Factsheet 6 – Ownership of media devices and services

Ofcom
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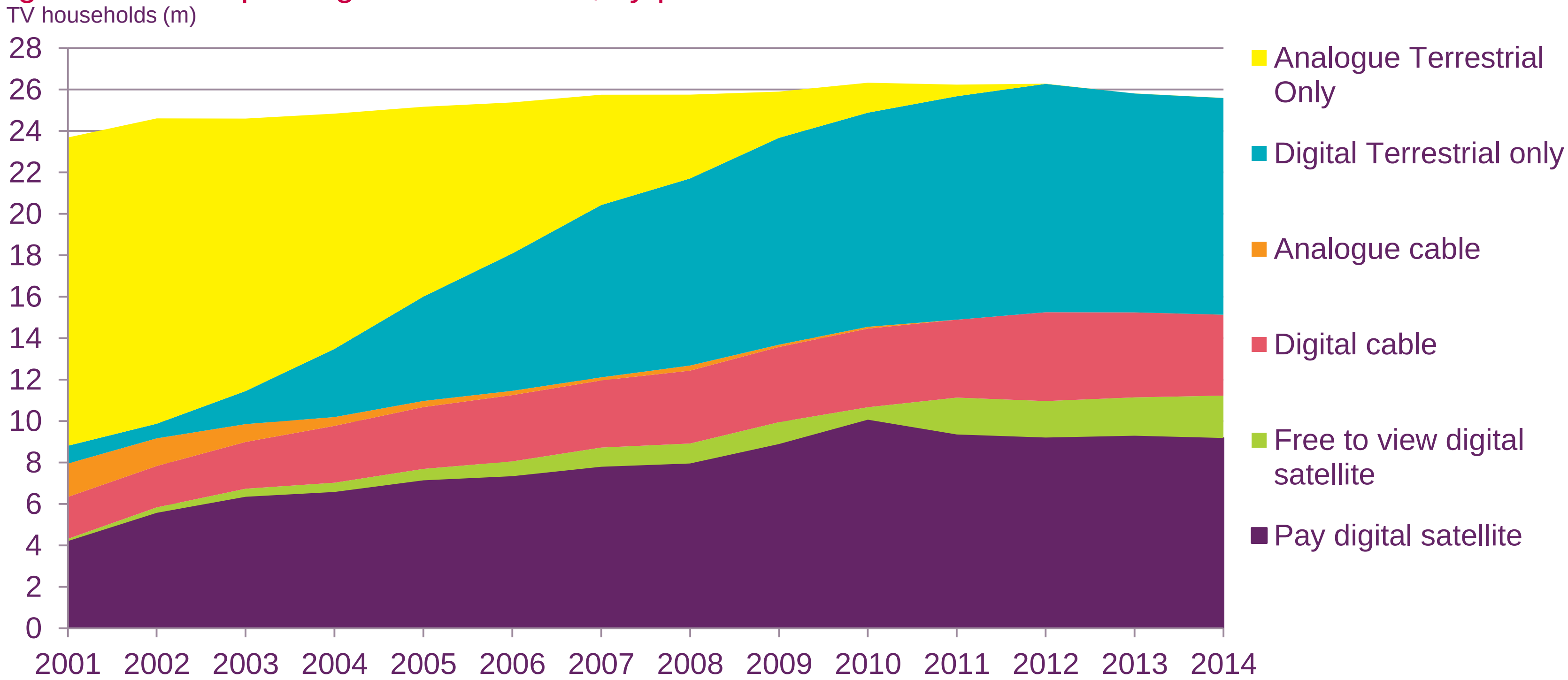
This factsheet has been compiled by Ofcom and provides background information to aid discussion at the 2016 Oxford Media Convention. It looks at ownership and take-up of various media devices and services in the UK in 2015 compared with previous years, as well as looking at age, socio-economic group and gender, drawing on Ofcom consumer research, much of which featured in Ofcom's CMR 2015 Report.

