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2008 Digital Entertainment Survey

Full report

ENTERTAINMENTMEDIARESEARCH

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Wiggin is a boutique law firm working exclusively in the media sector. Recognised by many as the best in the media business, Wiggin is a specialist in film, music, sport, gaming, technology, broadcast and publishing, and has earned an international reputation for fresh thinking and innovative approaches.

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ENTERTAINMENTMEDIARESEARCH

Entertainment Media Research is Europe's foremost research consultancy for entertainment and music. It was founded in 1997 by the former Head of Music Information at MTV Europe in anticipation of the digital entertainment revolution.

Today, Entertainment Media Research is an international business headquartered in London serving the entertainment, media and advertising industries.

We combine quantitative research skills with entertainment sector expertise and branding consultancy to offer a unique and powerful service to brands in the entertainment industry.

www.entertainmentmediaresearch.com

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Introduction and methodology

- A comprehensive audit of entertainment and digital activity in the UK today, investigating the behaviour, trends, preferences and attitudes across all forms of entertainment activity
- The findings are based a large-scale online survey of 1,608 UK respondents, representative of the national demographic conducted in January 2008
- The survey was commissioned by Wiggin
- Readers are welcome to use data in this report, but such use must acknowledge the 2008 Digital Entertainment Survey from Entertainment Media Research and Wiggin as the source

Please note that percentages may not add exactly due to rounding

All research, analysis and reporting conducted by Entertainment Media Research, Europe's number 1 music and entertainment research agency

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Sample profile

	Number of interviews	Weighted base	Weighted %
Male 15-19	115	100	6%
Male 20-24	82	97	6%
Male 25-34	198	193	12%
Male 35-44	215	225	14%
Male 45-54	192	188	12%
Female 15-19	104	95	6%
Female 20-24	82	95	6%
Female 25-34	196	195	12%
Female 35-44	232	229	14%
Female 45-54	192	191	12%
London	205	201	12%
South	565	502	31%
Midlands	251	258	16%
North	337	386	24%
Wales	82	79	5%
Northern Ireland	33	46	3%
Scotland	135	136	8%
Total	**1,608**	**100%**	**100%**

Sample has been weighted to reflect the national demographics for the UK

50% male

50% female

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Summary report of main headlines

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The activities audited

Gaming
Play online computer games on the PC
Play online computer games on a console
Subscribe to an MMORPG online game like World of Warcraft, EverQuest etc
Play games on your mobile phone
Play games using a handheld device like a PSP, Nintendo DS etc
Play computer games on the PC that are not online
Buy video games

Gambling
Play online poker for money
Play the National Lottery
Pay to play online bingo
Gamble on sites such as Betfair.com, Ladbrokes.com, paddypower.com or another similar site

Social networking and communications
Browse social network sites like Myspace, Bebo and Facebook
Use internet chatrooms
Chatting on Instant Messenger
Listen to music streamed from sites like Myspace, Bebo or Facebook
Write on your own blog
Read other peoples' blogs
Making calls using Skype or another application over the Internet
Use bluetooth technology or applications

Print, novels and publishing
Read magazines
Read newspapers (the normal print version)
Read paperback or hardback books / novels
Visit newspaper websites
Read e-books/novels downloaded from the Internet
Listen to audio books (usually narrated by the author)

Radio
Listen to radio streamed over the Internet
Listen to normal radio (not streamed over the internet)

Piracy
Download unauthorised movies or tv programmes using filesharing sites like BitTorrent, Limewire or Pirate Bay
Download unauthorised music using filesharing sites like BitTorrent, Limewire or Pirate Bay
Download unauthorised games or software applications using filesharing sites like BitTorrent, Limewire or Pirate Bay
Watch pirate DVDs of movies
Swap hard drives with friends to share entertainment content like music and movies

Movies
Go to the cinema
Rent DVDs
Watch pay-per-view movies via Sky or cable television
Watch pay-per-view movies over the Internet
Watch full movies on streaming sites like DailyMotion, YouTube, Tv-Links etc
Watch movies on Blu-ray disk
Watch movies on HD-DVD disk
Buy an authorised digital download version of a movie

Television
Watch recorded television
Watch television on your PC via a PC tv-card or USB tuner
Watch full tv programmes on streaming sites like DailyMotion, YouTube, Tv-Links etc
Watch Sky or other television service you need to pay a subscription for

Mobile
Using your mobile phone to surf the Internet
Listen to radio on your mobile phone

Music and podcasts
Subscribe to a paid monthly music download service
Listen to podcasts
Subscribe to a paid-for podcast
Listen to music streamed from sites like Myspace, Bebo or Facebook

In the following graphs, the description of each activity has been highly paraphrased.

A full text description of each activity is provided in the list on the left.

The full report includes in-depth coverage of all these activities.

Entertainment activity audit

Top 25 of 49

Question: Please tell us whether you do any of these leisure activities?

Base: All respondents (1,608)

This chart (continued overleaf) provides a comprehensive breakdown of current entertainment activities. The information is analysed by demographic, by crossover (activity by activity) and by technology owned in the appendix. This data is then re-presented in specific sections throughout this report, providing a contextual back-drop to each activity analysed.

The ranking of activities on the left shows that whilst all the discussion nowadays is of digital media, traditional media still reigns supreme in consumers' leisure time, with radio, TV and print at the top of the list.

But there is a major caveat here. Traditional media ranks highest among the total UK sample, but when activity is analysed by age, a very different picture emerges.

The presence in 6th place of browsing social networks (such as Facebook and Myspace) is revealing. It goes to show just how embedded social networks have become in consumers' leisure lives, and how social networking has become truly mainstream.

Entertainment activity audit

26 to 49

Question: Please tell us whether you do any of these leisure activities?

Base: All respondents (1,608)

The chart on the left shows less regular activities, becoming more and more niche as we read down the list.

Taking the list as a whole across all 49 activities, we appreciate the competition for time and money. Time is finite, even for the most ardent early adopter.

What the list also reveals is the myriad of ways in which consumers choose and prefer to consume content – whether it is legal or illegal, whether it is traditional or digital, and whether it is downloaded or streamed. This report investigates all of these behaviours and preferences in detail.

The data shown is a snapshot as of early 2008. The survey also examines and predicts future intentions across all of these activities. The future intention analysis is provided in its own section.

Base: Q3, All respondents (1,608)

High definition movie disks predicted to lead new entertainment growth

Top 25 of 49

The chart shows the ranking of the top 25 highest intentions for take-up.

Many factors will intervene between respondents' stated intentions to start such activities and conversion to actual behaviour. Therefore, we would recommend more attention is paid to the rank order of intention rather than the specific percentage.

Looking at the top of the list, it is clear that new format movie disks are creating the most interest among consumers.

Other activities with strong growth prediction include making calls via Skype (or similar) and watching TV on the PC via a tv-card or tuner.

Technology and devices owned

Question: Please tick which of the following devices you currently own or are considering to own

Base: All respondents (1,608)

As we have seen, consumers today are involved in a myriad of different leisure and entertainment activities.

It's therefore unsurprising to see just how much technology and how many devices are owned by UK consumers, with digital cameras, mobile phones and wireless networks being the most prevalent.

Not all of this technology is equally distributed across consumers and the ownership (or access) to some is highly correlated with age. The full report provides a breakdown by demographics.

A major digital divide in the UK today

… which if bridged offers rich opportunities for digital expansion

The survey reveals an astonishing divide in digital entertainment take-up and technology ownership between consumers of different ages. Furthermore, there is a substantial proportion of consumers that feel left behind. All this adds up to a significant untapped market for digital technologies and services.

To illustrate the divide, the leisure world of the teenager could not be more different from the older consumer. For the teenager, digital entertainment and communications is at its heart whereas the older consumer is still far more reliant on traditional media. This is also reflected in marked differences in the technology owned by younger and older consumers. Younger consumers are much more likely to be hooked up to the digital world, with next generation games consoles, wireless networks, advanced mobile phones and digital music players.

This divide is also apparent in attitudes towards technology. Whilst young males are much more likely to love new technology, older consumers, particularly females, are more likely to state they feel confused about what digital opportunities are available and they feel they are getting left behind. Put into context, around 3 in 5 older female consumers are confused with all the technology out there and around 1 in 2 often believe they are getting left behind.

It highlights that not everyone is moving at the same pace when it comes to embracing (or even understanding) new digital media and entertainment opportunities. A fairly massive chunk of the market has important barriers to overcome before electing to adopt.

These barriers include awareness, understanding and acceptance. Providers wishing to maximise take up of new technologies should not underestimate the extent to which they need to educate a substantial tranche of the market. But more often than not, new technology is riddled with jargon and a fair amount of prior assumed technical know-how. This only adds to the barriers facing many consumers. There is a much bigger market available for consumer technology and digital media if these barriers are overcome.

Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Love new technology	72%	80%	81%	82%	75%	75%	73%	72%	68%	66%	61%
Get confused	43%	36%	28%	39%	27%	34%	39%	43%	57%	60%	58%
Getting left behind	41%	31%	28%	42%	29%	41%	40%	34%	49%	49%	54%

7 out of 10 say they would cease pirating if they received a warning from their ISP

The survey revealed a range of attitudes towards piracy and what would dissuade consumers from acquiring unauthorised content.

One of the most compelling reasons to quit would be if a consumer received a cease and desist warning notification from their ISP. 7 out of 10 currently accessing unauthorised content state they would stop if this happened. Interestingly, some of the most likely to be dissuaded are teenagers (78% for male teenagers and 75% for female teenagers).

Nonetheless people are concerned about stories of prosecution, and nearly 2 in 3 say they would stop if they felt there was more chance of being caught, and over half are put off pirating by news stories.

Fear over being caught *is* a strong impetus to quit, but over 2 in 3 believe it is *very unlikely* they will ever be caught downloading. People are concerned about stories of prosecution, but they don't believe they will be caught in the first place.

Indeed 1 in 2 say they would keep on downloading even if there were more stories about prosecution because they perceive only a small chance of being caught. For male teenagers, it is even less effective, with nearly 2 in 3 saying they would continue downloading.

All of this makes a more direct ISP warning strategy more attractive to discourage digital piracy.

Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24*	F25-34	F35-44	F45-54**
Would stop if ISP email/call	70%	78%	68%	72%	57%	60%	75%	63%	84%	65%	**
Stop completely if better chance of being caught	66%	65%	65%	69%	60%	60%	68%	65%	75%	68%	**
Very unlikely I will be caught	68%	76%	75%	66%	65%	67%	69%	77%	64%	63%	**
Concerned about stories in news about prosecution	62%	60%	60%	65%	50%	48%	73%	76%	67%	57%	**
Would keep d/l even if more stories	51%	65%	52%	46%	43%	49%	48%	75%	57%	34%	**

*Caution - lower base ** Base too low to show

Social networks have the potential to become major content distribution platforms

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Current usage levels

Base: All respondents (1,608)

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
55%	59%	33%	24%	13%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
64%	68%	47%	21%	12%

Usage of social networks is now mainstream. Usage remains highly correlated with age, but even 1 in 8 45-54 year olds regularly use them. Among teenagers, over half of males and two thirds of females use social networks regularly.

They aren't a passing fad: the survey reveals that the emotional attachment is very strong and likely growth is high across all demographics.

Potential for content distribution

Base: All using social networks (1,031)

% Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Potential main way to access content	27%	35%	40%	30%	22%	25%	32%	35%	27%	15%	17%

Whilst most social networks already have the capability to stream content, the survey reveals the potential to become more significant media players and means of distributing content.

Tellingly, 1 in 4 users (27%) agree that social networks have the potential for them to be the *main* way in which they access video and music and many more are interested in using social networks to access content. Acceptance is even higher among the under 25s (up to 40% for males aged 20-24).

The ability of social networks to create an interactive and participative environment together with the content offering is a major draw – over 1 in 4 see the benefit in being able to chat with others or interact with the content as it is being streamed.

With over 60% of the under 25s regularly using social networks, why not take the content to them?

Significant impact of social networks on content discovery and purchase behaviour

Social networks are having a major influence on content discovery: 30% of users at least occasionally search them for new music and around 1 in 4 find out about movies or television programmes through peer recommendation. Nearly 1 in 2 female teenagers search for music on social networks.

It does not stop at mere content discovery. Around 1 in 5 say that they have actually *purchased* music based on peer recommendation from a social network and the same proportion have searched social networks for music to purchase.

The potential for social network sites to be content discovery tools and, even more potently, retail environments is clear. Site operators and channel owners need to make the process of discovery to purchase conversion as easy, intuitive and as 'social network-friendly' as possible.

Question: Please tell us whether you have done any of the following when using social networking sites

Base: All using social networks (1,031)

% Regularly / occasionally	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Searched for new music	30%	44%	36%	33%	30%	22%	48%	24%	27%	17%	22%
Found out about recommended movie	25%	38%	34%	29%	20%	13%	30%	30%	25%	15%	20%
Found out about recommended tv prog	22%	33%	37%	28%	18%	13%	25%	25%	18%	11%	14%
Searched for music to purchase	21%	26%	36%	30%	21%	13%	22%	22%	19%	13%	12%
Found out about recommended book/magazine	20%	28%	26%	25%	12%	12%	22%	27%	22%	13%	20%
Purchased song/album discovered or recommended by friend	18%	19%	31%	25%	14%	13%	25%	21%	16%	11%	8%

Social networks are an essential place to be for brands

Keeping with the theme of following the consumer where they spend a considerable and increasing proportion of their available leisure time, it's no surprise that brands are interested in using social networks to interact with consumers and for advertising.

The survey reveals that a substantial proportion of consumers are generally receptive towards brands being more involved in social networks: just under 1 in 5 would even add brands as a 'friend' on their profile. Again, showing receptiveness, over 1 in 4 agree that they would rather be served better targeted ads, even if that meant the use of certain personal cookie data. And just over 1 in 5 sometimes click on the ads served on social network sites.

Crucially, younger consumers are the most receptive to brand involvement: around 1 in 4 teenagers would add a brand as a 'friend' and around 3 in 10 among 20-24 year olds.

All this shows that social networking sites do have an audience for brands and for advertising. Of course there are a significant number of consumers who are not receptive, but these figures are encouraging nonetheless.

The survey predicts continuing strong expansion in social networks. If social networks expand into media distribution then there is an even stronger case for brands to get directly in front of consumers in an environment in which they are spending an increasing amount of leisure time.

Brands need to consider carefully what role to play in social networks and consider a much stronger role than mere banner advertising.

The more creative and closely fitted to the social networking environment, the better. It's a place where participation and interaction between peers is the norm, something that ought to be reflected in the style of content offered by brands. If content is sufficiently compelling, it has the potential to be distributed by users themselves.

Question: How much do you agree or disagree with the following statements about social networking sites?

Base: All using social networks (1,031)

% total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Better targeted ads	26%	42%	34%	30%	25%	23%	29%	30%	19%	16%	20%
Click on ads	22%	31%	31%	27%	15%	15%	29%	28%	23%	14%	13%
Add brands as 'friend'	20%	24%	31%	27%	11%	11%	23%	28%	25%	7%	10%

Social networks are reconfiguring work and leisure patterns

… and traditional media is being sacrificed

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The survey reveals that the growth of social networks is demonstrably at the expense of other activities and media.

The main activities 'sacrificed' are doing work or homework, watching broadcast television, reading print, visiting other websites, playing games (and the list goes on). Traditional media suffers disproportionately (in particular television -12%, books -10%, magazines -8%, newspapers -7%, DVDs -5%).

Among teenagers (who are much more into social networking than other age groups), the impact on other activities is even more prominent. Among female teenagers, for example, there is a -32% net less time spent on homework/work, -21% net less time spent watching broadcast television and -14% net less time spent reading books. On the other hand, among female teenagers, there is a net +19% increase in the time spent listening to music. Clearly young females are very happy using social networks and listening to music at the same time.

Whilst most other activities see a drain from social networking time, the sites are actually encouraging the spread and listening time for music (unsurprising as hearing music can add to, rather than distract from, the social network experience).

Whilst social networking is impacting time spent with the close family, it is encouraging socialising and spending time with friends, as you might expect from a 'social' network of friends and acquaintances.

All this adds weight to the potential for using social networks as a means of distributing content, for which there is a clear and receptive audience.

Question: Think about the time you spend on social networks. How would you say social networks have impacted the amount of time you used to spend…?

Base: All using social networks and doing activity

Net more / less	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Do work	-14%	-30%	-18%	-7%	-8%	-4%	-32%	-13%	-19%	-7%	-4%
Watch tv	-12%	-10%	-11%	-10%	-10%	-7%	-21%	-7%	-18%	-16%	-11%
Read books	-10%	-19%	-14%	-5%	-7%	-2%	-14%	-15%	-12%	-11%	+2%
Browse sites	-9%	-16%	-13%	-5%	-5%	-5%	-8%	-15%	-14%	-11%	0%
Read magazines	-8%	-10%	-9%	-12%	-7%	-7%	-3%	-12%	-10%	-2%	-6%
Read newspapers	-7%	-12%	-9%	-3%	-6%	-3%	-17%	-9%	-6%	-6%	0%
Listen to music	+5%	+11%	+4%	+3%	+8%	-1%	+19%	5%	-3%	-1%	+9%

In an increasingly digital world, traditional media is still the most emotionally engaging

A revealing analysis is to understand not only how many consumers are involved in a specific activity, but also how emotionally attached users are to it. In other words, to what degree is each activity embedded in their lives and to what extent would they hate to give it up.

The activities that generate the *highest* emotional attachment are relatively traditional: reading printed books, watching Sky/subscription television and listening to the radio.

Whilst much attention is placed on digital entertainment trends, it is still the traditional media to which consumers are the most emotionally attached.

The graph (below right) shows that 53% of those reading books would never stop or would hate to stop – this is the highest emotional attachment of all 49 entertainment activities measured. It is followed closely by watching Sky television (51%) and listening to radio (43%).

But the emotional attachment for traditional media tends to be highly correlated with age. Supporting their behaviour patterns, teenagers have a much higher level of emotional attachment to digital entertainment activities.

Interestingly, there are some activities that many consumers engage in that generate relatively little emotional attachment, such as newspaper websites and streamed radio. On the other hand, there are activities that few consumers currently engage in (like watching Blu-ray movies or playing MMORPG games) that generate a great deal of emotional attachment.

The entertainment activities with the lowest level of emotional attachment are gaming on mobile phones, reading blogs and podcasts.

Setting the scene for on-demand: usage and familiarity

Usage of on-demand services ranges widely with YouTube being used at least occasionally by 37% of UK consumers. The table below right demonstrates that usage differs enormously by demographics, with most services correlated with age and with a male bias.

Out of the on-demand services offered by the major UK broadcasters, Channel 4's 4OD service is a marginal leader of the pack. However, it must be noted that this is a snapshot as of January 2008 and the BBC had only just begun to seriously push its iPlayer service, having spent several months in beta testing.

Such services offer an unprecedented level of consumer control over content and, for the BBC and ITV at least, is free to consume, albeit it does come with DRM restrictions. Such services also offer relatively high quality video output, in contrast with the current low resolution offering from YouTube.

Other than YouTube and the offerings from the major UK broadcasters, the main issue facing providers is lack of familiarity. Consequently, the current level of intended take-up is low but we would expect this to change significantly over the medium term as Apple, "Kangaroo" and Google in particular invest more heavily in raising mass market awareness.

Question: Some companies have already started "on demand" services in the UK. Are you familiar with the following services and do you use any of them? Base: All respondents (1,608)

Use regularly/ occasionally	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
YouTube	37%	65%	65%	47%	38%	27%	53%	51%	35%	20%	15%
Virgin Media	20%	17%	27%	22%	18%	18%	17%	21%	20%	20%	21%
4OD	15%	28%	21%	22%	13%	12%	23%	30%	14%	9%	8%
BBC iPlayer	13%	22%	18%	22%	13%	12%	14%	14%	13%	6%	6%
Google Video	13%	38%	32%	21%	10%	7%	13%	12%	10%	5%	1%
ITV.com	12%	14%	19%	16%	10%	7%	12%	16%	12%	10%	11%

Interest in on-demand content is strong

… but consumers have a strong preference for it to be free

The graph shows the level of consumer demand for different types of content. The clear leader is recently released movies with 84% interested and almost 50% definitely interested. In our opinion a key driver is consumer demand to watch movies on the platform of their choice.

Apple's recent announcement of movie rentals and purchase through iTunes may well be one way of fulfilling this latent demand.

Opportunities clearly exist in other sectors. The music industry should take note of high levels of demand to watch live music concerts (and recorded gigs as well) and comedy is notably popular.

It's established that high levels of demand exist for on-demand content but what about consumer willingness to pay for any of it? Is there a viable business model?

Before investigating willingness to pay (see overleaf), we look at preferences for subscription with unlimited content versus à la carte PPV versus free ad-supported models.

The free ad-supported model wins hands down with 70% stating they would rather put up with the ads and receive the content for free than pay for it. Amongst the two other options, there is little to separate them in terms of preference.

We then asked consumers who originally chose the free model to choose between the two paid models. Again there is little to divide them but the PPV option receives slightly more consumer support.

What this suggests is that both types of pay to view models can find their own market as long as the payment terms and content on offer are sufficiently attractive.

Question: Given the choice, which, if any, of the following types of content would you be interested in watching "on demand"?

Base: All respondents (1,608)

Question: Which one of the following ways would you most prefer to access "on demand" content if you were forced to choose? Base: All respondents (1,608)

Question: And if watching "on demand" content wasn't free, which of these two would be most appealing to you, if forced to choose? (Among only those who prefer for free.)

High interest in on-demand content does not Necessarily translate into willingness to pay

… and live music concerts are a potential revenue goldmine for the music industry

The relationship between interest in on-demand content and the willingness to pay for it is not necessarily linear. In other words, there is content that is in high demand that consumers would be unwilling to pay for.

Whilst demand for recently released top movies is high and there is a high willingness to pay for them, content such as comedy programmes, which are in high demand, attract a relatively poor willingness to pay. There is also a high willingness to pay for adult material, live concerts and live sporting events.

This analysis shows that the demand for content is not a reliable indicator of likely revenue, however counter-intuitive that sounds. Consequently, a winning business proposition needs to supply content that people not only want but for which they are willing to pay.

Given the relative success and familiarity of PPV on-demand models for live sporting events and movies, it's tantalising to see the level of demand and preparedness to pay for live music concerts.

As the music industry seeks new revenue streams, the survey reveals an excellent opportunity in paying for live concerts via on-demand channels. Only movies and live sporting events are ahead in terms of willingness to pay. Being 'live' is critical: consumers are significantly less willing to pay for recorded concerts.

Therefore, with high demand and high willingness to pay, live concerts represent an exciting new revenue stream for the music industry and others wanting to take advantage of the boom in the live music scene.

Demand Versus Willingness to Pay

Definitely/Likely to consider paying for	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Top movies just out on DVD	53%	54%	63%	55%	55%	46%	53%	51%	59%	52%	43%
Live sporting events	52%	45%	63%	58%	57%	48%	48%	43%	50%	47%	45%
Recent movies	43%	46%	59%	47%	42%	32%	42%	43%	47%	41%	37%
Live music concerts	40%	33%	41%	39%	47%	41%	41%	43%	39%	33%	44%

Project 'Kangaroo' is the content pull for IPTV

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As of February 2008, there is much anticipation in the media industry of the joint venture between the BBC, ITV and Channel 4 for a single platform on-demand service, codenamed "Kangaroo".

Consumers would find such a service highly attractive. 52% of consumers said they were *more* interested in this service compared to other currently available services. The increased level of interest is even stronger among young males (over 2 in 3 are more interested).

The reason for the heightened interest is, of course, the breadth of content available. When consumers are asked if any particular provider sparks their interest in the service, the BBC leads the three broadcasters in terms of interest in the respective content of each channel. That said, just under half were equally keen on content from all three of the broadcasters and content from *all* is the real driver of interest.

If a single platform is launched, it is likely to be much more successful than standalone platforms from the three broadcasters. It potentially provides the stimulus for mass market adoption for IPTV and encouragement of a greater drive for consumers to get such content on their main television set (over 3 in 4 show a strong preference for downloaded content to be viewed on the main television set).

Based on the survey findings that many consumers are confused by technology *(see story on the digital divide)*, we would suggest that the optimal solution is a *single* platform rather than a portal to multiple platforms that might require potentially unnecessary multiple desktop applications.

Question: BBC, ITV and Channel 4 will soon be launching a single online service that will allow you to download/stream content from all 3 providers on the one platform. How would you describe your interest in this service compared to the current services that are available? (All respondents)

% Much more or more interested

Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
52%	68%	70%	59%	53%	52%	52%	60%	48%	40%	40%

Question: Thinking again about this service, which one of the providers are you most interested in seeing content from? (All respondents)

Question: Given a choice, would you prefer to watch the content you download or stream on you computer screen or on your main television screen? (All respondents)

Video streaming sites are impacting the amount of scheduled television watched

Video streaming sites like YouTube have become phenomenally popular. One question to ask is whether such sites have drained potential viewing time from scheduled/broadcast television.

For the vast majority (79%) it has had no impact. However, there are nearly 1 in 5 (18%) who state they are watching less scheduled television because of watching streamed video. The net balance is -15% towards less live/scheduled television.

Male teenagers are most likely to be sacrificing scheduled television for streamed video (with a net result of -26% towards less live/scheduled television), closely followed by females aged 20-24 (-23%).

It's interesting to see a net negative balance across all demographics, although it does tend to be more pronounced among the under 35s.

What the results show is that sites like YouTube *are* having a major impact for some. Not for most, but for some. In particular, male teenagers and females aged 20-24 are more likely to shift their viewing behaviour away from the tube to the online stream.

This reinforces a general trend seen in the report of younger consumers shifting away from mainstream media to digital alternatives.

Question: What impact would you say has watching clips/programmes on YouTube (and similar sites) had on how much "live" television you watch? By "live", we mean you watch the same time as scheduled by the broadcaster.

Base: All watching streamed video (864)

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Much less	5%	14%	8%	4%	4%	1%	4%	3%	6%	4%	4%
Less	13%	17%	16%	21%	9%	10%	14%	20%	12%	4%	5%
No change	79%	64%	69%	72%	85%	87%	78%	77%	78%	91%	88%
More	2%	4%	3%	2%	2%	1%	3%	0%	2%	1%	3%
Much more	1%	1%	4%	2%	0%	0%	1%	0%	1%	0%	0%
Net	-15%	-26%	-17%	-22%	-11%	-10%	-14%	-23%	-15%	-7%	-6%

Digitally recorded television is seriously affecting advertising reach

For commercial broadcasters reliant on advertising revenue, one of the challenges presented by on-demand viewing, such as that offered by Sky+, Windows Media Center and digital video recorders, is that it puts the viewer in control, able to bypass advertising segments with the fast-forward button.

Out of those consumers with the technology, only 4% watch only live/scheduled broadcasts, and a further 38% watch mostly live/scheduled broadcasts. This means the majority watch an amount of recorded television which they control, and 1 in 4 watch mostly recorded programming.

When watching recorded commercial television, the level of ad avoidance is astoundingly high. Just under half fast forward past the adverts "all of the time". A further 1 in 3 skip the adverts "most of the time". Only 6% rarely or never fast-forward past the adverts. This behaviour is fairly consistent across all demographics and is certainly not only early-adopter behaviour. Added to this, 2 out of 3 respondents in the UK agree with the statement "I actively try to avoid as many television ads as possible" showing that ad avoidance in the digital age is a real issue.

Advertising embedded in content by means of overlays and top-tail programme sponsorship activity is much less vulnerable to such trends.

Question: Which one of the following best describes your tv viewing?
Base: All with ability to record television digitally (737)

Question: When you watch programmes with adverts which you have recorded, how often, if at all, do you fast forward past the adverts?
Base: All with ability to record television digitally (737)

Question: How much do you agree or disagree with the following statement: "I actively try to avoid as many television ads as possible"
Base: All respondents (1,608)

Mobile entertainment: perceived barriers stifling consumer demand

It seems inevitable to many that mobile internet will become a major digital entertainment platform but the reality today is quite different.

The survey reveals that only 11% currently access the internet from their mobile devices and only a modest 20% are extremely or very interested in doing so in the future. Indeed, almost 1 in 2 just aren't interested.

Whilst not everyone would be expected to convert to mobile internet (significant proportion of consumers only want voice and text), such levels seem low given the wide array of entertainment opportunities. Intriguingly, even early-adopting male teenagers don't appear particularly interested (only 9% are extremely interested).

On a more positive note, interest in using the mobile for emailing is stronger with 17% considering it very important and a further 31% somewhat important. However, it still shows that there isn't yet mass market demand for online connectivity when on-the-go.

There are a number of reasons, the most important of which is the perceived cost of data charges. This was identified by almost 50% of respondents and helps explain why only 10% consider music downloading to mobile and 7% video streaming to mobile to be important features.

The second barrier is perceived speed. 1 in 5 consider the connection speed to be too slow to make mobile internet a viable option. This is more a technical barrier that can be overcome over time but it's certainly an obstacle right now.

Reflecting the lack of activity, many web sites aren't yet properly configured for mobile internet, which is highlighted as a main barrier for 1 in 4 consumers.

Various other reasons were given but only 10% of respondents stated there were no barriers for them, indicating the scale of the problem.

Question: How interested, if at all, are you in accessing the Internet from a portable device when you are on-the-go?

- Extremely interested
- Very interested
- Somewhat interested
- Not very interested
- Not at all interested

Base: All respondents (1,608)

	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Extremely	9%	18%	14%	9%	4%	4%	8%	10%	5%	5%
Not at all	15%	11%	12%	23%	31%	21%	15%	22%	30%	39%

Question: Please tell us how important, if at all, the following functions are on a mobile phone for you personally

Base: All respondents (1,608)

Question: What do you consider are the main barriers for you using a portable device to access the Internet when on-the-go?

Base: All respondents (1,608)

Demand for mobile entertainment needs a significant boost

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At present, only a minority of consumers regularly download content to their mobile.

Among mobile downloaders, music, ringtones and games are the most regularly downloaded content types.

Video content, especially full length content, has yet to really take off. Demand for video content has an audience, but is much less strong than music. However, we would expect that as mobiles become more sophisticated media players with better storage and the cost of data charges decreases, demand would increase accordingly.

At present, more needs to be done to convince consumers of the benefits of mobile video content to stimulate demand and barriers such as cost need to be removed.

Question: How often, if at all, do you download / stream the following to your mobile phone?
Base: All mobile owners (1,433)

Question: You said that you do not stream or download the following content to your mobile phone. How keen, if at all, would you be to start doing these things in the future?
Base: All mobile owners not doing activity

With cost, technical and familiarity barriers overcome, mobile content has much more potential

Whilst there is not at present overwhelming demand for content other than music and ringtones on mobile devices, consumers do tend to agree that their mobile will eventually become their main portable media device.

Another way of looking at consumer demand for mobile or portable content is to investigate which activities consumers would ideally like to do when travelling and have time to access content.

It's clear that music is the preferred choice. This supports the music strategies of the major mobile providers.

Radio on the mobile is also in very high demand and constitutes a significant opportunity for the traditional radio industry to increase its listening hours. This is particularly true of the 25-34 year old segment.

Other than generally being social and communicating, there is also a reasonable level of demand for surfing the internet and emailing. As phones become more connected online, we would expect familiarity and demand to increase for online activities.

Video content however, is much lower down the list. Less than 1 in 10 are interested in watching TV on the mobile. This level of demand may be depressed as consumers are simply unaccustomed to it. There definitely appears to be an education barrier to overcome.

Question: How much do you agree or disagree with this statement: "I believe the mobile phone of the future will be my main portable media device as well as a phone to make calls"

Base: All respondents (1,608)

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Strongly agree	17%	21%	23%	22%	19%	14%	13%	23%	19%	11%	14%
Strongly disagree	10%	11%	5%	5%	10%	18%	10%	7%	10%	11%	11%

Question: When commuting between home and work / college which activities would you ideally like to engage in to pass the time?

Base: All respondents (1,608)

Newspapers and magazines: the impact of websites on printed sales

WIGGIN

As newspaper and magazine brands increase their online activity, one important consideration is what impact this has had on the purchase levels of the printed versions.

30% of those visiting newspaper sites state they have stopped buying or are buying less newspapers currently. Among males aged 25-34, the proportion is even higher (42%). For magazines, the impact is still negative, but less prominent (22%).

But, of course, the online versions present their own revenue streams and there is other news to balance out the negative: firstly, for over half (51%), visiting the online newspaper sites has had no impact on their print purchase propensity (62% for magazines); and, even more encouragingly, 17% of online newspaper visitors never bought the printed version in the first place (13% for magazines).

Therefore, such sites are opening up newspaper and magazine brands to a new, previously untouched audience and potential additional advertising revenue.

Some of the major lures to newspaper sites, in addition of course to the latest news, are reviews, archives and multi-media. This highlights that newspaper sites are (and also have much greater potential to be) much more than up-to-date news repositories. Demand for multi-media content is high (58% at least sometimes view video clips for example on newspaper sites), suggesting that consumers are seeking a multi-media as well as a reading experience. The same is true for magazine websites.

Question: To what extent, if any, has visiting newspaper websites affected your purchases of printed newspapers?

Base: All ever visit newspaper sites (1,243)

Newspapers

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Stopped or buying less	30%	33%	32%	42%	29%	25%	23%	28%	29%	31%	27%

Question: To what extent, if any, has visiting magazine websites affected your purchases of printed magazines?

Base: All ever visit magazine sites (1,088)

Magazines

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Stopped or buying less	22%	31%	29%	34%	19%	19%	25%	18%	21%	13%	16%

Can the e-Book reader do for books what the iPod did for music?

One of the major obstacles for an e-Book reader device is the incredibly strong emotional attachment to the printed book. At present, this contributes to the limited (but still viable) market potential of the e-Book reader.

e-Books do have an audience, but for most consumers they are unappealing. Of course, this may change as familiarity and acceptance increases and more compelling devices are launched. Increasing familiarity is an important step in generating demand.

Whilst only 9% of consumers find the e-Book "very appealing", this does constitute a viable niche market for e-Books and we would suggest that this is a base level which will only increase as familiarity and acceptance increases. But for most people at this time, the printed book remains one of the highest emotionally attached media we measured, so such innovations are likely to be somewhat slow in catching on in the mainstream.

What is interesting is that, whilst the appeal of the e-Book device as a whole is more limited, the appeal of its individual features is much stronger. 76% find its battery life appealing, 66% for a non-glare page-like screen, 67% for portability, 67% for its light weight, 65% for storage capacity, 63% for its potential for downloading and connectivity. At the moment the sum of its parts is greater than the whole.

This would indicate strongly that the more consumers understand about e-Books, the more they are receptive towards them. It illustrates a great benefit in closing the familiarity gap to boost interest. This is further highlighted that by the fact that 17% state they would definitely or almost certainly buy an e-Book reader once they are made aware of all its features (nearly doubling its potential market).

Barrier: very strong emotional attachment to paper books

Base: All book readers

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
43%	62%	41%	45%	54%	56%	57%

Appeal level of the e-Book

Base: All respondents

Appeal of e-Book reader functionality

Base: All respondents

Video gaming: value for money versus volume

The market for next generation consoles is yet to reach its full ownership potential, constrained by pricing and value issues rather than interest levels or preferences for pc gaming.

The main reason, across all three consoles, is a perception they are too expensive. This is a concern felt most strongly about the Playstation 3 (46%) and least for the Wii (38%). It's no surprise then that around 1 in 4 are waiting for a price reduction before buying. Of course, following the business model of previous consoles, it is likely there will be on-going price reductions and this is only good news in stimulating the market.

The next most prevalent reason is the perception that the games are too expensive. Again, this applies slightly more strongly for the Playstation 3 (35%).

Despite the above, among non-owners, the Playstation 3 is marginally ahead of the Xbox 360 in terms of purchase intentions (9% and 6% respectively) but both trail the Wii which has a 15% planned purchase level among non-owners.

As we have seen, cost is a real issue for consumers (for the hardware and for the games). As a general attitude, 84% of gamers agree that 'games are too expensive' and 3 in 4 think that some games can be finished too quickly for their price. This raises questions over the perceived value of games today. 1 in 2 agree that introducing a multiplayer element would increase the longevity of the game (and presumably its perceived value).

When looking at general attitudes towards gaming, it's worth noting that 1 in 2 gamers are concerned about the realism of violence in some games. These feelings are particularly strong amongst older female gamers (63% of females aged 35-44 and 69% of those aged 45-54).

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Reasons for not purchasing a next generation console

Base: All non owners

General attitudes towards video gaming

Base: All video gamers

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Appendix of detailed findings

ENTERTAINMENTMEDIARESEARCH

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Entertainment and digital activity audit

ENTERTAINMENTMEDIARESEARCH

The activities audited

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Gaming
Play online computer games on the PC
Play online computer games on a console
Subscribe to an MMORPG online game like World of Warcraft, EverQuest etc
Play games on your mobile phone
Play games using a handheld device like a PSP, Nintendo DS etc
Play computer games on the PC that are not online
Buy video games

Gambling
Play online poker for money
Play the National Lottery
Pay to play online bingo
Gamble on sites such as Betfair.com, Ladbrokes.com, paddypower.com or another similar site

Social networking and communications
Browse social network sites like Myspace, Bebo and Facebook
Use internet chatrooms
Chatting on Instant Messenger
Listen to music streamed from sites like Myspace, Bebo or Facebook
Write on your own blog
Read other peoples' blogs
Making calls using Skype or another application over the Internet
Use bluetooth technology or applications

Print, novels and publishing
Read magazines
Read newspapers (the normal print version)
Read paperback or hardback books / novels
Visit newspaper websites
Read e-books/novels downloaded from the Internet
Listen to audio books (usually narrated by the author)

Radio
Listen to radio streamed over the Internet
Listen to normal radio (not streamed over the internet)

Piracy
Download unauthorised movies or tv programmes using filesharing sites like BitTorrent, Limewire or Pirate Bay
Download unauthorised music using filesharing sites like BitTorrent, Limewire or Pirate Bay
Download unauthorised games or software applications using filesharing sites like BitTorrent, Limewire or Pirate Bay
Watch pirate DVDs of movies
Swap hard drives with friends to share entertainment content like music and movies

Movies
Go to the cinema
Rent DVDs
Watch pay-per-view movies via Sky or cable television
Watch pay-per-view movies over the Internet
Watch full movies on streaming sites like DailyMotion, YouTube, Tv-Links etc
Watch movies on Blu-ray disk
Watch movies on HD-DVD disk
Buy an authorised digital download version of a movie

Television
Watch recorded television
Watch television on your PC via a PC tv-card or USB tuner
Watch full tv programmes on streaming sites like DailyMotion, YouTube, Tv-Links etc
Watch Sky or other television service you need to pay a subscription for

Mobile
Using your mobile phone to surf the Internet
Listen to radio on your mobile phone

Music and podcasts
Subscribe to a paid monthly music download service
Listen to podcasts
Subscribe to a paid-for podcast
Listen to music streamed from sites like Myspace, Bebo or Facebook

This section outlines the incidence, frequency and future take-up of 49 different entertainment, leisure and digital activities.

In the following graphs, the description of each activity has been highly paraphrased.

A full text description of each activity is provided in the list on the left.

Entertainment activity audit

Top 25 of 49

Question: Please tell us whether you do any of these leisure activities?

This chart (continued overleaf) provides a comprehensive breakdown of current entertainment options. The information is analysed by demographic, by crossover (activity by activity) and by technology owned in the appendix. This data is then re-presented in specific sections throughout this report, providing a contextual back-drop to each area analysed.

The ranking of activities on the left shows that whilst all the discussion nowadays is of digital media, traditional media still reigns supreme in consumers' leisure time, with radio, TV and print at the top of the list.

But there is a major caveat here. Traditional media ranks highest among the total UK sample, but when activity is analysed by age, a very different picture emerges.

The presence in 6th place of browsing social networks (like Facebook and Myspace) is revealing. It goes to show just how embedded social networks have become in consumers' leisure lives, social networking has become truly mainstream.

Base: Q3, All respondents (1,608)

Entertainment activity audit

26 to 49

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ENTERTAINMENTMEDIARESEARCH

Question: Please tell us whether you do any of these leisure activities?

The chart on the left shows less regular activities, becoming more and more niche as we read down the list.

Taking the list as a whole across all 49 activities, we appreciate the competition for time and money. Time is finite, even the most ardent early adopter.

What the list also reveals is the myriad of ways in which consumers choose and prefer to consume content – whether it is legal or illegal, whether it is traditional or digital, and whether it is downloaded or streamed. This report investigates all of these behaviours and preferences in detail.

The data shown is a snapshot as of early 2008. The survey also examines and predicts future intentions across all of these activities. The future intention analysis is provided in its own section.

Base: Q3, All respondents (1,608)

Comparing extremes

Teenage males versus males 45-54

For the UK as a whole, we see that traditional media ranks highest in terms of activity. But when we cut the analysis by demographics, a very different picture emerges.

By comparing two extremes (teenage and older males for example), we see just how different are their patterns of behaviour. Indeed, these two groups are living on two different planets when it comes to leisure and digital lifestyle, the differences are that marked.

The nature of the differences are what one would expect: teenage males are much more attracted to digital activities and video gaming.

Teenage consumption of traditional media is still relatively high (it's not as if they have been totally abandoned by any means). But consumption levels trails that of the older male by a substantial margin.

Of course this has important implications as teenage males' behaviour is likely to remain digital going forward. They are unlikely to revert to traditional media as their behaviour patterns are established and founded in the digital world.

This means that, going forward, traditional media will find itself increasingly squeezed by its digital competitors and alternatives.

Base: Q3, All not doing activity

Top 25 activities of teenage males

When we look specifically at the rank order of activities for teenage males, we see just how different is their behaviour.

Traditional media remains important but it's clear that social communications and networking are far more important in their lives, taking up much of their time.

Important information for advertisers and providers wishing to access teenagers. As leisure behaviour differs so greatly by demographic, companies should tailor their communications strategy accordingly. Companies wanting to access teenage males, for example, ought to consider how to incorporate social media, gaming and online in general into the communications mix. Relying too heavily upon traditional media would appear to miss a great opportunity for this particular demographic.

A full breakdown of activity by the full range of demographics is provided on the following pages.

