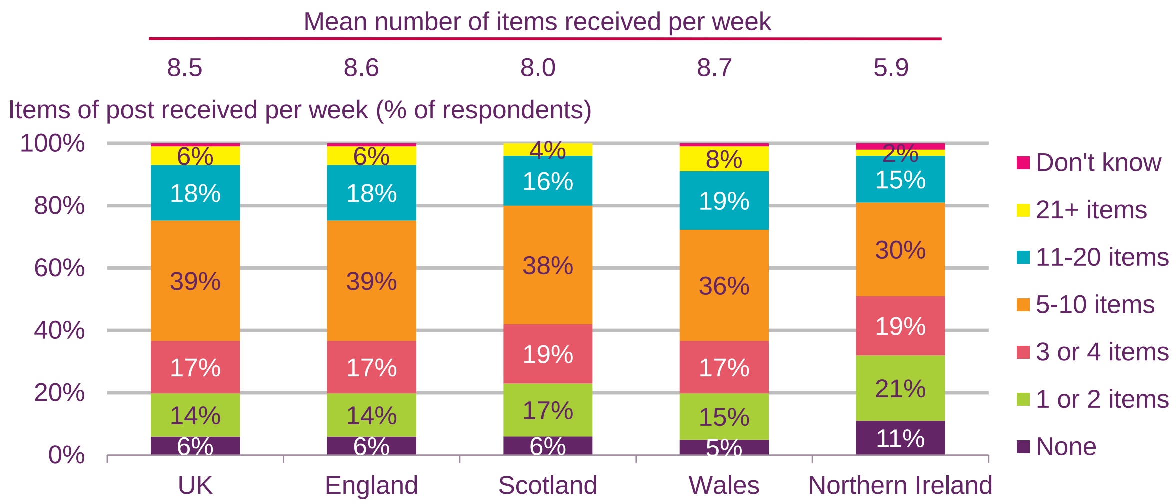
Figure 1.116 Approximate number of items of post sent each month (residential)



Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)
QC1. Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Adults in Wales also receive more post than those in other nations of the UK. They claim to receive 8.7 items of post (including letters, cards and parcels) on average every week. This compares to 8.6 in England, 8.0 in Scotland and 5.9 in Northern Ireland.

Figure 1.117 Approximate number of items of post received in the past week

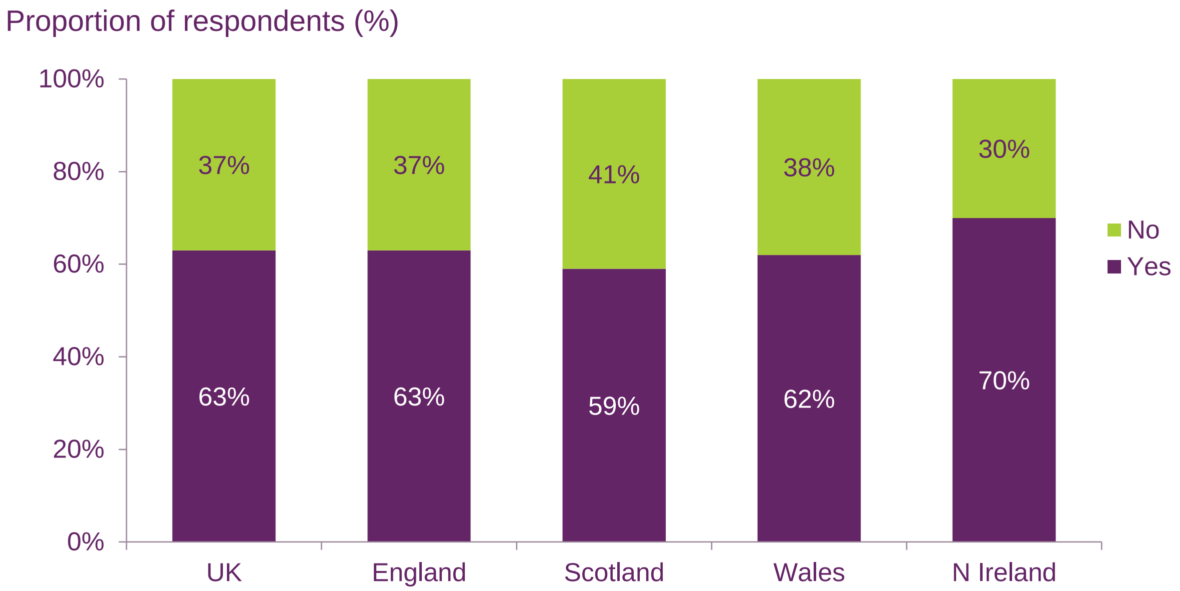


Source: Ofcom Residential Postal Tracker, Q2 2014-Q1 2015
Base: All respondents (n = 3557 UK, 2123 England, 580 Scotland, 418 Wales, 436 Northern Ireland)
QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the past week?

Businesses in Northern Ireland are most likely to have switched from post to other communications methods

Across the UK, 63% of businesses have switched some mail to other communications methods in the past 12 months. The figure is highest in Northern Ireland (70%), followed by England (63%), Wales (62%) and Scotland (59%).

Figure 1.118 Proportion who have switched some post to other communications methods in the past 12 months



Source: Ofcom Business Postal Tracker, Q2 2014-Q1 2015
Base: All respondents (n = 1591 UK, 973 England, 217 Scotland, 198 Wales, 203 N Ireland)
QF4. Over the last 12 months has your organisation moved some mail to other communications methods?