Market Context

Key points

- In 2014, there was an indication of a slight decline in the total proportion of households that received a television service, as shown in Figure 1. The small decline may be attributable to households who watch audio-visual content via an IP connection only, do not own a television, or use a television set that does not receive any broadcast signal. Comparing 2014 to 2013, there has been a decline in the proportion of households that receive a multichannel signal, from 94.7% to 94.0%.

Figure 1 Take-up of digital TV services, by platform



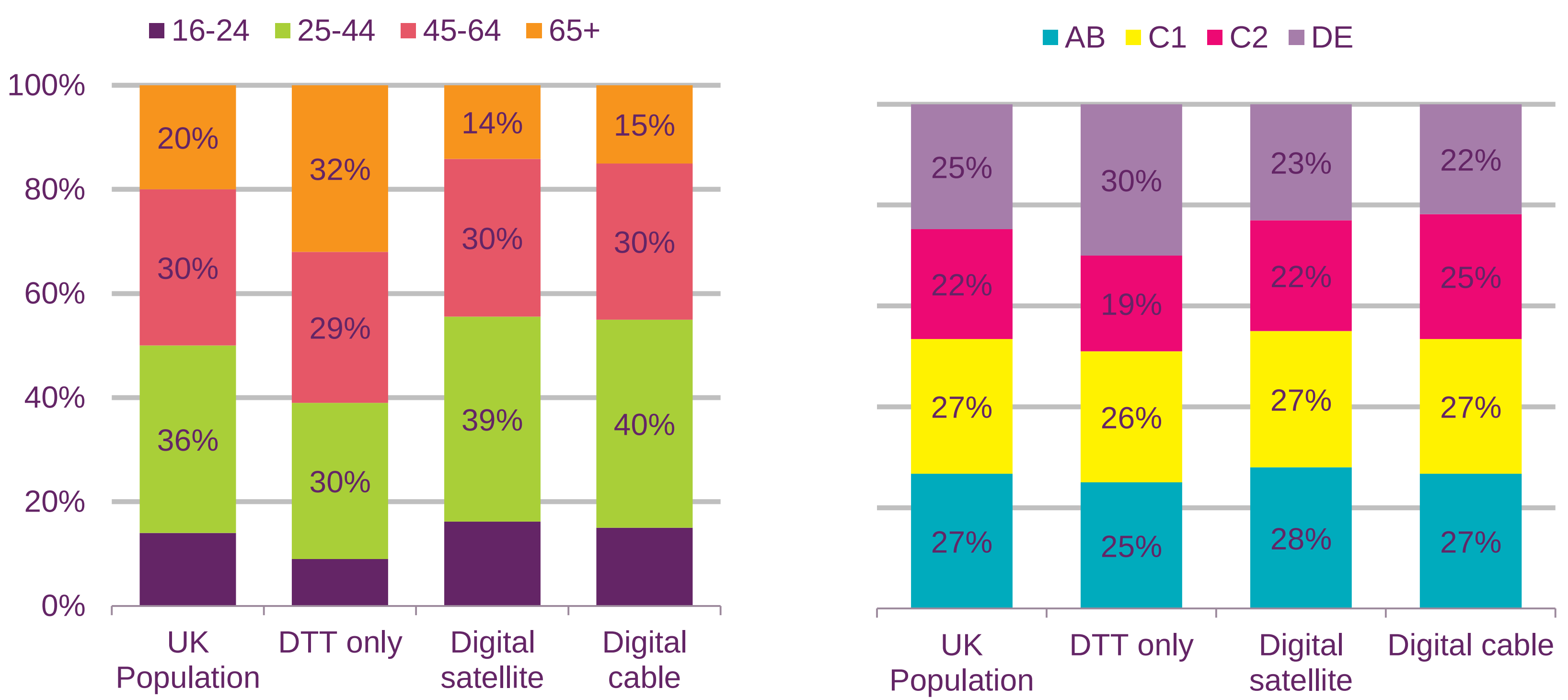
Source: Communications Market Report 2015, using BARB Establishment Survey data. Data points are based on household level data for Q4 of each year.