Base: Q3, M15-19

Entertainment activity audit by demographics

% Do regularly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Listen to radio (not online)	51%	40%	48%	51%	58%	57%	46%	39%	50%	55%	46%
Read paper/hardback books	47%	31%	31%	37%	43%	48%	43%	50%	55%	58%	55%
Watch Sky/other subscription	45%	35%	30%	46%	56%	47%	37%	39%	45%	48%	45%
Read newspapers (printed)	41%	32%	39%	41%	44%	51%	27%	29%	40%	36%	53%
Read magazines	35%	21%	23%	30%	33%	34%	36%	43%	42%	41%	41%
Browse social network sites	34%	55%	59%	33%	24%	13%	64%	68%	47%	21%	12%
Play the National Lottery	34%	10%	16%	28%	40%	50%	10%	19%	28%	48%	44%
Watch recorded television	32%	27%	25%	30%	38%	35%	26%	33%	28%	38%	29%
Chatting on Instant Messenger	32%	61%	42%	29%	23%	21%	63%	48%	33%	23%	19%
Visit newspaper websites	24%	14%	23%	32%	26%	23%	11%	24%	23%	24%	30%
Use bluetooth technology/applications	21%	34%	22%	28%	25%	21%	30%	13%	22%	16%	10%
Play offline games on PC	21%	32%	25%	23%	26%	19%	18%	18%	16%	19%	22%
Go to cinema	21%	27%	23%	21%	23%	17%	31%	19%	23%	20%	17%
Play online games on the PC	20%	30%	22%	18%	18%	17%	14%	24%	19%	23%	16%
Listen to radio streamed online	18%	17%	18%	21%	21%	18%	26%	18%	17%	17%	12%
Play games on handheld device	17%	27%	16%	18%	15%	11%	21%	21%	21%	18%	10%
Rent DVDs	15%	9%	18%	23%	14%	13%	14%	16%	18%	14%	12%
Buy video games	13%	20%	17%	21%	10%	9%	5%	19%	10%	16%	5%
Stream music from social networks	12%	24%	23%	14%	8%	5%	30%	20%	15%	5%	5%
Play online games on a console	12%	33%	19%	15%	10%	7%	8%	15%	11%	8%	6%
Play games on your mobile	12%	21%	18%	13%	9%	4%	15%	22%	17%	7%	7%
Use internet chatrooms	9%	17%	11%	13%	7%	6%	11%	15%	11%	5%	6%
Making calls w/ Skype/other online	8%	7%	10%	11%	10%	6%	8%	9%	9%	8%	5%
Using mobile to surf Internet	8%	13%	13%	13%	8%	3%	6%	14%	10%	5%	3%
Listen to podcasts	8%	12%	8%	12%	8%	7%	10%	7%	9%	5%	3%
Read other peoples' blogs	8%	11%	11%	11%	7%	3%	13%	13%	9%	4%	3%
Filesharing music	8%	15%	14%	7%	7%	5%	16%	13%	10%	3%	1%
Listen to radio on mobile phone	8%	13%	14%	10%	5%	4%	10%	11%	12%	3%	4%
Watch PPV movies via Sky/cable	7%	8%	10%	11%	8%	4%	4%	12%	9%	4%	6%
Watch movies on HD-DVD disk	7%	7%	9%	8%	4%	5%	8%	8%	8%	5%	8%
Watch full tv progs on streaming sites	6%	13%	14%	7%	4%	2%	14%	7%	8%	3%	3%
Watch full movies on streaming sites	6%	13%	14%	9%	3%	3%	12%	7%	5%	1%	1%
Online gambling	6%	3%	8%	8%	10%	7%	2%	7%	6%	2%	1%
Filesharing movies / programmes	5%	9%	9%	7%	7%	3%	7%	12%	6%	1%	1%
Watch pirate DVDs of movies	5%	6%	11%	7%	2%	1%	8%	9%	9%	3%	2%
Subscribe to MMORPG online game	5%	17%	10%	6%	4%	2%	3%	10%	4%	2%	2%
Watch TV on PC via tv-card/USB tuner	5%	9%	9%	7%	6%	3%	4%	5%	4%	4%	3%
Write on your own blog	5%	9%	7%	7%	2%	2%	10%	7%	6%	3%	1%
Pay to play online bingo	4%	5%	8%	5%	5%	4%	2%	9%	5%	2%	3%
Swap hard drives to share content	4%	6%	11%	6%	3%	3%	7%	10%	5%	1%	1%
Listen to audio books	4%	6%	7%	4%	2%	4%	2%	9%	6%	3%	3%
Read e-books/novels downloaded	4%	8%	5%	7%	1%	4%	3%	7%	5%	2%	2%
Subscribe paid mthly music d/l service	4%	6%	9%	5%	1%	3%	5%	8%	6%	1%	1%
Buy authorised digital download movie	4%	7%	10%	7%	2%	1%	2%	5%	6%	1%	1%
Filesharing games / software	4%	7%	10%	5%	3%	1%	4%	8%	5%	2%	0%
Watch PPV movies over Internet	3%	5%	7%	7%	1%	1%	4%	6%	6%	1%	1%
Play online poker for money	3%	5%	3%	7%	4%	2%	1%	4%	5%	2%	0%
Watch movies on Blu-ray disk	3%	5%	7%	5%	1%	1%	2%	5%	5%	1%	1%
Subscribe to paid-for podcast	2%	5%	6%	3%	0%	1%	2%	5%	4%	0%	1%

Entertainment activity audit by demographics

shown as relative to total

% Do regularly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Listen to radio (not online)	51%	-11%	-3%	0%	+7%	+6%	-5%	-12%	-1%	+4%	-5%
Read paper/hardback books	47%	-16%	-16%	-10%	-4%	+1%	-4%	+3%	+8%	+11%	+8%
Watch Sky/other subscription	45%	-10%	-15%	+1%	+11%	+2%	-8%	-6%	0%	+3%	0%
Read newspapers (printed)	41%	-9%	-2%	0%	+3%	+10%	-14%	-12%	-1%	-5%	+12%
Read magazines	35%	-14%	-12%	-5%	-2%	-1%	+1%	+8%	+7%	+6%	+6%
Browse social network sites	34%	21%	+25%	-1%	-10%	-21%	+30%	+34%	+13%	-13%	-22%
Play the National Lottery	34%	-24%	-18%	-6%	+6%	+16%	-24%	-15%	-6%	+14%	+10%
Watch recorded television	32%	-5%	-7%	-2%	+6%	+3%	-6%	+1%	-4%	+6%	-3%
Chatting on Instant Messenger	32%	+29%	+10%	-3%	-9%	-11%	+31%	+16%	+1%	-9%	-13%
Visit newspaper websites	24%	-10%	-1%	+8%	+2%	-1%	-13%	0%	-1%	0%	+6%
Use bluetooth technology/applications	21%	+13%	+1%	+7%	+4%	0%	+9%	-8%	+1%	-5%	-11%
Play offline games on PC	21%	+11%	+4%	+2%	+5%	-2%	-3%	-3%	-5%	-2%	+1%
Go to cinema	21%	+6%	+2%	0%	+2%	-4%	+10%	-2%	+2%	-1%	-4%
Play online games on the PC	20%	+10%	+2%	-2%	-2%	-3%	-6%	+4%	-1%	+3%	-4%
Listen to radio streamed online	18%	-1%	0%	+3%	+3%	0%	+8%	0%	-1%	-1%	-6%
Play games on handheld device	17%	+10%	-1%	+1%	-2%	-6%	+4%	+4%	+4%	+1%	-7%
Rent DVDs	15%	-6%	+3%	+8%	-1%	-2%	-1%	+1%	+3%	-1%	-3%
Buy video games	13%	+7%	+4%	+8%	-3%	-4%	-8%	+6%	-3%	+3%	-8%
Stream music from social networks	12%	+12%	+11%	+2%	-4%	-7%	+18%	+8%	+3%	-7%	-7%
Play online games on a console	12%	+21%	+7%	+3%	-2%	-5%	-4%	+3%	-1%	-4%	-6%
Play games on your mobile	12%	+9%	+6%	+1%	-3%	-8%	+3%	+10%	+5%	-5%	-5%
Use internet chatrooms	9%	+8%	+2%	+4%	-2%	-3%	+2%	+6%	+2%	-4%	-3%
Making calls w/ Skype/other online	8%	-1%	+2%	+3%	+2%	-2%	0%	+1%	+1%	0%	-3%
Using mobile to surf Internet	8%	+5%	+5%	+5%	0%	-5%	-2%	+6%	+2%	-3%	-5%
Listen to podcasts	8%	+4%	0%	+4%	0%	-1%	+2%	-1%	+1%	-3%	-5%
Read other peoples' blogs	8%	+3%	+3%	+3%	-1%	-5%	+5%	+5%	+1%	-4%	-5%
Filesharing music	8%	+7%	+6%	-1%	-1%	-3%	+8%	+5%	+2%	-5%	-7%
Listen to radio on mobile phone	8%	+5%	+6%	+2%	-3%	-4%	+2%	+3%	+4%	-5%	-4%
Watch PPV movies via Sky/cable	7%	+1%	+3%	+4%	+1%	-3%	-3%	+5%	+2%	-3%	-1%
Watch movies on HD-DVD disk	7%	0%	+2%	+1%	-3%	-2%	+1%	+1%	+1%	-2%	+1%
Watch full tv progs on streaming sites	6%	+7%	+8%	+1%	-2%	-4%	+8%	+1%	+2%	-3%	-3%
Watch full movies on streaming sites	6%	+7%	+8%	+3%	-3%	-3%	+6%	+1%	-1%	-5%	-5%
Online gambling	6%	-3%	+2%	+2%	+4%	+1%	-4%	+1%	0%	-4%	-5%
Filesharing movies / programmes	5%	+4%	+4%	+2%	+2%	-2%	+2%	+7%	+1%	-4%	-4%
Watch pirate DVDs of movies	5%	+1%	+6%	+2%	-3%	-4%	+3%	+4%	+4%	-2%	-3%
Subscribe to MMORPG online game	5%	+12%	+5%	+1%	-1%	-3%	-2%	+5%	-1%	-3%	-3%
Watch TV on PC via tv-card/USB tuner	5%	+4%	+4%	+2%	+1%	-2%	-1%	0%	-1%	-1%	-2%
Write on your own blog	5%	+4%	+2%	+2%	-3%	-3%	+5%	+2%	+1%	-2%	-4%
Pay to play online bingo	4%	+1%	+4%	+1%	+1%	0%	-2%	+5%	+1%	-2%	-1%
Swap hard drives to share content	4%	+2%	+7%	+2%	-1%	-1%	+3%	+6%	+1%	-3%	-3%
Listen to audio books	4%	+2%	+3%	0%	-2%	0%	-2%	+5%	+2%	-1%	-1%
Read e-books/novels downloaded	4%	+4%	+1%	+3%	-3%	0%	-1%	+3%	+1%	-2%	-2%
Subscribe paid mthly music d/l service	4%	+2%	+5%	+1%	-3%	-1%	+1%	+4%	+2%	-3%	-3%
Buy authorised digital download movie	4%	+3%	+6%	+3%	-2%	-3%	-2%	+1%	+2%	-3%	-3%
Filesharing games / software	4%	+3%	+6%	+1%	-1%	-3%	0%	+4%	+1%	-2%	-4%
Watch PPV movies over Internet	3%	+2%	+4%	+4%	-2%	-2%	+1%	+3%	+3%	-2%	-2%
Play online poker for money	3%	+2%	0%	+4%	1%	-1%	-2%	+1%	+2%	-1%	-3%
Watch movies on Blu-ray disk	3%	+2%	+4%	+2%	-2%	-2%	-1%	+2%	+2%	-2%	-2%
Subscribe to paid-for podcast	2%	+3%	+4%	+1%	-2%	-1%	0%	+3%	+2%	-2%	-1%

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Activity attachment

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Activity versus attachment

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A revealing analysis is to understand not only how many consumers are involved in a specific activity, but also how emotionally attached users are to it. In other words, to what degree is each activity embedded in their lives and to what extent would they hate to give it up. A summary of all activities is shown in the grid and the charts that follow provide a full breakdown.

There a few things to note about this analysis. Firstly the relationship between the level of activity (vertical axis) and emotional attachment to the activity (horizontal axis) is not linear. This means there are some activities that many consumers do, but they generate relatively little emotional attachment – such as newspaper websites and streamed radio. On the other hand, there are activities that not many people do (like watching Blu-ray movies or playing MMORPG games) that generate a great deal of emotional attachment.

The activities that generate the highest emotional attachment are relatively traditional: reading printed books, watching Sky/subscription television and listening to the radio.

A second tranche of activities such as Instant Messaging, Blu-ray, MMORPGs, recorded TV, newspapers, magazines and cinema also generate a great deal of connection, but they differ widely in the proportions of consumers active in each area.

Activities with the lowest levels of emotional commitment include podcasts, reading blogs and playing games on mobile phones. These are the activities that users could most readily give up without feeling the pain.

Base: Q58, All respondents (1,608)

Activity versus attachment

Emotional attachment to activity

Top 25 of 49

Question: Which of these activities would you find it really hard to give up and which could you stop easily?

	Addicted/never stop	Hate to stop	Uncomfortable	Easily stop	% Regularly / occasionally doing this
Read paper/hardback books	23%	30%	24%	24%	72%
Watch Sky/other subscription	15%	36%	26%	22%	55%
Listen to radio (not online)	10%	33%	28%	29%	73%
Chatting on Instant Messenger	12%	22%	28%	38%	53%
Watch movies on Blu-ray disk	7%	26%	28%	39%	8%
Read newspapers (printed)	6%	27%	27%	40%	69%
Subscribe to MMORPG online game	10%	22%	28%	39%	9%
Go to cinema	7%	26%	29%	38%	59%
Watch recorded television	9%	23%	29%	39%	57%
Read magazines	8%	24%	30%	39%	67%
Subscribe to paid-for podcast	7%	22%	31%	40%	5%
Subscribe paid mthly music d/l service	8%	21%	33%	38%	7%
Browse social network sites	10%	19%	27%	43%	53%
Play offline games on PC	8%	21%	28%	44%	47%
Filesharing games / software	6%	22%	32%	40%	8%
Making calls w/ Skype/other online	7%	20%	29%	43%	17%
Play online poker for money	6%	21%	26%	47%	9%
Watch movies on HD-DVD disk	6%	21%	31%	43%	15%
Filesharing music	7%	19%	27%	47%	18%
Play games on handheld device	7%	19%	28%	46%	34%
Buy video games	5%	20%	28%	47%	38%
Filesharing movies / programmes	6%	19%	29%	46%	12%
Play online games on a console	7%	17%	25%	51%	24%
Play online games on the PC	7%	17%	27%	49%	40%
Play the National Lottery	5%	19%	27%	50%	50%

This provides the full breakdown of the emotional commitment to each activity represented in the preceding grid, ranked by descending order of emotional commitment. It continues on the next page.

Base: Q7, All doing activity

Emotional attachment to activity

26 to 49

Question: Which of these activities would you find it really hard to give up and which could you stop easily?

Base: Q7, All doing activity

Emotional attachment by demographics

% Would never stop or hate to stop	Total	Male	Female	15-19	20-24	25-34	35-44	45-54
Read paper/hardback books	53%	43%	62%	41%	45%	54%	56%	57%
Watch Sky/other subscription	51%	48%	54%	55%	46%	50%	51%	55%
Listen to radio (not online)	43%	42%	43%	34%	29%	43%	48%	47%
Chatting on Instant Messenger	34%	34%	34%	51%	35%	31%	30%	27%
Watch movies on Blu-ray disk	33%	33%	33%	35%*	37%	35%	31%*	**
Read newspapers (printed)	33%	32%	34%	27%	27%	34%	33%	38%
Subscribe to MMORPG online game	32%	32%	32%	40%	29%	34%	29%	**
Go to cinema	32%	31%	34%	42%	25%	31%	35%	29%
Watch recorded television	32%	30%	34%	31%	29%	32%	33%	33%
Read magazines	32%	27%	36%	31%	29%	32%	35%	30%
Subscribe to paid-for podcast	30%	31%	28%*	**	22%*	42%*	**	**
Subscribe paid mthly music d/l service	30%	32%	25%	**	28%*	33%	**	**
Browse social network sites	29%	25%	34%	44%	40%	31%	20%	18%
Play offline games on PC	29%	30%	27%	34%	25%	28%	26%	32%
Filesharing games / software	28%	31%	23%	31%*	25%	32%	24%*	**
Making calls w/ Skype/other online	28%	28%	27%	22%	27%	33%	32%	19%
Play online poker for money	28%	28%	25%	22%*	25%	30%	30%	26%*
Watch movies on HD-DVD disk	26%	31%	22%	32%	22%	35%	20%	23%
Filesharing music	25%	27%	24%	34%	30%	31%	13%	16%
Play games on handheld device	25%	26%	25%	32%	31%	27%	25%	13%
Buy video games	25%	26%	22%	29%	27%	26%	22%	22%
Filesharing movies / programmes	25%	25%	24%	24%	31%	25%	22%	18%*
Play online games on a console	24%	28%	19%	29%	21%	27%	21%	22%
Play online games on the PC	24%	25%	23%	24%	22%	28%	24%	21%
Play the National Lottery	24%	22%	25%	26%	17%	26%	24%	24%
Write on your own blog	24%	26%	20%	30%	25%	29%	13%	16%*
Watch TV on PC via tv-card/USB tuner	23%	27%	16%*	30%	20%	30%	20%	15%
Online gambling	23%	25%	**	31%	21%	23%	23%	22%*
Use bluetooth tech'y/applications	23%	25%	20%	30%	14%	24%	19%	26%
Buy authorised digital download movie	22%	23%	19%	23%*	28%	29%	11%	11%*
Watch full movies on streaming sites	21%	22%	20%	27%	21%	25%	17%	7%*
Watch PPV movies over Internet	21%	23%	18%	15%*	35%*	26%	10%*	**
Watch pirate DVDs of movies	20%	22%	19%	18%	26%	26%	17%	11%
Swap hard drives to share content	20%	21%	19%	25%	20%	23%	14%*	**
Use internet chatrooms	20%	21%	19%	30%	16%	22%	16%	19%
Rent DVDs	20%	19%	21%	24%	16%	24%	20%	16%
Listen to radio on mobile phone	20%	22%	17%	23%	18%	29%	13%	13%
Stream music from social networks	20%	21%	19%	25%	24%	24%	13%	11%
Watch full tv progs on streaming sites	19%	20%	18%	25%	20%	21%	13%	15%
Pay to play online bingo	19%	25%	13%	**	15%	23%	15%	10%
Watch PPV movies via Sky/cable	19%	21%	16%	25%	22%	22%	13%	14%
Listen to radio streamed online	18%	18%	18%	20%	16%	20%	18%	17%
Visit newspaper websites	18%	17%	19%	14%	20%	24%	16%	16%
Using mobile to surf Internet	17%	21%	12%	27%	11%	20%	14%	13%
Listen to audio books	17%	15%	19%	20%	18%	20%	10%	17%
Read e-books/novels downloaded	16%	16%	15%	18%	16%	20%	12%	13%
Read other peoples' blogs	13%	14%	12%	17%	15%	18%	10%	6%
Play games on your mobile	13%	14%	12%	18%	17%	15%	9%	7%
Listen to podcasts	12%	12%	14%	19%	13%	14%	10%	7%

* Base <50

** Base too low to show

WIGGIN

Future trends

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New uptake

Top 25 of 49

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Included in the audit of current activity is a measure of what activities will be taken up in the next 6 months. The chart shows the ranking of the top 25 highest intentions for take-up.

It's clear that new high definition format movie disks are creating the most interest among consumers.

Base: Q3, All respondents (1,608)

New uptake

Base: Q3, All respondents (1,608)

Predicted change in activity among users

Top 25 of 49

Question: You said that you do these activities. In the next 12 months, will you do these more or less or at the same rate as now?

To better understand future trends we can also look at the predicted change in behaviour among consumers already engaged in specific activities.

For users of each activity, we asked whether they would do more, less or whether there would be no change in that particular activity. The chart on the left ranks all the activities by the level of net increase in activity (and it continues on the page overleaf).

Watching movies on the new high definition disks are among the activities showing the highest level of increased intended usage among those owning the players. It's also clear that there is more demand for VOIP and Bluetooth technology.

But one general finding worth mentioning is that consumers state they will increase their activity across all but two of the 49 activities. Considering how squeezed consumers' time is already, this is potentially unreasonable and perhaps even impossible. It shows consumers have a hunger to be more active but are potentially unrealistic about what's feasible. Also some activities may be more reflective of human nature (the intention to read more and pirate movies less, for example) than a truly accurate picture of future trends.

We therefore recommend that more emphasis is placed on the order of the list rather than take the net increased figures at face value.

Base: Q6, All doing activity

Predicted change in activity among users

26 to 49

Question: You said that you do these activities. In the next 12 months, will you do these more or less or at the same rate as now?

Base: Q6, All doing activity

Predicted change among users by demographics

% Net more or less	Total	Male	Female	15-19	20-24	25-34	35-44	45-54
Watch movies on Blu-ray disk	+39%	+39%	+38%	+41%*	+33%	+41%	+39%*	**
Making calls w/ Skype/other online	+33%	+31%	+35%	+46%	+43%	+26%	+33%	+24%
Watch movies on HD-DVD disk	+31%	+34%	+28%	+39%	+37%	+26%	+33%	+26%
Read paper/hardback books	+28%	+25%	+30%	+28%	+32%	+33%	+26%	+21%
Use bluetooth tech'y/applications	+26%	+30%	+22%	+30%	+27%	+25%	+25%	+28%
Go to cinema	+25%	+24%	+27%	+31%	+33%	+25%	+23%	+21%
Write on your own blog	+24%	+26%	+22%	+24%	+24%	+20%	+29%	+22%*
Subscribe paid mthly music d/l service	+23%	+15%	+38%	**	+40%*	+17%	**	**
Buy authorised digital download movie	+23%	+26%	+18%	+7%*	+36%	+38%	+16%	-1%*
Watch TV on PC via tv-card/USB tuner	+22%	+24%	+18%*	+17%	+23%	+20%	+22%	+26%
Subscribe to paid-for podcast	+20%	+19%	+23%*	**	+37%*	+18%*	**	**
Watch full tv progs on streaming sites	+19%	+22%	+16%	+9%	+27%	+29%	+15%	+13%
Watch PPV movies over Internet	+19%	+21%	+17%	+11%*	+41%*	+28%	-3%*	**
Listen to radio on mobile phone	+18%	+18%	+19%	+19%	+25%	+24%	+15%	+5%
Listen to podcasts	+17%	+17%	+16%	+11%	+17%	+18%	+22%	+12%
Listen to radio streamed online	+16%	+18%	+15%	+17%	+13%	+21%	+15%	+15%
Stream music from social networks	+16%	+15%	+17%	+16%	+16%	+15%	+12%	+22%
Read e-books/novels downloaded	+15%	+13%	+18%	+6%	+20%	+19%	+12%	+17%
Watch full movies on streaming sites	+15%	+15%	+15%	+5%	+30%	+20%	+7%	+7%*
Browse social network sites	+15%	+14%	+17%	+21%	+20%	+16%	+13%	+8%
Play games on handheld device	+15%	+16%	+14%	+4%	+23%	+22%	+17%	+6%
Using mobile to surf Internet	+15%	+16%	+14%	+12%	+33%	+13%	+7%	+13%
Listen to radio (not online)	+14%	+14%	+14%	+24%	+20%	+13%	+12%	+10%
Watch recorded television	+14%	+14%	+14%	+15%	+20%	+16%	+11%	+10%
Visit newspaper websites	+13%	+13%	+13%	+19%	+14%	+10%	+13%	+13%
Watch Sky/other subscription TV	+13%	+13%	+12%	+10%	+20%	+16%	+9%	+10%
Chatting on Instant Messenger	+13%	+11%	+14%	+18%	+10%	+10%	+13%	+13%
Read magazines	+11%	+10%	+12%	+22%	+14%	+12%	+9%	+6%
Listen to audio books	+11%	+10%	+13%	+6%	+28%	+6%	+12%	+10%
Play online poker for money	+11%	+10%	+13%	+11%*	+20%	+25%	-9%	-9%*
Filesharing games / software	+11%	+8%	+18%	+1%*	+13%	+22%	+3%*	**
Play online games on a console	+11%	+12%	+9%	+9%	+15%	+14%	+7%	+10%
Read newspapers (printed)	+11%	+12%	+10%	+22%	+15%	+8%	+10%	+7%
Swap hard drives to share content	+10%	+4%	+21%	+5%	+17%	+14%	+13%*	**
Buy video games	+9%	+10%	+9%	+4%	+17%	+20%	+7%	-2%
Play the National Lottery	+9%	+8%	+9%	+23%	+19%	+15%	+4%	0%
Read other peoples' blogs	+8%	+7%	+8%	+10%	+16%	+6%	+8%	+1%
Subscribe to MMORPG online game	+7%	+8%	+6%	-10%	+29%	+9%	+6%	**
Online gambling	+7%	+8%	**	+4%	+10%	+7%	+6%	+5%*
Watch PPV movies via Sky/cable	+7%	+8%	+5%	+11%	+17%	+8%	+5%	-3%
Play online games on the PC	+6%	+9%	+3%	+1%	+13%	+9%	+7%	+2%
Play offline games on PC	+6%	+8%	+5%	+3%	+12%	+7%	+7%	+4%
Filesharing movies / programmes	+3%	+2%	+5%	-1%	+14%	+7%	-1%	-16%*
Pay to play online bingo	+3%	+1%	+5%	**	+19%	+15%	-8%	-21%
Use internet chatrooms	+2%	+2%	+2%	-4%	+6%	+6%	+1%	-2%
Rent DVDs	+2%	+2%	+1%	+6%	+15%	+5%	-2%	-10%
Filesharing music	0%	-2%	+3%	+4%	+16%	+10%	-17%	-18%
Play games on your mobile	-2%	-2%	-2%	-1%	+5%	+3%	-8%	-7%
Watch pirate DVDs of movies	-6%	-8%	-3%	0%	+11%	+3%	-17%	-28%

* Base <50

** Base too low to show

WIGGIN

Technology and device ownership

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Technology and devices owned

Question: Please tick which of the following devices you currently own or are considering to own

As we have seen, consumers nowadays are involved in a myriad of different leisure and entertainment activities.

It's therefore unsurprising to see just how much technology and devices are owned by UK consumers, with digital cameras, mobile phones and wireless network being the most prevalent.

Not all of this technology is equally distributed across consumers and the ownership (or access) to some is highly correlated with age.

A breakdown of incidence by age is provided overleaf.

Base: Q17, All respondents (1,608)

Technology and devices owned by demographics

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% Own / access as if own	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Digital Camera (not on mobile)	79%	76%	78%	75%	78%	81%	79%	82%	79%	83%	79%
Mobile phone that can access Internet	68%	74%	74%	69%	75%	55%	70%	80%	73%	70%	55%
Wireless network at home	56%	76%	62%	56%	50%	54%	64%	69%	52%	49%	52%
Freeview (but not Top Up)	53%	58%	65%	50%	51%	59%	57%	55%	51%	50%	51%
Basic mobile phone	49%	55%	50%	48%	43%	54%	51%	46%	43%	49%	53%
DVD Recorder	48%	48%	38%	47%	48%	55%	51%	47%	41%	50%	51%
Mobile phone w/ media player	46%	56%	63%	50%	47%	36%	61%	58%	50%	42%	27%
Satellite television / Sky	44%	49%	44%	48%	46%	35%	52%	53%	41%	44%	36%
Personal digital music plyr (excl iPod)	40%	57%	53%	44%	41%	37%	54%	40%	34%	33%	32%
HD-ready tv set	39%	45%	38%	47%	35%	42%	43%	35%	33%	35%	39%
iPod	36%	48%	56%	41%	26%	28%	44%	48%	31%	38%	30%
External HDD to store media	35%	39%	49%	39%	36%	34%	43%	36%	32%	29%	24%
Windows Media Center	33%	42%	36%	31%	34%	38%	44%	35%	27%	31%	29%
Cable television	31%	32%	47%	31%	27%	29%	37%	28%	29%	32%	32%
Sky +	25%	31%	30%	33%	23%	20%	26%	38%	23%	22%	17%
Freeview plus Top Up	24%	27%	33%	30%	18%	21%	29%	25%	24%	24%	21%
Nintendo Wii	24%	34%	40%	29%	16%	18%	30%	37%	23%	23%	15%
DVR ie HDD recorder (excl Sky+)	24%	28%	28%	26%	21%	23%	30%	26%	23%	22%	21%
Non-portable DAB radio	23%	32%	33%	32%	24%	20%	25%	21%	18%	19%	19%
Computer with TV viewing card	22%	31%	32%	31%	22%	25%	21%	22%	16%	16%	14%
Portable DAB radio	21%	26%	29%	25%	22%	22%	26%	18%	17%	17%	15%
iPod with video	20%	37%	32%	27%	12%	18%	19%	21%	23%	15%	14%
Xbox 360	20%	39%	34%	25%	14%	13%	20%	24%	20%	15%	13%
Personal video plyr, excl video iPod	18%	26%	30%	24%	13%	16%	24%	19%	18%	12%	10%
An HD-DVD Player	16%	24%	27%	22%	10%	13%	24%	18%	15%	12%	14%
Playstation 3	16%	30%	29%	22%	12%	12%	17%	26%	16%	9%	8%
iPhone / N95 or similar	16%	27%	31%	23%	13%	9%	18%	22%	14%	10%	8%
PDA/Blackberry	13%	20%	17%	19%	13%	12%	8%	15%	11%	10%	8%
iPod with touchscreen	10%	21%	25%	13%	5%	6%	13%	16%	10%	9%	4%
An e-book reader	9%	20%	19%	14%	6%	5%	8%	14%	10%	2%	5%
Blu-ray player (not PS3)	7%	14%	20%	12%	2%	3%	9%	12%	6%	3%	1%
Apple iTV set top box	6%	13%	18%	12%	2%	1%	8%	11%	6%	2%	2%

Technology and devices owned by demographics

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% Own / access as if own	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Digital Camera (not on mobile)	79%	-3%	-1%	-4%	-1%	+2%	0%	+3%	0%	+4%	0%
Mobile phone that can access Internet	68%	+6%	+6%	+1%	+7%	-13%	+2%	+12%	5%	+2%	-13%
Wireless network at home	56%	+20%	+6%	0%	-6%	-2%	+8%	+13%	-4%	-7%	-4%
Freeview (but not Top Up)	53%	+5%	+12%	-3%	-2%	+6%	+4%	+2%	-2%	-3%	-2%
Basic mobile phone	49%	+6%	+1%	-1%	-6%	+5%	+2%	-3%	-6%	0%	+4%
DVD Recorder	48%	0%	-10%	-1%	0%	+7%	+3%	-1%	-7%	+2%	+3%
Mobile phone w/ media player	46%	+10%	+17%	+4%	+1%	-10%	+15%	+12%	4%	-4%	-19%
Satellite television / Sky	44%	+5%	0%	+4%	+2%	-9%	+8%	+9%	-3%	0%	-8%
Personal digital music plyr (excl iPod)	40%	+17%	+13%	+4%	+1%	-3%	+14%	0%	-6%	-7%	-8%
HD-ready tv set	39%	+6%	-1%	+8%	-4%	+3%	+4%	-4%	-6%	-4%	0%
iPod	36%	+12%	+20%	+5%	-10%	-8%	+8%	+12%	-5%	+2%	-6%
External HDD to store media	35%	+4%	+14%	+4%	+1%	-1%	+8%	+1%	-3%	-6%	-11%
Windows Media Center	33%	+9%	+3%	-2%	+1%	+5%	+11%	+2%	-6%	-2%	-4%
Cable television	31%	+1%	+16%	0%	-4%	-2%	+6%	-3%	-2%	1%	+1%
Sky +	25%	+6%	+5%	+8%	-2%	-5%	+1%	+13%	-2%	-3%	-8%
Freeview plus Top Up	24%	+3%	+9%	+6%	-6%	-3%	+5%	+1%	0%	0%	-3%
Nintendo Wii	24%	+10%	+16%	+5%	-8%	-6%	+6%	+13%	-1%	-1%	-9%
DVR ie HDD recorder (excl Sky+)	24%	+4%	+4%	+2%	-3%	-1%	+6%	+2%	-1%	-2%	-3%
Non-portable DAB radio	23%	+9%	+10%	+9%	+1%	-3%	+2%	-2%	-5%	-4%	-4%
Computer with TV viewing card	22%	+9%	+10%	+9%	0%	+3%	-1%	0%	-6%	-6%	-8%
Portable DAB radio	21%	+5%	+8%	+4%	+1%	+1%	+5%	-3%	-4%	-4%	-6%
iPod with video	20%	+17%	+12%	+7%	-8%	-2%	-1%	+1%	+3%	-5%	-6%
Xbox 360	20%	+19%	+14%	+5%	-6%	-7%	0%	+4%	0%	-5%	-7%
Personal video plyr, excl video iPod	18%	+8%	+12%	+6%	-5%	-2%	+6%	+1%	0%	-6%	-8%
An HD-DVD Player	16%	+8%	+11%	+6%	-6%	-3%	+8%	2%	-1%	-4%	-2%
Playstation 3	16%	+14%	+13%	+6%	-4%	-4%	+1%	10%	0%	-7%	-8%
iPhone / N95 or similar	16%	+11%	+15%	+7%	-3%	-7%	+2%	6%	-2%	-6%	-8%
PDA/Blackberry	13%	+7%	+4%	+6%	0%	-1%	-5%	2%	-2%	-3%	-5%
iPod with touchscreen	10%	+11%	+15%	+3%	-5%	-4%	+3%	6%	0%	-1%	-6%
An e-book reader	9%	+11%	+10%	+5%	-3%	-4%	-1%	5%	+1%	-7%	-4%
Blu-ray player (not PS3)	7%	+7%	+13%	+5%	-5%	-4%	+2%	5%	-1%	-4%	-6%
Apple iTV set top box	6%	+7%	+12%	+6%	-4%	-5%	+2%	5%	0%	-4%	-4%

Comparing extremes

Teenage males versus males 45-54

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We saw earlier that when we compare two age extremes (for example, male teenagers to males 45-54), the pattern of entertainment and leisure activity is markedly different. The same is true for technology and device ownership.

The teenage male is much more likely to be an early adopter and subsequently much more likely to own more devices. Indeed there are only three pieces of technology that the older male is likely to own and they are all mainstream devices found in the home.

Technology much more likely to be owned by teenagers include gaming consoles (particularly the Xbox 360), wireless networks, advanced mobile phones, personal digital music and media players.

It's interesting to see that out of the three gaming consoles, the Wii is less severely biased by age as the Xbox 360.

It's also very revealing to see the extent to which teenagers have the capability to carry a great deal of portable content on their person – whether it's music and video on their iPods, content on their media player enabled mobile phones or on their cutting edge portable devices such as the iPhone or Nokia N95. Whether these devices are actually used to gain access to content when on-the-go is explored in a later section. Just because people have access to technology, doesn't mean it is necessarily used to the fullest extent.

Base: Q3, All M15-19 and M45-54

Technology adoption curve

M15-19	11%	29%	45%	9%	6%	100%
M20-24	9%	38%	35%	11%	7%	100%
M25-34	8%	39%	34%	10%	9%	100%
M35-44	3%	29%	41%	18%	9%	100%
M45-54	4%	18%	47%	19%	13%	100%
F15-19	1%	26%	51%	14%	8%	100%
F20-24	5%	23%	44%	18%	10%	100%
F25-34	2%	18%	44%	24%	13%	100%
F35-44	2%	9%	43%	24%	21%	100%
F45-54	2%	8%	45%	20%	24%	100%

This analysis further highlights how adoption of technology and devices differs by age.

The standard technology adoption curve is shown in the graph on the left, with first adopters representing only 4% of the total and early adopters another 22%. But among teenage males, the proportion of first and early adopters is substantially boosted.

Reading down the age brackets, it's clear to see that technology adoption is highly correlated with age, as one would expect.

Technology adoption also differs by gender, with males much more likely to adopt earlier than females.

Indeed, even teenage females are relatively unlikely to be first adopters (this is very much male-biased), although they are likely to be early adopters compared to older females.

Base: Q62, All respondents (1,608)

Attitudes towards technology

Question: How much do you agree or disagree with these statements?

Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Love new technology	72%	80%	81%	82%	75%	75%	73%	72%	68%	66%	61%
Get confused	43%	36%	28%	39%	27%	34%	39%	43%	57%	60%	58%
Getting left behind	41%	31%	28%	42%	29%	41%	40%	34%	49%	49%	54%

The technology adoption analysis shows important age and gender biases. The underlying attitudes illustrated in the graph on the left provide more explanatory depth to those findings.

Young males are much more likely to agree that they "Love new technology" and older consumers, particularly females, are more likely to be confused about what is available and to believe they are getting left behind.

Put into context, around 3 in 5 older female consumers are confused with all the technology out there and around 1 in 2 often think they are getting left behind.

These findings demonstrate that not everyone moves at the same pace when it comes to embracing (or even understanding) new digital media and entertainment opportunities. A fairly massive chunk of the potential market has important barriers to overcome before electing to adopt – the barriers of awareness, understanding and acceptance. Providers wishing to maximise take-up of new technologies should not underestimate the extent to which they need to educate a substantial tranche of the market. But more often than not, new technology is often riddled with jargon and a fair amount of prior technical know-how is required in order to adopt. This only further adds to the barriers facing many consumers.

Base: Q58, All respondents (1,608)

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On-demand: content preferences and willingness to pay

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Incidence of different ways of accessing video/television/movie Content

% Regularly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Watch recorded TV	32%	27%	25%	30%	38%	35%	26%	33%	28%	38%	29%
PPV via Sky/cable	7%	8%	10%	11%	8%	4%	4%	12%	9%	4%	6%
TV progs streamed	6%	13%	14%	7%	4%	2%	14%	7%	8%	3%	3%
Full movies streamed	6%	13%	14%	9%	3%	3%	12%	7%	5%	1%	1%
TV via PC	5%	9%	9%	7%	6%	3%	4%	5%	4%	4%	3%
PPV online	3%	5%	7%	7%	1%	1%	4%	6%	6%	1%	1%

Before assessing the state-of-the-market for on-demand services, it's worth looking at the ways in which consumers access video content. Six main ways of watching video content are set out in the graph on the left.

Just under 1 in 3 consumers watch recorded television at a time that suits them (with over 1 in 2 watching at least occasionally). Previously this was only possible with the cumbersome VHS cassette, but consumers are now are able to record directly to hard disk recorders, via Sky+, via the PC and via Media Center.

The substantial demand for VOD applies to all demographics and represents very good news for on-demand providers.

It is also interesting to see that new take-up for TV content on the PC is relatively high, with 12% of the total UK sample stating they are planning to access TV via their PC in the next 6 months.

One of the key findings is the anticipated growth in the incidence if consumers using PCs to access TV. 12% of the sample stated they plan to do so in the next 6 months.

Base: Q3, All respondents (1,608)

On-demand: provider usage and familiarity

Question: Some companies have already started "on demand" services in the UK. Are you familiar with the following services and do you use any of them?

Usage of on-demand services ranges widely with YouTube being used at least occasionally by 37% of UK consumers. The page overleaf demonstrates that usage differs enormously by demographics.

Out of the on-demand services offered by the major UK broadcasters, Channel 4's 4OD service is a marginal leader of the pack. However, it must be noted that this is a snapshot as of January 2008 and the BBC had only just begun to seriously push its iPlayer service, having spent several months in beta testing.

Such services offer an unprecedented level of consumer control over content and, for the BBC and ITV at least, is free to consume, albeit it does come with DRM restrictions. Such services also offer relatively high quality video output, in contrast with the current low resolution offering from YouTube.

Other than YouTube and the offerings from the major UK broadcasters, the main issue facing providers is lack of familiarity. Consequently, the current level of intended take-up is low but we would expect this to change significantly over the medium term as Apple, "Kangaroo" and Google in particular invest more heavily in raising mass market awareness.

Base: Q13, All respondents (1,608)

On-demand: provider usage and familiarity by demographics

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Use regularly/occasionally	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
YouTube	37%	65%	65%	47%	38%	27%	53%	51%	35%	20%	15%
Virgin Media	20%	17%	27%	22%	18%	18%	17%	21%	20%	20%	21%
4OD (from Channel 4)	16%	28%	21%	22%	13%	12%	23%	30%	14%	9%	8%
BBC iPlayer	13%	22%	18%	22%	13%	12%	14%	14%	13%	6%	6%
Google Video	12%	38%	32%	21%	10%	7%	13%	12%	10%	5%	1%
ITV.com	12%	14%	19%	16%	10%	7%	12%	16%	12%	10%	11%
Sky Anytime	11%	13%	17%	18%	11%	9%	11%	15%	9%	8%	4%
Lovefilm	9%	11%	14%	14%	10%	7%	8%	13%	13%	5%	3%
Yahoo! Video	9%	12%	20%	14%	5%	7%	15%	12%	10%	3%	1%
MSN Video	8%	14%	14%	11%	4%	5%	11%	13%	10%	4%	3%
Veoh	6%	20%	14%	11%	1%	2%	11%	13%	6%	1%	2%
Metacafe	5%	15%	14%	10%	3%	3%	3%	11%	4%	1%	0%
AOL Video	5%	7%	9%	10%	2%	3%	10%	10%	5%	3%	1%
TV progs from Apple iTunes	5%	8%	13%	10%	2%	1%	8%	7%	5%	2%	1%
Top Up TV Anytime	5%	5%	11%	10%	2%	2%	3%	7%	6%	3%	1%
Joost	4%	11%	9%	7%	6%	3%	2%	7%	4%	0%	1%
BT Vision	4%	8%	8%	8%	2%	2%	3%	8%	5%	3%	2%
Apple TV	4%	6%	12%	10%	1%	1%	3%	8%	6%	2%	0%
Break.com	4%	9%	9%	8%	1%	2%	3%	7%	5%	1%	0%
Tiscali TV (frmrly Homechoice)	4%	6%	9%	9%	1%	2%	6%	6%	6%	1%	1%
Cinema Now	3%	6%	10%	8%	1%	1%	3%	7%	5%	0%	0%
Funny or Die	3%	10%	11%	7%	1%	1%	2%	6%	4%	1%	0%

Usage of on-demand services is correlated with age. For instance, 2 out of 3 males and 1 in 2 females under 24 regularly use YouTube. Having said that, over I in 4 males 45-54 also regularly use it. As one might expect, teenagers are the heaviest users with YouTube, 4OD, iPlayer, as well as streaming sites such as Veoh and Metacafe.

One major provider that bucks the youth trend is ITV, whose on-demand services are as much used by consumers in their 20s as they are by teenagers, most likely reflecting the older demographic reach of the channel.

Going forward, is it reasonable to suggest that consumer control is essential for video services to prosper?

The answer is probably yes and no. The evidence strongly suggests that the major traditional UK broadcasters can thrive in an on-demand environment as long as they offer quality content. Indeed, apart from YouTube, it is the major broadcasters that are capturing on demand usage even though such services are relatively still really in their infancy. Equally, it is difficult to suggest that YouTube's growth will fail to continue apace for the foreseeable future.

Multi-platform on-demand

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Question: BBC, ITV and Channel 4 will soon be launching a single online service that will allow you to download/stream content from all 3 providers on the one platform. How would you describe your interest in this service compared to the current services that are available?
(All respondents)

% Much more or more interested

Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
52%	68%	70%	59%	53%	52%	52%	60%	48%	40%	40%

Question: Thinking again about this service, which one of the providers are you most interested in seeing content from? (All respondents)

% Most interest	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
All equally	47%	40%	34%	44%	49%	56%	42%	33%	50%	51%	48%
BBC	20%	28%	22%	23%	25%	23%	19%	19%	12%	18%	18%
Channel 4	14%	19%	32%	16%	8%	4%	29%	32%	18%	9%	4%
ITV	8%	9%	9%	11%	4%	3%	4%	6%	11%	11%	7%

There has been considerable discussion recently of a possible single platform for on-demand content from the BBC, Channel 4 and ITV, codenamed *"Kangaroo."* It's not yet known exactly how this would sit with each providers' existing services as little information on the service has been released.

We asked UK consumers whether such a service interested them. The result is clear: over half stated that they'd be more interested in this compared to other available services. As one would expect, interest spikes with younger consumers, particularly younger males.

The reason for the boost in interest is, of course, the breadth of content available. When consumers are asked if any particular provider sparks their interest in the service, nearly 1 in 2 state they want the content from *all* the providers rather than any single broadcaster. That said, interest is slightly more driven by content from BBC and Channel 4 rather than ITV where providers have been singled out.

We would argue that such a service would maximise its appeal if it comprised a single platform, rather than a portal to multiple platforms, thereby avoiding unnecessary multiple desktop applications. For the early adopter, this might not be a problem but mass market adoption generally requires a lower hurdle of ease of use.

On-demand content preferences

Question: Given the choice, which, if any, of the following types of content would you be interested in watching "on demand"?

The graph left shows the level of consumer demand for different types of content. The clear leader is recently released movies with 84% interested and almost 50% definitely interested. In our opinion a key driver is consumer demand to watch movies on the platform of their choice.

Apple's recent announcement of movie rentals and purchase through iTunes may well be one way of fulfilling this latent demand.

Opportunities clearly exist in other sectors. The music industry should take note of high levels of demand to watch live music concerts (and recorded gigs as well) and comedy is notably popular.

Demand for different types of content are strong across all demographics, but the expected variation by age is there as well.

% Definitely interested	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Top movies just released on DVD	48%	53%	55%	47%	46%	32%	53%	57%	52%	51%	49%
Recent movies out for few mths	43%	50%	42%	44%	42%	26%	47%	47%	51%	45%	43%
TV comedy programmes	35%	42%	51%	41%	32%	21%	38%	51%	39%	27%	31%
Live music concerts	30%	40%	43%	29%	32%	21%	38%	36%	27%	27%	26%
TV drama programmes	29%	29%	24%	28%	21%	16%	28%	41%	34%	34%	35%
Live sporting events	28%	37%	47%	43%	39%	33%	10%	20%	17%	20%	15%
US progs not yet on British tv	27%	42%	38%	31%	26%	7%	35%	50%	36%	21%	15%
Stand-up comedy	26%	44%	48%	31%	24%	16%	34%	34%	31%	17%	15%
Documentaries	26%	25%	31%	30%	28%	20%	26%	25%	28%	24%	28%
Recorded music concerts	23%	28%	27%	22%	26%	17%	27%	26%	23%	20%	23%
Music videos	23%	36%	26%	24%	18%	14%	34%	33%	23%	19%	18%
Classic movies from years past	22%	18%	24%	26%	21%	15%	25%	21%	23%	22%	22%
News / current affairs	20%	22%	20%	23%	20%	16%	16%	19%	19%	19%	24%
Soap operas	19%	17%	22%	15%	5%	4%	22%	41%	26%	26%	22%
Reality TV shows	14%	18%	19%	11%	9%	5%	18%	20%	21%	17%	9%
Recorded sporting events	13%	23%	24%	23%	18%	10%	9%	10%	10%	8%	6%
Adult material (18+ only)	11%	32%	25%	19%	10%	13%	10%	10%	8%	2%	2%

Base: Q11, All respondents (1,608)

On-demand: willingness to pay

Question: Which one of the following ways would you most prefer to access "on demand" content if you were forced to choose? (All respondents)

- For free, but it would have adverts that you couldn't skip past
- A reasonable monthly subscription to watch unlimited content
- A reasonable fee for every programme you watch and you only pay for what you watch

Preference	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Free / ad supported	72%	66%	66%	65%	71%	73%	78%	74%	70%	71%
Monthly subscription	13%	22%	22%	19%	14%	10%	12%	13%	12%	11%
A la carte	15%	12%	13%	16%	14%	17%	10%	13%	18%	18%

Question: And if watching "on demand" content wasn't free, which of these two would be most appealing to you, if forced to choose? (Only among those who prefer for free)

- A reasonable monthly subscription to watch unlimited content
- A reasonable fee for every programme you watch and you only pay for what you watch

Forced preference	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Monthly subscription	45%	41%	42%	31%	43%	48%	28%	38%	52%	53%
A la carte	55%	59%	58%	69%	57%	52%	72%	62%	48%	47%

It's established that high levels of demand exist for on-demand content but what about consumer willingness to pay for any of it? Is there a viable business model?

Before investigating willingness to pay, we look at preferences for subscription with unlimited content versus à la carte PPV versus free ad-supported models.

The free ad-supported model wins hands down with 70% stating they would rather put up with the ads and receive the content for free than pay for it. Amongst the two other options, there is little to separate them in terms of preference.

We then asked consumers who originally chose the free model to choose between the two paid models. Again there is little to divide them but the PPV option receives slightly more consumer support.

What this suggests is that both types of pay to view models can find their own market as long as the payment terms and content on offer are sufficiently attractive.

On-demand: willingness to pay

Question: Which would you be willing to pay to watch assuming that the following weren't available for free somewhere else (like on free TV channels)?
(Asked among those interested in type of content)

In order to explore willingness to pay, we need to consider different types of content. The graph on the left highlights that different types of content generate markedly different levels of willingness to pay.

What's interesting is that willingness to pay is not necessarily directly linked with the level of demand for content. This is best illustrated in the grid overleaf.

% Definitely/Likely consider paying	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Top movies only just released on DVD	53%	54%	63%	55%	55%	46%	53%	51%	59%	52%	43%
Live sporting events	52%	45%	63%	58%	57%	48%	48%	43%	50%	47%	45%
Recent movies out for few months	43%	46%	59%	47%	42%	32%	42%	43%	47%	41%	37%
Live music concerts	40%	33%	41%	39%	47%	41%	41%	43%	39%	33%	44%
Adult material	35%	42%	40%	37%	26%	31%	32%	40%	53%	23%	30%
Recorded music concerts	28%	27%	27%	36%	26%	28%	34%	25%	32%	19%	26%
US progs not yet shown on British tv	28%	33%	45%	32%	23%	17%	33%	36%	25%	25%	16%
Recorded sporting events	24%	28%	34%	30%	18%	21%	36%	29%	28%	12%	16%
Classic movies from years past	24%	31%	34%	32%	15%	21%	29%	30%	22%	17%	23%
Stand-up comedy	23%	26%	29%	29%	17%	17%	35%	37%	25%	17%	11%
TV drama programmes	23%	27%	33%	26%	18%	16%	25%	33%	21%	18%	23%
Soap operas	21%	26%	30%	31%	8%	18%	28%	19%	22%	19%	13%
TV comedy programmes	21%	20%	33%	27%	16%	13%	26%	29%	24%	15%	13%
Reality TV shows	20%	26%	36%	21%	11%	31%	27%	27%	18%	12%	12%
Documentaries	20%	22%	26%	27%	17%	15%	26%	25%	22%	15%	18%
News / current affairs	16%	26%	29%	23%	8%	12%	22%	29%	15%	9%	10%

Base: All interested in content type

Demand versus willingness to pay

This grid clearly reveals the relationship between demand for content and willingness to pay for it isn't necessarily linear. Content such as comedy programmes are high in demand but there's little appetite to pay for them. This contrasts with adult material which received low stated demand (in our survey at least) but a relatively high preparedness to pay for it.

Demand for content is not therefore a reliable indicator of revenue prospects, however counter-intuitive that sounds.

On-demand: interest in different methods of receiving on-demand content

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Question: How interested are you, if at all, in each of the following ways of receiving the programmes/movies "on demand"?

So, there is clear demand for on-demand video content and there are consumers willing to pay for it. Another key issue is how consumers accesses that content.

There are a multiple ways of delivering content – through the PC (streamed or downloaded), via set-top boxes, via media extender devices (like a games console) and via networked mobile devices.

All this choice presents a confusing picture to the average consumer, particularly those older and female. The problem is exacerbated by the requirement in many cases for new devices and knowledge of home networks and expertise in shifting content between devices. This can present a challenge to even fairly experienced techies. It is interesting to see that whilst consumers are keen on the wireless method, few actually do it – indicating technical know-how barriers.

The solutions that generate the most interest are those involving the PC rather than a set-top box or gaming console – most likely as they entail using technology already owned. The solution with the greatest interest is downloading content to the PC and wirelessly streaming it to the TV. Getting the content on the main TV in the living room is a winning solution, particularly given the incidence of large-screen TV ownership.

Base: Q9, All familiar with method

On-demand: interest in different methods of receiving on-demand content

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Question: How interested are you, if at all, in each of the following ways of receiving the programmes/movies "on demand"?

Already do	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Via Sky	13%	18%	9%	19%	12%	12%	9%	19%	10%	13%	7%
Via other set top box	12%	17%	12%	13%	9%	12%	9%	9%	15%	11%	12%
D-loaded to your home PC	10%	19%	16%	15%	11%	7%	10%	14%	10%	4%	2%
Streamed to home PC	10%	25%	11%	15%	10%	7%	9%	16%	8%	3%	3%
D-loaded to PC, streamed wireless to TV	5%	10%	7%	13%	3%	2%	1%	8%	4%	2%	1%
Via Xbox360 console	3%	7%	4%	5%	1%	0%	1%	4%	5%	1%	0%
Via Playstation3 console	3%	8%	3%	6%	2%	2%	1%	3%	4%	0%	0%
Streamed to mobile phone	3%	6%	5%	5%	<1%	1%	1%	9%	3%	1%	0%
Downloaded to mobile phone	3%	7%	6%	6%	1%	0%	1%	7%	4%	0%	0%
Via Apple TV set top box	2%	5%	3%	3%	1%	0%	1%	3%	3%	2%	0%
Via BT Vision	2%	3%	7%	3%	1%	0%	2%	6%	4%	1%	2%

Extremely/very interested	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
D-loaded to PC, streamed wireless to TV	28%	38%	41%	34%	28%	22%	36%	35%	25%	17%	19%
D-loaded to your home PC	25%	31%	36%	35%	27%	19%	29%	33%	19%	18%	18%
Streamed to home PC	23%	24%	33%	31%	28%	17%	27%	26%	22%	17%	12%
Via other set top box	20%	24%	25%	21%	22%	14%	24%	29%	19%	15%	16%
Via Sky	19%	20%	28%	24%	18%	9%	28%	25%	25%	14%	13%
Via Xbox360 console	11%	23%	26%	21%	8%	4%	13%	20%	10%	5%	3%
Via Playstation3 console	11%	21%	22%	17%	8%	5%	17%	17%	11%	7%	4%
Via Apple TV set top box	10%	16%	24%	18%	8%	6%	10%	15%	11%	3%	5%
Via BT Vision	10%	18%	19%	19%	7%	5%	8%	17%	10%	3%	4%
Streamed to mobile phone	9%	15%	21%	15%	8%	3%	15%	11%	9%	3%	5%
Downloaded to mobile phone	9%	14%	21%	14%	5%	3%	13%	16%	6%	6%	4%

Base: Q9, All respondents excluding those unfamiliar with method

On-demand: interest in different methods of receiving on-demand content

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: How interested are you, if at all, in each of the following ways of receiving the programmes/movies "on demand"?

We can further explore means of access by looking exclusively at those who already have the means of accessing on-demand content through their ownership of compatible devices.

Whilst very few consumers in the survey own an Apple TV set top box, this together with Sky account for the highest incidence of user access. Owners of next-gen games consoles like the Xbox 360 and PS3 are also accessing content and an even higher proportion are interested in doing so. Again, this shows clear and healthy demand for on-demand content.

Relatively few consumers with wireless networks actually stream their content from their PC to their main television screen. This isn't surprising as without the know how, the cables and the right devices and software, it is not an easy installation. Importantly, the proportion of people wanting to do this is very high eg there is a ratio of over 4:1 of people wanting to do this compared to those already doing it.

Those already wirelessly streaming content to the television are much more likely to be early adopting young males, whereas interest in doing so extends across a wide-range of demographics, indicating widespread demand. At the moment there appear to be far too many barriers for it to take-off. Television sets with built-in wireless streaming capability is one potentially attractive solution.

Base: Q9, All owning relevant device

Impact of video streaming sites on scheduled television

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ENTERTAINMENTMEDIARESEARCH

Question: What impact would you say has watching clips/programmes on YouTube (and similar sites) had on how much "live television you watch. By "live", we mean you watch the same time as scheduled by the broadcaster.

Streaming video sites like YouTube have become phenomenally popular. It's therefore important to understand whether such sites have cannibalised viewing time from scheduled/ broadcast television.

Across the total sample there has been no discernible impact for the majority of people (79%). However, there are nearly 1 in 5 (18%) who state they are watching less scheduled television because of watching streaming video. The net balance is -15%.

This loss occurs across all demographics although it does tend to be heavier among the under 35s.

Male teenagers are much more likely to sacrifice scheduled television for streamed video (with -26% net less). Females aged 20-24 are also disproportionately high.

More or less scheduled	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Much less scheduled	5%	14%	8%	4%	4%	1%	4%	3%	6%	4%	4%
Less scheduled	13%	17%	16%	21%	9%	10%	14%	20%	12%	4%	5%
Not changed	79%	64%	69%	72%	85%	87%	78%	77%	78%	91%	88%
More scheduled	2%	4%	3%	2%	2%	1%	3%	0%	2%	1%	3%
Much more scheduled	1%	1%	4%	2%	0%	0%	1%	0%	1%	0%	0%
Net more or less	**-15%**	**-26%**	**-17%**	**-22%**	**-11%**	**-10%**	**-14%**	**-23%**	**-15%**	**-7%**	**-6%**

Base: Q21, All watching streamed video (864)

WIGGIN

Time-lapsed TV viewing and advertising behaviour

ENTERTAINMENTMEDIARESEARCH

Television viewing behaviour for those with Sky+ or Media Center

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Question: Which one of the following best describes your tv viewing?

For commercial broadcasters, one of the challenges presented by on-demand content that puts the viewer in control is advertising and the ability of the consumer to bypass it with the fast-forward button.

It's important therefore to identify just how much television programming is recorded and how much is watched on schedule among those who use Sky+ or Media Center.

For these consumers, nearly a quarter of their viewing is recorded, allowing them to skip the adverts if they so wish. While some of the respondent bases at demographic level are low, it's interesting that for males aged 25-34, this increases to over 40% of their viewing time.

TV Viewing	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Only recorded	5%	10%	11%*	9%	3%	1%	5%	7%*	5%	2%	1%
Mostly recorded	18%	11%	21%*	33%	19%	13%	12%	21%*	12%	23%	10%
Equal	35%	35%	47%*	30%	30%	37%	29%	40%*	44%	36%	33%
Mostly live	38%	43%	19%*	25%	42%	48%	48%	33%*	33%	33%	54%
Only live	4%	2%	2%*	3%	6%	1%	6%	0%*	7%	5%	2%

* Base under 50

Base: Q19, All with Sky+ or Windows Media Center (737)

Ad avoidance when watching recorded television on Sky+ or Media Center

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Question: When you watch programmes with adverts which you have recorded, how often, if at all, do you fast forward past the adverts?

In the survey, nearly half of those watching recorded programmes using Sky+ or Media Center fast forward past the adverts all the time. A further 1 in 3 skip the ads most of the time.

Just 2% stated they never skip the ads.

This behaviour is fairly consistent across all demographics.

Ad avoidance	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
All the time	46%	51%	39%*	37%	50%	43%	41%	49%*	43%	50%	60%
Most of the time	33%	30%	34%*	41%	25%	33%	26%	44%*	44%	31%	27%
Some of the time	15%	18%	21%*	16%	16%	21%	23%	5%*	10%	12%	7%
Rarely	4%	0%	6%*	4%	8%	3%	3%	2%*	0%	4%	3%
Never	2%	2%	0%*	2%	2%	0%	7%	0%*	3%	2%	2%

* Base under 50

Base: Q18, All with Sky+ or Windows Media Center (737)

Ad avoidance in general

Question: How much do you agree or disagree with the following statement: "I actively try to avoid as many television ads as possible"?

Nearly 2 out of 3 of the total sample agree they avoid as many ads as possible and this level of agreement is fairly evenly distributed across demographics.

Perhaps encouragingly, there is no indication here that younger consumers are more ad-averse. Indeed, it is female teenagers who show the least agreement with the statement.

However, as a whole, it further highlights a general negativity towards television advertising, which is a real issue where more and more consumption is at the control of the consumer, making avoidance of the traditional ad-break increasingly easy. Advertising embedded in content through watermarks and sponsorship are less vulnerable to such behaviour.

The survey also reveals that ad avoiders are more likely owners of more advanced technology (eg external hard drives), They are also generally hungry for different types of content.

Agreement	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Total agree	64%	60%	61%	70%	63%	65%	53%	62%	64%	66%	62%
Strongly agree only	23%	20%	21%	24%	26%	26%	18%	16%	21%	23%	25%

Base: Q58, All respondents (1,608)

Deep profiling of ad avoiders

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ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

WIGGIN

Accessing content

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Download Or stream preference

Question: Given a choice, would you prefer to download content at a higher resolution whenever you want, or would you prefer to stream lower resolution content that you watch immediately and doesn't take up space on your hard drive? Please tell us for each of the following types of content...

There are a variety of means of providing consumers with digital content. One major issue is whether to allow consumers to download content (with or without DRM restrictions) or to stream content (at a potentially lower resolution) for immediate consumption.

The survey found that consumer preference to download to own or to stream is highly dependent on the nature of the content.

In order to look at the preference ratio more clearly, the next slide re-presents the same data excluding any consumers that simply are not interested in downloading or streaming in the first place.

Base: Q8, All respondents (1,608)

Download Or stream preference

Excluding "Just not interested"

Question: Given a choice, would you prefer to download content at a higher resolution whenever you want, or would you prefer to stream lower resolution content that you watch immediately and doesn't take up space on your hard drive? Please tell us for each of the following types of content...

%s shown as download:stream	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Music	73:27	77:23	83:17	74:26	72:28	71:29	76:24	78:22	71:29	68:32	62:38
Movies	65:35	59:41	67:33	68:32	68:32	62:38	61:39	68:32	68:32	63:37	54:46
Games	63:37	69:31	74:26	70:30	65:35	62:38	56:44	68:32	55:45	52:48	53:47
Audio books	56:44	42:58	44:56	61:39	58:42	53:47	44:56	65:35	63:37	59:41	53:47
Adult material (18+ only)	44:56	50:50	37:63	49:51	47:53	41:59	31:69	52:48	34:66	47:53	37:63
Television programmes	43:57	40:60	44:56	50:50	48:52	38:62	32:68	48:52	39:61	40:60	42:58
Music videos	38:62	38:62	40:60	43:57	37:63	43:57	42:58	32:68	28:72	35:65	41:59
Sporting events	30:70	29:71	24:76	34:66	27:73	31:69	43:57	47:53	28:72	19:81	22:78
Movie trailers	20:80	26:74	21:79	28:72	16:84	23:77	14:86	24:76	18:82	8:92	12:88

By stripping out the uninterested, we can see the preference for downloading or streaming more clearly.

The vast majority of consumers want to own the music they download. The absolute opposite is true for movie trailers. The degree to which consumers want to download to own is correlated with the emotional connection to the content. Music and movies are things that people really want to own.

Of course, this analysis is a generalisation. We know the movie rental market has succeeded for a long time. It's more a case that in principle, people want to own the movies they love and are content to rent the rest.

On the other hand, music rental models have worked less well. This analysis shows music audio is the media that consumers want most to own while streaming is fine for music videos.

Base: Q8, All interested in each content type

Computer screen versus main TV screen

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ENTERTAINMENTMEDIARESEARCH

Question: Given a choice, would you prefer to watch the content you download or stream on your computer screen or on your main television screen?

Once consumers gain access to digital video content, one of the big questions is how they wish to view it.

The results show a massive preference to view downloaded or streamed video content on the main television. 76% of consumers want to always of mostly use the main television set. Less than 1 in 10 want to view it always or mostly on the computer screen.

Interestingly, it is the older market and females over 35 in particular that show the greatest demand for content on the main television screen. Males under 24 are more content watching content mainly on the computer screen.

Consumer demand therefore clearly exists but the issue, as identified in the previous chapter, is that it's unacceptably complicated in most cases to get the content from the PC to the main television set.

Those providers who can offer ease of use can expect to find a receptive audience.

Preference	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Always on main TV	41%	26%	26%	36%	40%	42%	29%	30%	46%	53%	52%
Mostly on main TV	35%	33%	40%	39%	32%	35%	38%	42%	37%	31%	29%
Equally	16%	25%	17%	20%	20%	16%	20%	18%	11%	11%	12%
Mostly on computer	6%	13%	15%	3%	6%	5%	8%	6%	5%	3%	6%
Always on computer	2%	3%	3%	2%	2%	3%	4%	4%	1%	2%	1%

Base: Q10, All respondents (1,608)

Monthly paid music download subscription

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ENTERTAINMENTMEDIARESEARCH

Current and intended usage levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
6%	9%	5%	1%	3%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
5%	8%	6%	1%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
32%	25%	**	28%*	33%	**	**

* Caution – low base
** Base too low to show

Future usage among subscribers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+15%	+38%	**	+40%*	+17%	**	**

* Caution – low base
** Base too low to show

As well as video, we also looked at accessing music. We saw earlier that music generates exceptionally high emotional attachment and it's something that consumers would prefer to own than rent. This then explains the relatively low take-up of monthly paid music download subscription services at 4%. Usage of such services is heavily biased towards the under 35s.

However, among the relatively small number of users, there is a high emotional connection to the service. 30% never want or would hate to stop. In context, out of the 49 activities surveyed, this level of emotional connection just qualifies for the top quartile of activities by emotional connection.

Growth prospects are somewhat prosaic. Just 7% of the total state they are going to start using such services in the next 6 months. Out of the 49 activities surveyed this is in the lower half when ranked by future uptake.

One of the key obstacles hitherto is that rented music is lost when the subscription ends. Music is something consumers really want to own and this then represents a true obstacle for such services thriving.

Although such a model is wrought with issues, any provider able to provide a service that allows consumers to keep the music post subscription may have a winning proposition.

Deep profiling of monthly subscribers to music service

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How their activity differs from UK average

How their ownership of technology differs from UK average

WIGGIN

Movies

ENTERTAINMENTMEDIARESEARCH

Watching brand new movies

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Question: How do you watch brand new movies? Please look at the list and tell us whether you access them in the following ways.

All the time/mostly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Cinema	36%	51%	52%	37%	29%	27%	49%	42%	30%	33%	31%
Terrestrial TV	34%	33%	29%	30%	36%	39%	27%	41%	33%	32%	36%
Buy DVD	31%	43%	42%	32%	23%	28%	34%	43%	27%	28%	29%
Cable/Sat (not PPV)	29%	35%	29%	33%	28%	27%	26%	32%	25%	27%	28%
Rent DVD	25%	27%	35%	33%	21%	16%	31%	24%	31%	23%	18%
PPV	9%	15%	18%	12%	6%	5%	11%	10%	10%	5%	7%
Fileshare	8%	18%	19%	13%	7%	3%	7%	16%	8%	4%	1%
Stream	6%	16%	21%	11%	1%	1%	10%	13%	6%	2%	2%
Buy download	6%	13%	17%	11%	2%	1%	6%	14%	6%	2%	1%
Newsgroup/forum	5%	9%	14%	8%	2%	1%	6%	10%	7%	3%	1%

Another way of understanding content access preferences is to look at a specific examples – in this case how consumers wish to watch brand new movies. There are currently five main ways this happens.

What is equally interesting is to note the levels of demand for non-mainstream means of accessing movies; around 1 in 10 use PPV services on satellite/cable.

Whilst only 1 in 20 (6%) buy legal downloads, the amount of piracy (filesharing, streaming and via newsgroups) indicates a very strong demand for digital versions of movies in general.

And, of course, the highest demand for digital versions of movies is from the younger respondents. At present, young people are much more likely to obtain their movies from unauthorised sources but they are also among the most likely to purchase legal versions. This is a clear indication to movie studios to invest more seriously in legal digital download solutions.

Base: Q16, All respondents (1,608)

Profiling cinema attendance

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended attendance levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
27%	23%	21%	23%	17%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
31%	19%	23%	20%	17%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
31%	34%	42%	25%	31%	35%	29%

Future usage among cinema goers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+24%	+27%	+31%	+33%	+25%	+23%	+21%

Profiling authorised movie downloaders

WIGGIN ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
7%	10%	7%	2%	1%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
2%	5%	6%	1%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
23%	19%	23%*	28%	29%	11%	11%*

* Caution – low base

Future usage among downloaders

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+26%	+18%	+7%*	+36%	+38%	+16%	-1%*

* Caution – low base

Deep profiling of authorised movie downloaders

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling PPV movie online purchasers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

- Regularly
- Occasionally
- Rarely
- No but plan to in next 6mth
- No & no plan to
- Unfamiliar

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
5%	7%	7%	1%	1%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
4%	6%	6%	1%	1%

Emotional attachment

- Addicted/would never stop
- Hate to stop
- Uncomfortable to stop
- Easily stop

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
23%	18%	15%*	35%*	26%	10%*	**

* Caution – low base
** Base too low to show

Future usage among viewers

- Do more
- No change
- Do less

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+21%	+17%	+11%*	+41%*	+28%	-3%*	**

* Caution – low base
** Base too low to show

Deep profiling of online PPV purchasers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling those watching full movies from streaming sites

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
13%	14%	9%	3%	3%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
12%	7%	5%	1%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
22%	20%	27%	21%	25%	17%	7%*

* Caution: low base

Future usage among streamers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+15%	+15%	+5%	+30%	+20%	+7%	+7%*

* Caution: low base

Deep profiling of those streaming movies

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling physical DVD renters

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended renting levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
9%	18%	23%	14%	13%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
14%	16%	18%	14%	12%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
19%	21%	24%	16%	24%	20%	16%

Future usage among renters

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+2%	+1%	+6%	+15%	+5%	-2%	-10%

Deep profiling of physical DVD renters

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

WIGGIN

High definition movie disks

ENTERTAINMENTMEDIARESEARCH

Player ownership incidence

Question: Please tick which of the following devices you currently own and are considering to own

When we look at ownership incidence within the general population, we see the two formats are neck-and-neck (when we include Playstation3).

At present, ownership has a slight male bias and is stronger among the under 35s. Indications here that it is still an early adopter market and yet to breakout into the mainstream.

However, plans to purchase a player (either of them) are relatively high. Of all the devices and activities measured in this report, demand for HD-DVD and Blu-ray top the list.

This research also shows that the battle to win generation war is having substantially negative effects from a consumer perspective. This is explored in more detail on the following page.

Own/access as if own	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
HD-DVD player	16%	24%	27%	22%	10%	13%	24%	18%	15%	12%	14%
Playstation 3	16%	30%	29%	22%	12%	12%	17%	26%	16%	9%	8%
Blu-ray player	7%	14%	20%	12%	2%	3%	9%	12%	6%	3%	1%

Base: Q17, All respondents (1,608)

New disk purchase barriers

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Question: Why have you not yet bought a Blu-ray or an HD-DVD player? Please select all that apply

Barrier	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Too expensive	40%	54%	42%	42%	45%	39%	39%	41%	42%	36%	33%
Wait for price reduce	35%	42%	30%	33%	47%	39%	28%	29%	28%	34%	33%
Happy with DVD	34%	43%	36%	41%	37%	28%	32%	46%	34%	31%	24%
Not thought about it	28%	24%	31%	17%	20%	29%	37%	23%	30%	37%	33%
Wait for winner	27%	29%	18%	34%	39%	32%	17%	20%	17%	24%	23%
Don't have right TV	25%	35%	32%	21%	27%	26%	18%	25%	27%	22%	22%
Movies too expensive	22%	33%	29%	24%	24%	26%	20%	22%	21%	17%	16%
Too many DVDs	17%	25%	11%	19%	16%	10%	22%	17%	22%	16%	15%
Wait for recorder	14%	11%	7%	12%	19%	19%	15%	4%	12%	16%	12%
Not enough movies	13%	20%	17%	14%	11%	14%	19%	16%	8%	9%	14%
Not interested	8%	12%	2%	3%	7%	11%	10%	7%	4%	10%	11%
Not impressed	4%	14%	11%	4%	3%	3%	6%	4%	3%	3%	1%

The vast majority are yet to own a next-generation player. Whilst demand for the devices and demand for watching next-gen movies is relatively high, the research reveals serious barriers to take ownership out from its early adopter core and into the mainstream.

Firstly, as all early adopters are aware, the price of the players is perceived to be too high. This is a barrier that will become less and less important as the cost of production decreases and is passed onto the consumer.

But there are also non-price related barriers. Around 1 in 3 are content with DVD quality and 1 in 4 don't own a TV that would show the quality benefit.

But of more concern to the industry as a whole is the 1 in 4 (27%) that are waiting to see which of the two formats will "win" before they consider purchasing. The battle itself is depressing sales.

Consumers need a clear message on the way forward. The next page illustrates even more clearly that concerns over spending a substantial amount on a potentially obsolete format is real concern.

Base: Q60, All familiar, but not yet owning (1,457)

Concern over purchasing a technology becoming obsolete

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ENTERTAINMENTMEDIARESEARCH

Question: How much do you agree or disagree with this statement: "I'm put off buying a new generation disk player (Blu-ray or HD-DVD) because I don't want to buy something that may become obsolete"

We have seen that whilst demand is high, there are barriers to mainstream take up of next gen disk players, with 1 in 4 consumers waiting for a resolution of the format war.

When we ask consumers directly whether they agree with the statement "I'm put off buying a new generation disk player because I don't want to buy something that may become obsolete", we see over 3 in 5 in agreement.

Whilst this is a leading question, the strength of agreement shows that the format war certainly is depressing the consumer appetite to go out and purchase these devices. Until there is more clarity in the market, levels of new uptake will not reach their full potential.

Agreement	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Strongly agree	18%	20%	12%	21%	18%	19%	8%	9%	20%	15%	23%
Agree	45%	45%	39%	47%	42%	49%	49%	54%	44%	43%	42%
Disagree	28%	24%	37%	29%	30%	23%	32%	29%	26%	31%	25%
Strongly disagree	9%	12%	11%	4%	10%	9%	11%	8%	10%	11%	10%
Total agree	62%	64%	52%	68%	60%	68%	57%	63%	64%	58%	65%
Total disagree	38%	36%	48%	32%	40%	32%	43%	37%	36%	42%	35%

Base: Q58, All respondents (1,608)

Profiling Blu-ray movie watchers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended watching levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
5%	7%	5%	1%	1%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
2%	5%	5%	1%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
33%	33%	35%*	37%	35%	31%*	**

* Caution – low base
** Base too low to show

Future usage among Blu-ray viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+39%	+38%	+41%*	+33%	+41%	+39%*	**

* Caution – low base
** Base too low to show

Deep profiling of Blu-ray watchers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling HD-DVD movie watchers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
7%	9%	8%	4%	5%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
8%	8%	8%	5%	8%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
31%	22%	32%	22%	35%	20%	23%

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+34%	+28%	+39%	+37%	+26%	+33%	+26%

Deep profiling of those watching HD-DVD movies

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

WIGGIN

Television

ENTERTAINMENTMEDIARESEARCH

Profiling recorded television viewers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
27%	25%	30%	38%	35%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
26%	33%	28%	38%	29%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
30%	34%	31%	29%	32%	33%	33%

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+14%	+14%	+15%	+20%	+16%	+11%	+10%

Profiling Sky/subscription TV viewers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
35%	30%	46%	56%	47%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
37%	39%	45%	48%	45%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
48%	54%	55%	46%	50%	51%	55%

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+13%	+12%	+10%	+20%	+16%	+9%	+10%

Deep profiling of subscribers to Sky

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling PPV movies on Sky/Cable viewers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
8%	10%	11%	8%	4%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
4%	12%	9%	4%	6%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
21%	16%	25%	22%	22%	13%	14%

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+8%	+5%	+11%	+17%	+8%	+5%	-3%

Deep profiling of those watching PPV movies via Sky/Cable

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling those watching full TV programmes from streaming sites

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
13%	14%	7%	4%	2%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
14%	7%	8%	3%	3%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
20%	18%	25%	20%	21%	13%	15%

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+22%	+16%	+9%	+27%	+29%	+15%	+13%

Deep profiling of those streaming TV

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Profiling those watching TV on PC via TV-Card/USB tuner

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
9%	9%	7%	6%	3%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
4%	5%	4%	4%	3%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
27%	16%*	30%	20%	30%	20%	15%

* Caution: low base

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+24%	+18%*	+17%	+23%	+20%	+22%	+26%

* Caution: low base

Deep profiling of those watching TV on PC

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

WIGGIN

Social networks and community websites

ENTERTAINMENTMEDIARESEARCH

Usage of social networks

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended usage levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
55%	59%	33%	24%	13%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
64%	68%	47%	21%	12%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
25%	34%	44%	40%	31%	20%	18%

Future usage among users

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+14%	+17%	+21%	+20%	+16%	+13%	+8%

Usage of social networks and communities is now mainstream with an average of 1 in 2 at least occasionally using them. Usage does remain highly correlated with age but even 1 in 8 45-54 year olds regularly use them.

Among teenagers, over half of males and two thirds of females use social networks regularly. As we have seen, for teenagers they take up a great deal of their available leisure time and they are having a serious impact on the consumption of other activities and media, particularly traditional media.

Social networks aren't a passing fad: the emotional attachment and likely future usage are also very strong with a net 1 in 6 saying they are going to use them more.

Awareness and usage

Question: Do you ever use any of the following websites?

There are many social networks out there. The top five according to consumers are Facebook, Myspace, Friends Reunited, YouTube (which qualifies as it has a community element) and Bebo.

Facebook is a remarkable success. When consumers were asked, Facebook elicited the highest proportion of those with a profile and also the highest profile to browsing ratio. According to this sample, it has overtaken Myspace. Awareness of both is incredibly high – only around 6-7% have never heard of these communities.

Base: Q20, All respondents (1,608)

Awareness and usage by demographics

% Have profile on…	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Facebook	55%	54%	62%	56%	49%	37%	53%	72%	73%	53%	33%
Myspace	39%	63%	39%	29%	43%	33%	60%	43%	34%	26%	28%
Friends Reunited	36%	12%	20%	35%	44%	37%	10%	36%	50%	51%	47%
YouTube	32%	59%	44%	36%	35%	24%	47%	28%	21%	17%	17%
Bebo	24%	41%	35%	21%	14%	14%	56%	29%	18%	13%	15%
MSN Spaces	17%	25%	22%	18%	12%	12%	33%	22%	17%	9%	11%
MSN Groups	15%	13%	12%	15%	15%	16%	26%	13%	15%	10%	21%
Yahoo! Groups	14%	9%	13%	14%	20%	19%	6%	14%	14%	10%	16%
Faceparty	9%	11%	10%	9%	5%	9%	11%	24%	8%	4%	6%
WAYN	9%	9%	14%	15%	10%	5%	9%	11%	11%	3%	5%
hi5	9%	10%	16%	10%	8%	4%	16%	12%	9%	1%	5%
Flickr	8%	10%	8%	11%	12%	8%	9%	8%	6%	2%	4%
Last.fm	6%	9%	9%	10%	7%	2%	6%	8%	4%	2%	0%
Second Life	6%	6%	5%	7%	8%	9%	1%	10%	3%	5%	2%
LinkedIn	5%	5%	6%	10%	9%	3%	1%	4%	6%	3%	2%
Piczo	4%	10%	4%	6%	1%	1%	15%	8%	4%	0%	0%
StumbleUpon	4%	4%	4%	8%	6%	1%	1%	6%	4%	1%	0%
Pandora	4%	7%	5%	6%	3%	1%	6%	3%	4%	1%	1%
del.icio.us	3%	4%	5%	8%	1%	1%	1%	5%	4%	1%	0%
TagWorld	3%	5%	4%	4%	1%	1%	4%	9%	4%	0%	1%
Daily Motion	3%	7%	6%	6%	0%	1%	0%	4%	2%	1%	0%
Xanga	2%	5%	6%	5%	0%	0%	4%	5%	2%	0%	0%
reddit	2%	3%	4%	6%	1%	0%	0%	4%	5%	1%	0%
Metacafe	2%	7%	6%	5%	0%	1%	0%	4%	2%	0%	0%
Digg	2%	6%	4%	4%	1%	0%	0%	5%	2%	1%	0%
Tioti	2%	4%	4%	5%	1%	0%	0%	4%	1%	2%	0%
Daily Episodes	2%	4%	4%	5%	0%	0%	0%	4%	3%	0%	0%
Nuzizo	2%	3%	4%	4%	0%	0%	1%	1%	2%	0%	0%

Usage of these networks differs markedly by demographic.

Facebook is relatively strong across all demographics, only slightly weaker among 45-54 year olds.

Myspace, on the other hand, has more of an age bias in its user base.

As to be expected, Bebo also has a major age bias with teenagers by far the most likely user demographic.

Base: Q20, All respondents (1,608)

Deep profiling of social networkers

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ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

General attitudes towards social networks

Question: How much do you agree or disagree with the following statements about social networking sites?

There are a number of important findings to consider.

Just 60% claim to only have friends they know and like in social networks, meaning many have strangers or new 'friends' on their profile. This presents interesting possibilities for brands and entertainment providers.

Social networks are addictive - nearly 1 in 2 users say so. As indicated above, social networks engender a high emotional attachment and many consumers are spending more and more time in them. This suggests important new opportunities eg the potential to expand social networks into being serious media players and using them as part of a content distribution model.

This findings support the hypothesis that social networks are a time drain. Over 1 in 4 say that using social networks impacts the amount of work they get done in a day. Partly in mitigation, just under 1 in 5 have used social networks for their work or career.

Base: Q22, All using social networks (1,031)

Expansion as a serious media player

Question: How much do you agree or disagree with the following statements about social networking sites?

More and more time is being spent in social networking communities. Many of them have the capability of streaming video and music. This analysis explores the potential for social networks to expand to be serious media players and means of distributing content.

The headline finding in this analysis is that over 1 in 4 (27%) agree that social networks have the potential to be the main way in which they access video and music, as long as the player was up to scratch. Many more are interested in using social networks to access content.

If following the consumer, why not place content where the consumer is spending a considerable and increasing amount of their available leisure time. This analysis shows that social networks have a serious potential for content distribution. Over a quarter also see the benefit in being able to chat or interact with whatever content is being streamed.

Base: Q22, All using social networks (1,031)

Social networks, brands and advertising

Question: How much do you agree or disagree with the following statements about social networking sites?

Keeping with the theme of following the consumer to where they spend leisure time this analysis shows that a substantial proportion of consumers are receptive towards the concept of brands being more involved in social networks.

Over 1 in 4 agree that they would rather be served with better targeted ads, even if it means the use of certain personal cookie data. Just over 1 in 5 sometimes click on the ads served on social networking sites.

Showing the true receptiveness of consumers, just under 1 in 5 would add a brand as a 'friend' on such sites.

All this shows that social networking sites do have an audience for brands and advertising. Of course there are proportions of consumers that are not at all receptive, but these figures are encouraging nonetheless.

Base: Q22, All using social networks (1,031)

Attitudes towards social networks by demographics

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ENTERTAINMENTMEDIARESEARCH

% Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
I only have 'friends' that I know and like	61%	56%	60%	63%	62%	48%	65%	61%	68%	61%	61%
Using social networks is addictive	49%	60%	59%	54%	36%	30%	59%	67%	56%	40%	38%
I've streamed video through a social networking site	29%	38%	42%	37%	32%	27%	26%	34%	25%	18%	10%
Social networks impact amount of work get done in day	28%	46%	42%	32%	16%	17%	42%	44%	27%	17%	9%
Potential main way access video/music, if player good	27%	35%	40%	30%	22%	25%	32%	35%	27%	15%	17%
Better targeted ads than generic even if use personal data	26%	42%	34%	30%	25%	23%	29%	30%	19%	16%	20%
Interested in chat about what's shown as video streamed	26%	38%	30%	32%	23%	22%	33%	28%	22%	10%	23%
Interested using as serious media player to stream music	23%	34%	32%	32%	16%	22%	35%	26%	18%	11%	13%
Interested using as serious media player to stream tv progs	22%	30%	34%	28%	15%	20%	31%	30%	17%	11%	13%
I sometimes click on ads in social network sites	22%	31%	31%	27%	15%	15%	29%	28%	23%	14%	13%
I've arranged to meet someone met through a site	22%	25%	32%	29%	19%	20%	17%	28%	20%	15%	12%
Social networks are a fad that will soon be over	21%	32%	26%	27%	16%	16%	10%	26%	23%	20%	6%
Interested using as serious media player to stream movies	20%	24%	33%	31%	17%	14%	30%	25%	17%	6%	10%
I would add brands as a 'friend' on my social network sites	19%	24%	31%	27%	11%	11%	23%	28%	25%	7%	10%
I've used social network sites for work/career	19%	22%	22%	32%	19%	15%	17%	27%	13%	11%	9%
I'm competitive about how many 'friends' I have on profile	16%	28%	25%	25%	5%	5%	15%	25%	20%	5%	9%
Interested using embedded online gambling applications	13%	17%	26%	20%	12%	8%	5%	18%	9%	5%	8%
I've bought music through a social networking site	11%	14%	21%	18%	7%	9%	12%	16%	10%	4%	1%

Base: Q22, All using social networks (1,031)

Impact of social networks on content discovery and purchase

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Question: Please tell us whether you have done any of the following when using social networking sites

This analysis shows the degree to which social networks are influencing content discovery and, most importantly, content purchase.

Social networks are certainly influencing content discovery with 30% at least occasionally searching for new music and around a quarter finding out about movies or TV programmes through peer recommendation.