Market Context

Key points

- Figure 2 shows the age and demographic mix of TV platform users in 2015. Digital satellite and cable attracted a higher proportion of younger viewers (25-44) than the DTT-only platform. DTT only had the highest proportion of 65+ of all the digital platforms, as well as the highest proportion of those from DE households. Digital satellite had the highest proportion of AB households (28%), while digital cable and digital satellite were equally popular among C1s (27%). Digital cable was most popular among C2 households, at 25%.

Figure 2 Platform demographics, by age and SEG



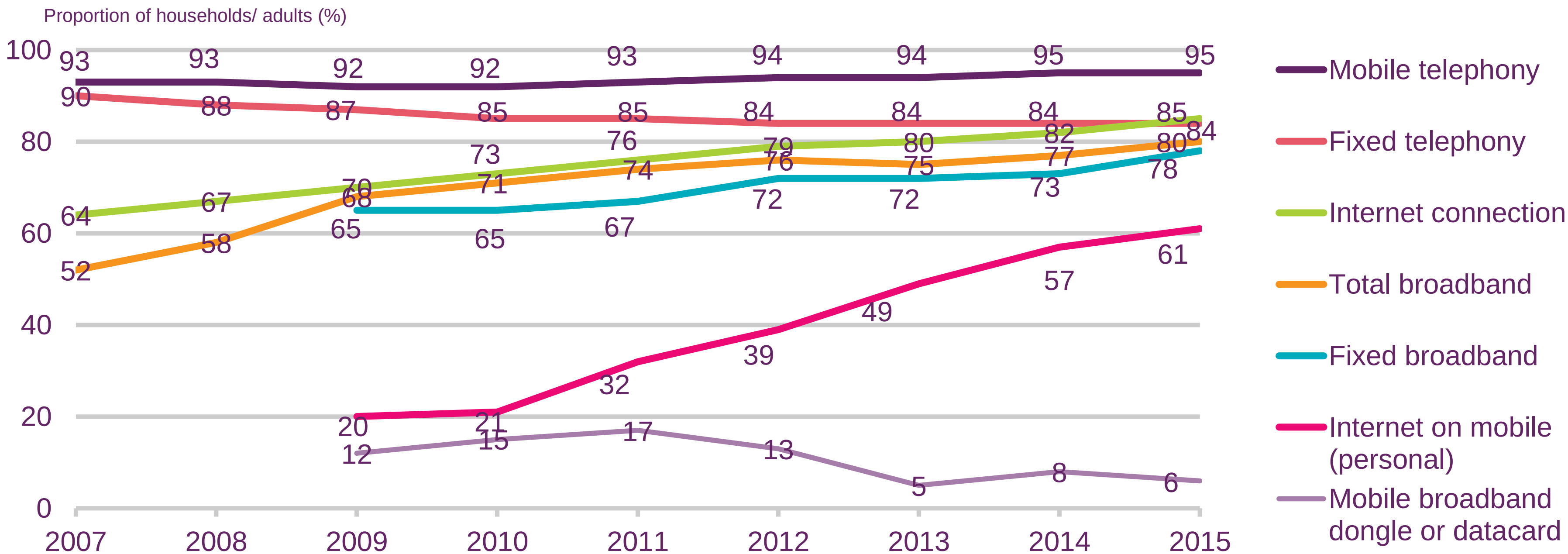
Source: Ofcom Technology Tracker H1 2015. Base: All adults 16+.

Market Context

Key points

- Figure 3 shows that the proportion of households with access to the internet increased by three percentage points in the year to 2015, standing at 85%. The ways in which people are connecting continues to evolve. As shown in figure 3, in 2015, over six in ten respondents (61%) said they personally use their mobile phone to access the internet (up from 57% in 2014), driven by growth in the smartphone market. Total broadband take-up increased three percentage points between 2014 and 2015 to 80% of UK households. This figure includes households with fixed and/or mobile broadband connections, but excludes access via a mobile handset.