It doesn't stop at mere content discovery. Around 1 in 5 say that they have actually purchased music based on a peer recommendation from a social network and around the same proportion have searched social networks looking for music to purchase. The link between its utility as a content discovery tool and purchase is clear. Content providers need to make the process of discovery to purchase conversion as easy, intuitive and as 'social-network friendly' as possible.

% Regularly / occasionally	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Searched for new music	30%	44%	36%	33%	30%	22%	48%	24%	27%	17%	22%
Found out about recommended movie	25%	38%	34%	29%	20%	13%	30%	30%	25%	15%	20%
Found out about recommended tv prog	22%	33%	37%	28%	18%	13%	25%	25%	18%	11%	14%
Searched for music to purchase	21%	26%	36%	30%	21%	13%	22%	22%	19%	13%	12%
Found out about a recommended book/mag	20%	28%	26%	25%	12%	12%	22%	27%	22%	13%	20%
Purchased song/album discovered or recommended by friend	18%	19%	31%	25%	14%	13%	25%	21%	16%	11%	8%

Base: Q23, All using social networks (1,031)

Impact of social networks on other leisure activities

Question: Think about the time you spend on social networks. How would you say social networks have impacted the amount of time you used to spend…?

This analysis shows that the success of social networks at the expense of other activities and traditional media in particular.

The main activities affected are work (and homework), watching broadcast television, reading print, visiting other sites, playing games and the list goes on.

Whilst social networks are impacting time spent with the family, they are encouraging socialising and spending time with friends, as you might expect from a 'social' network of friends and acquaintances. Social networks are also encouraging the spread and listening of music.

Base: Q24, All using social networks and doing activity

Impact of social networks on other leisure activities by demographics

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Net more or less	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Do homework/work for business at home	-14%	-30%	-18%	-7%	-8%	-4%	-32%	-13%	-19%	-7%	-4%
Watching television	-12%	-10%	-11%	-10%	-10%	-7%	-21%	-7%	-18%	-16%	-11%
Reading books	-10%	-19%	-14%	-5%	-7%	-2%	-14%	-15%	-12%	-11%	+2%
Browsing other websites	-9%	-16%	-13%	-5%	-5%	-5%	-8%	-15%	-14%	-11%	0%
Playing video games	-8%	-14%	-15%	-9%	-11%	-9%	-16%	-12%	-1%	-5%	+10%
Spending time with my family	-8%	-19%	-7%	-12%	-5%	-2%	-22%	-14%	-4%	-6%	+4%
Reading magazines	-8%	-10%	-9%	-12%	-7%	-7%	-3%	-12%	-10%	-2%	-6%
Exercising / Doing sport	-7%	-5%	-7%	-3%	-7%	-4%	-19%	-11%	-11%	-4%	-6%
Reading newspapers	-7%	-12%	-9%	-3%	-6%	-3%	-17%	-9%	-6%	-6%	0%
Doing hobby / arts / crafts	-7%	-5%	-10%	-8%	+2%	-7%	-17%	-5%	-11%	-8%	+2%
Watching DVDs	-5%	-10%	-4%	-2%	-3%	-6%	-8%	-7%	-8%	-4%	+1%
Download unauthorised TV/Movies	-3%	-5%	-7%	-1%	+3%	-6%	-4%	-5%	-6%	-8%	+4%
Listening to the radio	-3%	-6%	-1%	-7%	+2%	0%	-3%	-7%	-5%	-3%	+5%
Going to the cinema	-2%	0%	-5%	-3%	0%	-1%	+2%	0%	-5%	-3%	-2%
Attend cultural events (theatre, galleries etc)	-1%	-8%	-4%	-2%	+1%	0%	-2%	0%	-2%	-2%	+5%
Download unauthorised music	-1%	+1%	-6%	+4%	+4%	-2%	-3%	-6%	-9%	-4%	+11%
Spending time with friends	+1%	+2%	-8%	-1%	+7%	+2%	-2%	2%	+1%	-1%	+1%
Socialising / Going out	+2%	+8%	+1%	-4%	+2%	+3%	+2%	5%	+7%	-1%	+4%
Listening to music	+5%	+11%	+4%	+3%	+8%	-1%	+19%	5%	-3%	-1%	+9%

When we breakout the impact of social networks, we see marked differences by demographics. For teenagers (who are the most emotionally attached to social networks), the impact on other activities and media is even more prominent. Among teenage females, for example, there is a -31% net less time spent on work/homework. There is also a major negative impact on traditional media – again for teenage females there is a -21% net less time spent watching broadcast television and -14% net less time spent reading books. On the other hand, among female teenagers, there is a net +19% increase in time spent listening to music.

Again, this reinforces the belief that it makes sense to intercept the consumer in such places, providing even more weight for the potential of such communities to be used to distribute content.

Streaming music from social networks

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Current and intended streaming levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
24%	23%	14%	8%	5%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
30%	20%	15%	5%	5%

Emotional attachment

% Would never stop or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
21%	19%	25%	24%	24%	13%	11%

Future usage among streamers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+15%	+17%	+16%	+16%	+15%	+12%	+22%

Deep profiling of those streaming music on social networks

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How their activity differs from UK average

How their ownership of technology differs from UK average

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Newspapers

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Printed newspaper reading

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Current and intended reading levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
32%	39%	41%	44%	51%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
27%	29%	40%	36%	53%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
32%	34%	27%	27%	34%	33%	38%

Future usage among readers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+12%	+10%	+22%	+15%	+8%	+10%	+7%

Visit newspaper websites

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Current and intended visit levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
14%	23%	32%	26%	23%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
11%	24%	23%	24%	30%

Emotional attachment

% Would never stop or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
17%	19%	14%	20%	24%	16%	16%

Future usage among visitors

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+13%	+13%	+19%	+14%	+10%	+13%	+13%

Deep profiling of newspaper website visitors

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Impact of websites on purchase of printed newspapers

WIGGIN
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Question: To what extent, if any, has visiting newspaper websites affected your purchases of printed newspapers?

- I have stopped buying printed newspapers
- I buy printed newspapers less now
- I never bought printed newspapers anyway
- It has not changed how often I buy printed newspapers
- I buy printed newspapers more often now

As newspapers increase their online activity, one important analysis is to assess what impact this is having upon the purchase levels of the printed version.

30% of those visiting newspaper sites state they have stopped buying or are buying fewer printed newspapers. Among males aged 25-34, the proportion is even higher (42%).

That said, 17% never bought printed newspapers in the first place and for this group, such sites are opening up newspaper brands to a new audience.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Stopped buying/buying less	30%	33%	32%	42%	29%	25%	23%	28%	29%	31%	27%
Stopped buying	9%	7%	9%	9%	10%	6%	4%	7%	7%	14%	8%
Buying less	21%	26%	22%	33%	19%	19%	20%	20%	22%	17%	19%
Never bought anyway	17%	31%	16%	15%	14%	15%	37%	17%	17%	14%	15%
No change	51%	33%	49%	43%	56%	58%	38%	56%	51%	52%	57%
Buy more	2%	2%	4%	<1%	1%	2%	2%	0%	3%	3%	1%

Base: Q30, All ever visit newspaper sites (1,243)

UK newspaper websites visited regularly

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Question: Which sites do you visit most regularly? Please select all that apply

Regularly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
The Sun Online	31%	35%	32%	34%	38%	33%	19%	26%	32%	26%	28%
Times Online	21%	23%	17%	20%	24%	25%	15%	21%	15%	23%	25%
Daily Mail	21%	22%	16%	21%	20%	20%	40%	11%	13%	20%	33%
Guardian Unlimited	20%	22%	15%	22%	20%	21%	20%	22%	22%	18%	22%
Telegraph.co.uk	14%	12%	14%	14%	15%	19%	10%	11%	9%	15%	15%
Mirror.co.uk	14%	18%	12%	16%	12%	10%	14%	15%	11%	15%	16%
Metro.co.uk	12%	12%	8%	16%	17%	9%	11%	14%	17%	7%	9%
News of the World	10%	11%	11%	14%	8%	9%	13%	12%	13%	8%	9%
The Independent	10%	12%	10%	13%	9%	11%	15%	14%	9%	9%	8%
FT.com	8%	8%	15%	11%	10%	10%	5%	14%	4%	7%	2%
Daily Express	8%	14%	9%	9%	8%	7%	5%	6%	6%	6%	11%
The Observer	6%	6%	8%	8%	4%	6%	7%	4%	6%	4%	5%
Sunday Mirror.co.uk	4%	8%	4%	10%	3%	1%	6%	5%	1%	1%	3%

Base: Q29, All visiting UK newspaper sites (1,243)

Impact of websites on purchase of printed newspapers by sites visited

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Visitors to newspaper websites…	Stopped /Buy Less	Stopped buying	Buy less	Never bought	Not changed	Buy more
Sunday Mirror.co.uk*	***53%****	9%*	44%*	11%*	33%*	3%*
FT.com	***44%***	8%	36%	10%	43%	3%
Daily Express	***40%***	6%	34%	10%	44%	5%
Metro.co.uk	***38%***	9%	29%	20%	40%	3%
Mirror.co.uk	***36%***	10%	26%	15%	46%	2%
Daily Mail	***35%***	7%	28%	12%	51%	3%
News of the World	***33%***	5%	28%	9%	56%	3%
Guardian Unlimited	***32%***	5%	27%	16%	49%	3%
Telegraph.co.uk	***31%***	7%	24%	17%	51%	1%
Times Online	***31%***	6%	25%	14%	53%	1%
The Sun Online	***29%***	9%	20%	13%	57%	2%
The Independent	***29%***	2%	27%	18%	51%	2%
The Observer	***24%***	1%	23%	19%	49%	7%

* Caution – base under 50 (49)

What's interesting is to analyse the impact by visitors to newspaper websites.

Visitors to sites such as The Observer exhibit a much lower tendency to buy fewer newspapers compared to those who visit The Sunday Mirror..

Newspaper sites content usage and demand

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Question: When visiting newspaper websites, what do you tend to look at?

This analysis reveals the lure to drive consumers to newspaper websites.

Of course the latest news is the most important content but there is strong demand for reviews, archive material, video, commentary, audio and reader feedback.

This highlights that newspaper sites have the potential to be much more than up-to-date news repositories. Demand for video and audio, for example, is relatively high, meaning consumers are seeking a multi-media rather than a straight-forward narrative experience.

Always look at	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Latest news	55%	51%	54%	53%	61%	51%	40%	47%	51%	54%	67%
Reviews	10%	16%	13%	13%	8%	10%	11%	10%	9%	4%	9%
Archive material	8%	16%	9%	10%	5%	6%	13%	6%	11%	3%	9%
Video clips	7%	7%	12%	12%	3%	8%	12%	11%	10%	2%	3%
Editorial	10%	16%	8%	16%	9%	8%	11%	8%	9%	9%	12%
Audio clips	5%	9%	11%	10%	3%	5%	4%	7%	8%	1%	1%
Comments/feedback	6%	12%	8%	11%	2%	3%	6%	7%	10%	4%	5%

Always look at	Total	Daily Express	Daily Mail	FT.com	Guardian Unlimited	Metro	Daily Mirror	News of the World	Sunday Mirror*	Daily Telegraph	The Independent	The Observer	The Sun Online	Times Online
Latest news	55%	63%	64%	62%	59%	59%	59%	60%	56%	53%	67%	65%	56%	66%
Reviews	10%	21%	15%	19%	17%	14%	12%	16%	26%	12%	18%	29%	11%	15%
Editorial	10%	23%	14%	22%	22%	13%	11%	15%	22%	14%	25%	34%	8%	17%
Video clips	7%	15%	10%	16%	8%	10%	13%	16%	24%	8%	9%	19%	10%	6%
Audio clips	5%	19%	9%	16%	7%	9%	12%	16%	27%	6%	9%	14%	7%	7%
Archive material	8%	15%	13%	17%	17%	13%	8%	11%	26%	10%	18%	28%	7%	12%
Comments/feedback	6%	16%	12%	11%	9%	10%	9%	12%	22%	8%	11%	18%	7%	9%

* Caution – base under 50 (49)

Base: Q31, All ever visit newspaper sites (1,243)

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Magazines

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Magazine websites visited regularly

Top 30

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Question: Which sites do you visit most regularly? Please select all that apply

% Always	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
BBC Top Gear	15%	25%	20%	24%	20%	17%	2%	6%	9%	9%	9%
FHM	11%	19%	21%	19%	21%	14%	4%	4%	4%	3%	3%
NME	9%	6%	9%	10%	11%	14%	19%	5%	4%	6%	6%
Glamour	8%	2%	5%	5%	1%	0%	22%	25%	14%	11%	11%
Cosmopolitan	8%	2%	5%	6%	1%	1%	21%	21%	12%	12%	10%
Nat'l Geographic	8%	4%	3%	9%	7%	12%	5%	0%	10%	10%	12%
Kerrang!	7%	16%	4%	4%	3%	12%	21%	6%	6%	7%	4%
Heat	7%	8%	6%	8%	2%	1%	9%	13%	11%	10%	9%
Empire	7%	9%	9%	7%	10%	7%	6%	8%	8%	3%	7%
Marie Claire	7%	4%	2%	4%	2%	0%	10%	14%	11%	8%	15%
New Woman	7%	1%	0%	4%	2%	1%	6%	12%	14%	13%	13%
Nuts	6%	15%	13%	11%	12%	7%	0%	2%	1%	1%	4%
Hello!	6%	5%	3%	5%	1%	1%	12%	6%	10%	8%	16%
Maxim	6%	9%	10%	10%	13%	11%	0%	2%	1%	1%	3%
Computeractive	6%	8%	6%	5%	8%	14%	0%	0%	7%	3%	5%
Zoo	6%	14%	14%	11%	8%	6%	0%	3%	1%	1%	3%
PC Pro	6%	1%	3%	4%	11%	17%	0%	3%	3%	1%	7%
Total Film	6%	4%	4%	10%	6%	5%	5%	4%	5%	4%	7%
Mens Health	6%	16%	15%	8%	10%	7%	0%	3%	1%	1%	0%
OK! Magazine	6%	5%	5%	3%	2%	1%	9%	8%	9%	8%	10%
TV Times	5%	8%	2%	4%	3%	3%	5%	5%	8%	9%	6%
Closer	5%	4%	3%	3%	1%	0%	8%	8%	12%	5%	10%
Time Out	5%	3%	2%	6%	8%	4%	3%	1%	2%	6%	9%
Chat	5%	3%	3%	5%	1%	1%	2%	6%	12%	5%	9%
The Economist	5%	6%	7%	6%	8%	3%	4%	1%	2%	3%	4%
Loaded	5%	12%	3%	8%	7%	8%	1%	0%	2%	1%	1%
Elle	4%	4%	7%	3%	1%	1%	12%	10%	6%	4%	6%
Vogue	4%	3%	7%	4%	2%	0%	16%	10%	4%	1%	8%
Q	4%	7%	1%	4%	4%	7%	10%	4%	3%	3%	3%
T3	4%	2%	10%	4%	7%	3%	0%	4%	2%	2%	5%

Base: Q32, All visiting magazine sites (1,088)

Impact of websites on purchase of printed magazines

WIGGIN
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Question: To what extent, if any, has visiting magazine websites affected your purchases of printed magazines?

- I have stopped buying printed magazines
- I buy printed magazines less now
- I never bought printed magazines anyway
- It has not changed how often I buy printed magazines
- I buy printed magazines more often now

As with newspapers, we can see the extent to which visiting magazine websites has affected purchase levels of the printed version.

The first thing to note is the impact is less pronounced for magazines than for newspapers. For over 3 in 5 there is no impact at all. The proportion that have stopped buying or are buying less magazines is 22% (compared to 30% for newspapers).

Males are slightly more likely than females to have stopped buying or buying less of the printed versions.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Stopped buying/buying less	22%	31%	29%	34%	19%	19%	25%	18%	21%	13%	16%
Stopped buying	4%	6%	3%	6%	4%	4%	4%	4%	3%	2%	4%
Buying less	18%	25%	26%	28%	16%	15%	21%	14%	18%	11%	12%
Never bought anyway	13%	23%	17%	15%	14%	12%	14%	7%	10%	14%	9%
No change	62%	40%	46%	48%	63%	68%	60%	72%	66%	70%	74%
Buy more	3%	6%	8%	2%	4%	2%	1%	4%	4%	3%	1%

Base: Q33, All ever visit magazine sites (1,088)

Magazine sites content usage and demand

Question: When visiting websites of magazines, what do you tend to look at?

The content driving consumers to magazine websites is very similar to newspapers. Predominantly it's the latest news - more than a third of consumers always looking at the latest news.

Reviews are also popular, with just under 1 in 5 (19%) always looking at reviews.

There is not much separating the other types of content on magazine websites, but archive material and editorial content also play their part.

As with newspapers, there's considerable consumer appetite for magazine websites to become multi-media experiences.

Always	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Latest news	34%	44%	22%	32%	36%	32%	31%	27%	38%	30%	41%
Reviews	19%	27%	13%	24%	21%	15%	19%	21%	21%	10%	22%
Editorial	12%	16%	4%	20%	10%	11%	11%	17%	14%	7%	13%
Video clips	10%	20%	20%	14%	9%	11%	11%	14%	9%	3%	2%
Archive material	9%	14%	9%	11%	5%	9%	9%	12%	13%	2%	9%
Comments/feedback	8%	12%	8%	14%	4%	5%	14%	12%	10%	2%	8%
Audio clips	8%	12%	11%	14%	6%	8%	6%	12%	9%	3%	2%

Base: Q34, All ever visit magazine sites (1,088)

WIGGIN

e-Books
and audio books

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Reading paper/hardback books

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Current and intended reading levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
31%	31%	37%	43%	48%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
43%	50%	55%	58%	55%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
43%	62%	41%	45%	54%	56%	57%

Future usage among readers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+25%	+30%	+28%	+32%	+33%	+26%	+21%

Barrier to e-Books: attachment to paper books

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: How much do you agree or disagree with this statement: "I'm not interested in an e-Book reader device because I'm too attached to paperbacks and hardbacks"?

Among the total sample (1,387)

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Strongly agree	19%	23%	11%	12%	20%	17%	11%	22%	21%	23%	22%
Strongly disagree	10%	8%	9%	10%	12%	12%	9%	13%	8%	10%	8%

More than half of the sample agree that they are not interested in e-book readers because they are too attached to paperbacks and hardbacks. Even the usually early adopting male teenager has a high level of emotional attachment to the printed book.

Among consumers that are currently unlikely to buy an e-book reader, more than three quarters agree they are not interested because they are too attached to paperbacks and hardbacks.

Among those unlikely to purchase e-Book reader (669)

Base: Q58

Listen to audio books

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended listening levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
6%	7%	4%	2%	4%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
2%	9%	6%	3%	3%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
15%	19%	20%	18%	20%	10%	17%

Future usage among listeners

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+10%	+13%	+6%	+28%	+6%	+12%	+10%

Deep profiling of audio book listeners

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ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Read e-Books / download novels

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended reading levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
8%	5%	7%	1%	4%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
3%	7%	5%	2%	2%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
16%	15%	18%	16%	20%	12%	13%

Future usage among readers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+13%	+18%	+6%	+20%	+19%	+12%	+17%

Deep profiling of e-Book readers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Appeal of concepts

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e-Books

Question: How appealing do you find the concept of the "e-book"?

An e-book is the digital version of a conventional printed book that you can download to a home computer?

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Very appealing	9%	10%	14%	11%	5%	7%	8%	10%	10%	8%	10%
Very unappealing	26%	19%	18%	22%	20%	30%	22%	33%	29%	32%	31%

Audio-books

Question: How appealing do you find the concept of the "audio book"?

An audio book is an audio version normally narrated by the author that you can download or buy on CD.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Very appealing	9%	10%	17%	9%	6%	6%	7%	10%	10%	10%	9%
Very unappealing	26%	23%	21%	24%	20%	25%	22%	31%	27%	29%	30%

e-Books do have an audience but for most people they are currently unappealing.

Only 9% find the e-Book concept "very appealing," although another 30% do find it "appealing." Males aged 20-24 finding the concept most appealing.

One of the issues is a relative lack of familiarity. The earlier analysis showed 12% totally unfamiliar with the concept and we would expect that a significant proportion of the 56% who said they had no interest in the concept were also unfamiliar.

If we compare the current appeal of the e-Book with audio books which is a well established market, then the appeal for e-Books is on a par and therefore somewhat encouraging.

For most people at this time, the printed book remains one of the highest emotionally-attached media we measured, so such innovations are likely to be somewhat slow in catching on in the mainstream.

Base: Q25, All respondents (1,608)

Appeal of specific e-Book factors

Question: An e-book reader is a portable device that can store books in the same way that an iPod can store music. Here are some specifications of such devices - please tell us whether you find these appealing or not?

Whilst the appeal of the overall e-Book concept is limited, the appeal of the specific features of an e-Book reader are much stronger.

This would suggest that the more consumers understand about e-Books, the more they are likely to be receptive.

Base: Q26, All respondents (1,608)

e-Book Reader purchase consideration

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Question: If the price were reasonable, how likely, if at all, would you be to purchase an e-book reader in the next 6 months?
(Note this question was asked after respondents were informed of all its functions and capabilities)

It's long been considered whether an e-Book can do for books what the iPod did for music (and also the dangers of piracy in making available digital versions of books).

In terms of purchase consideration the analysis shows that the e-Book market is still relatively niche despite the relatively high levels of appeal for its functionality. 17% stated they would definitely or almost certainly consider a purchase. Demand peaks with males 25-34

There is a viable audience but there is still a long way to go to make the e-Book reader a mainstream device.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Definitely/Almost Certainly	**17%**	**20%**	**22%**	**25%**	**15%**	**12%**	**21%**	**22%**	**18%**	**14%**	**11%**
Definitely consider	8%	8%	12%	11%	6%	5%	7%	9%	8%	7%	6%
Definitely will not consider	25%	19%	21%	17%	26%	30%	15%	17%	25%	30%	34%

Base: Q27, All respondents (1,608)

WIGGIN

Mobile

ENTERTAINMENTMEDIARESEARCH

Importance of mobile functions

Question: Please tell us how important, if at all, the following functions are on a mobile phone for you personally

As mobile phones evolve into converged communication and entertainment devices, understanding the importance of the different functions to consumers becomes all the more interesting.

The most important function for consumers was the ability to play music. Linked to this is the requirement for relatively large storage capacity. Over 1 in 3 consumers want it to sync with their existing music library. This presents many compatibility issues if mobile providers wish to advance their own proprietary libraries/players as the leading music player remains iTunes.

All the functions are important to some. What this analysis demonstrates is a considerable demand for mobile phones as media playing devices with sufficient storage to keep the content portable.

Base: Q44, All respondents (1,608)

Importance of mobile functions by demographics

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Question: Please tell us how important, if at all, the following functions are on a mobile phone for you personally

Very important	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
The ability to play music	23%	36%	26%	25%	21%	12%	39%	31%	26%	17%	14%
Has large memory to store music & video (4GB)	20%	21%	25%	23%	19%	14%	33%	22%	25%	14%	12%
Has very large memory to store music & video (16GB)	19%	19%	24%	21%	18%	16%	31%	16%	25%	13%	11%
It can access the Internet and has an internet browser	17%	21%	21%	25%	22%	11%	16%	16%	20%	11%	13%
You can send and receive emails	17%	18%	17%	19%	19%	18%	13%	11%	18%	13%	18%
It has a large screen	16%	17%	18%	19%	16%	17%	18%	13%	16%	13%	14%
The ability to play video	13%	26%	17%	15%	12%	7%	25%	10%	15%	6%	6%
You can sync your phone with your music library	12%	17%	16%	16%	11%	8%	24%	10%	14%	11%	7%
It is a 3G phone	12%	15%	14%	19%	14%	10%	8%	11%	13%	9%	6%
The ability to download music directly to mobile	10%	14%	10%	12%	8%	5%	19%	13%	13%	8%	9%
Play high quality games	8%	15%	12%	12%	6%	4%	12%	12%	8%	3%	4%
The ability to stream video directly to mobile	7%	13%	15%	10%	6%	4%	13%	6%	9%	4%	2%
It has a touchscreen	7%	11%	10%	9%	6%	3%	13%	6%	8%	4%	5%
You can play online poker for money on the mobile	3%	10%	5%	5%	1%	2%	3%	4%	5%	1%	1%
You can make gambling bets online	3%	6%	8%	3%	3%	1%	5%	5%	3%	<1%	2%

Very/Somewhat important	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
The ability to play music	53%	68%	67%	60%	55%	41%	78%	62%	55%	44%	33%
It has a large screen	53%	66%	59%	63%	54%	54%	52%	51%	53%	43%	48%
Has large memory to store music & video (4GB)	49%	61%	71%	61%	51%	40%	69%	53%	50%	34%	28%
You can send and receive emails	48%	48%	55%	56%	56%	54%	47%	46%	47%	37%	39%
It can access the Internet and has an internet browser	47%	57%	71%	61%	54%	37%	47%	51%	48%	33%	35%
Has very large memory to store music & video (16GB)	46%	57%	68%	55%	45%	38%	69%	50%	49%	33%	30%
The ability to play video	39%	53%	65%	52%	42%	33%	54%	46%	41%	22%	17%
You can sync your phone with your music library	38%	49%	55%	48%	38%	30%	49%	41%	41%	29%	21%
The ability to download music directly to mobile	35%	44%	52%	46%	33%	25%	48%	42%	37%	27%	23%
It is a 3G phone	34%	41%	52%	48%	39%	35%	31%	33%	30%	23%	22%
Play high quality games	28%	46%	50%	37%	23%	25%	34%	37%	26%	14%	15%
It has a touchscreen	28%	34%	43%	39%	30%	24%	34%	23%	26%	18%	24%
The ability to stream video directly to mobile	27%	39%	48%	42%	26%	21%	39%	35%	29%	11%	10%
You can play online poker for money on the mobile	10%	16%	28%	22%	5%	5%	11%	11%	10%	3%	2%
You can make gambling bets online	10%	17%	26%	18%	9%	8%	12%	12%	9%	2%	3%

Base: Q44, All respondents (1,608)

Mobile phone preference

Forced single choice

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Question: Which one of the following mobile phones would you most prefer to have?

Most prefer	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Talking and texting	26%	19%	12%	18%	22%	33%	12%	20%	27%	34%	39%
As many functions as poss.	21%	25%	23%	22%	26%	19%	27%	31%	20%	15%	13%
Talking/texting/email	20%	11%	22%	16%	22%	24%	11%	17%	20%	24%	22%
Digital music player	11%	20%	10%	7%	10%	6%	23%	13%	10%	14%	10%
Surfs Internet at high speed	10%	8%	12%	19%	9%	10%	10%	7%	8%	6%	8%
Music/video/TV	6%	6%	8%	10%	8%	4%	10%	3%	8%	4%	3%
Video and TV	4%	4%	6%	6%	3%	2%	6%	5%	4%	2%	2%
Playing games	2%	8%	6%	3%	<1%	2%	1%	4%	3%	<1%	2%

The 'ideal' mobile phone means different things to different people.

For 1 in 4, all they wish for is a simple phone for talking and texting. Of course, this means that 3 out of 4 people are seeking much more than this from their mobile.

Indeed, other than a simple phone, the next most popular type is a device that incorporates as many functions as possible. Out of the other options, it's clear there is a high level of demand for the mobile phone as a functioning media playing device. At present there appears to be more demand for music than video based content.

Online connectivity is another draw. At present the demand for this is more driven by the wish to communicate via email rather than entertainment content but opening up the mobile to online does create a whole range of content opportunities (which are investigated in more detail below).

Base: Q43, All respondents (1,608)

Downloading / streaming content to mobile phone

Question: How often, if at all, do you download / stream the following to your mobile phone?

Currently only a small minority of consumers regularly download content to their mobile.

Music and ringtones are the most popular content types downloaded with games not far behind.

With many mobile phone companies launching music services we expect music to overtake ringtones in the near future (see page below).

Video content and especially full length movies and TV programmes have yet to really take off.

% Regularly/occasionally	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Stream or d/l music	19%	29%	27%	22%	18%	12%	32%	20%	18%	15%	11%
Download ringtones	16%	26%	25%	22%	15%	12%	16%	18%	17%	10%	10%
Download games to play	16%	25%	25%	24%	13%	9%	14%	22%	16%	11%	9%
Download software applications	12%	22%	27%	20%	11%	8%	12%	17%	11%	7%	4%
Stream or d/l music videos	11%	18%	24%	18%	7%	4%	16%	19%	12%	6%	4%
Stream or d/l clips from TV progs	9%	18%	22%	17%	6%	5%	8%	16%	10%	5%	0%
Stream or d/l movie trailers	9%	16%	21%	18%	4%	4%	12%	16%	9%	3%	1%
Stream or d/l full length TV progs	9%	20%	24%	16%	5%	3%	10%	16%	9%	3%	1%
Stream or d/l full length movies	9%	16%	20%	17%	5%	2%	9%	17%	10%	3%	0%
Stream or d/l clips sport	8%	14%	20%	18%	7%	3%	8%	16%	9%	3%	0%

% Regularly/occasionally	Total	Network						Handset				
		3 (Three)	O2	Orange	T-Mob	Vodafone	Virgin	LG	Motorola	Nokia	Samsung	Sony Ericsson
Stream or d/l music	19%	32%	21%	14%	21%	17%	18%	21%	13%	17%	20%	22%
Download ringtones	16%	27%	18%	11%	18%	15%	17%	27%	14%	15%	19%	16%
Download games to play	16%	28%	18%	11%	16%	13%	15%	21%	10%	15%	16%	17%
Download software applications	12%	20%	14%	8%	15%	11%	13%	18%	10%	11%	10%	12%
Stream or d/l music videos	11%	27%	12%	7%	10%	12%	9%	20%	10%	11%	10%	10%
Stream or d/l clips from TV progs	9%	16%	11%	7%	9%	10%	8%	16%	7%	9%	8%	8%
Stream or d/l movie trailers	9%	21%	10%	5%	9%	10%	6%	16%	7%	8%	7%	9%
Stream or d/l full length TV progs	9%	16%	9%	5%	8%	10%	11%	16%	7%	9%	7%	8%
Stream or d/l full length movies	9%	16%	8%	6%	8%	10%	10%	16%	6%	8%	8%	8%
Stream or d/l clips sport	8%	17%	10%	5%	8%	8%	6%	17%	6%	8%	6%	8%

Base: Q45, All mobile owners (1,433)

Interest in downloading or streaming content among current non-users

Question: You said that you do not stream or download the following content to your mobile phone. How keen, if at all, would you be to start doing these things in the future?

In terms of future activity, consumers currently show relatively limited interest in starting to use their mobiles for downloading or streaming. For instance just 5% of those people not currently downloading music to their mobiles state that they are very keen to start. This suggests that the market is unlikely to grow significantly in the near future.

We expect that as mobiles become more sophisticated media players with better storage and the cost of data charges decreases activity levels will increase accordingly.

Base: Q46, All currently not doing these activities

Belief in the mobile phone as consumers' main portable media device

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Question: How much do you agree or disagree with this statement: "I believe the mobile phone of the future will be my main portable media device as well as a phone to make calls"?

Whilst there is not at present overwhelming demand for content other than music and ringtones on mobile devices, consumers do tend to agree that their mobile will eventually become their main portable media device.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Strongly agree	17%	21%	23%	22%	19%	14%	13%	23%	19%	11%	14%
Strongly disagree	10%	11%	5%	5%	10%	18%	10%	7%	10%	11%	11%

Base: Q58, All respondents (1,608)

Playing games on a mobile phone

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Current and intended play levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
21%	18%	13%	9%	4%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
15%	22%	17%	7%	7%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
14%	12%	18%	17%	15%	9%	7%

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
-2%	-2%	-1%	+5%	+3%	-8%	-7%

Listening to radio on a mobile phone

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Current and intended listening levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
13%	14%	10%	5%	4%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
10%	11%	12%	3%	4%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
22%	17%	23%	18%	29%	13%	13%

Future usage among listeners

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+18%	+19%	+19%	+25%	+24%	+15%	+5%

WIGGIN

On-the-go and portable devices

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Portable device preferences

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Prediction of number of devices

Question: In the next couple of years or so, which one of the following do you think best applies to you?

- I think I will be carrying more portable devices on my person
- I think I will be carrying the same number of portable devices on my person
- I think I will be carrying less portable devices on my person

Preference	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Carry more	22%	32%	25%	24%	19%	17%	34%	30%	28%	15%	12%
Same number	68%	54%	67%	64%	68%	73%	57%	67%	64%	75%	77%
Carry less	10%	14%	8%	12%	13%	9%	9%	3%	8%	11%	11%

Preference for carrying more or less devices

Question: Which one of the following best applies to you?

- I would rather have many portable devices that are the best of their type
- I would rather have fewer portable devices that can do more than one thing

Preference	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Rather many	25%	37%	30%	34%	19%	25%	28%	23%	31%	21%	12%
Rather fewer	75%	63%	70%	66%	81%	75%	72%	77%	69%	79%	88%

As more portable devices enter the market, there is a question as to whether consumers will carry more devices that are specialised or carry fewer, more converged devices.

Whilst most consumers (68%) believe they will carry about the same number of devices, more believe they will be carrying more devices rather than fewer.

This finding sits exactly opposite the majority preference: 3 out of 4 consumers would rather carry fewer devices that can do more than one thing.

There are however some telling differences by demographic. There is a strong correlation between age and belief that people will carry more devices on their person. Around 1 in 3 teenagers believe this will be the case and is much higher than for consumers over 35.

Teenage males in particular are much more likely to express a preference to want to carry more devices that are the best of their type even though the majority would still prefer to carry fewer.

Base: Q50, All respondents (1,608)

Consumer activity when on-the-go

Question: When commuting between home and work / college which activities would you ideally like to engage in to pass the time? Please tick all that apply

Another way of looking at consumer demand for mobile or portable content is to investigate which activities consumers would ideally like to do when travelling and have time to access content.

It's clear that music is the preferred choice. This supports the music strategies of the major mobile providers.

Radio on the mobile is also in very high demand and constitutes a significant opportunity for the traditional radio industry to increase its listening hours. This is particularly true with the 25-34 year old segment.

Other than generally being social and communicating, there is also a reasonable level of demand for surfing the internet and emailing. As phones become more connected online, we would expect familiarity and demand to increase for online activities.

Video content however, is much lower down the list. Less than 1 in 10 are interested in watching TV on the mobile. This level of demand may be depressed as consumers are simply unaccustomed to it. There definitely appears to be an education barrier to overcome.

Base: Q47, All respondents (1,608)

Consumer activity when on-the-go

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: When commuting between home and work / college which activities would you ideally like to engage in to pass the time? Please tick all that apply

% apply	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Listen to music	50%	56%	53%	52%	51%	41%	67%	57%	53%	47%	37%
Listen to the radio	38%	39%	32%	43%	36%	40%	44%	37%	42%	39%	29%
Send text messages	37%	41%	49%	38%	33%	24%	49%	52%	41%	35%	29%
Read a book / magazine	36%	24%	33%	34%	30%	31%	48%	49%	40%	36%	37%
Chat with someone	29%	35%	41%	20%	23%	24%	41%	45%	34%	23%	28%
Phone a friend	28%	25%	36%	30%	25%	20%	44%	35%	30%	25%	22%
Read a newspaper	27%	26%	27%	28%	28%	27%	27%	32%	25%	25%	26%
Surf the internet	23%	34%	32%	32%	24%	15%	32%	26%	27%	13%	16%
Write / read your emails	22%	23%	19%	30%	17%	16%	28%	30%	26%	16%	20%
Sleep	20%	29%	21%	25%	16%	20%	36%	34%	22%	12%	11%
Tidy your text box, personal organiser	19%	24%	31%	19%	17%	9%	18%	31%	21%	18%	16%
Play games on your mobile/etc.	14%	16%	17%	17%	16%	7%	19%	25%	14%	9%	9%
Prepare for the day's work / study	14%	20%	12%	12%	13%	11%	21%	25%	10%	11%	12%
Browse a social network website	10%	14%	18%	11%	6%	3%	27%	19%	10%	6%	5%
Watch music videos	10%	13%	13%	13%	7%	7%	23%	6%	10%	4%	9%
Listen to a podcast	10%	13%	13%	12%	13%	8%	18%	9%	8%	7%	4%
Watch news clips	9%	11%	13%	12%	9%	6%	9%	10%	7%	5%	9%
Interact with a social network website	8%	14%	15%	9%	6%	5%	19%	12%	9%	3%	3%
Watch TV programmes on mobile	8%	12%	11%	13%	8%	2%	9%	9%	8%	3%	6%
Do nothing	7%	5%	3%	6%	10%	6%	4%	8%	5%	9%	9%
Watch movie trailers	7%	9%	14%	11%	7%	1%	14%	9%	5%	2%	7%
Watch movies on mobile	7%	11%	12%	11%	6%	3%	10%	7%	6%	2%	6%
Watch clips from TV programmes	6%	9%	14%	9%	5%	3%	9%	5%	8%	3%	6%
Watch sports clips	6%	16%	13%	8%	6%	8%	1%	5%	4%	1%	2%
Purchase music downloads	5%	7%	10%	7%	3%	3%	8%	9%	7%	2%	3%
Make bets on an online betting website	3%	2%	5%	6%	3%	2%	3%	5%	1%	<1%	2%
Play online poker for money	2%	1%	9%	6%	1%	2%	4%	2%	1%	0%	1%
Pay to play online bingo	2%	2%	8%	4%	<1%	0%	3%	3%	3%	0%	1%

Devices carried when on-the-go

WIGGIN
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Question: Which, if any, of the following devices do you usually carry around with you in the following situations?

Work/college	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Mobile phone	70%	68%	77%	68%	74%	65%	76%	83%	66%	68%	71%
iPod/MP3 plyr	31%	49%	43%	44%	27%	22%	50%	42%	27%	19%	16%
Laptop	13%	13%	14%	26%	15%	12%	10%	18%	7%	8%	5%
PDA/Blackberry	7%	6%	14%	12%	9%	4%	7%	10%	4%	3%	3%
Personal gaming	6%	14%	8%	11%	4%	3%	7%	12%	6%	2%	2%
Personal CD	5%	10%	10%	8%	3%	3%	4%	11%	5%	2%	2%
Portable video	4%	10%	11%	11%	3%	3%	2%	6%	3%	<1%	2%
Personal DVD	4%	5%	9%	9%	<1%	2%	4%	9%	3%	1%	1%
iPhone	3%	7%	10%	7%	2%	1%	4%	7%	2%	<1%	1%
Dislike carry	17%	12%	12%	12%	16%	22%	10%	7%	21%	22%	23%

At other times	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Mobile phone	67%	58%	67%	55%	69%	63%	66%	77%	68%	70%	76%
iPod/MP3 plyr	32%	40%	44%	41%	32%	30%	46%	30%	32%	24%	19%
Laptop	19%	23%	21%	24%	17%	18%	32%	16%	16%	17%	12%
Personal gaming	12%	25%	17%	17%	8%	5%	19%	10%	14%	10%	4%
Personal CD	8%	12%	14%	14%	7%	7%	12%	3%	7%	4%	8%
Personal DVD	8%	12%	13%	10%	6%	4%	20%	7%	8%	7%	8%
PDA/Blackberry	7%	9%	17%	10%	8%	8%	10%	2%	5%	5%	3%
Portable video	6%	6%	12%	9%	6%	4%	14%	1%	5%	5%	2%
iPhone	5%	6%	9%	9%	4%	2%	11%	1%	5%	3%	2%
Dislike carry	15%	16%	10%	16%	18%	16%	7%	12%	16%	17%	14%

Base: Q48, All respondents (1,608)

WIGGIN

Mobile and portable internet

ENTERTAINMENTMEDIARESEARCH

Using the mobile to surf the internet

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended usage levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
13%	13%	13%	8%	3%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
6%	14%	10%	5%	3%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
21%	12%	27%	11%	20%	14%	13%

Future usage among mobile surfers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+16%	+14%	+12%	+33%	+13%	+7%	+13%

Deep profiling of those accessing web from mobile phone

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Incidence of portable online access

Question: Do you ever access the Internet from a portable device?
All respondents

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Any Yes	**56%**	**74%**	**79%**	**73%**	**59%**	**44%**	**63%**	**76%**	**54%**	**45%**	**33%**
Often	11%	16%	17%	17%	12%	6%	9%	20%	9%	7%	8%
Sometimes	21%	35%	41%	31%	19%	16%	25%	27%	23%	13%	3%
Rarely	24%	23%	20%	25%	29%	22%	28%	29%	22%	25%	21%
Never	44%	26%	21%	27%	41%	56%	37%	24%	46%	55%	67%

Question: Which portable devices do you use to access the Internet?
Among those ever access internet from portable device

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Mobile phone	76%	61%	80%	77%	82%	71%	73%	80%	82%	78%	72%
Sony PSP	10%	25%	17%	15%	7%	6%	7%	5%	9%	6%	3%
PDA	10%	5%	11%	13%	12%	12%	5%	11%	10%	6%	9%
Blackberry	5%	5%	3%	9%	3%	4%	7%	8%	5%	4%	1%
iPhone	5%	10%	12%	7%	0%	0%	5%	5%	7%	3%	2%

Most commentators expect mobile internet to be huge in the future. However, this survey reveals some concerning issues relating to consumer demand and barriers that need to be overcome before mobile internet can start to reach its potential.

The current incidence rate is low. Just 11% currently access mobile internet on a regular basis although the rate rises to 17% for 20-34 year old males.

As, relatively speaking, mobile internet is in its infancy, such levels are understandable.

What is perhaps more concerning is the lack of prospective consumer demand which is somewhat surprising. Over the next two pages we explore why this is the case and what needs to happen to stimulate demand.

Interest in accessing the internet using portable devices

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: How interested, if at all, are you in accessing the Internet from a portable device when you are on-the-go?

Here we can immediately see the lack of interest for online on-the-go. Only 20% are extremely or very interested which is a relatively low level of definitive interest. Just under 50% are not very interested or not at all interested.

Whilst not everyone will convert to mobile internet (a significant proportion only want mobiles to call and text), such levels seem low given the wide range of opportunities that exist with the technology.

What's even more intriguing is that one would expect higher levels of interest among early adopting teenagers. This is not the case. Interest is higher among males in their 20s rather than teenagers.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Extremely interested	8%	9%	18%	14%	9%	4%	4%	8%	10%	5%	5%
Not at all interested	23%	15%	11%	12%	23%	31%	21%	15%	22%	30%	39%

Base: Q53, All respondents (1,608)

Perceived barriers to accessing the internet using a portable device

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: What do you consider are the main barriers for you using a portable device to access the Internet when on-the-go? Please tick all that apply

The survey reveals some of the key reasons why demand for mobile internet is not as high as might be expected.

Firstly, a significant proportion (25%) are simply not interested. This we would expect given the incidence of consumers who simply want phones for calling and texting.

There are however, a whole range of other reasons for suppressed demand.

Cost is a major issue - the cost not only of the hardware (mentioned by 1 in 4 consumers) but also of data charges (1in 2 consumers) As the cost of internet-enabled hardware comes down, this might become less of an issue but consumers clearly need more reasonably priced data tariffs to stimulate their interest.

There are other barriers. 1 in 5 consider the speed of access to websites to be too slow to make mobile internet a viable option. This is more a technical barrier that can be overcome over time but it is certainly a barrier right now.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Cost of data charges	48%	55%	57%	54%	49%	47%	48%	46%	47%	45%	35%
Slow speed of accessing websites	33%	45%	47%	38%	38%	30%	35%	35%	31%	25%	23%
Just not interested	25%	19%	15%	15%	23%	37%	23%	24%	22%	30%	36%
Many sites not configured for portable devices	24%	27%	38%	32%	27%	23%	20%	21%	21%	17%	17%
Cost of hardware/portable device	23%	28%	20%	25%	22%	22%	31%	21%	22%	19%	29%
Worried about device being stolen	20%	24%	13%	14%	13%	17%	37%	25%	23%	17%	27%
Difficulty in using device	12%	8%	11%	12%	10%	10%	13%	16%	15%	11%	16%
There are no barriers for me	10%	12%	10%	8%	10%	7%	6%	11%	11%	13%	12%

Base: Q54, All respondents (1,608)

Bluetooth

Usage of Bluetooth technology and apps

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended usage levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
34%	22%	28%	25%	21%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
30%	13%	22%	16%	10%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
25%	20%	30%	14%	24%	19%	26%

Future usage among users

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+30%	+22%	+30%	+27%	+25%	+25%	+28%

Deep profiling of Bluetooth users

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Bluetooth incidence and intentions

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: Do you use or plan to start using Bluetooth technology or applications?

- Yes - regularly use
- Yes - occasionally use
- Yes - rarely use
- No - but plan to start in next 6 months
- No - and no plans to start
- Not at all familiar with this

Base: Q3, All respondents (1,608)

More than 1 in 5 claim to use Bluetooth regularly and a further 1 in 4 (24%) use it occasionally.

Overall incidence of those using Bluetooth technology is 64%. 7% claim to plan start using it in the next 6 months.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Regularly use	21%	34%	22%	28%	25%	21%	30%	13%	22%	16%	10%
Plan to start	7%	6%	2%	7%	10%	8%	5%	8%	7%	7%	9%
Not at all familiar	6%	3%	1%	3%	5%	6%	5%	1%	7%	8%	14%

Question: What, if at all, do you use Bluetooth technology for?

Base: Q61, All Bluetooth Users (1,032)

WIGGIN

PC and console gaming

ENTERTAINMENTMEDIARESEARCH

Playing offline PC games

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended play levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
32%	25%	23%	26%	19%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
18%	18%	16%	19%	22%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
30%	27%	34%	25%	28%	26%	32%

Future usage among gamers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+8%	+5%	+3%	+12%	+7%	+7%	+4%

Deep profiling of offline PC gamers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Playing MMORPG subscription games

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended play levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
17%	10%	6%	4%	2%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
3%	10%	4%	2%	2%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
32%	32%	40%	29%*	34%	29%*	**

* Caution – low base
** Base too low to show

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+8%	+6%	-10%	+29%*	+9%	+6%*	**

* Caution – low base
** Base too low to show

Playing games on a handheld device

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended play levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
27%	16%	18%	15%	11%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
21%	21%	21%	18%	10%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
26%	25%	32%	31%	27%	25%	13%

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+16%	+14%	+4%	+23%	+22%	+17%	+6%

Deep profiling of those playing games on a handheld device

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Buy video games

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended purchase levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
20%	17%	21%	10%	9%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
5%	19%	10%	16%	5%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
26%	22%	29%	27%	26%	22%	22%

Future usage among purchasers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+10%	+9%	+4%	+17%	+20%	+7%	-2%

Playing online games on a console

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended gaming levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
33%	19%	15%	10%	7%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
8%	15%	11%	8%	6%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
28%	19%	29%	21%	27%	21%	22%

Future usage among gamers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+12%	+9%	+9%	+15%	+14%	+7%	+10%

Perception of next generation consoles as “must have” items

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: For each of these next generation consoles, how would you rate each of them on a scale of 1 to 7, where 7 is "A must have item" and 1 is "Completely unimportant“?

One way of understanding the relative position of the players in the next generation console battle is to ask consumers the extent to which they consider each to be a “must have” item.

The Nintendo Wii is a fairly clear winner in terms of being considered a “must have.” The Xbox 360 and Playstation 3 are roughly on a par. The Wii is ahead across all demographics (although it is more of a dead heat among Males aged 25-34).

Average	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Nintendo Wii	4.0	4.4	4.7	4.2	3.8	3.8	4.2	4.4	3.9	4.1	3.6
Xbox 360	3.5	4.0	4.2	4.0	3.3	3.3	3.5	3.6	3.1	3.3	3.0
PS3	3.6	4.1	4.6	4.1	3.5	3.6	3.5	3.7	3.1	3.4	3.1

Base: Q40, All respondents (1,608)

Reasons for not purchasing a next generation games console

Among non-owners

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: You said earlier that you didn't own a next generation games console like a Playstation 3, Xbox360 or a Nintendo Wii. What are the reasons why you haven't bought...?

This analysis provides explanations as to why non-owners have not yet purchased a next generation games console.

One reason of course is that they're simply not interested in gaming, don't need one or prefer PC gaming.

The major reason however, is a perception across all three consoles, that they are too expensive. This is a concern felt more strongly for the Playstation 3 and least for the Wii. Almost 1 in 4 consumers are awaiting a price reduction.

It is highly likely that price reductions will occur and this is only good news in stimulating the market.

The next most important reason is the perception that games are too expensive. Again, this perception is felt slightly more strongly for the Playstation 3.

The Wii generates the highest purchase intention (15%), followed by the Playstation 3 (9%) and then the Xbox 360 (6%).

Base: Q39, All not owning next gen console (982)

Reasons for not purchasing…

* Caution – base under 50

Playstation 3	Total	M15-19*	M20-24*	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Not interested in gaming	27%	21%	22%	15%	22%	30%	23%	30%	31%	33%	33%
Console too expensive	46%	69%	71%	41%	44%	41%	53%	50%	49%	40%	45%
Play PC instead	22%	37%	10%	16%	28%	25%	27%	25%	17%	16%	21%
Games too expensive	35%	69%	46%	39%	36%	34%	39%	23%	35%	25%	34%
Waiting for price reduction	23%	38%	51%	26%	24%	17%	25%	19%	22%	17%	21%
Heard bad reviews	5%	16%	13%	9%	3%	5%	7%	5%	5%	2%	2%
Waiting for good games	6%	23%	5%	9%	5%	2%	8%	5%	5%	4%	4%
DK enough about it	11%	9%	0%	13%	11%	10%	16%	10%	10%	13%	13%
Don't like the brand	5%	16%	3%	5%	6%	6%	6%	2%	3%	3%	3%
Unreliable	4%	13%	0%	7%	2%	4%	5%	5%	4%	5%	2%
Don't need one	16%	29%	9%	13%	16%	11%	21%	15%	23%	16%	14%
Inferior to others	5%	14%	0%	6%	6%	3%	9%	7%	3%	4%	2%
Prefer PC	19%	36%	9%	17%	20%	29%	19%	16%	15%	14%	16%
Concern w/ backwds comply	7%	22%	8%	12%	6%	10%	10%	5%	5%	4%	4%
Plan to buy, not done so yet	9%	23%	24%	11%	9%	7%	6%	4%	10%	5%	5%

Nintendo Wii	Total	M15-19*	M20-24*	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Not interested in gaming	24%	17%	24%	12%	20%	28%	17%	25%	28%	29%	29%
Console too expensive	38%	39%	42%	30%	34%	31%	61%	45%	41%	38%	42%
Play PC instead	19%	28%	15%	17%	24%	23%	21%	23%	14%	11%	18%
Games too expensive	30%	41%	28%	32%	32%	27%	41%	19%	33%	23%	33%
Waiting for price reduction	23%	26%	28%	28%	20%	14%	31%	24%	28%	20%	24%
Heard bad reviews	4%	19%	5%	6%	2%	4%	10%	2%	6%	3%	0%
Waiting for good games	5%	5%	6%	10%	2%	2%	14%	5%	4%	4%	4%
DK enough about it	10%	13%	3%	9%	10%	11%	11%	4%	10%	10%	11%
Don't like the brand	5%	22%	6%	8%	4%	5%	9%	0%	7%	4%	1%
Unreliable	3%	16%	3%	4%	3%	4%	3%	0%	4%	3%	1%
Don't need one	12%	15%	5%	11%	13%	8%	24%	10%	15%	12%	10%
Inferior to others	5%	23%	6%	13%	3%	2%	10%	0%	6%	2%	2%
Prefer PC	16%	30%	6%	16%	16%	27%	22%	14%	13%	11%	14%
Concern w/ backwds comply	4%	10%	0%	6%	3%	7%	10%	2%	4%	4%	2%
Plan to buy, not done so yet	15%	13%	19%	14%	16%	11%	15%	18%	19%	20%	11%

Xbox360	Total	M15-19*	M20-24*	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Not interested in gaming	27%	19%	24%	13%	22%	32%	27%	30%	30%	33%	34%
Console too expensive	42%	57%	56%	38%	40%	37%	54%	47%	41%	40%	43%
Play PC instead	21%	37%	10%	17%	26%	24%	24%	23%	14%	16%	20%
Games too expensive	32%	60%	33%	34%	34%	30%	36%	23%	32%	23%	31%
Waiting for price reduction	17%	28%	31%	28%	17%	10%	21%	11%	13%	12%	16%
Heard bad reviews	4%	20%	5%	9%	1%	5%	10%	5%	4%	2%	2%
Waiting for good games	4%	15%	3%	10%	1%	3%	10%	5%	4%	2%	4%
DK enough about it	13%	19%	7%	12%	11%	10%	23%	9%	12%	14%	13%
Don't like the brand	9%	25%	13%	12%	8%	9%	16%	7%	10%	5%	4%
Unreliable	6%	24%	6%	10%	5%	6%	15%	2%	4%	2%	3%
Don't need one	14%	25%	13%	13%	12%	10%	22%	14%	19%	14%	11%
Inferior to others	6%	24%	9%	8%	5%	6%	19%	10%	4%	3%	2%
Prefer PC	19%	35%	14%	17%	19%	28%	30%	16%	13%	14%	15%
Concern w/ backwds comply	5%	14%	6%	8%	4%	9%	6%	7%	2%	3%	3%
Plan to buy, not done so yet	6%	7%	6%	14%	6%	3%	4%	4%	5%	5%	2%

General attitudes towards gaming

Question: Please look at the following list and tell us whether you agree or disagree with each

We saw above that cost is an issue for gamers. For example, 84% of gamers agree that games are too expensive and three quarters think that some games can be finished too quickly for their price. This raises questions over the perceived value of games today.

Whilst it's important for consoles to have exclusivity on games and franchises to support hardware sales, many consumers find it frustrating they cannot get such games for their own console. That said, a remarkable 1 in 3 say they have been tempted to buy a console for these exclusive titles which supports an exclusivity strategy.

There are some interesting underlying attitudes towards the games themselves. Just over half consider there is too much emphasis on graphics quality than playability and exactly half are concerned about the realism of violence in some games (these feelings are strongly felt among older females, potentially mothers of gamers, rather than young male gamers).

There is little agreement that the next gen consoles makes owning a PC less important. They are not perceived as a PC replacements.

Whilst only 1 in 5 are interested in using the mobile to manage elements within games (like inventories, for example), there is an audience for such innovation and interest is much stronger among young male gamers.

Base: Q38, All gamers (1,384)

Potential gaming business model concepts

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: Please look at the following list and tell us whether you agree or disagree with each

Here is consumer reaction to various ideas to innovate in the video gaming market.

Firstly, a significant proportion (44%) are interested in downloading games and additional content (episodes, items, levels etc.) but 2 in 3 gamers prefer the physical disk

Offering downloadable games or other content that can be burned to disk would therefore appear to be a viable route, particularly if it comes with original artwork.

There is certainly a much wider market for digital download gaming than has been opened up hitherto and it seems there are many more opportunities to provide additional content.

One thing that should be considered is value for money for downloads. As we saw earlier, there is a general concern over the value of games, so any episodic/content which consumers have to pay for beyond the cost of the game needs to be carefully priced to avoid further erosion of value perceptions.

Base: Q38, All gamers (1,384)

Attitudes towards gaming by demographics

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Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54	Own/Have access to		
												Wii	X360	PS3
Games are too expensive	84%	79%	80%	85%	81%	88%	81%	79%	87%	87%	90%	86%	88%	84%
Some can be finished too quickly for price	74%	75%	74%	73%	76%	73%	69%	74%	70%	74%	81%	78%	84%	79%
Frustrating some only avail. on certain consoles	73%	75%	79%	76%	75%	71%	74%	76%	72%	70%	70%	79%	83%	83%
Prefer buy physical disk than digital d/l version	67%	75%	77%	66%	67%	75%	63%	73%	61%	63%	58%	73%	74%	72%
Should have multiplayer to increase longevity	59%	72%	69%	63%	58%	55%	65%	60%	55%	56%	51%	69%	78%	74%
Too much emphasis on graphics, not playability	55%	59%	60%	63%	53%	56%	55%	51%	51%	49%	52%	56%	58%	58%
Prefer simple games than complex	54%	42%	45%	49%	42%	57%	53%	57%	63%	61%	63%	56%	54%	58%
Concerned about realism of violence in some	50%	41%	42%	38%	42%	43%	47%	41%	64%	63%	69%	51%	53%	59%
Classic arcade games from 80s are still the best	46%	39%	49%	45%	41%	41%	35%	55%	50%	47%	54%	50%	50%	53%
Like idea of "episodic" content to d/l	44%	56%	56%	54%	46%	41%	36%	53%	37%	39%	34%	53%	59%	66%
Pay for extra content (levels, items) to d/l	42%	55%	62%	51%	44%	38%	37%	54%	35%	30%	32%	50%	61%	66%
Really only interested in single player games	42%	44%	40%	47%	38%	44%	31%	50%	43%	39%	45%	38%	44%	49%
I'd buy more if could download them easily	38%	48%	48%	44%	36%	29%	35%	54%	36%	33%	33%	44%	50%	57%
Been tempted to buy console for excl. games	34%	53%	61%	49%	29%	23%	34%	44%	30%	21%	22%	41%	54%	57%
Unimpressed by graphics/quality of next gen	29%	32%	41%	31%	22%	28%	39%	34%	27%	26%	25%	32%	36%	45%
Next gen consoles makes owning PC less impt	25%	38%	33%	34%	22%	19%	27%	37%	24%	12%	19%	32%	39%	47%
Prefer buy digital d/l than have physical disk	23%	39%	25%	35%	20%	16%	24%	32%	23%	11%	16%	26%	34%	43%
Interested using mobile to manage games	22%	38%	44%	34%	19%	11%	21%	39%	18%	8%	11%	27%	37%	46%

Base: Q38, All gamers (1,384)

Consumer preference of single versus competitive console platform

Question: Which one of these two options would be your preference for the next generation of games consoles?

Among all respondents

- There should be a single platform so all games are available to everyone
- Companies should compete for the best platform and let consumers decide which is best for them

What do consumers think of the next generation console battle? Is it better to have a single platform and single market to open up games to everyone or is competition better and consumers determine the winner?

Gamers are split down the middle on this question.

Among gamers

- There should be a single platform so all games are available to everyone
- Companies should compete for the best platform and let consumers decide which is best for them

Interest in games based on TV programmes

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: How interested, if at all, would you be in playing games that are based on or form part of top television programmes?

There is a modest level of interest in games based on top television programmes. Of course this is only interest in principle and the real level of demand would depend on the TV programme in question.

Among regular games purchasers, interest is significantly boosted: around 1 in 3 would definitely buy or would be very interested to buy television-based titles.

Preference	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54	Buy video games regularly
Definitely would buy	4%	6%	7%	8%	2%	2%	4%	9%	5%	1%	2%	15%
Very interested	10%	16%	15%	13%	6%	7%	15%	13%	12%	8%	4%	17%
Somewhat interested	38%	46%	30%	45%	35%	27%	49%	41%	35%	41%	34%	35%
Not very interested	26%	21%	29%	22%	30%	32%	22%	26%	26%	25%	27%	20%
Not at all interested	22%	11%	19%	12%	27%	32%	11%	12%	22%	26%	33%	13%
Def buy/Very int.	14%	22%	22%	20%	8%	9%	19%	21%	17%	9%	6%	32%
Not very/at all int.	49%	32%	48%	34%	57%	64%	33%	38%	48%	51%	60%	33%

Base: Q42, All respondents (1,608)

WIGGIN

Next generation games consoles as media devices

ENTERTAINMENTMEDIARESEARCH

Usage of next generation games consoles as media devices

Question: Do you ever use your games console to do any of the following?

Next generation consoles (such as the Playstation 3 and Xbox 360) have the capability to be used as serious media devices as well as gaming machines.

This is borne out by consumer usage of next generation gaming consoles. 58% of the sample use them as a DVD player and 1 in 3 use them to get online.

Only a minority have used their console for video streaming but intentions to do so are strong. Nearly as many intend to start as are currently doing so.

Intentions to use consoles to play media are strong across the board. Playstation 3 owners are much more likely in general to use their device as a media player and this is most notable in terms of watching Blu-ray movies and streaming content.

Total use	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19*	F20-24*	F25-34	F35-44	F45-54
Play a movie DVD	58%	71%	60%	69%	55%	54%	60%	59%	57%	49%	45%
Play other gamers over Internet	41%	70%	49%	51%	48%	24%	35%	53%	41%	28%	14%
Use it to surf Internet	33%	46%	41%	43%	29%	17%	43%	42%	28%	24%	15%
Play a next gen movie	31%	47%	40%	42%	24%	22%	33%	40%	30%	19%	12%
Stream movies/progs directly	24%	40%	42%	40%	15%	11%	28%	31%	26%	7%	5%
Stream movies/progs from PC	24%	40%	43%	38%	16%	13%	22%	35%	27%	7%	1%

Total use	Total	Own Wii	Own Xbox 360	Own PS3
Play a movie DVD	58%	50%	74%	76%
Play other gamers over Internet	41%	39%	58%	56%
Use it to surf Internet	33%	36%	39%	46%
Play a next gen movie	31%	30%	39%	56%
Stream movies/progs directly	24%	25%	34%	42%
Stream movies/progs from PC	24%	26%	34%	37%

Base: Q35, All owning next gen console (626)

Importance of using console as a media device

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: How important, if at all, is your games console for watching media (movies, programmes etc) in general?

We have seen a healthy appetite for consumers to use their next generation consoles as media devices.

This is shown again here in this analysis. 1 in 3 say that it is vitally or very important for their games console to be a media device in addition to games-playing. A further 1 in 3 consider it somewhat important.

	Total	M15-19*	M20-24*	M25-34	M35-44*	M45-54*	F15-19*	F20-24*	F25-34*	F35-44*	F45-54*	Wii	Xbox 360	PS3
Vitally important	12%	13%	18%	17%	8%	0%	4%	20%	20%	4%	8%	13%	15%	15%
Not at all important	9%	7%	3%	4%	8%	9%	18%	11%	11%	14%	17%	10%	8%	6%

* Caution – base under 50

Base: Q36, All using next gen console as a media device (431)

Reactions to Xbox Live and Sony Home type of services

WIGGIN ENTERTAINMENTMEDIARESEARCH

Question: Sony PlayStation will soon release "Sony Home" and Xbox have their "Xbox Live" services. These allow consumers with access to these services to download new games or levels as well as download video content and purchase online goods and services. Please take a look at the following and tell us whether you agree or disagree with the following.

Services like Xbox Live and Sony Home propose to open up an exciting online world to owners of next generation consoles.

Consumer reaction is very positive with over 2 in 3 gamers and over 80% of next generation console owners considering the concept a great idea.

What's more, 1 in 2 Xbox 360 and PS3 owners state an interest in paying to download movies via their consoles.

Base: Q37, All gamers (1,384)

Reactions to Xbox Live and Sony Home type of services

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: Sony PlayStation will soon release "Sony Home" and Xbox have their "Xbox Live" services. These allow consumers with access to these services to download new games or levels as well as download video content and purchase online goods and services. Please take a look at the following and tell us whether you agree or disagree with the following.

Any agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54	Own/Access Xbox	Own/Access PS3
They are a great idea	69%	78%	86%	76%	64%	61%	66%	78%	68%	63%	57%	84%	83%
Interested to d/l new levels/items in existing games	49%	65%	72%	57%	49%	42%	48%	56%	45%	35%	36%	74%	75%
Interested to d/l new games using this	45%	62%	68%	56%	42%	39%	44%	56%	43%	34%	31%	72%	72%
Interested to watch tv progs/movies d/l via service	41%	59%	66%	52%	38%	34%	42%	48%	37%	31%	24%	59%	65%
If good, it could become main way access video	36%	49%	57%	52%	33%	28%	34%	44%	36%	22%	19%	55%	63%
I'm very familiar with these services	35%	57%	71%	48%	34%	28%	34%	34%	30%	20%	19%	71%	66%
Interested to pay d/l new movie to own via service	34%	38%	59%	49%	32%	24%	29%	45%	33%	23%	23%	53%	61%
Interested to pay to rent new movie d/ls via service	32%	39%	58%	44%	27%	23%	33%	41%	31%	22%	17%	50%	58%
Interested in using as online shopping channel	31%	38%	52%	41%	29%	23%	32%	40%	28%	21%	16%	46%	57%

Base: Q37, All gamers (1,384)

WIGGIN

Gambling

ENTERTAINMENTMEDIARESEARCH

Gambling activity

Question: Please tell us whether you do any of these leisure activities?

% Regularly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Play National Lottery	34%	10%	16%	28%	40%	50%	10%	19%	28%	48%	44%
Gamble betting sites	6%	3%	8%	8%	10%	7%	2%	7%	6%	2%	1%
Pay to play online bingo	4%	5%	8%	5%	5%	4%	2%	9%	5%	2%	3%
Play online poker	3%	5%	3%	7%	4%	2%	1%	4%	5%	2%	0%

Base: Q3, All respondents (1,608)

Play the National Lottery

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ENTERTAINMENTMEDIARESEARCH

Current and intended play levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
10%	16%	28%	40%	50%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
10%	19%	28%	48%	44%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
22%	25%	26%	17%	26%	24%	24%

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+8%	+9%	+23%	+19%	+15%	+4%	0%

Online gambling

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended online gambling levels

% Regularly by demographics

M18-19	M20-24	M25-34	M35-44	M45-54
3%	8%	8%	10%	7%
F18-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
2%	7%	6%	2%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
25%	18%	**	21%	23%	23%	22%*

* Caution – low base
** Base too low to show

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+8%	+4%	**	+10%	+7%	+6%	+5%*

* Caution – low base
** Base too low to show

Deep profiling of online gamblers

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Playing online bingo for money

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended playing levels

% Regularly by demographics

M18-19	M20-24	M25-34	M35-44	M45-54
5%	8%	5%	5%	4%
F18-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
2%	9%	5%	2%	3%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
25%	13%	**	15%	23%	15%	10%

** Base too low to show

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+1%	+5%	**	+19%	+15%	-8%	-21%

** Base too low to show

Deep profiling of those playing online bingo

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Playing online poker for money

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended playing levels

% Regularly by demographics

M18-19	M20-24	M25-34	M35-44	M45-54
5%	3%	7%	4%	2%
F18-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
1%	4%	5%	2%	0%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
28%	25%	22%*	25%	30%	30%	26%*

* Caution – low base

Future usage among players

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+10%	+13%	+11%*	+20%	+25%	-9%	-9%*

* Caution – low base

Deep profiling of online poker players

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

WIGGIN

Radio

ENTERTAINMENTMEDIARESEARCH

Listening to broadcast radio

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended listening levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
40%	48%	51%	58%	57%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
46%	39%	50%	55%	46%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
42%	43%	34%	29%	43%	48%	47%

Future usage among listeners

The good news for radio is that 14% more people intend to listen more to the radio in the future.

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+14%	+14%	+24%	+20%	+13%	+12%	+10%

Listening to online streamed radio

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended listening levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
17%	18%	21%	21%	18%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
26%	18%	17%	17%	12%

While streamed / internet radio is less emotionally engaging than traditional radio (57% could easily stop Vs 29% respectively) a net 17% more people intend to listen more in the future to streamed radio compared to 14% to traditional radio.

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
18%	18%	20%	16%	20%	18%	17%

Future usage among listeners

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+18%	+15%	+17%	+13%	+21%	+15%	+15%

WIGGIN

Podcasts and blogs

Listening to podcasts

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended podcast listening levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
12%	8%	12%	8%	7%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
10%	7%	9%	5%	3%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
12%	14%	19%	13%	14%	10%	7%

Future usage among listeners

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+17%	+16%	+11%	+17%	+18%	+22%	+12%

WIGGIN

Piracy

ENTERTAINMENTMEDIARESEARCH

Incidence of accessing unauthorised content

* Not necessarily piracy or copyright infringement

% Regularly	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Stream tv progs	6%	13%	14%	7%	4%	2%	14%	7%	8%	3%	3%
Fileshare music	8%	15%	14%	7%	7%	5%	16%	13%	10%	3%	1%
Watch pirate movie DVDs	5%	6%	11%	7%	2%	1%	8%	9%	9%	3%	2%
Full movies streamed	6%	13%	14%	9%	3%	3%	12%	7%	5%	1%	1%
Fileshare movies/progs	5%	9%	9%	7%	7%	3%	7%	12%	6%	1%	1%
Swap hard drives	4%	6%	11%	6%	3%	3%	7%	10%	5%	1%	1%
Fileshare games/software	4%	7%	10%	5%	3%	1%	4%	8%	5%	2%	0%

Piracy is of course a critically important issue for digital content. This analysis places each type of content activity in context.

Streaming full tv programmes is the most regular unauthorised activity (albeit there are many legal routes and the results may be overstated).

The incidence of music piracy is well documented but the scale of movie piracy may come as a surprise. Nearly 3 in 10 have watched pirated DVDs and roughly the same proportion have viewed movies on streaming sites (which, whilst there are legal sites available, are more likely than not to be unauthorised).

Whilst most of the publicity about piracy is focused on peer-to-peer filesharing, streaming and direct download sites are also a significant issue.

Incidence of piracy is much stronger among younger consumers, particularly males under 25. For example around 1 in 7 young males fileshare music.

It is worth noting that nearly 1 in 5 share their hard drives with friends.

Base: Q3, All respondents (1,608)

Pirates' attitudes towards piracy

Question: Please look at the following list and tell us whether you agree or disagree with each

Here are some underlying attitudes towards piracy.

Pirates perceive legal sites don't have the range of content of illegal ones (70%) and take longer to acquire content (68%). That it is free is, of course, the main reason why piracy is so rife but perceptions of a lack of choice in legal sites is a contributory factor.

Pirates are typically media heavy consumers and purchase considerable quantities of legal content in addition to unauthorised content. Nearly 2 out of 3 pirates claim they would pay for legal downloads if what they wanted was available.

In terms of deterring piracy, unauthorised downloaders concede that one of the most compelling reasons to quit would be the receipt of a cease and desist warning from their ISP. 7 out of 10 would stop if this were to happen.

Fear of being caught is also a strong deterrent in theory but 2 in 3 believe it is very unlikely they will ever be caught.

Base: Q55, All pirating content (520)

Pirates' attitudes towards piracy by demographics

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Question: Please look at the following list and tell us whether you agree or disagree with each

Any agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24*	F25-34	F35-44	F45-54**
Legal d/l sites don't have the range of illegal ones	70%	76%	64%	68%	70%	78%	79%	70%	73%	55%	**
Can get what I want a lot faster compared to legal sites	68%	70%	80%	62%	66%	65%	68%	79%	70%	57%	**
Would stop d/l unauthorised content if received an email/call from ISP	70%	78%	68%	72%	57%	60%	75%	63%	84%	65%	**
Would stop d/l completely if thought better chance of being caught	66%	65%	65%	69%	60%	60%	68%	65%	75%	68%	**
Would pay for legal d/ls if they had what I wanted	64%	63%	65%	66%	56%	78%	63%	66%	66%	50%	**
I believe it's very unlikely I will be caught d/l unauthorised content	68%	76%	75%	66%	65%	67%	69%	77%	64%	63%	**
Get concerned about stories in news about people being prosecuted	62%	60%	60%	65%	50%	48%	73%	76%	67%	57%	**
Would keep on d/l even if were more stories about prosec'n because little chance of being caught	51%	65%	52%	46%	43%	49%	48%	75%	57%	34%	**
Seeing news stories about people being prosecuted puts me off doing it	57%	59%	52%	58%	52%	44%	61%	67%	65%	46%	**

*Caution – lower base
** Base too low to show

Base: Q55, All pirating content (520)

Piracy - filesharing music

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended filesharing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
15%	14%	7%	7%	5%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
16%	13%	10%	3%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
27%	24%	34%	30%	31%	13%	16%

Future usage among filesharers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
-2%	+3%	+4%	+16%	+10%	-17%	-18%

Piracy - filesharing movies and TV

WIGGIN
ENTERTAINMENTMEDIARESEARCH

Current and intended filesharing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
9%	9%	7%	7%	3%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
7%	12%	6%	1%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
25%	24%	24%	31%	25%	22%	18%*

* Caution - low base

Future usage among filesharers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+2%	+5%	-1%	+14%	+7%	-1%	-16%*

* Caution - low base

Deep profiling of those sharing movies via P2P

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Piracy - filesharing games and software

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ENTERTAINMENTMEDIARESEARCH

Current and intended filesharing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
7%	10%	5%	3%	1%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
4%	8%	5%	2%	0%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
31%	23%	31%*	25%	32%	24%*	**

* Caution - low base
** Base too low to show

Future usage among filesharers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+8%	+18%	+1%*	+13%	+22%	+3%*	**

* Caution - low base
** Base too low to show

Piracy - watching pirate DVDs

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ENTERTAINMENTMEDIARESEARCH

Current and intended viewing levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
6%	11%	7%	2%	1%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
8%	9%	9%	3%	2%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
22%	19%	18%	26%	26%	17%	11%

Future usage among viewers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
-8%	-3%	0%	+11%	+3%	-17%	-28%

Deep profiling of those watching pirate DVDs

WIGGIN
ENTERTAINMENTMEDIARESEARCH

How their activity differs from UK average

How their ownership of technology differs from UK average

Piracy – swapping HDDs to share content

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ENTERTAINMENTMEDIARESEARCH

Current and intended swapping levels

% Regularly by demographics

M15-19	M20-24	M25-34	M35-44	M45-54
6%	11%	6%	3%	3%
F15-19	**F20-24**	**F25-34**	**F35-44**	**F45-54**
7%	10%	5%	1%	1%

Emotional attachment

% Never or hate to stop by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
21%	19%	25%	20%	23%	14%*	**

* Caution – low base
** Base too low to show

Future usage among HDD swappers

% Net more or less by demographics

Male	Female	15-19	20-24	25-34	35-44	45-54
+4%	+21%	+5%	+17%	+14%	+13%*	**

* Caution – low base
** Base too low to show

WIGGIN

DRM

ENTERTAINMENTMEDIARESEARCH

Familiarity with DRM

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Question: How familiar, if at all, would you say you are with "Digital Rights Management" (DRM)?

- I know exactly what it means
- I have a good understanding of what it means
- I know something about it
- I have heard of it, but I don't know what it is
- I have never heard of it

DRM is a contentious issue for many commentators and businesses but in the mass market, levels of familiarity are still relatively low. Less than 1 in 5 claim to have a good understanding of what it is and half claim to have never heard of it.

Familiarity is much stronger among males than females and particularly among male teenagers.

	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24	F25-34	F35-44	F45-54
Know exactly what it means	7%	15%	10%	13%	11%	10%	5%	4%	2%	2%	1%
Never heard of it	53%	34%	44%	33%	41%	43%	48%	64%	67%	70%	77%

Base: Q56, All respondents (1,608)

Attitudes towards DRM

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Question: Please read the following statements about Digital Rights Management (DRM) and state whether you agree or disagree with each

Of those familiar with DRM there are some deeply felt attitudes towards it.

Around half believe it to be a nuisance, that it invades consumer rights and it indicates content providers have insufficient trust in consumers not to share content.

Feelings among male teenagers are even stronger with nearly 2 in 3 considering DRM a nuisance.

On the other hand, consumers also accept that it does help protect content from filesharing and that the fuss may die down as consumers get used to the idea.

Total agree	Total	M15-19	M20-24	M25-34	M35-44	M45-54	F15-19	F20-24*	F25-34	F35-44	F45-54*
It's a nuisance and I don't like it	48%	64%	59%	51%	47%	37%	46%	68%	41%	39%	35%
It invades the rights of the consumer	50%	60%	51%	55%	54%	43%	43%	68%	49%	41%	30%
Have concerns that it invades my privacy	54%	63%	57%	57%	63%	49%	43%	61%	50%	47%	43%
Content providers should trust consumers	49%	58%	52%	58%	43%	47%	41%	70%	45%	34%	49%
Have a much better understanding of it	51%	63%	59%	54%	42%	56%	39%	53%	48%	44%	63%
Good idea because protects copyright	49%	52%	33%	53%	47%	48%	36%	58%	52%	52%	58%
Fuss about DRM will die down	42%	54%	41%	42%	40%	42%	35%	61%	35%	40%	38%

* Caution – base under 50

Base: Q57, All familiar with DRM (753)

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Appendix

Activity crossover

ENTERTAINMENTMEDIARESEARCH

Crossover (Part 1 of 4)

% Do regularly on both axes	Total	Radio	Books	Sky/ cable	News-papers	Maga-zines	Social network	Lottery	Record TV	Chat on IM	Paper sites	Blue-tooth	Offline games	Cinema	Online games
Listen to radio (not online)	51%	100%	61%	59%	64%	66%	58%	62%	64%	56%	68%	68%	56%	66%	61%
Read paper/hardback books	47%	57%	100%	54%	58%	64%	52%	56%	58%	49%	63%	56%	61%	67%	58%
Watch Sky/other subscription TV	45%	53%	51%	100%	51%	54%	47%	59%	61%	46%	54%	59%	61%	55%	57%
Read newspapers (printed)	41%	52%	51%	47%	100%	63%	44%	55%	57%	45%	66%	53%	48%	62%	46%
Read magazines	35%	46%	48%	42%	54%	100%	41%	48%	49%	42%	57%	48%	45%	59%	44%
Browse social network sites	34%	39%	38%	35%	36%	39%	100%	29%	39%	60%	39%	50%	41%	48%	47%
Play the National Lottery	34%	41%	40%	44%	45%	46%	28%	100%	46%	30%	47%	41%	41%	44%	45%
Watch recorded television	32%	40%	39%	44%	44%	45%	37%	44%	100%	37%	51%	46%	45%	51%	45%
Chatting on Instant Messenger	32%	35%	33%	33%	34%	37%	56%	28%	37%	100%	39%	46%	40%	45%	47%
Visit newspaper websites	24%	32%	32%	29%	39%	39%	28%	34%	38%	30%	100%	37%	34%	44%	33%
Use bluetooth technology/applications	21%	29%	25%	28%	28%	30%	32%	26%	31%	31%	33%	100%	32%	33%	33%
Play offline games on PC	21%	24%	28%	29%	25%	27%	26%	26%	30%	27%	30%	32%	100%	32%	52%
Go to cinema	21%	28%	30%	26%	32%	36%	30%	28%	34%	31%	39%	33%	32%	100%	29%
Play online games on the PC	20%	24%	24%	25%	22%	25%	28%	26%	28%	30%	27%	30%	48%	27%	100%
Listen to radio streamed online	18%	27%	25%	20%	26%	28%	26%	22%	26%	28%	33%	37%	31%	32%	32%
Play games on handheld device	17%	21%	20%	23%	23%	27%	25%	23%	27%	27%	26%	32%	32%	32%	34%
Rent DVDs	15%	20%	22%	16%	21%	24%	19%	21%	23%	20%	28%	23%	24%	36%	24%
Buy video games	13%	15%	17%	18%	18%	21%	18%	21%	22%	17%	24%	23%	33%	27%	29%
Stream music from social networks	12%	16%	15%	14%	17%	21%	30%	14%	20%	28%	23%	27%	19%	29%	23%
Play online games on a console	12%	15%	14%	17%	15%	17%	21%	14%	18%	19%	18%	26%	28%	21%	33%
Play games on your mobile	12%	16%	15%	15%	16%	20%	21%	14%	17%	19%	20%	29%	25%	25%	29%
Use internet chatrooms	9%	12%	11%	11%	13%	15%	18%	13%	14%	21%	16%	20%	16%	20%	22%
Making calls w/ Skype/other online	8%	11%	11%	10%	11%	12%	13%	12%	15%	15%	18%	17%	17%	17%	19%
Using mobile to surf Internet	8%	12%	11%	11%	13%	15%	14%	12%	16%	16%	20%	25%	17%	19%	18%
Listen to podcasts	8%	11%	12%	9%	11%	14%	14%	10%	15%	12%	19%	21%	15%	18%	15%
Read other peoples' blogs	8%	11%	11%	10%	11%	14%	18%	10%	13%	17%	18%	16%	15%	18%	17%
Filesharing music	8%	9%	8%	10%	10%	11%	14%	9%	11%	13%	11%	17%	13%	14%	16%
Listen to radio on mobile phone	8%	12%	10%	10%	13%	15%	14%	12%	16%	15%	16%	20%	15%	20%	17%
Watch PPV movies via Sky/cable	7%	10%	10%	13%	13%	14%	10%	13%	15%	13%	17%	19%	16%	18%	14%
Watch movies on HD-DVD disk	7%	9%	10%	8%	10%	13%	11%	11%	12%	11%	14%	16%	14%	18%	15%
Watch full tv progs on streaming sites	6%	8%	9%	8%	10%	11%	13%	9%	14%	14%	13%	15%	16%	16%	18%
Watch full movies on streaming sites	6%	7%	7%	7%	9%	10%	12%	8%	11%	11%	12%	14%	14%	15%	15%
Online gambling	6%	7%	7%	9%	10%	9%	8%	11%	11%	8%	12%	12%	12%	14%	12%
Filesharing movies / programmes	5%	6%	6%	8%	7%	7%	11%	7%	8%	8%	11%	14%	10%	10%	11%
Watch pirate DVDs of movies	5%	8%	8%	8%	9%	10%	10%	8%	10%	10%	12%	14%	10%	12%	13%
Subscribe to MMORPG online game	5%	7%	8%	7%	6%	6%	9%	6%	8%	9%	10%	11%	15%	11%	21%
Watch TV on PC via tv-card/USB tuner	5%	7%	7%	6%	8%	9%	8%	8%	10%	9%	12%	13%	13%	13%	13%
Write on your own blog	5%	6%	7%	6%	8%	8%	11%	6%	9%	11%	11%	12%	12%	12%	12%
Pay to play online bingo	4%	6%	7%	7%	8%	8%	8%	11%	9%	9%	9%	11%	12%	11%	16%
Swap hard drives to share content	4%	7%	6%	5%	8%	8%	9%	7%	9%	9%	10%	14%	10%	11%	14%
Listen to audio books	4%	7%	7%	6%	6%	9%	7%	7%	9%	7%	10%	10%	9%	12%	11%
Read e-books/novels downloaded	4%	6%	7%	6%	7%	8%	9%	7%	8%	9%	11%	12%	11%	12%	13%
Subscribe paid mthly music d/l service	4%	6%	6%	6%	7%	7%	7%	7%	8%	8%	9%	12%	10%	11%	12%
Buy authorised digital download movie	4%	5%	6%	6%	6%	8%	8%	6%	8%	8%	9%	12%	12%	12%	11%
Filesharing games / software	4%	5%	5%	5%	6%	7%	7%	6%	8%	7%	9%	10%	10%	10%	12%
Watch PPV movies over Internet	3%	6%	5%	5%	7%	8%	7%	8%	8%	8%	10%	12%	10%	12%	11%
Play online poker for money	3%	5%	4%	6%	6%	7%	6%	7%	7%	6%	7%	10%	9%	9%	11%
Watch movies on Blu-ray disk	3%	4%	4%	5%	6%	6%	5%	6%	7%	6%	8%	10%	9%	9%	9%
Subscribe to paid-for podcast	2%	3%	4%	4%	4%	5%	5%	5%	6%	5%	7%	8%	8%	8%	7%

Crossover (Part 2 of 4)