Figure 3 – Household take-up of communications services



Source: Ofcom Technology Tracker. Data from Q1 of each year 2007-2013, then H1 2014-2015. Base: All adults aged 16+ .

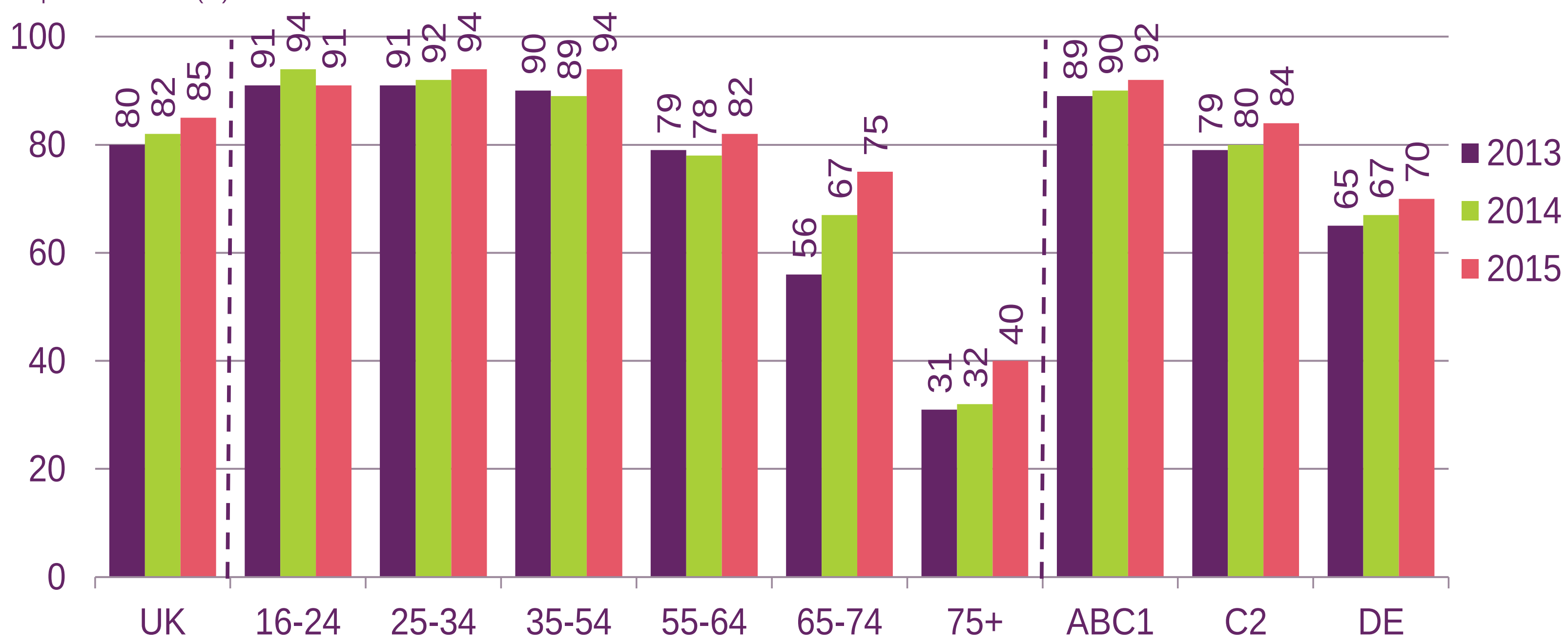
Market Context

Key points

- Figure 4 shows the variation of the rise in UK internet take-up by age and socio-economic group for Q1 2015. The largest difference was between the youngest and oldest age groups: 91% of those aged between 16 and 24 had access to the internet, while only 40% of those aged 75 and over had access. However, internet take-up among this latter age group rose by nine percentage points between 2013 and 2015, the largest rise of any of the age groups.