% Do regularly on both axes	Total	Stream radio	Hand games	Rent DVDs	Buy games	Music netwk	Online console	Mobile games	Chat-rooms	Skype et al	Mobile web	Podcast	Read blogs	p2p music	Mobile radio
Listen to radio (not online)	51%	74%	63%	65%	62%	66%	64%	69%	64%	68%	76%	75%	70%	60%	81%
Read paper/hardback books	47%	63%	56%	69%	62%	56%	56%	59%	58%	65%	62%	70%	66%	52%	64%
Watch Sky/other subscription TV	45%	49%	62%	49%	65%	50%	63%	58%	54%	56%	61%	55%	58%	56%	61%
Read newspapers (printed)	41%	57%	56%	56%	58%	58%	52%	57%	57%	54%	66%	60%	60%	56%	70%
Read magazines	35%	53%	56%	55%	59%	60%	50%	59%	56%	52%	67%	61%	62%	49%	72%
Browse social network sites	34%	48%	50%	43%	49%	82%	58%	60%	67%	52%	59%	61%	79%	64%	62%
Play the National Lottery	34%	41%	46%	46%	55%	38%	39%	41%	48%	48%	49%	42%	42%	39%	54%
Watch recorded television	32%	45%	50%	48%	55%	52%	49%	45%	50%	58%	65%	60%	56%	45%	68%
Chatting on Instant Messenger	32%	49%	50%	41%	42%	73%	50%	52%	73%	57%	62%	51%	71%	53%	62%
Visit newspaper websites	24%	44%	37%	45%	46%	46%	37%	42%	43%	53%	59%	58%	57%	36%	52%
Use bluetooth technology/applications	21%	43%	41%	33%	39%	47%	46%	53%	47%	43%	66%	57%	44%	48%	57%
Play offline games on PC	21%	36%	40%	33%	56%	32%	50%	45%	36%	44%	46%	40%	43%	36%	43%
Go to cinema	21%	37%	40%	50%	45%	50%	39%	45%	47%	44%	51%	50%	50%	39%	56%
Play online games on the PC	20%	34%	40%	31%	45%	36%	55%	48%	48%	45%	45%	39%	43%	41%	44%
Listen to radio streamed online	18%	100%	31%	35%	37%	43%	40%	37%	43%	46%	51%	58%	44%	40%	49%
Play games on handheld device	17%	28%	100%	35%	51%	42%	49%	39%	42%	34%	41%	47%	39%	37%	52%
Rent DVDs	15%	29%	32%	100%	40%	32%	29%	29%	34%	38%	42%	42%	37%	28%	42%
Buy video games	13%	25%	38%	33%	100%	28%	44%	34%	32%	32%	43%	36%	39%	27%	41%
Stream music from social networks	12%	29%	31%	26%	27%	100%	31%	37%	46%	34%	40%	38%	50%	38%	50%
Play online games on a console	12%	26%	34%	23%	41%	29%	100%	38%	36%	32%	41%	34%	40%	32%	43%
Play games on your mobile	12%	24%	28%	23%	32%	36%	38%	100%	40%	26%	49%	37%	39%	33%	46%
Use internet chatrooms	9%	21%	23%	20%	23%	34%	28%	31%	100%	29%	36%	31%	40%	29%	38%
Making calls w/ Skype/other online	8%	21%	17%	21%	20%	22%	22%	18%	26%	100%	32%	31%	37%	26%	30%
Using mobile to surf Internet	8%	22%	19%	22%	27%	26%	28%	33%	31%	31%	100%	34%	34%	32%	41%
Listen to podcasts	8%	24%	21%	21%	22%	24%	22%	24%	26%	29%	33%	100%	35%	26%	34%
Read other peoples' blogs	8%	18%	18%	19%	24%	31%	26%	25%	34%	34%	33%	35%	100%	29%	35%
Filesharing music	8%	17%	16%	14%	16%	23%	21%	21%	24%	24%	31%	25%	28%	100%	26%
Listen to radio on mobile phone	8%	20%	23%	21%	24%	31%	27%	29%	31%	27%	39%	33%	34%	26%	100%
Watch PPV movies via Sky/cable	7%	19%	23%	23%	23%	27%	22%	21%	30%	29%	32%	30%	27%	24%	40%
Watch movies on HD-DVD disk	7%	18%	17%	24%	22%	25%	24%	22%	30%	26%	32%	26%	31%	22%	30%
Watch full tv progs on streaming sites	6%	16%	17%	20%	20%	30%	21%	22%	25%	30%	28%	24%	36%	33%	31%
Watch full movies on streaming sites	6%	16%	16%	17%	19%	29%	20%	21%	27%	27%	29%	27%	34%	30%	30%
Online gambling	6%	15%	15%	16%	18%	14%	17%	15%	18%	21%	30%	25%	20%	19%	24%
Filesharing movies / programmes	5%	12%	12%	11%	15%	18%	15%	17%	21%	21%	24%	25%	24%	56%	21%
Watch pirate DVDs of movies	5%	12%	16%	16%	17%	21%	15%	20%	21%	23%	27%	26%	22%	35%	27%
Subscribe to MMORPG online game	5%	13%	12%	15%	17%	18%	17%	15%	23%	20%	21%	21%	24%	21%	22%
Watch TV on PC via tv-card/USB tuner	5%	15%	15%	17%	18%	22%	18%	17%	20%	28%	26%	29%	25%	23%	26%
Write on your own blog	5%	13%	12%	15%	17%	21%	19%	17%	25%	26%	25%	27%	44%	24%	25%
Pay to play online bingo	4%	13%	12%	15%	16%	18%	20%	18%	22%	25%	23%	22%	24%	24%	26%
Swap hard drives to share content	4%	15%	15%	14%	14%	21%	18%	17%	25%	27%	25%	29%	26%	30%	25%
Listen to audio books	4%	15%	14%	15%	15%	18%	15%	18%	21%	23%	22%	32%	22%	24%	25%
Read e-books/novels downloaded	4%	16%	14%	14%	17%	20%	20%	19%	28%	26%	27%	33%	26%	22%	26%
Subscribe paid mthly music d/l service	4%	12%	13%	14%	17%	18%	16%	18%	21%	22%	22%	26%	24%	18%	26%
Buy authorised digital download movie	4%	13%	12%	15%	19%	20%	22%	18%	20%	23%	27%	27%	28%	22%	28%
Filesharing games / software	4%	12%	13%	12%	15%	18%	16%	17%	19%	21%	24%	24%	22%	36%	26%
Watch PPV movies over Internet	3%	14%	14%	16%	16%	22%	18%	18%	22%	23%	26%	27%	27%	25%	29%
Play online poker for money	3%	10%	11%	10%	13%	13%	17%	14%	17%	18%	18%	19%	18%	18%	20%
Watch movies on Blu-ray disk	3%	10%	12%	13%	17%	15%	16%	15%	18%	19%	23%	21%	22%	17%	22%
Subscribe to paid-for podcast	2%	9%	9%	11%	13%	16%	13%	13%	15%	18%	19%	21%	18%	16%	22%

Crossover (Part 3 of 4)

% Do regularly on both axes	Total	PPV Sky et al	HD-DVD	Stream TV	Stream movies	Online gamble	p2p movies	Pirate DVDs	MMO-RPG	TV via PC	Write blog	Online bingo	Swap HDDs	Audio books	eBooks
Listen to radio (not online)	51%	67%	73%	62%	62%	68%	58%	76%	65%	72%	68%	73%	79%	85%	78%
Read paper/hardback books	47%	65%	72%	64%	58%	60%	57%	71%	70%	70%	74%	74%	68%	84%	82%
Watch Sky/other subscription TV	45%	78%	58%	59%	56%	77%	65%	67%	58%	59%	59%	69%	56%	60%	61%
Read newspapers (printed)	41%	69%	63%	65%	66%	73%	58%	71%	45%	64%	65%	73%	75%	60%	72%
Read magazines	35%	68%	71%	59%	60%	56%	49%	69%	45%	63%	61%	65%	60%	74%	66%
Browse social network sites	34%	47%	55%	70%	69%	47%	69%	64%	62%	57%	79%	59%	71%	56%	71%
Play the National Lottery	34%	60%	57%	47%	46%	65%	46%	55%	43%	58%	45%	79%	51%	59%	59%
Watch recorded television	32%	65%	60%	70%	62%	61%	51%	62%	52%	68%	59%	65%	65%	70%	65%
Chatting on Instant Messenger	32%	54%	55%	71%	60%	45%	49%	61%	57%	59%	70%	60%	64%	55%	67%
Visit newspaper websites	24%	56%	53%	50%	51%	53%	49%	58%	49%	57%	55%	50%	57%	60%	66%
Use bluetooth technology/applications	21%	56%	51%	51%	51%	45%	58%	59%	47%	55%	56%	53%	68%	54%	65%
Play offline games on PC	21%	45%	44%	54%	51%	45%	40%	42%	62%	58%	54%	59%	48%	49%	56%
Go to cinema	21%	52%	59%	53%	55%	54%	41%	52%	45%	57%	52%	54%	54%	60%	63%
Play online games on the PC	20%	38%	46%	54%	51%	45%	43%	50%	80%	51%	51%	70%	61%	55%	61%
Listen to radio streamed online	18%	47%	50%	47%	53%	49%	42%	44%	47%	57%	49%	55%	63%	67%	69%
Play games on handheld device	17%	52%	44%	44%	47%	47%	39%	53%	41%	50%	44%	47%	56%	58%	59%
Rent DVDs	15%	47%	55%	48%	47%	45%	33%	49%	44%	53%	48%	52%	48%	56%	53%
Buy video games	13%	39%	43%	39%	43%	41%	36%	42%	42%	46%	46%	45%	41%	46%	52%
Stream music from social networks	12%	46%	47%	58%	64%	32%	43%	50%	44%	55%	54%	49%	59%	53%	60%
Play online games on a console	12%	36%	43%	38%	43%	36%	34%	35%	39%	44%	47%	52%	49%	45%	57%
Play games on your mobile	12%	34%	40%	41%	44%	32%	39%	47%	36%	41%	43%	49%	47%	52%	54%
Use internet chatrooms	9%	38%	42%	36%	44%	31%	36%	38%	42%	38%	49%	46%	51%	46%	62%
Making calls w/ Skype/other online	8%	32%	32%	39%	40%	31%	32%	36%	32%	46%	45%	45%	50%	46%	53%
Using mobile to surf Internet	8%	35%	39%	36%	41%	43%	37%	43%	32%	42%	43%	40%	45%	43%	53%
Listen to podcasts	8%	32%	31%	29%	37%	35%	37%	39%	32%	46%	44%	39%	51%	61%	63%
Read other peoples' blogs	8%	28%	36%	44%	46%	28%	35%	34%	37%	40%	72%	41%	46%	41%	49%
Filesharing music	8%	25%	25%	40%	40%	26%	80%	52%	32%	35%	39%	41%	52%	45%	41%
Listen to radio on mobile phone	8%	41%	34%	37%	40%	32%	30%	40%	32%	40%	40%	44%	43%	46%	48%
Watch PPV movies via Sky/cable	7%	100%	31%	33%	35%	41%	30%	46%	37%	37%	37%	42%	48%	47%	48%
Watch movies on HD-DVD disk	7%	27%	100%	34%	45%	32%	29%	37%	32%	41%	39%	43%	49%	50%	55%
Watch full tv progs on streaming sites	6%	29%	33%	100%	60%	29%	36%	37%	31%	53%	47%	45%	42%	41%	41%
Watch full movies on streaming sites	6%	27%	39%	53%	100%	28%	34%	38%	35%	46%	45%	40%	45%	40%	47%
Online gambling	6%	30%	27%	26%	27%	100%	23%	28%	24%	31%	26%	38%	38%	35%	33%
Filesharing movies / programmes	5%	21%	23%	30%	32%	22%	100%	47%	29%	29%	35%	34%	46%	40%	41%
Watch pirate DVDs of movies	5%	31%	28%	30%	34%	26%	45%	100%	32%	36%	36%	33%	49%	39%	42%
Subscribe to MMORPG online game	5%	25%	25%	25%	31%	22%	28%	32%	100%	32%	30%	34%	36%	42%	44%
Watch TV on PC via tv-card/USB tuner	5%	24%	30%	41%	40%	27%	27%	35%	31%	100%	38%	36%	39%	43%	47%
Write on your own blog	5%	24%	28%	35%	37%	23%	31%	33%	28%	37%	100%	35%	39%	37%	41%
Pay to play online bingo	4%	26%	29%	32%	32%	31%	29%	29%	30%	33%	33%	100%	39%	41%	43%
Swap hard drives to share content	4%	29%	33%	29%	35%	31%	39%	42%	31%	35%	36%	39%	100%	43%	49%
Listen to audio books	4%	26%	32%	26%	29%	26%	31%	31%	34%	36%	32%	38%	40%	100%	57%
Read e-books/novels downloaded	4%	27%	34%	26%	34%	24%	32%	34%	36%	40%	36%	40%	46%	57%	100%
Subscribe paid mthly music d/l service	4%	28%	29%	32%	34%	30%	27%	33%	30%	39%	37%	43%	41%	42%	49%
Buy authorised digital download movie	4%	28%	33%	32%	35%	29%	28%	32%	29%	38%	35%	44%	41%	42%	46%
Filesharing games / software	4%	27%	26%	28%	33%	27%	44%	42%	30%	32%	34%	40%	45%	43%	44%
Watch PPV movies over Internet	3%	33%	33%	32%	38%	27%	29%	39%	31%	41%	38%	39%	44%	47%	52%
Play online poker for money	3%	22%	20%	21%	23%	33%	23%	24%	23%	24%	26%	41%	30%	29%	31%
Watch movies on Blu-ray disk	3%	22%	32%	24%	28%	21%	23%	28%	25%	34%	29%	30%	31%	33%	35%
Subscribe to paid-for podcast	2%	22%	25%	24%	33%	23%	22%	27%	26%	34%	33%	34%	32%	34%	36%

Crossover (Part 4 of 4)

% Do regularly on both axes	Total	Rent music	Buy movie download	p2p software	PPV online	Online poker	Blu-ray	Pay podcast
Listen to radio (not online)	51%	76%	72%	75%	84%	74%	73%	78%
Read paper/hardback books	47%	70%	71%	69%	71%	62%	68%	87%
Watch Sky/other subscription TV	45%	70%	76%	65%	67%	77%	76%	77%
Read newspapers (printed)	41%	76%	70%	70%	86%	70%	77%	80%
Read magazines	35%	67%	78%	68%	83%	69%	76%	82%
Browse social network sites	34%	65%	69%	68%	71%	60%	62%	79%
Play the National Lottery	34%	68%	59%	57%	76%	71%	72%	77%
Watch recorded television	32%	73%	67%	69%	73%	66%	74%	86%
Chatting on Instant Messenger	32%	66%	66%	58%	74%	54%	66%	70%
Visit newspaper websites	24%	61%	62%	61%	73%	52%	66%	80%
Use bluetooth technology/applications	21%	70%	69%	59%	77%	61%	73%	80%
Play offline games on PC	21%	60%	70%	57%	61%	58%	67%	77%
Go to cinema	21%	61%	68%	58%	74%	54%	67%	79%
Play online games on the PC	20%	62%	60%	62%	65%	67%	57%	67%
Listen to radio streamed online	18%	62%	67%	61%	74%	54%	61%	74%
Play games on handheld device	17%	58%	57%	59%	71%	56%	67%	68%
Rent DVDs	15%	57%	64%	51%	71%	46%	68%	79%
Buy video games	13%	58%	65%	52%	60%	49%	72%	74%
Stream music from social networks	12%	60%	68%	61%	78%	50%	61%	91%
Play online games on a console	12%	50%	70%	53%	64%	59%	64%	69%
Play games on your mobile	12%	59%	59%	56%	65%	50%	61%	71%
Use internet chatrooms	9%	52%	50%	47%	61%	46%	57%	64%
Making calls w/ Skype/other online	8%	49%	52%	48%	55%	44%	51%	69%
Using mobile to surf Internet	8%	49%	58%	52%	62%	43%	62%	69%
Listen to podcasts	8%	55%	57%	52%	62%	43%	56%	74%
Read other peoples' blogs	8%	51%	58%	47%	60%	42%	56%	64%
Filesharing music	8%	36%	45%	76%	56%	41%	45%	55%
Listen to radio on mobile phone	8%	54%	58%	54%	65%	45%	55%	78%
Watch PPV movies via Sky/cable	7%	56%	56%	55%	72%	49%	54%	75%
Watch movies on HD-DVD disk	7%	52%	60%	46%	64%	40%	70%	76%
Watch full tv progs on streaming sites	6%	54%	55%	49%	60%	39%	51%	71%
Watch full movies on streaming sites	6%	51%	54%	51%	63%	39%	53%	86%
Online gambling	6%	44%	43%	41%	43%	54%	40%	58%
Filesharing movies / programmes	5%	39%	40%	64%	45%	37%	42%	53%
Watch pirate DVDs of movies	5%	45%	45%	59%	59%	37%	48%	65%
Subscribe to MMORPG online game	5%	42%	40%	42%	47%	35%	43%	62%
Watch TV on PC via tv-card/USB tuner	5%	52%	50%	42%	59%	36%	56%	78%
Write on your own blog	5%	48%	44%	44%	53%	37%	47%	72%
Pay to play online bingo	4%	53%	53%	49%	51%	55%	45%	69%
Swap hard drives to share content	4%	49%	50%	55%	57%	40%	47%	66%
Listen to audio books	4%	47%	47%	49%	57%	36%	46%	64%
Read e-books/novels downloaded	4%	54%	51%	50%	63%	38%	49%	69%
Subscribe paid mthly music d/l service	4%	100%	55%	49%	64%	41%	55%	72%
Buy authorised digital download movie	4%	55%	100%	51%	59%	43%	56%	74%
Filesharing games / software	4%	49%	51%	100%	57%	40%	48%	64%
Watch PPV movies over Internet	3%	59%	54%	53%	100%	38%	56%	74%
Play online poker for money	3%	37%	39%	37%	38%	100%	36%	49%
Watch movies on Blu-ray disk	3%	44%	45%	39%	49%	32%	100%	66%
Subscribe to paid-for podcast	2%	42%	44%	38%	47%	32%	48%	100%

Caution:

Base sizes decrease as activity becomes increasingly niche

Activity (Regular)	Base
Subscribe paid mthly music d/l service	59
Buy authorised digital download movie	59
Filesharing games / software	59
Watch PPV movies over Internet	55
Play online poker for money	54
Watch movies on Blu-ray disk	48
Subscribe to paid-for podcast	35

Crossover (Part 1 of 4)

shown as relative to total

% Do regularly on both axes	Total	Radio	Books	Sky/ cable	News-papers	Maga-zines	Social network	Lottery	Record TV	Chat on IM	Paper sites	Blue-tooth	Offline games	Cinema	Online games
Listen to radio (not online)	51%		+10%	+8%	+13%	+15%	+7%	+11%	+13%	+5%	+17%	+17%	+5%	+15%	+10%
Read paper/hardback books	47%	+10%		+7%	+11%	+17%	+5%	+9%	+11%	+2%	+16%	+9%	+14%	+20%	+11%
Watch Sky/other subscription TV	45%	+8%	+6%		+6%	+9%	+2%	+14%	+16%	+1%	+9%	+14%	+16%	+10%	+12%
Read newspapers (printed)	41%	+11%	+10%	+6%		+22%	+3%	+14%	+16%	+4%	+25%	+12%	+7%	+21%	+5%
Read magazines	35%	+11%	+13%	+7%	+19%		+6%	+13%	+14%	+7%	+22%	+13%	+10%	+24%	+9%
Browse social network sites	34%	+5%	+4%	+1%	+2%	+5%		-5%	+5%	+26%	+5%	+16%	+7%	+14%	+13%
Play the National Lottery	34%	+7%	+6%	+10%	+11%	+12%	-6%		+12%	-4%	+13%	+7%	+7%	+10%	+11%
Watch recorded television	32%	+8%	+7%	+12%	+12%	+13%	+5%	+12%		+5%	+19%	+14%	+13%	+19%	+13%
Chatting on Instant Messenger	32%	+3%	+1%	+1%	+2%	+5%	+24%	-4%	+5%		+7%	+14%	+8%	+13%	+15%
Visit newspaper websites	24%	+8%	+8%	+5%	+15%	+15%	+4%	+10%	+14%	+6%		+13%	+10%	+20%	+9%
Use bluetooth technology/applications	21%	+8%	+4%	+7%	+7%	+9%	+11%	+5%	+10%	+10%	+12%		+11%	+12%	+12%
Play offline games on PC	21%	+3%	+7%	+8%	+4%	+6%	+5%	+5%	+9%	+6%	+9%	+11%		+11%	+31%
Go to cinema	21%	+7%	+9%	+5%	+11%	+15%	+9%	+7%	+13%	+10%	+18%	+12%	+11%		+8%
Play online games on the PC	20%	+4%	+4%	+5%	+2%	+5%	+8%	+6%	+8%	+10%	+7%	+10%	+28%	+7%	
Listen to radio streamed online	18%	+9%	+7%	+2%	+8%	+10%	+8%	+4%	+8%	+10%	+15%	+19%	+13%	+14%	+14%
Play games on handheld device	17%	+4%	+3%	+6%	+6%	+10%	+8%	+6%	+10%	+10%	+9%	+15%	+15%	+15%	+17%
Rent DVDs	15%	+5%	+7%	+1%	+6%	+9%	+4%	+6%	+8%	+5%	+13%	+8%	+9%	+21%	+9%
Buy video games	13%	+2%	+4%	+5%	+5%	+8%	+5%	+8%	+9%	+4%	+11%	+10%	+20%	+14%	+16%
Stream music from social networks	12%	+4%	+3%	+2%	+5%	+9%	+18%	+2%	+8%	+16%	+11%	+15%	+7%	+17%	+11%
Play online games on a console	12%	+3%	+2%	+5%	+3%	+5%	+9%	+2%	+6%	+7%	+6%	+14%	+16%	+9%	+21%
Play games on your mobile	12%	+4%	+3%	+3%	+4%	+8%	+9%	+2%	+5%	+7%	+8%	+17%	+13%	+13%	+17%
Use internet chatrooms	9%	+3%	+2%	+2%	+4%	+6%	+9%	+4%	+5%	+12%	+7%	+11%	+7%	+11%	+13%
Making calls w/ Skype/other online	8%	+3%	+3%	+2%	+3%	+4%	+5%	+4%	+7%	+7%	+10%	+9%	+9%	+9%	+11%
Using mobile to surf Internet	8%	+4%	+3%	+3%	+5%	+7%	+6%	+4%	+8%	+8%	+12%	+17%	+9%	+11%	+10%
Listen to podcasts	8%	+3%	+4%	+1%	+3%	+6%	+6%	+2%	+7%	+4%	+11%	+13%	+7%	+10%	+7%
Read other peoples' blogs	8%	+3%	+3%	+2%	+3%	+6%	+10%	+2%	+5%	+9%	+10%	+8%	+7%	+10%	+9%
Filesharing music	8%	+1%	0%	+2%	+2%	+3%	+6%	+1%	+3%	+5%	+3%	+9%	+5%	+6%	+8%
Listen to radio on mobile phone	8%	+4%	+2%	+2%	+5%	+7%	+6%	+4%	+8%	+7%	+8%	+12%	+7%	+12%	+9%
Watch PPV movies via Sky/cable	7%	+3%	+3%	+6%	+6%	+7%	+3%	+6%	+8%	+6%	+10%	+12%	+9%	+11%	+7%
Watch movies on HD-DVD disk	7%	+2%	+3%	+1%	+3%	+6%	+4%	+4%	+5%	+4%	+7%	+9%	+7%	+11%	+8%
Watch full tv progs on streaming sites	6%	+2%	+3%	+2%	+4%	+5%	+7%	+3%	+8%	+8%	+7%	+9%	+10%	+10%	+12%
Watch full movies on streaming sites	6%	+1%	+1%	+1%	+3%	+4%	+6%	+2%	+5%	+5%	+6%	+8%	+8%	+9%	+9%
Online gambling	6%	+1%	+1%	+3%	+4%	+3%	+2%	+5%	+5%	+2%	+6%	+6%	+6%	+8%	+6%
Filesharing movies / programmes	5%	+1%	+1%	+3%	+2%	+2%	+6%	+2%	+3%	+3%	+6%	+9%	+5%	+5%	+6%
Watch pirate DVDs of movies	5%	+3%	+3%	+3%	+4%	+5%	+5%	+3%	+5%	+5%	+7%	+9%	+5%	+7%	+8%
Subscribe to MMORPG online game	5%	+2%	+3%	+2%	+1%	+1%	+4%	+1%	+3%	+4%	+5%	+6%	+10%	+6%	+16%
Watch TV on PC via tv-card/USB tuner	5%	+2%	+2%	+1%	+3%	+4%	+3%	+3%	+5%	+4%	+7%	+8%	+8%	+8%	+8%
Write on your own blog	5%	+1%	+2%	+1%	+3%	+3%	+6%	+1%	+4%	+6%	+6%	+7%	+7%	+7%	+7%
Pay to play online bingo	4%	+2%	+3%	+3%	+4%	+4%	+4%	+7%	+5%	+5%	+5%	+7%	+8%	+7%	+12%
Swap hard drives to share content	4%	+3%	+2%	+1%	+4%	+4%	+5%	+3%	+5%	+5%	+6%	+10%	+6%	+7%	+10%
Listen to audio books	4%	+3%	+3%	+2%	+2%	+5%	+3%	+3%	+5%	+3%	+6%	+6%	+5%	+8%	+7%
Read e-books/novels downloaded	4%	+2%	+3%	+2%	+3%	+4%	+5%	+3%	+4%	+5%	+7%	+8%	+7%	+8%	+9%
Subscribe paid mthly music d/l service	4%	+2%	+2%	+2%	+3%	+3%	+3%	+3%	+4%	+4%	+5%	+8%	+6%	+7%	+8%
Buy authorised digital download movie	4%	+1%	+2%	+2%	+2%	+4%	+4%	+2%	+4%	+4%	+5%	+8%	+8%	+8%	+7%
Filesharing games / software	4%	+1%	+1%	+1%	+2%	+3%	+3%	+2%	+4%	+3%	+5%	+6%	+6%	+6%	+8%
Watch PPV movies over Internet	3%	+3%	+2%	+2%	+4%	+5%	+4%	+5%	+5%	+5%	+7%	+9%	+7%	+9%	+8%
Play online poker for money	3%	+2%	+1%	+3%	+3%	+4%	+3%	+4%	+4%	+3%	+4%	+7%	+6%	+6%	+8%
Watch movies on Blu-ray disk	3%	+1%	+1%	+2%	+3%	+3%	+2%	+3%	+4%	+3%	+5%	+7%	+6%	+6%	+6%
Subscribe to paid-for podcast	2%	+1%	+2%	+2%	+2%	+3%	+3%	+3%	+4%	+3%	+5%	+6%	+6%	+6%	+5%

Crossover (Part 2 of 4)

shown as relative to total

% Do regularly on both axes	Total	Stream radio	Hand games	Rent DVDs	Buy games	Music netwk	Online console	Mobile games	Chat-rooms	Skype et al	Mobile web	Podcast	Read blogs	p2p music	Mobile radio
Listen to radio (not online)	51%	+23%	+12%	+14%	+11%	+15%	+13%	+18%	+13%	+17%	+25%	+24%	+19%	+9%	+30%
Read paper/hardback books	47%	+16%	+9%	+22%	+15%	+9%	+9%	+12%	+11%	+18%	+15%	+23%	+19%	+5%	+17%
Watch Sky/other subscription TV	45%	+4%	+17%	+4%	+20%	+5%	+18%	+13%	+9%	+11%	+16%	+10%	+13%	+11%	+16%
Read newspapers (printed)	41%	+16%	+15%	+15%	+17%	+17%	+11%	+16%	+16%	+13%	+25%	+19%	+19%	+15%	+29%
Read magazines	35%	+18%	+21%	+20%	+24%	+25%	+15%	+24%	+21%	+17%	+32%	+26%	+27%	+14%	+37%
Browse social network sites	34%	+14%	+16%	+9%	+15%	+48%	+24%	+26%	+33%	+18%	+25%	+27%	+45%	+30%	+28%
Play the National Lottery	34%	+7%	+12%	+12%	+21%	+4%	+5%	+7%	+14%	+14%	+15%	+8%	+8%	+5%	+20%
Watch recorded television	32%	+13%	+18%	+16%	+23%	+20%	+17%	+13%	+18%	+26%	+33%	+28%	+24%	+13%	+36%
Chatting on Instant Messenger	32%	+17%	+18%	+9%	+10%	+41%	+18%	+20%	+41%	+25%	+30%	+19%	+39%	+21%	+30%
Visit newspaper websites	24%	+20%	+13%	+21%	+22%	+22%	+13%	+18%	+19%	+29%	+35%	+34%	+33%	+12%	+28%
Use bluetooth technology/applications	21%	+22%	+20%	+12%	+18%	+26%	+25%	+32%	+26%	+22%	+45%	+36%	+23%	+27%	+36%
Play offline games on PC	21%	+15%	+19%	+12%	+35%	+11%	+29%	+24%	+15%	+23%	+25%	+19%	+22%	+15%	+22%
Go to cinema	21%	+16%	+19%	+29%	+24%	+29%	+18%	+24%	+26%	+23%	+30%	+29%	+29%	+18%	+35%
Play online games on the PC	20%	+14%	+20%	+11%	+25%	+16%	+35%	+28%	+28%	+25%	+25%	+19%	+23%	+21%	+24%
Listen to radio streamed online	18%		+13%	+17%	+19%	+25%	+22%	+19%	+25%	+28%	+33%	+40%	+26%	+22%	+31%
Play games on handheld device	17%	+11%		+18%	+34%	+25%	+32%	+22%	+25%	+17%	+24%	+30%	+22%	+20%	+35%
Rent DVDs	15%	+14%	+17%		+25%	+17%	+14%	+14%	+19%	+23%	+27%	+27%	+22%	+13%	+27%
Buy video games	13%	+12%	+25%	+20%		+15%	+31%	+21%	+19%	+19%	+30%	+23%	+26%	+14%	+28%
Stream music from social networks	12%	+17%	+19%	+14%	+15%		+19%	+25%	+34%	+22%	+28%	+26%	+38%	+26%	+38%
Play online games on a console	12%	+14%	+22%	+11%	+29%	+17%		+26%	+24%	+20%	+29%	+22%	+28%	+20%	+31%
Play games on your mobile	12%	+12%	+16%	+11%	+20%	+24%	+26%		+28%	+14%	+37%	+25%	+27%	+21%	+34%
Use internet chatrooms	9%	+12%	+14%	+11%	+14%	+25%	+19%	+22%		+20%	+27%	+22%	+31%	+20%	+29%
Making calls w/ Skype/other online	8%	+13%	+9%	+13%	+12%	+14%	+14%	+10%	+18%		+24%	+23%	+29%	+18%	+22%
Using mobile to surf Internet	8%	+14%	+11%	+14%	+19%	+18%	+20%	+25%	+23%	+23%		+26%	+26%	+24%	+33%
Listen to podcasts	8%	+16%	+13%	+13%	+14%	+16%	+14%	+16%	+18%	+21%	+25%		+27%	+18%	+26%
Read other peoples' blogs	8%	+10%	+10%	+11%	+16%	+23%	+18%	+17%	+26%	+26%	+25%	+27%		+21%	+27%
Filesharing music	8%	+9%	+8%	+6%	+8%	+15%	+13%	+13%	+16%	+16%	+23%	+17%	+20%		+18%
Listen to radio on mobile phone	8%	+12%	+15%	+13%	+16%	+23%	+19%	+21%	+23%	+19%	+31%	+25%	+26%	+18%	
Watch PPV movies via Sky/cable	7%	+12%	+16%	+16%	+16%	+20%	+15%	+14%	+23%	+22%	+25%	+23%	+20%	+17%	+33%
Watch movies on HD-DVD disk	7%	+11%	+10%	+17%	+15%	+18%	+17%	+15%	+23%	+19%	+25%	+19%	+24%	+15%	+23%
Watch full tv progs on streaming sites	6%	+10%	+11%	+14%	+14%	+24%	+15%	+16%	+19%	+24%	+22%	+18%	+30%	+27%	+25%
Watch full movies on streaming sites	6%	+10%	+10%	+11%	+13%	+23%	+14%	+15%	+21%	+21%	+23%	+21%	+28%	+24%	+24%
Online gambling	6%	+9%	+9%	+10%	+12%	+8%	+11%	+9%	+12%	+15%	+24%	+19%	+14%	+13%	+18%
Filesharing movies / programmes	5%	+7%	+7%	+6%	+10%	+13%	+10%	+12%	+16%	+16%	+19%	+20%	+19%	+51%	+16%
Watch pirate DVDs of movies	5%	+7%	+11%	+11%	+12%	+16%	+10%	+15%	+16%	+18%	+22%	+21%	+17%	+30%	+22%
Subscribe to MMORPG online game	5%	+8%	+7%	+10%	+12%	+13%	+12%	+10%	+18%	+15%	+16%	+16%	+19%	+16%	+17%
Watch TV on PC via tv-card/USB tuner	5%	+10%	+10%	+12%	+13%	+17%	+13%	+12%	+15%	+23%	+21%	+24%	+20%	+18%	+21%
Write on your own blog	5%	+8%	+7%	+10%	+12%	+16%	+14%	+12%	+20%	+21%	+20%	+22%	+39%	+19%	+20%
Pay to play online bingo	4%	+9%	+8%	+11%	+12%	+14%	+16%	+14%	+18%	+21%	+19%	+18%	+20%	+20%	+22%
Swap hard drives to share content	4%	+11%	+11%	+10%	+10%	+17%	+14%	+13%	+21%	+23%	+21%	+25%	+22%	+26%	+21%
Listen to audio books	4%	+11%	+10%	+11%	+11%	+14%	+11%	+14%	+17%	+19%	+18%	+28%	+18%	+20%	+21%
Read e-books/novels downloaded	4%	+12%	+10%	+10%	+13%	+16%	+16%	+15%	+24%	+22%	+23%	+29%	+22%	+18%	+22%
Subscribe paid mthly music d/l service	4%	+8%	+9%	+10%	+13%	+14%	+12%	+14%	+17%	+18%	+18%	+22%	+20%	+14%	+22%
Buy authorised digital download movie	4%	+9%	+8%	+11%	+15%	+16%	+18%	+14%	+16%	+19%	+23%	+23%	+24%	+18%	+24%
Filesharing games / software	4%	+8%	+9%	+8%	+11%	+14%	+12%	+13%	+15%	+17%	+20%	+20%	+18%	+32%	+22%
Watch PPV movies over Internet	3%	+11%	+11%	+13%	+13%	+19%	+15%	+15%	+19%	+20%	+23%	+24%	+24%	+22%	+26%
Play online poker for money	3%	+7%	+8%	+7%	+10%	+10%	+14%	+11%	+14%	+15%	+15%	+16%	+15%	+15%	+17%
Watch movies on Blu-ray disk	3%	+7%	+9%	+10%	+14%	+12%	+13%	+12%	+15%	+16%	+20%	+18%	+19%	+14%	+19%
Subscribe to paid-for podcast	2%	+7%	+7%	+9%	+11%	+14%	+11%	+11%	+13%	+16%	+17%	+19%	+16%	+14%	+20%

Crossover (Part 3 of 4)

shown as relative to total

% Do regularly on both axes	Total	PPV Sky et al	HD-DVD	Stream TV	Stream movies	Online gamble	p2p movies	Pirate DVDs	MMO-RPG	TV via PC	Write blog	Online bingo	Swap HDDs	Audio books	eBooks
Listen to radio (not online)	51%	+16%	+22%	+11%	+11%	+17%	+7%	+25%	+14%	+21%	+17%	+22%	+28%	+34%	+27%
Read paper/hardback books	47%	+18%	+25%	+17%	+11%	+13%	+10%	+24%	+23%	+23%	+27%	+27%	+21%	+37%	+35%
Watch Sky/other subscription TV	45%	+33%	+13%	+14%	+11%	+32%	+20%	+22%	+13%	+14%	+14%	+24%	+11%	+15%	+16%
Read newspapers (printed)	41%	+28%	+22%	+24%	+25%	+32%	+17%	+30%	+4%	+23%	+24%	+32%	+34%	+19%	+31%
Read magazines	35%	+33%	+36%	+24%	+25%	+21%	+14%	+34%	+10%	+28%	+26%	+30%	+25%	+39%	+31%
Browse social network sites	34%	+13%	+21%	+36%	+35%	+13%	+35%	+30%	+28%	+23%	+45%	+25%	+37%	+22%	+37%
Play the National Lottery	34%	+26%	+23%	+13%	+12%	+31%	+12%	+21%	+9%	+24%	+11%	+45%	+17%	+25%	+25%
Watch recorded television	32%	+33%	+28%	+38%	+30%	+29%	+19%	+30%	+20%	+36%	+27%	+33%	+33%	+38%	+33%
Chatting on Instant Messenger	32%	+22%	+23%	+39%	+28%	+13%	+17%	+29%	+25%	+27%	+38%	+28%	+32%	+23%	+35%
Visit newspaper websites	24%	+32%	+29%	+26%	+27%	+29%	+25%	+34%	+25%	+33%	+31%	+26%	+33%	+36%	+42%
Use bluetooth technology/applications	21%	+35%	+30%	+30%	+30%	+24%	+37%	+38%	+26%	+34%	+35%	+32%	+47%	+33%	+44%
Play offline games on PC	21%	+24%	+23%	+33%	+30%	+24%	+19%	+21%	+41%	+37%	+33%	+38%	+27%	+28%	+35%
Go to cinema	21%	+31%	+38%	+32%	+34%	+33%	+20%	+31%	+24%	+36%	+31%	+33%	+33%	+39%	+42%
Play online games on the PC	20%	+18%	+26%	+34%	+31%	+25%	+23%	+30%	+60%	+31%	+31%	+50%	+41%	+35%	+41%
Listen to radio streamed online	18%	+29%	+32%	+29%	+35%	+31%	+24%	+26%	+29%	+39%	+31%	+37%	+45%	+49%	+51%
Play games on handheld device	17%	+35%	+27%	+27%	+30%	+30%	+22%	+36%	+24%	+33%	+27%	+30%	+39%	+41%	+42%
Rent DVDs	15%	+32%	+40%	+33%	+32%	+30%	+18%	+34%	+29%	+38%	+33%	+37%	+33%	+41%	+38%
Buy video games	13%	+26%	+30%	+26%	+30%	+28%	+23%	+29%	+29%	+33%	+33%	+32%	+28%	+33%	+39%
Stream music from social networks	12%	+34%	+35%	+46%	+52%	+20%	+31%	+38%	+32%	+43%	+42%	+37%	+47%	+41%	+48%
Play online games on a console	12%	+24%	+31%	+26%	+31%	+24%	+22%	+23%	+27%	+32%	+35%	+40%	+37%	+33%	+45%
Play games on your mobile	12%	+22%	+28%	+29%	+32%	+20%	+27%	+35%	+24%	+29%	+31%	+37%	+35%	+40%	+42%
Use internet chatrooms	9%	+29%	+33%	+27%	+35%	+22%	+27%	+29%	+33%	+29%	+40%	+37%	+42%	+37%	+53%
Making calls w/ Skype/other online	8%	+24%	+24%	+31%	+32%	+23%	+24%	+28%	+24%	+38%	+37%	+37%	+42%	+38%	+45%
Using mobile to surf Internet	8%	+27%	+31%	+28%	+33%	+35%	+29%	+35%	+24%	+34%	+35%	+32%	+37%	+35%	+45%
Listen to podcasts	8%	+24%	+23%	+21%	+29%	+27%	+29%	+31%	+24%	+38%	+36%	+31%	+43%	+53%	+55%
Read other peoples' blogs	8%	+20%	+28%	+36%	+38%	+20%	+27%	+26%	+29%	+32%	+64%	+33%	+38%	+33%	+41%
Filesharing music	8%	+17%	+17%	+32%	+32%	+18%	+72%	+44%	+24%	+27%	+31%	+33%	+44%	+37%	+33%
Listen to radio on mobile phone	8%	+33%	+26%	+29%	+32%	+24%	+22%	+32%	+24%	+32%	+32%	+36%	+35%	+38%	+40%
Watch PPV movies via Sky/cable	7%		+24%	+26%	+28%	+34%	+23%	+39%	+30%	+30%	+30%	+35%	+41%	+40%	+41%
Watch movies on HD-DVD disk	7%	+20%		+27%	+38%	+25%	+22%	+30%	+25%	+34%	+32%	+36%	+42%	+43%	+48%
Watch full tv progs on streaming sites	6%	+23%	+27%		+54%	+23%	+30%	+31%	+25%	+47%	+41%	+39%	+36%	+35%	+35%
Watch full movies on streaming sites	6%	+21%	+33%	+47%		+22%	+28%	+32%	+29%	+40%	+39%	+34%	+39%	+34%	+41%
Online gambling	6%	+24%	+21%	+20%	+21%		+17%	+22%	+18%	+25%	+20%	+32%	+32%	+29%	+27%
Filesharing movies / programmes	5%	+16%	+18%	+25%	+27%	+17%		+42%	+24%	+24%	+30%	+29%	+41%	+35%	+36%
Watch pirate DVDs of movies	5%	+26%	+23%	+25%	+29%	+21%	+40%		+27%	+31%	+31%	+28%	+44%	+34%	+37%
Subscribe to MMORPG online game	5%	+20%	+20%	+20%	+26%	+17%	+23%	+27%		+27%	+25%	+29%	+31%	+37%	+39%
Watch TV on PC via tv-card/USB tuner	5%	+19%	+25%	+36%	+35%	+22%	+22%	+30%	+26%		+33%	+31%	+34%	+38%	+42%
Write on your own blog	5%	+19%	+23%	+30%	+32%	+18%	+26%	+28%	+23%	+32%		+30%	+34%	+32%	+36%
Pay to play online bingo	4%	+22%	+25%	+28%	+28%	+27%	+25%	+25%	+26%	+29%	+29%		+35%	+37%	+39%
Swap hard drives to share content	4%	+25%	+29%	+25%	+31%	+27%	+35%	+38%	+27%	+31%	+32%	+35%		+39%	+45%
Listen to audio books	4%	+22%	+28%	+22%	+25%	+22%	+27%	+27%	+30%	+32%	+28%	+34%	+36%		+53%
Read e-books/novels downloaded	4%	+23%	+30%	+22%	+30%	+20%	+28%	+30%	+32%	+36%	+32%	+36%	+42%	+53%	
Subscribe paid mthly music d/l service	4%	+24%	+25%	+28%	+30%	+26%	+23%	+29%	+26%	+35%	+33%	+39%	+37%	+38%	+45%
Buy authorised digital download movie	4%	+24%	+29%	+28%	+31%	+25%	+24%	+28%	+25%	+34%	+31%	+40%	+37%	+38%	+42%
Filesharing games / software	4%	+23%	+22%	+24%	+29%	+23%	+40%	+38%	+26%	+28%	+30%	+36%	+41%	+39%	+40%
Watch PPV movies over Internet	3%	+30%	+30%	+29%	+35%	+24%	+26%	+36%	+28%	+38%	+35%	+36%	+41%	+44%	+49%
Play online poker for money	3%	+19%	+17%	+18%	+20%	+30%	+20%	+21%	+20%	+21%	+23%	+38%	+27%	+26%	+28%
Watch movies on Blu-ray disk	3%	+19%	+29%	+21%	+25%	+18%	+20%	+25%	+22%	+31%	+26%	+27%	+28%	+30%	+32%
Subscribe to paid-for podcast	2%	+20%	+23%	+22%	+31%	+21%	+20%	+25%	+24%	+32%	+31%	+32%	+30%	+32%	+34%

Crossover (Part 4 of 4)

shown as relative to total

% Do regularly on both axes	Total	Rent music	Buy movie download	p2p software	PPV online	Online poker	Blu-ray	Pay podcast
Listen to radio (not online)	51%	+25%	+21%	+24%	+33%	+23%	+22%	+27%
Read paper/hardback books	47%	+23%	+24%	+22%	+24%	+15%	+21%	+40%
Watch Sky/other subscription TV	45%	+25%	+31%	+20%	+22%	+32%	+31%	+32%
Read newspapers (printed)	41%	+35%	+29%	+29%	+45%	+29%	+36%	+39%
Read magazines	35%	+32%	+43%	+33%	+48%	+34%	+41%	+47%
Browse social network sites	34%	+31%	+35%	+34%	+37%	+26%	+28%	+45%
Play the National Lottery	34%	+34%	+25%	+23%	+42%	+37%	+38%	+43%
Watch recorded television	32%	+41%	+35%	+37%	+41%	+34%	+42%	+54%
Chatting on Instant Messenger	32%	+34%	+34%	+26%	+42%	+22%	+34%	+38%
Visit newspaper websites	24%	+37%	+38%	+37%	+49%	+28%	+42%	+56%
Use bluetooth technology/applications	21%	+49%	+48%	+38%	+56%	+40%	+52%	+59%
Play offline games on PC	21%	+39%	+49%	+36%	+40%	+37%	+46%	+56%
Go to cinema	21%	+40%	+47%	+37%	+53%	+33%	+46%	+58%
Play online games on the PC	20%	+42%	+40%	+42%	+45%	+47%	+37%	+47%
Listen to radio streamed online	18%	+44%	+49%	+43%	+56%	+36%	+43%	+56%
Play games on handheld device	17%	+41%	+40%	+42%	+54%	+39%	+50%	+51%
Rent DVDs	15%	+42%	+49%	+36%	+56%	+31%	+53%	+64%
Buy video games	13%	+45%	+52%	+39%	+47%	+36%	+59%	+61%
Stream music from social networks	12%	+48%	+56%	+49%	+66%	+38%	+49%	+79%
Play online games on a console	12%	+38%	+58%	+41%	+52%	+47%	+52%	+57%
Play games on your mobile	12%	+47%	+47%	+44%	+53%	+38%	+49%	+59%
Use internet chatrooms	9%	+43%	+41%	+38%	+52%	+37%	+48%	+55%
Making calls w/ Skype/other online	8%	+41%	+44%	+40%	+47%	+36%	+43%	+61%
Using mobile to surf Internet	8%	+41%	+50%	+44%	+54%	+35%	+54%	+61%
Listen to podcasts	8%	+47%	+49%	+44%	+54%	+35%	+48%	+66%
Read other peoples' blogs	8%	+43%	+50%	+39%	+52%	+34%	+48%	+56%
Filesharing music	8%	+28%	+37%	+68%	+48%	+33%	+37%	+47%
Listen to radio on mobile phone	8%	+46%	+50%	+46%	+57%	+37%	+47%	+70%
Watch PPV movies via Sky/cable	7%	+49%	+49%	+48%	+65%	+42%	+47%	+68%
Watch movies on HD-DVD disk	7%	+45%	+53%	+39%	+57%	+33%	+63%	+69%
Watch full tv progs on streaming sites	6%	+48%	+49%	+43%	+54%	+33%	+45%	+65%
Watch full movies on streaming sites	6%	+45%	+48%	+45%	+57%	+33%	+47%	+80%
Online gambling	6%	+38%	+37%	+35%	+37%	+48%	+34%	+52%
Filesharing movies / programmes	5%	+34%	+35%	+59%	+40%	+32%	+37%	+48%
Watch pirate DVDs of movies	5%	+40%	+40%	+54%	+54%	+32%	+43%	+60%
Subscribe to MMORPG online game	5%	+37%	+35%	+37%	+42%	+30%	+38%	+57%
Watch TV on PC via tv-card/USB tuner	5%	+47%	+45%	+37%	+54%	+31%	+51%	+73%
Write on your own blog	5%	+43%	+39%	+39%	+48%	+32%	+42%	+67%
Pay to play online bingo	4%	+49%	+49%	+45%	+47%	+51%	+41%	+65%
Swap hard drives to share content	4%	+45%	+46%	+51%	+53%	+36%	+43%	+62%
Listen to audio books	4%	+43%	+43%	+45%	+53%	+32%	+42%	+60%
Read e-books/novels downloaded	4%	+50%	+47%	+46%	+59%	+34%	+45%	+65%
Subscribe paid mthly music d/l service	4%		+51%	+45%	+60%	+37%	+51%	+68%
Buy authorised digital download movie	4%	+51%		+47%	+55%	+39%	+52%	+70%
Filesharing games / software	4%	+45%	+47%		+53%	+36%	+44%	+60%
Watch PPV movies over Internet	3%	+56%	+51%	+50%		+35%	+53%	+71%
Play online poker for money	3%	+34%	+36%	+34%	+35%		+33%	+46%
Watch movies on Blu-ray disk	3%	+41%	+42%	+36%	+46%	+29%		+63%
Subscribe to paid-for podcast	2%	+40%	+42%	+36%	+45%	+30%	+46%	

Caution:

Base sizes decrease as activity becomes increasingly niche

Activity (Regular)	Base
Subscribe paid mthly music d/l service	59
Buy authorised digital download movie	59
Filesharing games / software	59
Watch PPV movies over Internet	55
Play online poker for money	54
Watch movies on Blu-ray disk	48
Subscribe to paid-for podcast	35

WIGGIN

Appendix

Technology and device ownership crossover

ENTERTAINMENTMEDIARESEARCH

Technology and devices owned crossover (1 of 2)

WIGGIN
ENTERTAINMENTMEDIARESEARCH

% Own / access as if own on both axes	Total	Dig camera	Mobile intrnet	Wireless net	Free-view	Basic mobile	DVD record	Mobile media	Sky	Dig player	HD TV	iPod	Extnrl HDD	Media Center	Cable TV	Sky+	FV Top up
Digital Camera (not on mobile)	79%	100%	86%	88%	87%	85%	86%	86%	86%	90%	89%	91%	90%	88%	83%	86%	86%
Mobile phone access the Internet	68%	74%	100%	76%	74%	63%	76%	92%	79%	81%	79%	80%	82%	81%	75%	81%	77%
Wireless network at home	56%	62%	62%	100%	64%	61%	64%	67%	68%	66%	70%	73%	73%	68%	58%	76%	68%
Freeview (but not Top Up)	53%	59%	58%	61%	100%	59%	60%	61%	48%	63%	64%	59%	64%	61%	52%	52%	75%
Basic mobile phone	49%	53%	45%	53%	54%	100%	55%	43%	52%	56%	53%	57%	57%	57%	55%	53%	59%
DVD Recorder	48%	52%	54%	55%	54%	55%	100%	56%	57%	58%	63%	57%	65%	62%	56%	63%	62%
Mobile phone w/ media player	46%	50%	62%	56%	53%	41%	54%	100%	55%	59%	57%	59%	61%	63%	55%	60%	60%
Satellite television / Sky	44%	47%	50%	53%	39%	46%	52%	52%	100%	51%	56%	56%	53%	57%	35%	89%	49%
Personal digital music plyr (excl iPod)	40%	46%	48%	48%	48%	46%	48%	51%	47%	100%	51%	46%	58%	55%	50%	49%	53%
HD-ready tv set	39%	43%	45%	48%	47%	42%	51%	48%	49%	49%	100%	50%	53%	54%	46%	56%	58%
iPod	36%	42%	42%	48%	40%	42%	43%	46%	46%	42%	47%	100%	51%	48%	41%	56%	53%
External HDD to store media	35%	39%	42%	45%	41%	40%	47%	46%	42%	50%	48%	48%	100%	50%	45%	48%	48%
Windows Media Center	33%	37%	40%	41%	38%	39%	43%	45%	44%	46%	46%	44%	48%	100%	43%	50%	49%
Cable television	31%	33%	34%	32%	30%	35%	36%	37%	25%	39%	37%	35%	41%	41%	100%	29%	42%
Sky +	25%	27%	30%	34%	24%	27%	32%	32%	51%	30%	36%	38%	35%	37%	23%	100%	33%
Freeview plus Top Up	24%	26%	27%	29%	34%	29%	31%	31%	27%	32%	36%	36%	34%	35%	32%	32%	100%
Nintendo Wii	24%	27%	28%	31%	29%	27%	30%	31%	36%	30%	36%	36%	34%	32%	32%	45%	36%
DVR ie HDD recorder (excl Sky+)	24%	27%	28%	31%	31%	29%	38%	32%	30%	33%	38%	34%	39%	38%	33%	43%	41%
Non-portable DAB radio	23%	26%	26%	29%	30%	28%	30%	31%	30%	33%	33%	37%	35%	34%	31%	36%	38%
Computer with TV viewing card	22%	25%	27%	31%	29%	27%	32%	31%	30%	35%	33%	34%	37%	44%	31%	39%	41%
Portable DAB radio	21%	23%	24%	27%	26%	26%	29%	27%	28%	30%	30%	32%	34%	33%	29%	38%	36%
iPod with video	20%	24%	25%	27%	24%	23%	27%	29%	29%	27%	32%	47%	34%	33%	30%	36%	38%
Xbox 360	20%	21%	23%	26%	24%	21%	24%	28%	29%	27%	31%	30%	30%	29%	28%	37%	32%
Personal video plyr, excl video iPod	18%	20%	22%	24%	23%	22%	26%	26%	24%	33%	27%	28%	31%	31%	28%	31%	32%
An HD-DVD Player	16%	18%	20%	21%	21%	21%	26%	23%	22%	23%	32%	27%	30%	30%	26%	31%	34%
Playstation 3	16%	17%	18%	21%	19%	19%	21%	22%	25%	22%	28%	27%	26%	27%	24%	35%	33%
iPhone / N95 or similar	16%	17%	21%	22%	19%	18%	21%	28%	24%	24%	24%	28%	29%	28%	25%	32%	29%
PDA/Blackberry	13%	14%	16%	19%	16%	17%	18%	19%	19%	21%	20%	23%	25%	22%	23%	25%	24%
iPod with touchscreen	10%	12%	14%	15%	14%	14%	16%	16%	18%	18%	18%	25%	20%	21%	20%	27%	23%
An e-book reader	9%	9%	11%	13%	12%	13%	14%	14%	14%	16%	17%	17%	20%	19%	19%	23%	21%
Blu-ray player (not PS3)	7%	8%	9%	10%	10%	10%	12%	11%	12%	14%	14%	16%	17%	15%	16%	21%	18%
Apple iTV set top box	6%	7%	7%	9%	9%	9%	10%	10%	11%	12%	12%	13%	13%	14%	16%	20%	18%

Technology and devices owned crossover (2 of 2)

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% Own / access as if own on both axes	Total	Wii	DVR	DAB	TV via PC	DAB prtble	iPod w/ video	Xbox 360	Pers'l video	HD-DVD	PS3	iPhone/ N95	PDA/B-berry	iPod Touch	e-Book reader	Blu-ray	Apple Set-top
Digital Camera (not on mobile)	79%	89%	89%	88%	89%	88%	92%	86%	90%	88%	86%	87%	91%	91%	83%	94%	88%
Mobile phone access the Internet	68%	80%	80%	76%	84%	77%	85%	81%	85%	83%	77%	91%	87%	90%	86%	89%	84%
Wireless network at home	56%	73%	74%	69%	77%	71%	76%	74%	77%	71%	75%	78%	83%	79%	82%	84%	88%
Freeview (but not Top Up)	53%	65%	70%	68%	70%	68%	63%	66%	70%	68%	63%	67%	69%	71%	74%	78%	86%
Basic mobile phone	49%	55%	59%	58%	60%	59%	57%	53%	60%	61%	57%	55%	65%	68%	72%	75%	77%
DVD Recorder	48%	59%	76%	63%	68%	67%	63%	59%	71%	77%	62%	65%	70%	76%	78%	85%	85%
Mobile phone w/ media player	46%	60%	63%	61%	65%	59%	67%	66%	68%	65%	65%	84%	71%	71%	74%	77%	82%
Satellite television / Sky	44%	65%	55%	55%	59%	58%	63%	63%	60%	57%	67%	67%	65%	74%	70%	79%	81%
Personal digital music plyr (excl iPod)	40%	50%	55%	57%	64%	58%	54%	56%	75%	57%	57%	63%	67%	69%	72%	82%	83%
HD-ready tv set	39%	58%	61%	55%	57%	56%	62%	62%	60%	76%	67%	59%	62%	67%	72%	81%	78%
iPod	36%	54%	51%	57%	56%	55%	84%	56%	58%	60%	63%	66%	67%	87%	67%	84%	83%
External HDD to store media	35%	49%	57%	52%	59%	57%	59%	53%	61%	63%	56%	64%	70%	66%	78%	87%	79%
Windows Media Center	33%	45%	54%	48%	67%	52%	54%	49%	59%	61%	56%	60%	57%	67%	70%	76%	78%
Cable television	31%	41%	44%	41%	43%	43%	46%	45%	50%	49%	46%	49%	57%	60%	66%	74%	83%
Sky +	25%	47%	45%	38%	43%	46%	45%	46%	44%	48%	54%	51%	50%	65%	63%	78%	85%
Freeview plus Top Up	24%	36%	41%	39%	44%	42%	46%	40%	45%	50%	50%	46%	47%	54%	57%	65%	74%
Nintendo Wii	24%	100%	38%	35%	37%	39%	45%	50%	41%	43%	53%	50%	52%	62%	61%	73%	78%
DVR ie HDD recorder (excl Sky+)	24%	38%	100%	44%	43%	47%	41%	43%	51%	53%	48%	47%	55%	56%	65%	79%	80%
Non-portable DAB radio	23%	34%	43%	100%	41%	51%	43%	39%	46%	46%	45%	52%	53%	56%	62%	69%	78%
Computer with TV viewing card	22%	34%	40%	39%	100%	40%	41%	40%	51%	50%	46%	47%	57%	59%	67%	76%	73%
Portable DAB radio	21%	34%	41%	45%	38%	100%	41%	36%	45%	45%	41%	46%	51%	59%	61%	74%	77%
iPod with video	20%	38%	35%	37%	38%	40%	100%	44%	47%	46%	44%	53%	51%	69%	64%	77%	84%
Xbox 360	20%	41%	36%	33%	35%	34%	43%	100%	43%	42%	50%	45%	49%	53%	57%	76%	80%
Personal video plyr, excl video iPod	18%	30%	38%	34%	41%	37%	41%	39%	100%	44%	45%	45%	52%	56%	66%	76%	79%
An HD-DVD Player	16%	29%	37%	32%	37%	35%	38%	35%	41%	100%	43%	44%	45%	58%	62%	78%	78%
Playstation 3	16%	35%	32%	30%	33%	31%	35%	40%	40%	42%	100%	42%	42%	53%	57%	71%	78%
iPhone / N95 or similar	16%	33%	31%	35%	33%	34%	41%	36%	40%	42%	41%	100%	49%	56%	60%	72%	78%
PDA/Blackberry	13%	27%	29%	28%	32%	30%	32%	32%	37%	34%	33%	40%	100%	49%	63%	68%	75%
iPod with touchscreen	10%	26%	24%	25%	27%	29%	35%	28%	33%	36%	34%	37%	40%	100%	57%	70%	75%
An e-book reader	9%	23%	25%	24%	27%	26%	28%	26%	34%	34%	32%	35%	45%	49%	100%	66%	79%
Blu-ray player (not PS3)	7%	20%	22%	20%	23%	24%	26%	26%	29%	32%	30%	31%	36%	46%	49%	100%	71%
Apple TV set top box	6%	19%	20%	20%	19%	21%	24%	24%	26%	28%	29%	29%	35%	43%	52%	62%	100%

Technology and devices owned crossover (1 of 2 – shown as relative to total)

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% Own / access as if own on both axes	Total	Dig camera	Mobile intrnet	Wireles s net	Free-view	Basic mobile	DVD record	Mobile media	Sky	Dig player	HD TV	iPod	Extnrl HDD	Media Center	Cable TV	Sky+	FV Top up
Digital Camera (not on mobile)	79%		+7%	+9%	+8%	+6%	+7%	+7%	+7%	+11%	+10%	+12%	+11%	+9%	+4%	+7%	+7%
Mobile phone access the Internet	68%	+6%		+8%	+6%	-5%	+8%	+24%	+11%	+13%	+11%	+12%	+14%	+13%	+7%	+13%	+9%
Wireless network at home	56%	+6%	+6%		+8%	+5%	+8%	+11%	+12%	+10%	+14%	+17%	+17%	+12%	+2%	+20%	+12%
Freeview (but not Top Up)	53%	+6%	+5%	+8%		+6%	+7%	+8%	-5%	+10%	+11%	+6%	+11%	+8%	-1%	-1%	+22%
Basic mobile phone	49%	+4%	-4%	+4%	+5%		+6%	-6%	+3%	+7%	+4%	+8%	+8%	+8%	+6%	+4%	+10%
DVD Recorder	48%	+4%	+6%	+7%	+6%	+7%		+8%	+9%	+10%	+15%	+9%	+17%	+14%	+8%	+15%	+14%
Mobile phone w/ media player	46%	+4%	+16%	+10%	+7%	-5%	+8%		+9%	+13%	+11%	+13%	+15%	+17%	+9%	+14%	+14%
Satellite television / Sky	44%	+3%	+6%	+9%	-5%	+2%	+8%	+8%		+7%	+12%	+12%	+9%	+13%	-9%	+45%	+5%
Personal digital music plyr (excl iPod)	40%	+6%	+8%	+8%	+8%	+6%	+8%	+11%	+7%		+11%	+6%	+18%	+15%	+10%	+9%	+13%
HD-ready tv set	39%	+4%	+6%	+9%	+8%	+3%	+12%	+9%	+10%	+10%		+11%	+14%	+15%	+7%	+17%	+19%
iPod	36%	+6%	+6%	+12%	+4%	+6%	+7%	+10%	+10%	+6%	+11%		+15%	+12%	+5%	+20%	+17%
External HDD to store media	35%	+4%	+7%	+10%	+6%	+5%	+12%	+11%	+7%	+15%	+13%	+13%		+15%	+10%	+13%	+13%
Windows Media Center	33%	+4%	+7%	+8%	+5%	+6%	+10%	+12%	+11%	+13%	+13%	+11%	+15%		+10%	+17%	+16%
Cable television	31%	+2%	+3%	+1%	-1%	+4%	+5%	+6%	-6%	+8%	+6%	+4%	+10%	+10%		-2%	+11%
Sky +	25%	+2%	+5%	+9%	-1%	+2%	+7%	+7%		+5%	+11%	+13%	+10%	+12%	-2%		+8%
Freeview plus Top Up	24%	+2%	+3%	+5%		+5%	+7%	+7%	+3%	+8%	+12%	+12%	+10%	+11%	+8%	+8%	
Nintendo Wii	24%	+3%	+4%	+7%	+5%	+3%	+6%	+7%	+12%	+6%	+12%	+12%	+10%	+8%	+8%	+21%	+12%
DVR ie HDD recorder (excl Sky+)	24%	+3%	+4%	+7%	+7%	+5%	+14%	+8%	+6%	+9%	+14%	+10%	+15%	+14%	+9%	+19%	+17%
Non-portable DAB radio	23%	+3%	+3%	+6%	+7%	+5%	+7%	+8%	+7%	+10%	+10%	+14%	+12%	+11%	+8%	+13%	+15%
Computer with TV viewing card	22%	+3%	+5%	+9%	+7%	+5%	+10%	+9%	+8%	+13%	+11%	+12%	+15%	+22%	+9%	+17%	+19%
Portable DAB radio	21%	+2%	+3%	+6%	+5%	+5%	+8%	+6%	+7%	+9%	+9%	+11%	+13%	+12%	+8%	+17%	+15%
iPod with video	20%	+4%	+5%	+7%	+4%	+3%	+7%	+9%	+9%	+7%	+12%	+27%	+14%	+13%	+10%	+16%	+18%
Xbox 360	20%	+1%	+3%	+6%	+4%	+1%	+4%	+8%	+9%	+7%	+11%	+10%	+10%	+9%	+8%	+17%	+12%
Personal video plyr, excl video iPod	18%	+2%	+4%	+6%	+5%	+4%	+8%	+8%	+6%	+15%	+9%	+10%	+13%	+13%	+10%	+13%	+14%
An HD-DVD Player	16%	+2%	+4%	+5%	+5%	+5%	+10%	+7%	+6%	+7%	+16%	+11%	+14%	+14%	+10%	+15%	+18%
Playstation 3	16%	+1%	+2%	+5%	+3%	+3%	+5%	+6%	+9%	+6%	+12%	+11%	+10%	+11%	+8%	+19%	+17%
iPhone / N95 or similar	16%	+1%	+5%	+6%	+3%	+2%	+5%	+12%	+8%	+8%	+8%	+12%	+13%	+12%	+9%	+16%	+13%
PDA/Blackberry	13%	+1%	+3%	+6%	+3%	+4%	+5%	+6%	+6%	+8%	+7%	+10%	+12%	+9%	+10%	+12%	+11%
iPod with touchscreen	10%	+2%	+4%	+5%	+4%	+4%	+6%	+6%	+8%	+8%	+8%	+15%	+10%	+11%	+10%	+17%	+13%
An e-book reader	9%	+0%	+2%	+4%	+3%	+4%	+5%	+5%	+5%	+7%	+8%	+8%	+11%	+10%	+10%	+14%	+12%
Blu-ray player (not PS3)	7%	+1%	+2%	+3%	+3%	+3%	+5%	+4%	+5%	+7%	+7%	+9%	+10%	+8%	+9%	+14%	+11%
Apple iTV set top box	6%	+1%	+1%	+3%	+3%	+3%	+4%	+4%	+5%	+6%	+6%	+7%	+7%	+8%	+10%	+14%	+12%

Technology and devices owned crossover (2 of 2 – shown as relative to total)

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% Own / access as if own on both axes	Total	Wii	DVR	DAB	TV via PC	DAB prtble	iPod w/ video	Xbox 360	Pers'l video	HD-DVD	PS3	iPhone/ N95	PDA/B-berry	iPod Touch	e-Book reader	Blu-ray	Apple Set-top
Digital Camera (not on mobile)	79%	+10%	+10%	+9%	+10%	+9%	+13%	+7%	+11%	+9%	+7%	+8%	+12%	+12%	-4%	+15%	+9%
Mobile phone access the Internet	68%	+12%	+12%	+8%	+16%	+9%	+17%	+13%	+17%	+15%	+9%	+23%	+19%	+22%	+18%	+21%	+16%
Wireless network at home	56%	+17%	+18%	+13%	+21%	+15%	+20%	+18%	+21%	+15%	+19%	+22%	+27%	+23%	+26%	+28%	+32%
Freeview (but not Top Up)	53%	+12%	+17%	+15%	+17%	+15%	+10%	+13%	+17%	+15%	+10%	+14%	+16%	+18%	+21%	+25%	+33%
Basic mobile phone	49%	+6%	+10%	+9%	+11%	+10%	+8%	+4%	+11%	+12%	+8%	+6%	+16%	+19%	+23%	+26%	+28%
DVD Recorder	48%	+11%	+28%	+15%	+20%	+19%	+15%	+11%	+23%	+29%	+14%	+17%	+22%	+28%	+30%	+37%	+37%
Mobile phone w/ media player	46%	+14%	+17%	+15%	+19%	+13%	+21%	+20%	+22%	+19%	+19%	+38%	+25%	+25%	+28%	+31%	+36%
Satellite television / Sky	44%	+21%	+11%	+11%	+15%	+14%	+19%	+19%	+16%	+13%	+23%	+23%	+21%	+30%	+26%	+35%	+37%
Personal digital music plyr (excl iPod)	40%	+10%	+15%	+17%	+24%	+18%	+14%	+16%	+35%	+17%	+17%	+23%	+27%	+29%	+32%	+42%	+43%
HD-ready tv set	39%	+19%	+22%	+16%	+18%	+17%	+23%	+23%	+21%	+37%	+28%	+20%	+23%	+28%	+33%	+42%	+39%
iPod	36%	+18%	+15%	+21%	+20%	+19%	+48%	+20%	+22%	+24%	+27%	+30%	+31%	+51%	+31%	+48%	+47%
External HDD to store media	35%	+14%	+22%	+17%	+24%	+22%	+24%	+18%	+26%	+28%	+21%	+29%	+35%	+31%	+43%	+52%	+44%
Windows Media Center	33%	+12%	+21%	+15%	+34%	+19%	+21%	+16%	+26%	+28%	+23%	+27%	+24%	+34%	+37%	+43%	+45%
Cable television	31%	+10%	+13%	+10%	+12%	+12%	+15%	+14%	+19%	+18%	+15%	+18%	+26%	+29%	+35%	+43%	+52%
Sky +	25%	+22%	+20%	+13%	+18%	+21%	+20%	+21%	+19%	+23%	+29%	+26%	+25%	+40%	+38%	+53%	+60%
Freeview plus Top Up	24%	+12%	+17%	+15%	+20%	+18%	+22%	+16%	+21%	+26%	+26%	+22%	+23%	+30%	+33%	+41%	+50%
Nintendo Wii	24%		+14%	+11%	+13%	+15%	+21%	+26%	+17%	+19%	+29%	+26%	+28%	+38%	+37%	+49%	+54%
DVR ie HDD recorder (excl Sky+)	24%	+14%		+20%	+19%	+23%	+17%	+19%	+27%	+29%	+24%	+23%	+31%	+32%	+41%	+55%	+56%
Non-portable DAB radio	23%	+11%	+20%		+18%	+28%	+20%	+16%	+23%	+23%	+22%	+29%	+30%	+33%	+39%	+46%	+55%
Computer with TV viewing card	22%	+12%	+18%	+17%		+18%	+19%	+18%	+29%	+28%	+24%	+25%	+35%	+37%	+45%	+54%	+51%
Portable DAB radio	21%	+13%	+20%	+24%	+17%		+20%	+15%	+24%	+24%	+20%	+25%	+30%	+38%	+40%	+53%	+56%
iPod with video	20%	+18%	+15%	+17%	+18%	+20%		+24%	+27%	+26%	+24%	+33%	+31%	+49%	+44%	+57%	+64%
Xbox 360	20%	+21%	+16%	+13%	+15%	+14%	+23%		+23%	+22%	+30%	+25%	+29%	+33%	+37%	+56%	+60%
Personal video plyr, excl video iPod	18%	+12%	+20%	+16%	+23%	+19%	+23%	+21%		+26%	+27%	+27%	+34%	+38%	+48%	+58%	+61%
An HD-DVD Player	16%	+13%	+21%	+16%	+21%	+19%	+22%	+19%	+25%		+27%	+28%	+29%	+42%	+46%	+62%	+62%
Playstation 3	16%	+19%	+16%	+14%	+17%	+15%	+19%	+24%	+24%	+26%		+26%	+26%	+37%	+41%	+55%	+62%
iPhone / N95 or similar	16%	+17%	+15%	+19%	+17%	+18%	+25%	+20%	+24%	+26%	+25%		+33%	+40%	+44%	+56%	+62%
PDA/Blackberry	13%	+14%	+16%	+15%	+19%	+17%	+19%	+19%	+24%	+21%	+20%	+27%		+36%	+50%	+55%	+62%
iPod with touchscreen	10%	+16%	+14%	+15%	+17%	+19%	+25%	+18%	+23%	+26%	+24%	+27%	+30%		+47%	+60%	+65%
An e-book reader	9%	+14%	+16%	+15%	+18%	+17%	+19%	+17%	+25%	+25%	+23%	+26%	+36%	+40%		+57%	+70%
Blu-ray player (not PS3)	7%	+13%	+15%	+13%	+16%	+17%	+19%	+19%	+22%	+25%	+23%	+24%	+29%	+39%	+42%		+64%
Apple TV set top box	6%	+13%	+14%	+14%	+13%	+15%	+18%	+18%	+20%	+22%	+23%	+23%	+29%	+37%	+46%	+56%	

WIGGIN

Appendix

Activity by technology and device ownership

ENTERTAINMENTMEDIARESEARCH

Activity versus ownership (Part 1 of 2)

% Do regularly versus own	Total	Dig camera	Mobile intrnet	Wireles s net	Free-view	Basic mobile	DVD record	Mobile media	Sky	Dig player	HD TV	iPod	Extnrl HDD	Media Center	Cable TV	Sky+	FV Top up
Listen to radio (not online)	51%	53%	54%	54%	53%	53%	55%	55%	52%	53%	54%	54%	53%	52%	50%	52%	54%
Read paper/hardback books	47%	49%	49%	49%	49%	50%	50%	47%	48%	49%	48%	52%	48%	46%	48%	47%	45%
Watch Sky/other subscription TV	45%	48%	51%	50%	38%	43%	49%	51%	73%	49%	54%	47%	48%	49%	56%	70%	40%
Read newspapers (printed)	41%	42%	43%	43%	42%	42%	45%	44%	44%	44%	45%	44%	42%	46%	43%	46%	49%
Read magazines	35%	38%	38%	38%	36%	36%	39%	39%	38%	40%	38%	42%	42%	38%	38%	40%	41%
Browse social network sites	34%	35%	37%	38%	36%	33%	34%	40%	36%	38%	35%	42%	39%	35%	34%	36%	39%
Play the National Lottery	34%	36%	34%	32%	35%	36%	36%	33%	37%	34%	41%	33%	32%	38%	36%	38%	35%
Watch recorded television	32%	34%	36%	35%	34%	31%	39%	37%	41%	37%	38%	38%	41%	38%	33%	57%	34%
Chatting on Instant Messenger	32%	32%	35%	37%	35%	33%	34%	39%	33%	37%	36%	38%	38%	37%	36%	36%	36%
Visit newspaper websites	24%	26%	25%	27%	28%	27%	27%	25%	26%	28%	28%	28%	30%	29%	27%	30%	30%
Use bluetooth techapps	21%	23%	27%	27%	25%	19%	27%	32%	27%	28%	30%	27%	33%	31%	26%	28%	27%
Play offline games on PC	21%	22%	24%	23%	23%	23%	25%	26%	26%	26%	24%	24%	29%	28%	25%	30%	23%
Go to cinema	21%	23%	23%	23%	23%	23%	23%	25%	23%	26%	26%	28%	28%	22%	26%	27%	29%
Play online games on the PC	20%	20%	21%	22%	22%	22%	23%	23%	23%	23%	21%	22%	24%	26%	23%	26%	23%
Listen to radio streamed online	18%	20%	21%	22%	21%	20%	22%	23%	20%	26%	22%	25%	24%	23%	20%	25%	25%
Play games on handheld device	17%	18%	20%	20%	19%	16%	21%	22%	21%	22%	24%	23%	22%	24%	23%	25%	24%
Rent DVDs	15%	17%	17%	18%	18%	17%	18%	19%	17%	20%	20%	21%	20%	20%	17%	20%	21%
Buy video games	13%	13%	15%	15%	15%	13%	15%	17%	17%	17%	18%	19%	19%	17%	17%	22%	20%
Stream music from social networks	12%	13%	14%	14%	15%	13%	14%	17%	15%	16%	16%	19%	18%	17%	17%	19%	20%
Play online games on a console	12%	13%	15%	15%	14%	13%	15%	17%	17%	17%	17%	18%	18%	17%	15%	22%	19%
Play games on your mobile	12%	12%	14%	12%	12%	11%	14%	17%	14%	16%	15%	15%	16%	16%	18%	17%	16%
Use internet chatrooms	9%	9%	10%	10%	11%	12%	11%	11%	11%	13%	12%	13%	12%	12%	14%	15%	14%
Making calls w/ Skype/other online	8%	9%	9%	11%	10%	11%	11%	11%	10%	12%	11%	11%	15%	14%	12%	15%	13%
Using mobile to surf Internet	8%	9%	11%	11%	11%	8%	11%	15%	12%	12%	13%	14%	15%	12%	11%	17%	13%
Listen to podcasts	8%	8%	9%	10%	10%	9%	9%	10%	10%	12%	11%	15%	14%	11%	11%	13%	14%
Read other peoples' blogs	8%	8%	8%	10%	10%	10%	10%	10%	10%	10%	10%	13%	12%	11%	11%	14%	13%
Filesharing music	8%	7%	9%	10%	8%	8%	8%	12%	9%	11%	11%	10%	11%	10%	11%	12%	11%
Listen to radio on mobile phone	8%	8%	9%	9%	8%	8%	9%	13%	10%	12%	9%	11%	12%	12%	13%	15%	14%
Watch PPV movies via Sky/cable	7%	8%	8%	9%	8%	9%	11%	10%	12%	10%	12%	11%	12%	12%	14%	17%	14%
Watch movies on HD-DVD disk	7%	7%	8%	8%	9%	8%	10%	9%	8%	9%	13%	10%	11%	10%	11%	13%	14%
Watch full tv prog streams	6%	7%	7%	8%	8%	9%	8%	10%	8%	9%	8%	10%	10%	10%	10%	13%	12%
Watch full movie streams	6%	6%	7%	7%	7%	8%	8%	9%	7%	10%	9%	10%	9%	10%	10%	11%	12%
Online gambling	6%	6%	6%	6%	6%	8%	7%	8%	8%	9%	7%	9%	9%	8%	9%	11%	10%
Filesharing movies / programmes	5%	5%	6%	7%	6%	7%	6%	8%	7%	8%	8%	7%	8%	8%	9%	9%	8%
Watch pirate DVDs of movies	5%	5%	6%	6%	6%	6%	7%	8%	8%	8%	8%	7%	9%	8%	9%	9%	10%
Subscribe to MMORPG online game	5%	5%	6%	7%	7%	6%	7%	7%	7%	8%	6%	7%	8%	8%	8%	8%	9%
Watch TV on PC via tv-card/USB	5%	5%	6%	6%	7%	7%	8%	8%	6%	9%	8%	8%	11%	11%	9%	11%	11%
Write on your own blog	5%	5%	6%	7%	7%	6%	7%	7%	7%	8%	7%	8%	8%	8%	8%	10%	9%
Pay to play online bingo	4%	5%	5%	5%	6%	6%	6%	7%	6%	6%	7%	7%	7%	8%	7%	9%	10%
Swap hard drives to share content	4%	4%	5%	6%	6%	6%	7%	7%	6%	7%	7%	7%	8%	8%	8%	9%	9%
Listen to audio books	4%	4%	5%	5%	5%	6%	6%	6%	5%	7%	7%	8%	8%	7%	9%	8%	10%
Read e-books/novels downloaded	4%	5%	5%	6%	6%	6%	7%	7%	6%	7%	8%	8%	9%	8%	9%	10%	11%
Subscribe mthly music d/l service	4%	4%	5%	5%	6%	6%	6%	6%	7%	7%	7%	8%	7%	8%	9%	10%	10%
Buy authorised digital d/l movie	4%	4%	5%	5%	6%	5%	6%	7%	6%	7%	7%	8%	8%	7%	9%	10%	12%
Filesharing games / software	4%	4%	4%	5%	5%	5%	6%	6%	6%	6%	6%	6%	6%	6%	8%	9%	8%
Watch PPV movies over Internet	3%	4%	4%	5%	5%	5%	6%	6%	6%	7%	6%	7%	7%	8%	8%	11%	11%
Play online poker for money	3%	4%	4%	4%	4%	5%	5%	5%	6%	6%	5%	6%	5%	6%	6%	8%	8%
Watch movies on Blu-ray disk	3%	3%	4%	4%	5%	4%	5%	5%	5%	5%	6%	6%	6%	6%	6%	8%	7%
Subscribe to paid-for podcast	2%	3%	3%	3%	3%	4%	4%	4%	4%	5%	4%	5%	5%	5%	6%	7%	8%

Activity versus ownership (Part 2 of 2)

% Do regularly versus own	Total	Wii	DVR	DAB	TV via PC	DAB prtble	iPod w/ video	Xbox 360	Pers'l video	HD-DVD	PS3	iPhone/ N95	PDA/B-berry	iPod Touch	e-Book reader	Blu-ray	Apple Set-top
Listen to radio (not online)	51%	53%	53%	61%	54%	63%	55%	49%	51%	50%	49%	53%	56%	55%	46%	50%	46%
Read paper/hardback books	47%	49%	47%	47%	47%	50%	51%	48%	47%	49%	43%	48%	50%	48%	46%	42%	44%
Watch Sky/other subscription TV	45%	55%	46%	49%	50%	49%	51%	54%	48%	45%	49%	50%	50%	51%	41%	48%	41%
Read newspapers (printed)	41%	46%	42%	45%	47%	49%	48%	45%	43%	50%	47%	49%	49%	49%	45%	49%	53%
Read magazines	35%	39%	38%	44%	40%	45%	45%	43%	42%	42%	44%	44%	46%	49%	41%	52%	47%
Browse social network sites	34%	38%	35%	39%	40%	38%	41%	39%	43%	43%	41%	46%	37%	43%	41%	45%	43%
Play the National Lottery	34%	39%	37%	37%	36%	38%	40%	35%	33%	36%	37%	34%	38%	38%	35%	38%	38%
Watch recorded television	32%	39%	50%	40%	40%	46%	40%	37%	39%	42%	40%	45%	40%	43%	42%	46%	43%
Chatting on Instant Messenger	32%	40%	39%	36%	40%	34%	39%	35%	42%	43%	41%	43%	39%	41%	44%	46%	49%
Visit newspaper websites	24%	29%	29%	32%	34%	33%	36%	30%	33%	31%	31%	35%	42%	35%	37%	43%	44%
Use bluetooth techapps	21%	29%	30%	29%	34%	31%	36%	35%	36%	38%	33%	43%	37%	41%	40%	46%	47%
Play offline games on PC	21%	29%	29%	25%	33%	28%	30%	30%	31%	26%	30%	30%	35%	31%	35%	37%	38%
Go to cinema	21%	28%	25%	24%	25%	28%	31%	30%	31%	30%	32%	31%	31%	40%	35%	42%	43%
Play online games on the PC	20%	26%	23%	24%	30%	25%	26%	30%	30%	29%	29%	25%	30%	27%	36%	39%	40%
Listen to radio streamed online	18%	24%	22%	27%	30%	29%	28%	24%	31%	30%	29%	31%	28%	34%	36%	46%	39%
Play games on handheld device	17%	33%	24%	22%	26%	25%	29%	31%	32%	27%	36%	27%	30%	39%	35%	40%	40%
Rent DVDs	15%	21%	21%	21%	24%	22%	26%	23%	28%	27%	28%	25%	28%	34%	33%	40%	41%
Buy video games	13%	26%	20%	18%	22%	21%	25%	29%	26%	22%	31%	25%	24%	30%	27%	36%	42%
Stream music from social networks	12%	18%	17%	19%	20%	22%	21%	22%	23%	26%	25%	27%	24%	32%	32%	42%	41%
Play online games on a console	12%	23%	19%	18%	22%	21%	24%	32%	26%	25%	31%	24%	28%	28%	31%	37%	40%
Play games on your mobile	12%	17%	15%	16%	20%	19%	21%	20%	21%	20%	20%	24%	24%	28%	26%	36%	33%
Use internet chatrooms	9%	15%	12%	14%	18%	15%	15%	15%	18%	20%	20%	18%	22%	26%	27%	30%	36%
Making calls w/ Skype/other online	8%	12%	15%	15%	18%	14%	17%	14%	19%	19%	16%	22%	26%	23%	26%	32%	35%
Using mobile to surf Internet	8%	17%	17%	15%	17%	18%	21%	17%	18%	23%	19%	27%	26%	25%	25%	34%	32%
Listen to podcasts	8%	14%	12%	14%	15%	18%	19%	13%	18%	18%	15%	20%	21%	24%	26%	30%	34%
Read other peoples' blogs	8%	11%	13%	14%	14%	15%	16%	15%	16%	17%	17%	18%	19%	21%	23%	30%	29%
Filesharing music	8%	13%	11%	11%	14%	12%	15%	14%	14%	16%	16%	17%	18%	20%	21%	29%	30%
Listen to radio on mobile phone	8%	16%	14%	16%	14%	19%	17%	16%	16%	16%	20%	20%	21%	24%	26%	33%	35%
Watch PPV movies via Sky/cable	7%	15%	14%	14%	16%	17%	15%	16%	17%	22%	20%	20%	22%	28%	28%	35%	36%
Watch movies on HD-DVD disk	7%	13%	14%	13%	15%	15%	15%	15%	17%	30%	18%	17%	22%	24%	26%	33%	35%
Watch full tv prog streams	6%	12%	12%	11%	14%	12%	15%	15%	17%	17%	17%	15%	18%	20%	25%	31%	31%
Watch full movie streams	6%	11%	10%	12%	14%	14%	14%	14%	16%	18%	16%	16%	16%	22%	23%	34%	33%
Online gambling	6%	11%	9%	12%	11%	11%	12%	11%	11%	13%	12%	12%	16%	18%	19%	25%	21%
Filesharing movies / programmes	5%	10%	9%	9%	11%	10%	11%	11%	12%	13%	12%	13%	13%	17%	17%	26%	26%
Watch pirate DVDs of movies	5%	11%	9%	10%	11%	12%	13%	13%	14%	15%	15%	15%	17%	21%	21%	28%	30%
Subscribe to MMORPG online game	5%	11%	10%	10%	12%	10%	12%	12%	13%	14%	12%	14%	17%	17%	23%	26%	29%
Watch TV on PC via tv-card/USB	5%	9%	12%	11%	18%	13%	15%	13%	15%	14%	13%	16%	19%	19%	25%	27%	34%
Write on your own blog	5%	9%	10%	8%	10%	10%	13%	12%	12%	13%	13%	13%	16%	17%	21%	27%	28%
Pay to play online bingo	4%	10%	8%	8%	11%	10%	11%	12%	11%	14%	13%	13%	15%	18%	20%	25%	30%
Swap hard drives to share content	4%	8%	10%	10%	11%	12%	11%	10%	13%	15%	12%	13%	15%	20%	23%	29%	29%
Listen to audio books	4%	9%	9%	9%	10%	10%	14%	11%	11%	15%	12%	14%	18%	18%	23%	27%	27%
Read e-books/novels downloaded	4%	10%	11%	10%	13%	12%	13%	12%	13%	17%	12%	15%	19%	21%	27%	29%	34%
Subscribe mthly music d/l service	4%	10%	10%	10%	11%	11%	13%	12%	13%	15%	14%	14%	17%	20%	24%	30%	35%
Buy authorised digital d/l movie	4%	11%	11%	11%	12%	13%	14%	13%	15%	17%	15%	15%	18%	22%	25%	34%	35%
Filesharing games / software	4%	10%	8%	9%	10%	11%	11%	11%	12%	14%	13%	14%	16%	19%	20%	29%	29%
Watch PPV movies over Internet	3%	10%	9%	10%	11%	12%	13%	12%	13%	15%	15%	15%	18%	22%	25%	32%	36%
Play online poker for money	3%	8%	7%	8%	9%	8%	10%	10%	9%	11%	12%	11%	14%	16%	16%	21%	25%
Watch movies on Blu-ray disk	3%	9%	8%	8%	9%	9%	11%	10%	12%	13%	15%	12%	14%	18%	21%	26%	30%
Subscribe to paid-for podcast	2%	7%	7%	7%	8%	9%	9%	9%	9%	11%	10%	11%	14%	17%	18%	25%	28%