Figure 4 Internet access, by age and SEG: Q1 2015

Proportion of adults (%)



Source: Ofcom ‘s Communications Market Report 2015, data as at Q1 2015 . Base: All adults aged 16+ Q Do you or does anyone in your household have access to the internet/ World Wide Web at home?

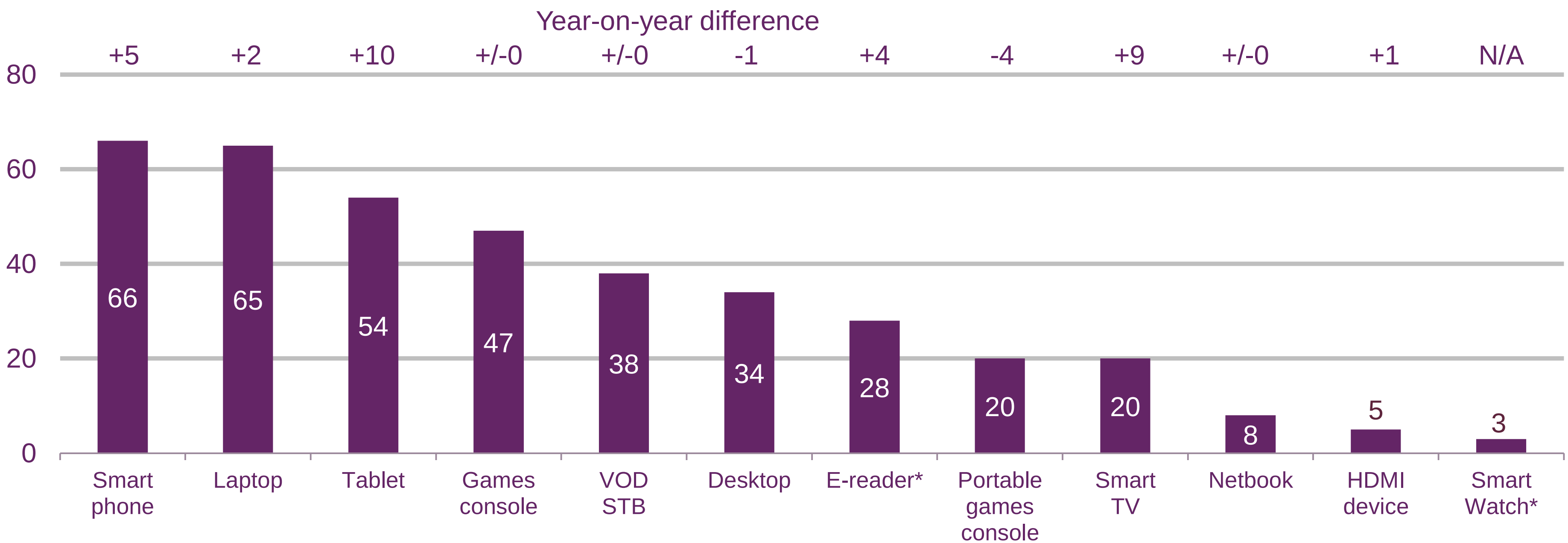
Source: Ofcom’s Communications Market Report 2015, Ofcom Technology Tracker H1. Base: Adults aged 16+.

Market Context

Key points

- Figure 5 shows take-up of a range of communications devices over recent years. Smartphone ownership rose by five percentage points in the year to 2015, reaching 66%. Smartphones are now the most popular connected device in households, overtaking laptops (65%). Household take-up of tablet computers rose sharply between 2014 and 2015, rising ten percentage points to become the third most popular connected device (Figure 5). The popularity of smart TVs grew substantially in the year to 2015, with household take-up increasing by nine percentage points to 20% (Figure 5).

Figure 5 – Ownership of connected devices in the home



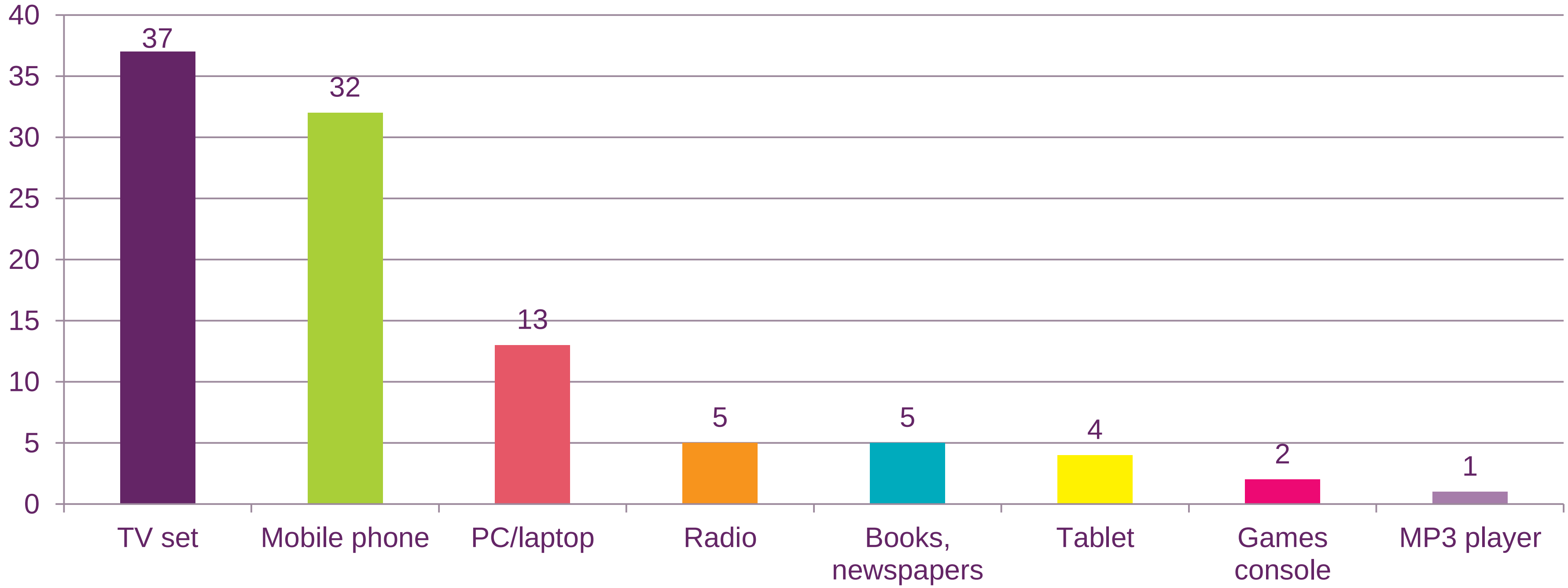
Source: Ofcom's Communications Market Report 2015, Ofcom Technology Tracker H1. Base: Adults aged 16+.

Market Context

Key points

- Figure 6 shows which media device respondents to Ofcom's Media Literacy Tracker said they used every day and would miss the most if it were taken away. Television was the most popular response, with 37% of UK adults choosing this option in 2014. A mobile phone would be the most-missed medium for nearly a third (32%) of respondents, significantly higher than PC/laptops (13%), reflective of changing device preferences among consumers. Print media - defined as books, newspapers and magazines – would be most missed by only 5% of respondents, more than games consoles and MP3 players but less than TVs, mobiles and PC/laptops.

Figure 6 – Most-missed media activity



Source: Ofcom' Consumer research Q4 2014. Base: All adults 16+. Q Which one of these things you use almost every day would you miss the most if it got taken away? (Prompted responses, single coded)