Activity versus ownership (Part 1 of 2)

Shown as relative to total

% Do regularly versus own	Total	Dig camera	Mobile intrnet	Wireless net	Free-view	Basic mobile	DVD record	Mobile media	Sky	Dig player	HD TV	iPod	Extnrl HDD	Media Center	Cable TV	Sky+	FV Top up
Listen to radio (not online)	51%	+2%	+3%	+3%	+2%	+2%	+4%	+4%	+1%	+2%	+3%	+3%	+2%	+1%	-1%	+1%	+3%
Read paper/hardback books	47%	+2%	+2%	+2%	+2%	+3%	+3%	0%	+1%	+2%	+1%	+5%	+1%	-1%	+1%	0%	-2%
Watch Sky/other subscription TV	45%	+3%	+6%	+5%	-7%	-2%	+4%	+6%	+28%	+4%	+9%	+2%	+3%	+4%	+11%	+25%	-5%
Read newspapers (printed)	41%	+1%	+2%	+2%	+1%	+1%	+4%	+3%	+3%	+3%	+4%	+3%	+1%	+5%	+2%	+5%	+8%
Read magazines	35%	+3%	+3%	+3%	+1%	+1%	+4%	+4%	+3%	+5%	+3%	+7%	+7%	+3%	+3%	+5%	+6%
Browse social network sites	34%	+1%	+3%	+4%	+2%	-1%	0%	+6%	+2%	+4%	+1%	+8%	+5%	+1%	0%	+2%	+5%
Play the National Lottery	34%	+2%	0%	-2%	+1%	+2%	+2%	-1%	+3%	0%	+7%	-1%	-2%	+4%	+2%	+4%	+1%
Watch recorded television	32%	+2%	+4%	+3%	+2%	-1%	+7%	+5%	+9%	+5%	+6%	+6%	+9%	+6%	+1%	+25%	+2%
Chatting on Instant Messenger	32%	0%	+3%	+5%	+3%	+1%	+2%	+7%	+1%	+5%	+4%	+6%	+6%	+5%	+4%	+4%	+4%
Visit newspaper websites	24%	+2%	+1%	+3%	+4%	+3%	+3%	+1%	+2%	+4%	+4%	+4%	+6%	+5%	+3%	+6%	+6%
Use bluetooth techapps	21%	+2%	+6%	+6%	+4%	-2%	+6%	+11%	+6%	+7%	+9%	+6%	+12%	+10%	+5%	+7%	+6%
Play offline games on PC	21%	+1%	+3%	+2%	+2%	+2%	+4%	+5%	+5%	+5%	+3%	+3%	+8%	+7%	+4%	+9%	+2%
Go to cinema	21%	+2%	+2%	+2%	+2%	+2%	+2%	+4%	+2%	+5%	+5%	+7%	+7%	+1%	+5%	+6%	+8%
Play online games on the PC	20%	0%	+1%	+2%	+2%	+2%	+3%	+3%	+3%	+3%	+1%	+2%	+4%	+6%	+3%	+6%	+3%
Listen to radio streamed online	18%	+2%	+3%	+4%	+3%	+2%	+4%	+5%	+2%	+8%	+4%	+7%	+6%	+5%	+2%	+7%	+7%
Play games on handheld device	17%	+1%	+3%	+3%	+2%	-1%	+4%	+5%	+4%	+5%	+7%	+6%	+5%	+7%	+6%	+8%	+7%
Rent DVDs	15%	+2%	+2%	+3%	+3%	+2%	+3%	+4%	+2%	+5%	+5%	+6%	+5%	+5%	+2%	+5%	+6%
Buy video games	13%	0%	+2%	+2%	+2%	0%	+2%	+4%	+4%	+4%	+5%	+6%	+6%	+4%	+4%	+9%	+7%
Stream music from social networks	12%	+1%	+2%	+2%	+3%	+1%	+2%	+5%	+3%	+4%	+4%	+7%	+6%	+5%	+5%	+7%	+8%
Play online games on a console	12%	+1%	+3%	+3%	+2%	+1%	+3%	+5%	+5%	+5%	+5%	+6%	+6%	+5%	+3%	+10%	+7%
Play games on your mobile	12%	0%	+2%	0%	0%	-1%	+2%	+5%	+2%	+4%	+3%	+3%	+4%	+4%	+6%	+5%	+4%
Use internet chatrooms	9%	0%	+1%	+1%	+2%	+3%	+2%	+2%	+2%	+4%	+3%	+4%	+3%	+3%	+5%	+6%	+5%
Making calls w/ Skype/other online	8%	+1%	+1%	+3%	+2%	+3%	+3%	+3%	+2%	+4%	+3%	+3%	+7%	+6%	+4%	+7%	+5%
Using mobile to surf Internet	8%	+1%	+3%	+3%	+3%	0%	+3%	+7%	+4%	+4%	+5%	+6%	+7%	+4%	+3%	+9%	+5%
Listen to podcasts	8%	0%	+1%	+2%	+2%	+1%	+1%	+2%	+2%	+4%	+3%	+7%	+6%	+3%	+3%	+5%	+6%
Read other peoples' blogs	8%	0%	0%	+2%	+2%	+2%	+2%	+2%	+2%	+2%	+2%	+5%	+4%	+3%	+3%	+6%	+5%
Filesharing music	8%	-1%	+1%	+2%	0%	0%	0%	+4%	+1%	+3%	+3%	+2%	+3%	+2%	+3%	+4%	+3%
Listen to radio on mobile phone	8%	0%	+1%	+1%	0%	0%	+1%	+5%	+2%	+4%	+1%	+3%	+4%	+4%	+5%	+7%	+6%
Watch PPV movies via Sky/cable	7%	+1%	+1%	+2%	+1%	+2%	+4%	+3%	+5%	+3%	+5%	+4%	+5%	+5%	+7%	+10%	+7%
Watch movies on HD-DVD disk	7%	0%	+1%	+1%	+2%	+1%	+3%	+2%	+1%	+2%	+6%	+3%	+4%	+3%	+4%	+6%	+7%
Watch full tv prog streams	6%	+1%	+1%	+2%	+2%	+3%	+2%	+4%	+2%	+3%	+2%	+4%	+4%	+4%	+4%	+7%	+6%
Watch full movie streams	6%	0%	+1%	+1%	+1%	+2%	+2%	+3%	+1%	+4%	+3%	+4%	+3%	+4%	+4%	+5%	+6%
Online gambling	6%	0%	0%	0%	0%	+2%	+1%	+2%	+2%	+3%	+1%	+3%	+3%	+2%	+3%	+5%	+4%
Filesharing movies / programmes	5%	0%	+1%	+2%	+1%	+2%	+1%	+3%	+2%	+3%	+3%	+2%	+3%	+3%	+4%	+4%	+3%
Watch pirate DVDs of movies	5%	0%	+1%	+1%	+1%	+1%	+2%	+3%	+3%	+3%	+3%	+2%	+4%	+3%	+4%	+4%	+5%
Subscribe to MMORPG online game	5%	0%	+1%	+2%	+2%	+1%	+2%	+2%	+2%	+3%	+1%	+2%	+3%	+3%	+3%	+3%	+4%
Watch TV on PC via tv-card/USB	5%	0%	+1%	+1%	+2%	+2%	+3%	+3%	+1%	+4%	+3%	+3%	+6%	+6%	+4%	+6%	+6%
Write on your own blog	5%	0%	+1%	+2%	+2%	+1%	+2%	+2%	+2%	+3%	+2%	+3%	+3%	+3%	+3%	+5%	+4%
Pay to play online bingo	4%	+1%	+1%	+1%	+2%	+2%	+2%	+3%	+2%	+2%	+3%	+3%	+3%	+4%	+3%	+5%	+6%
Swap hard drives to share content	4%	0%	+1%	+2%	+2%	+2%	+3%	+3%	+2%	+3%	+3%	+3%	+4%	+4%	+4%	+5%	+5%
Listen to audio books	4%	0%	+1%	+1%	+1%	+2%	+2%	+2%	+1%	+3%	+3%	+4%	+4%	+3%	+5%	+4%	+6%
Read e-books/novels downloaded	4%	+1%	+1%	+2%	+2%	+2%	+3%	+3%	+2%	+3%	+4%	+4%	+5%	+4%	+5%	+6%	+7%
Subscribe mthly music d/l service	4%	0%	+1%	+1%	+2%	+2%	+2%	+2%	+3%	+3%	+3%	+4%	+3%	+4%	+5%	+6%	+6%
Buy authorised digital d/l movie	4%	0%	+1%	+1%	+2%	+1%	+2%	+3%	+2%	+3%	+3%	+4%	+4%	+3%	+5%	+6%	+8%
Filesharing games / software	4%	0%	0%	+1%	+1%	+1%	+2%	+2%	+2%	+2%	+2%	+2%	+2%	+2%	+4%	+5%	+4%
Watch PPV movies over Internet	3%	+1%	+1%	+2%	+2%	+2%	+3%	+3%	+3%	+4%	+3%	+4%	+4%	+5%	+5%	+8%	+8%
Play online poker for money	3%	+1%	+1%	+1%	+1%	+2%	+2%	+2%	+3%	+3%	+2%	+3%	+2%	+3%	+3%	+5%	+5%
Watch movies on Blu-ray disk	3%	0%	+1%	+1%	+2%	+1%	+2%	+2%	+2%	+2%	+3%	+3%	+3%	+3%	+3%	+5%	+4%
Subscribe to paid-for podcast	2%	+1%	+1%	+1%	+1%	+2%	+2%	+2%	+2%	+3%	+2%	+3%	+3%	+3%	+4%	+5%	+6%

Activity versus ownership (Part 2 of 2)

Shown as relative to total

% Do regularly versus own	Total	Wii	DVR	DAB	TV via PC	DAB prtble	iPod w/ video	Xbox 360	Pers'l video	HD-DVD	PS3	iPhone/ N95	PDA/B-berry	iPod Touch	e-Book reader	Blu-ray	Apple Set-top
Listen to radio (not online)	51%	+2%	+2%	+10%	+3%	+12%	+4%	-2%	0%	-1%	-2%	+2%	+5%	+4%	-5%	-1%	-5%
Read paper/hardback books	47%	+2%	0%	0%	0%	+3%	+4%	+1%	0%	+2%	-4%	+1%	+3%	+1%	-1%	-5%	-3%
Watch Sky/other subscription TV	45%	+10%	+1%	+4%	+5%	+4%	+6%	+9%	+3%	0%	+4%	+5%	+5%	+6%	-4%	+3%	-4%
Read newspapers (printed)	41%	+5%	+1%	+4%	+6%	+8%	+7%	+4%	+2%	+9%	+6%	+8%	+8%	+8%	+4%	+8%	+12%
Read magazines	35%	+4%	+3%	+9%	+5%	+10%	+10%	+8%	+7%	+7%	+9%	+9%	+11%	+14%	+6%	+17%	+12%
Browse social network sites	34%	+4%	+1%	+5%	+6%	+4%	+7%	+5%	+9%	+9%	+7%	+12%	+3%	+9%	+7%	+11%	+9%
Play the National Lottery	34%	+5%	+3%	+3%	+2%	+4%	+6%	+1%	-1%	+2%	+3%	0%	+4%	+4%	+1%	+4%	+4%
Watch recorded television	32%	+7%	+18%	+8%	+8%	+14%	+8%	+5%	+7%	+10%	+8%	+13%	+8%	+11%	+10%	+14%	+11%
Chatting on Instant Messenger	32%	+8%	+7%	+4%	+8%	+2%	+7%	+3%	+10%	+11%	+9%	+11%	+7%	+9%	+12%	+14%	+17%
Visit newspaper websites	24%	+5%	+5%	+8%	+10%	+9%	+12%	+6%	+9%	+7%	+7%	+11%	+18%	+11%	+13%	+19%	+20%
Use bluetooth techapps	21%	+8%	+9%	+8%	+13%	+10%	+15%	+14%	+15%	+17%	+12%	+22%	+16%	+20%	+19%	+25%	+26%
Play offline games on PC	21%	+8%	+8%	+4%	+12%	+7%	+9%	+9%	+10%	+5%	+9%	+9%	+14%	+10%	+14%	+16%	+17%
Go to cinema	21%	+7%	+4%	+3%	+4%	+7%	+10%	+9%	+10%	+9%	+11%	+10%	+10%	+19%	+14%	+21%	+22%
Play online games on the PC	20%	+6%	+3%	+4%	+10%	+5%	+6%	+10%	+10%	+9%	+9%	+5%	+10%	+7%	+16%	+19%	+20%
Listen to radio streamed online	18%	+6%	+4%	+9%	+12%	+11%	+10%	+6%	+13%	+12%	+11%	+13%	+10%	+16%	+18%	+28%	+21%
Play games on handheld device	17%	+16%	+7%	+5%	+9%	+8%	+12%	+14%	+15%	+10%	+19%	+10%	+13%	+22%	+18%	+23%	+23%
Rent DVDs	15%	+6%	+6%	+6%	+9%	+7%	+11%	+8%	+13%	+12%	+13%	+10%	+13%	+19%	+18%	+25%	+26%
Buy video games	13%	+13%	+7%	+5%	+9%	+8%	+12%	+16%	+13%	+9%	+18%	+12%	+11%	+17%	+14%	+23%	+29%
Stream music from social networks	12%	+6%	+5%	+7%	+8%	+10%	+9%	+10%	+11%	+14%	+13%	+15%	+12%	+20%	+20%	+30%	+29%
Play online games on a console	12%	+11%	+7%	+6%	+10%	+9%	+12%	+20%	+14%	+13%	+19%	+12%	+16%	+16%	+19%	+25%	+28%
Play games on your mobile	12%	+5%	+3%	+4%	+8%	+7%	+9%	+8%	+9%	+8%	+8%	+12%	+12%	+16%	+14%	+24%	+21%
Use internet chatrooms	9%	+6%	+3%	+5%	+9%	+6%	+6%	+6%	+9%	+11%	+11%	+9%	+13%	+17%	+18%	+21%	+27%
Making calls w/ Skype/other online	8%	+4%	+7%	+7%	+10%	+6%	+9%	+6%	+11%	+11%	+8%	+14%	+18%	+15%	+18%	+24%	+27%
Using mobile to surf Internet	8%	+9%	+9%	+7%	+9%	+10%	+13%	+9%	+10%	+15%	+11%	+19%	+18%	+17%	+17%	+26%	+24%
Listen to podcasts	8%	+6%	+4%	+6%	+7%	+10%	+11%	+5%	+10%	+10%	+7%	+12%	+13%	+16%	+18%	+22%	+26%
Read other peoples' blogs	8%	+3%	+5%	+6%	+6%	+7%	+8%	+7%	+8%	+9%	+9%	+10%	+11%	+13%	+15%	+22%	+21%
Filesharing music	8%	+5%	+3%	+3%	+6%	+4%	+7%	+6%	+6%	+8%	+8%	+9%	+10%	+12%	+13%	+21%	+22%
Listen to radio on mobile phone	8%	+8%	+6%	+8%	+6%	+11%	+9%	+8%	+8%	+8%	+12%	+12%	+13%	+16%	+18%	+25%	+27%
Watch PPV movies via Sky/cable	7%	+8%	+7%	+7%	+9%	+10%	+8%	+9%	+10%	+15%	+13%	+13%	+15%	+21%	+21%	+28%	+29%
Watch movies on HD-DVD disk	7%	+6%	+7%	+6%	+8%	+8%	+8%	+8%	+10%	+23%	+11%	+10%	+15%	+17%	+19%	+26%	+28%
Watch full tv prog streams	6%	+6%	+6%	+5%	+8%	+6%	+9%	+9%	+11%	+11%	+11%	+9%	+12%	+14%	+19%	+25%	+25%
Watch full movie streams	6%	+5%	+4%	+6%	+8%	+8%	+8%	+8%	+10%	+12%	+10%	+10%	+10%	+16%	+17%	+28%	+27%
Online gambling	6%	+5%	+3%	+6%	+5%	+5%	+6%	+5%	+5%	+7%	+6%	+6%	+10%	+12%	+13%	+19%	+15%
Filesharing movies / programmes	5%	+5%	+4%	+4%	+6%	+5%	+6%	+6%	+7%	+8%	+7%	+8%	+8%	+12%	+12%	+21%	+21%
Watch pirate DVDs of movies	5%	+6%	+4%	+5%	+6%	+7%	+8%	+8%	+9%	+10%	+10%	+10%	+12%	+16%	+16%	+23%	+25%
Subscribe to MMORPG online game	5%	+6%	+5%	+5%	+7%	+5%	+7%	+7%	+8%	+9%	+7%	+9%	+12%	+12%	+18%	+21%	+24%
Watch TV on PC via tv-card/USB	5%	+4%	+7%	+6%	+13%	+8%	+10%	+8%	+10%	+9%	+8%	+11%	+14%	+14%	+20%	+22%	+29%
Write on your own blog	5%	+4%	+5%	+3%	+5%	+5%	+8%	+7%	+7%	+8%	+8%	+8%	+11%	+12%	+16%	+22%	+23%
Pay to play online bingo	4%	+6%	+4%	+4%	+7%	+6%	+7%	+8%	+7%	+10%	+9%	+9%	+11%	+14%	+16%	+21%	+26%
Swap hard drives to share content	4%	+4%	+6%	+6%	+7%	+8%	+7%	+6%	+9%	+11%	+8%	+9%	+11%	+16%	+19%	+25%	+25%
Listen to audio books	4%	+5%	+5%	+5%	+6%	+6%	+10%	+7%	+7%	+11%	+8%	+10%	+14%	+14%	+19%	+23%	+23%
Read e-books/novels downloaded	4%	+6%	+7%	+6%	+9%	+8%	+9%	+8%	+9%	+13%	+8%	+11%	+15%	+17%	+23%	+25%	+30%
Subscribe mthly music d/l service	4%	+6%	+6%	+6%	+7%	+7%	+9%	+8%	+9%	+11%	+10%	+10%	+13%	+16%	+20%	+26%	+31%
Buy authorised digital d/l movie	4%	+7%	+7%	+7%	+8%	+9%	+10%	+9%	+11%	+13%	+11%	+11%	+14%	+18%	+21%	+30%	+31%
Filesharing games / software	4%	+6%	+4%	+5%	+6%	+7%	+7%	+7%	+8%	+10%	+9%	+10%	+12%	+15%	+16%	+25%	+25%
Watch PPV movies over Internet	3%	+7%	+6%	+7%	+8%	+9%	+10%	+9%	+10%	+12%	+12%	+12%	+15%	+19%	+22%	+29%	+33%
Play online poker for money	3%	+5%	+4%	+5%	+6%	+5%	+7%	+7%	+6%	+8%	+9%	+8%	+11%	+13%	+13%	+18%	+22%
Watch movies on Blu-ray disk	3%	+6%	+5%	+5%	+6%	+6%	+8%	+7%	+9%	+10%	+12%	+9%	+11%	+15%	+18%	+23%	+27%
Subscribe to paid-for podcast	2%	+5%	+5%	+5%	+6%	+7%	+7%	+7%	+7%	+9%	+8%	+9%	+12%	+15%	+16%	+23%	+26%

WIGGIN

Appendix

Technology and device ownership by activity

ENTERTAINMENTMEDIARESEARCH

Technology owned/accessed by activity

Part 1 of 4

% Own / access versus do regularly	Total	Radio	Books	Sky/ cable	News-papers	Maga-zines	Social network	Lottery	Record TV	Chat on IM	Paper sites	Blue-tooth	Offline games	Cinema	Online games
Digital Camera (not on mobile)	79%	84%	83%	85%	82%	85%	81%	86%	84%	80%	87%	84%	83%	87%	80%
Mobile phone access the Internet	68%	73%	71%	78%	72%	74%	75%	70%	76%	76%	70%	88%	78%	74%	74%
Wireless network at home	56%	60%	58%	62%	58%	60%	63%	54%	62%	65%	62%	71%	61%	60%	61%
Freeview (but not Top Up)	53%	56%	56%	46%	54%	54%	58%	56%	56%	59%	62%	62%	58%	57%	60%
Basic mobile phone	49%	51%	52%	47%	49%	50%	48%	52%	48%	51%	54%	43%	51%	52%	53%
DVD Recorder	48%	52%	51%	52%	52%	53%	48%	51%	58%	52%	54%	60%	57%	52%	55%
Mobile phone w/ media player	46%	50%	46%	52%	50%	51%	55%	46%	54%	58%	48%	69%	56%	55%	54%
Satellite television / Sky	44%	45%	45%	71%	47%	48%	47%	49%	55%	46%	47%	54%	52%	47%	50%
Personal digital music plyr (excl iPod)	40%	42%	43%	44%	43%	46%	46%	41%	46%	47%	47%	53%	49%	49%	47%
HD-ready tv set	39%	42%	40%	46%	42%	41%	40%	48%	46%	44%	45%	54%	44%	46%	41%
iPod	36%	39%	40%	38%	39%	43%	45%	36%	43%	44%	43%	46%	42%	47%	40%
External HDD to store media	35%	37%	35%	37%	36%	41%	40%	33%	44%	42%	43%	53%	47%	45%	42%
Windows Media Center	33%	35%	33%	36%	38%	36%	35%	38%	40%	39%	39%	49%	44%	34%	44%
Cable television	31%	31%	32%	39%	33%	34%	31%	34%	32%	36%	35%	38%	37%	38%	36%
Sky +	25%	26%	25%	39%	28%	28%	27%	28%	44%	28%	31%	33%	35%	32%	32%
Freeview plus Top Up	24%	26%	23%	21%	29%	28%	28%	26%	26%	28%	30%	30%	26%	33%	28%
Nintendo Wii	24%	25%	25%	30%	27%	26%	27%	28%	29%	30%	28%	33%	32%	32%	32%
DVR ie HDD recorder (excl Sky+)	24%	25%	24%	24%	24%	26%	25%	26%	37%	29%	28%	33%	32%	27%	28%
Non-portable DAB radio	23%	28%	24%	25%	26%	29%	27%	26%	29%	27%	31%	31%	28%	27%	29%
Computer with TV viewing card	22%	24%	22%	25%	25%	25%	26%	23%	27%	28%	31%	35%	34%	26%	34%
Portable DAB radio	21%	26%	22%	23%	25%	27%	23%	24%	30%	23%	29%	30%	27%	28%	27%
iPod with video	20%	22%	22%	23%	24%	26%	25%	24%	25%	25%	30%	34%	28%	29%	27%
Xbox 360	20%	19%	20%	24%	22%	24%	23%	20%	22%	22%	25%	32%	28%	27%	30%
Personal video plyr, excl video iPod	18%	18%	17%	19%	18%	21%	22%	17%	21%	23%	24%	30%	26%	26%	27%
An HD-DVD Player	16%	16%	17%	16%	20%	20%	21%	18%	22%	23%	21%	29%	20%	23%	24%
Playstation 3	16%	15%	15%	17%	18%	20%	19%	18%	20%	21%	20%	24%	22%	24%	23%
iPhone / N95 or similar	16%	16%	16%	17%	19%	20%	21%	16%	22%	21%	23%	31%	22%	23%	20%
PDA/Blackberry	13%	14%	13%	14%	15%	16%	14%	14%	16%	16%	22%	21%	20%	18%	19%
iPod with touchscreen	10%	11%	10%	12%	12%	14%	13%	12%	14%	13%	15%	20%	15%	19%	14%
An e-book reader	9%	8%	9%	8%	10%	10%	11%	9%	12%	12%	14%	17%	15%	15%	16%
Blu-ray player (not PS3)	7%	7%	6%	7%	8%	10%	9%	8%	10%	10%	12%	14%	12%	13%	13%
Apple TV set top box	6%	5%	5%	5%	8%	8%	7%	7%	8%	9%	11%	13%	10%	12%	12%

Technology owned/accessed by activity

Part 2 of 4

% Own / access versus do regularly	Total	Stream radio	Hand games	Rent DVDs	Buy games	Music netwk	Online console	Mobile games	Chat-rooms	Skype et al	Mobile web	Podcast	Read blogs	p2p music	Mobile radio
Digital Camera (not on mobile)	79%	85%	84%	89%	84%	81%	87%	79%	81%	88%	88%	85%	82%	73%	81%
Mobile phone access the Internet	68%	77%	82%	75%	80%	79%	84%	83%	74%	76%	96%	82%	75%	78%	83%
Wireless network at home	56%	66%	65%	66%	68%	63%	72%	55%	61%	74%	75%	69%	75%	70%	67%
Freeview (but not Top Up)	53%	62%	59%	64%	62%	64%	64%	56%	63%	66%	72%	67%	72%	56%	60%
Basic mobile phone	49%	54%	47%	54%	52%	53%	54%	43%	62%	64%	47%	57%	64%	53%	54%
DVD Recorder	48%	57%	60%	55%	56%	55%	60%	56%	57%	63%	68%	58%	61%	49%	60%
Mobile phone w/ media player	46%	58%	60%	58%	61%	64%	66%	67%	54%	62%	84%	59%	61%	71%	79%
Satellite television / Sky	44%	47%	55%	48%	58%	53%	64%	50%	54%	54%	65%	54%	55%	54%	58%
Personal digital music plyr (excl iPod)	40%	56%	53%	53%	55%	54%	57%	55%	56%	61%	60%	60%	53%	60%	62%
HD-ready tv set	39%	46%	56%	50%	55%	49%	55%	48%	50%	53%	62%	53%	49%	54%	46%
iPod	36%	50%	49%	50%	53%	55%	55%	44%	51%	51%	62%	70%	59%	49%	54%
External HDD to store media	35%	46%	46%	44%	51%	50%	53%	48%	44%	62%	63%	60%	55%	49%	57%
Windows Media Center	33%	42%	47%	44%	45%	45%	49%	46%	44%	56%	51%	49%	46%	45%	51%
Cable television	31%	33%	42%	36%	41%	42%	40%	46%	47%	45%	41%	46%	44%	44%	54%
Sky +	25%	33%	36%	32%	43%	39%	47%	35%	41%	46%	53%	41%	47%	40%	49%
Freeview plus Top Up	24%	33%	35%	33%	38%	39%	39%	33%	36%	38%	40%	42%	42%	36%	46%
Nintendo Wii	24%	31%	46%	34%	49%	35%	45%	35%	38%	34%	50%	42%	35%	39%	50%
DVR ie HDD recorder (excl Sky+)	24%	28%	34%	33%	37%	33%	38%	30%	31%	43%	50%	38%	39%	33%	43%
Non-portable DAB radio	23%	34%	31%	32%	34%	36%	36%	31%	37%	42%	43%	41%	43%	34%	49%
Computer with TV viewing card	22%	36%	34%	35%	39%	36%	41%	37%	42%	50%	47%	43%	40%	41%	42%
Portable DAB radio	21%	33%	31%	31%	35%	37%	37%	34%	34%	37%	46%	48%	42%	34%	53%
iPod with video	20%	31%	34%	35%	40%	35%	42%	36%	34%	41%	52%	51%	41%	38%	45%
Xbox 360	20%	25%	36%	30%	45%	35%	52%	33%	31%	34%	42%	33%	37%	36%	43%
Personal video plyr, excl video iPod	18%	30%	33%	32%	36%	33%	38%	31%	35%	40%	40%	41%	36%	32%	37%
An HD-DVD Player	16%	27%	26%	29%	28%	35%	35%	28%	36%	39%	47%	38%	36%	34%	35%
Playstation 3	16%	25%	34%	29%	39%	33%	41%	27%	34%	32%	37%	32%	35%	33%	43%
iPhone / N95 or similar	16%	26%	25%	26%	31%	34%	31%	31%	30%	41%	52%	41%	36%	34%	42%
PDA/Blackberry	13%	19%	22%	23%	24%	25%	29%	25%	30%	40%	41%	33%	31%	29%	34%
iPod with touchscreen	10%	19%	24%	23%	24%	27%	24%	24%	29%	29%	32%	32%	29%	27%	33%
An e-book reader	9%	17%	19%	19%	19%	23%	23%	20%	26%	28%	28%	30%	26%	25%	31%
Blu-ray player (not PS3)	7%	17%	16%	17%	19%	23%	21%	20%	22%	26%	28%	26%	26%	26%	29%
Apple TV set top box	6%	12%	14%	16%	19%	20%	20%	16%	23%	25%	23%	25%	22%	23%	27%

Technology owned/accessed by activity

Part 3 of 4

% Own / access versus do regularly	Total	PPV Sky et al	HD-DVD	Stream TV	Stream movies	Online gamble	p2p movies	Pirate DVDs	MMO-RPG	TV via PC	Write blog	Online bingo	Swap HDDs	Audio books	eBooks
Digital Camera (not on mobile)	79%	86%	86%	85%	87%	86%	78%	78%	85%	86%	87%	83%	80%	83%	90%
Mobile phone access the Internet	68%	76%	83%	80%	80%	80%	76%	80%	79%	83%	81%	81%	72%	80%	88%
Wireless network at home	56%	68%	67%	69%	69%	65%	74%	66%	76%	71%	80%	67%	73%	66%	79%
Freeview (but not Top Up)	53%	56%	77%	68%	64%	59%	61%	66%	71%	77%	73%	72%	69%	71%	83%
Basic mobile phone	49%	57%	62%	65%	67%	68%	60%	58%	61%	68%	65%	69%	69%	69%	67%
DVD Recorder	48%	71%	74%	60%	69%	61%	57%	69%	63%	74%	67%	64%	74%	74%	77%
Mobile phone w/ media player	46%	63%	64%	70%	73%	66%	68%	75%	67%	74%	65%	70%	71%	72%	78%
Satellite television / Sky	44%	71%	53%	55%	57%	64%	57%	64%	57%	58%	60%	63%	60%	53%	62%
Personal digital music plyr (excl iPod)	40%	57%	53%	60%	69%	66%	60%	60%	63%	71%	65%	58%	60%	64%	70%
HD-ready tv set	39%	60%	75%	51%	59%	52%	56%	62%	49%	60%	57%	59%	60%	64%	71%
iPod	36%	53%	53%	57%	65%	57%	50%	51%	53%	61%	63%	60%	59%	68%	72%
External HDD to store media	35%	54%	56%	57%	56%	56%	50%	59%	52%	75%	61%	50%	66%	66%	75%
Windows Media Center	33%	53%	53%	54%	58%	51%	48%	54%	51%	77%	53%	58%	58%	55%	65%
Cable television	31%	59%	53%	50%	56%	51%	53%	58%	51%	60%	54%	51%	57%	66%	69%
Sky +	25%	57%	48%	51%	49%	48%	44%	46%	39%	54%	51%	52%	51%	50%	63%
Freeview plus Top Up	24%	47%	53%	47%	50%	43%	36%	48%	41%	53%	44%	54%	48%	59%	64%
Nintendo Wii	24%	49%	47%	47%	45%	47%	45%	51%	51%	47%	45%	52%	44%	54%	60%
DVR ie HDD recorder (excl Sky+)	24%	44%	51%	46%	43%	40%	40%	42%	45%	60%	51%	43%	51%	51%	62%
Non-portable DAB radio	23%	45%	45%	41%	48%	49%	39%	47%	47%	52%	38%	42%	53%	53%	56%
Computer with TV viewing card	22%	47%	52%	51%	55%	42%	48%	47%	52%	83%	47%	52%	54%	54%	70%
Portable DAB radio	21%	49%	48%	39%	53%	40%	41%	50%	39%	54%	46%	46%	56%	52%	62%
iPod with video	20%	42%	47%	49%	52%	43%	43%	50%	46%	61%	56%	50%	52%	68%	66%
Xbox 360	20%	42%	44%	45%	49%	40%	41%	50%	45%	53%	49%	51%	44%	53%	56%
Personal video plyr, excl video iPod	18%	39%	46%	46%	50%	34%	40%	48%	47%	55%	43%	44%	53%	49%	56%
An HD-DVD Player	16%	48%	74%	43%	52%	40%	40%	47%	44%	48%	46%	51%	57%	60%	67%
Playstation 3	16%	42%	43%	43%	45%	35%	36%	45%	37%	42%	44%	46%	45%	44%	48%
iPhone / N95 or similar	16%	42%	41%	36%	45%	34%	39%	45%	43%	52%	44%	44%	46%	52%	58%
PDA/Blackberry	13%	38%	42%	36%	37%	37%	32%	41%	41%	48%	43%	43%	43%	54%	60%
iPod with touchscreen	10%	39%	38%	33%	40%	34%	32%	41%	34%	41%	38%	41%	46%	46%	53%
An e-book reader	9%	34%	36%	35%	36%	30%	29%	38%	40%	46%	39%	41%	47%	51%	58%
Blu-ray player (not PS3)	7%	31%	34%	33%	41%	31%	32%	36%	34%	37%	38%	37%	44%	44%	47%
Apple TV set top box	6%	28%	31%	29%	34%	22%	29%	34%	33%	40%	35%	39%	38%	38%	48%

Technology owned/accessed by activity

Part 4 of 4

% Own / access versus do regularly	Total	Rent music	Buy movie download	p2p software	PPV online	Online poker	Blu-ray	Pay podcast
Digital Camera (not on mobile)	79%	87%	84%	79%	87%	87%	84%	93%
Mobile phone access the Internet	68%	85%	92%	78%	82%	84%	84%	90%
Wireless network at home	56%	73%	74%	69%	79%	75%	78%	82%
Freeview (but not Top Up)	53%	82%	81%	71%	75%	67%	86%	85%
Basic mobile phone	49%	73%	70%	63%	78%	78%	67%	79%
DVD Recorder	48%	75%	76%	74%	83%	70%	76%	80%
Mobile phone w/ media player	46%	81%	82%	74%	88%	76%	79%	86%
Satellite television / Sky	44%	77%	76%	68%	75%	75%	70%	76%
Personal digital music plyr (excl iPod)	40%	78%	75%	69%	80%	69%	72%	85%
HD-ready tv set	39%	68%	71%	68%	67%	60%	81%	79%
iPod	36%	75%	75%	63%	76%	64%	71%	87%
External HDD to store media	35%	69%	79%	58%	71%	55%	70%	82%
Windows Media Center	33%	70%	65%	58%	74%	62%	66%	80%
Cable television	31%	73%	75%	65%	77%	60%	68%	88%
Sky +	25%	69%	70%	58%	78%	61%	69%	82%
Freeview plus Top Up	24%	65%	78%	56%	75%	56%	59%	84%
Nintendo Wii	24%	67%	70%	63%	71%	59%	71%	80%
DVR ie HDD recorder (excl Sky+)	24%	66%	68%	52%	62%	53%	62%	81%
Non-portable DAB radio	23%	63%	67%	59%	66%	57%	67%	80%
Computer with TV viewing card	22%	69%	72%	59%	73%	58%	68%	80%
Portable DAB radio	21%	64%	72%	62%	71%	51%	65%	88%
iPod with video	20%	71%	75%	64%	75%	58%	75%	83%
Xbox 360	20%	65%	70%	59%	70%	59%	69%	81%
Personal video plyr, excl video iPod	18%	64%	72%	60%	68%	46%	69%	76%
An HD-DVD Player	16%	65%	75%	61%	72%	54%	71%	82%
Playstation 3	16%	61%	65%	58%	72%	55%	80%	73%
iPhone / N95 or similar	16%	60%	65%	59%	70%	54%	66%	79%
PDA/Blackberry	13%	57%	63%	55%	68%	52%	58%	79%
iPod with touchscreen	10%	56%	63%	54%	67%	49%	62%	80%
An e-book reader	9%	57%	60%	50%	66%	44%	64%	73%
Blu-ray player (not PS3)	7%	55%	63%	52%	62%	42%	58%	76%
Apple TV set top box	6%	55%	56%	47%	63%	44%	60%	76%

Caution:

Base sizes decrease as activity becomes increasingly niche

Activity (Regular)	Base
Subscribe paid mthly music d/l service	59
Buy authorised digital download movie	59
Filesharing games / software	59
Watch PPV movies over Internet	55
Play online poker for money	54
Watch movies on Blu-ray disk	48
Subscribe to paid-for podcast	35

Technology owned/accessed by activity

Part 1 of 4

Shown as relative to total

% Own / access versus do regularly	Total	Radio	Books	Sky/ cable	News-papers	Maga-zines	Social network	Lottery	Record TV	Chat on IM	Paper sites	Blue-tooth	Offline games	Cinema	Online games
Digital Camera (not on mobile)	79%	+5%	+4%	+6%	+3%	+6%	+2%	+7%	+5%	+1%	+8%	+5%	+4%	+8%	+1%
Mobile phone access the Internet	68%	+5%	+3%	+10%	+4%	+6%	+7%	+2%	+8%	+8%	+2%	+20%	+10%	+6%	+6%
Wireless network at home	56%	+4%	+2%	+6%	+2%	+4%	+7%	-2%	+6%	+9%	+6%	+15%	+5%	+4%	+5%
Freeview (but not Top Up)	53%	+3%	+3%	-7%	+1%	+1%	+5%	+3%	+3%	+6%	+9%	+9%	+5%	+4%	+7%
Basic mobile phone	49%	+2%	+3%	-2%	0%	+1%	-1%	+3%	-1%	+2%	+5%	-6%	+2%	+3%	+4%
DVD Recorder	48%	+4%	+3%	+4%	+4%	+5%	0%	+3%	+10%	+4%	+6%	+12%	+9%	+4%	+7%
Mobile phone w/ media player	46%	+4%	0%	+6%	+4%	+5%	+9%	0%	+8%	+12%	+2%	+23%	+10%	+9%	+8%
Satellite television / Sky	44%	+1%	+1%	+27%	+3%	+4%	+3%	+5%	+11%	+2%	+3%	+10%	+8%	+3%	+6%
Personal digital music plyr (excl iPod)	40%	+2%	+3%	+4%	+3%	+6%	+6%	+1%	+6%	+7%	+7%	+13%	+9%	+9%	+7%
HD-ready tv set	39%	+3%	+1%	+7%	+3%	+2%	+1%	+9%	+7%	+5%	+6%	+15%	+5%	+7%	+2%
iPod	36%	+3%	+4%	+2%	+3%	+7%	+9%	0%	+7%	+8%	+7%	+10%	+6%	+11%	+4%
External HDD to store media	35%	+2%	0%	+2%	+1%	+6%	+5%	-2%	+9%	+7%	+8%	+18%	+12%	+10%	+7%
Windows Media Center	33%	+2%	0%	+3%	+5%	+3%	+2%	+5%	+7%	+6%	+6%	+16%	+11%	+1%	+11%
Cable television	31%	0%	+1%	+8%	+2%	+3%	0%	+3%	+1%	+5%	+4%	+7%	+6%	+7%	+5%
Sky +	25%	+1%	0%	+14%	+3%	+3%	+2%	+3%	+19%	+3%	+6%	+8%	+10%	+7%	+7%
Freeview plus Top Up	24%	+2%	-1%	-3%	+5%	+4%	+4%	+2%	+2%	+4%	+6%	+6%	+2%	+9%	+4%
Nintendo Wii	24%	+1%	+1%	+6%	+3%	+2%	+3%	+4%	+5%	+6%	+4%	+9%	+8%	+8%	+8%
DVR ie HDD recorder (excl Sky+)	24%	+1%	0%	0%	0%	+2%	+1%	+2%	+13%	+5%	+4%	+9%	+8%	+3%	+4%
Non-portable DAB radio	23%	+5%	+1%	+2%	+3%	+6%	+4%	+3%	+6%	+4%	+8%	+8%	+5%	+4%	+6%
Computer with TV viewing card	22%	+2%	0%	+3%	+3%	+3%	+4%	+1%	+5%	+6%	+9%	+13%	+12%	+4%	+12%
Portable DAB radio	21%	+5%	+1%	+2%	+4%	+6%	+2%	+3%	+9%	+2%	+8%	+9%	+6%	+7%	+6%
iPod with video	20%	+2%	+2%	+3%	+4%	+6%	+5%	+4%	+5%	+5%	+10%	+14%	+8%	+9%	+7%
Xbox 360	20%	-1%	0%	+4%	+2%	+4%	+3%	0%	+2%	+2%	+5%	+12%	+8%	+7%	+10%
Personal video plyr, excl video iPod	18%	0%	-1%	+1%	0%	+3%	+4%	-1%	+3%	+5%	+6%	+12%	+8%	+8%	+9%
An HD-DVD Player	16%	0%	+1%	0%	+4%	+4%	+5%	+2%	+6%	+7%	+5%	+13%	+4%	+7%	+8%
Playstation 3	16%	-1%	-1%	+1%	+2%	+4%	+3%	+2%	+4%	+5%	+4%	+8%	+6%	+8%	+7%
iPhone / N95 or similar	16%	0%	0%	+1%	+3%	+4%	+5%	0%	+6%	+5%	+7%	+15%	+6%	+7%	+4%
PDA/Blackberry	13%	+1%	0%	+1%	+2%	+3%	+1%	+1%	+3%	+3%	+9%	+8%	+7%	+5%	+6%
iPod with touchscreen	10%	+1%	0%	+2%	+2%	+4%	+3%	+2%	+4%	+3%	+5%	+10%	+5%	+9%	+4%
An e-book reader	9%	-1%	0%	-1%	+1%	+1%	+2%	0%	+3%	+3%	+5%	+8%	+6%	+6%	+7%
Blu-ray player (not PS3)	7%	0%	-1%	0%	+1%	+3%	+2%	+1%	+3%	+3%	+5%	+7%	+5%	+6%	+6%
Apple TV set top box	6%	-1%	-1%	-1%	+2%	+2%	+1%	+1%	+2%	+3%	+5%	+7%	+4%	+6%	+6%

Technology owned/accessed by activity

Part 2 of 4

Shown as relative to total

% Own / access versus do regularly	Total	Stream radio	Hand games	Rent DVDs	Buy games	Music netwk	Online console	Mobile games	Chat-rooms	Skype et al	Mobile web	Podcast	Read blogs	p2p music	Mobile radio
Digital Camera (not on mobile)	79%	+6%	+5%	+10%	+5%	+2%	+8%	0%	+2%	+9%	+9%	+6%	+3%	-6%	+2%
Mobile phone access the Internet	68%	+9%	+14%	+7%	+12%	+11%	+16%	+15%	+6%	+8%	+28%	+14%	+7%	+10%	+15%
Wireless network at home	56%	+10%	+9%	+10%	+12%	+7%	+16%	-1%	+5%	+18%	+19%	+13%	+19%	+14%	+11%
Freeview (but not Top Up)	53%	+9%	+6%	+11%	+9%	+11%	+11%	+3%	+10%	+13%	+19%	+14%	+19%	+3%	+7%
Basic mobile phone	49%	+5%	-2%	+5%	+3%	+4%	+5%	-6%	+13%	+15%	-2%	+8%	+15%	+4%	+5%
DVD Recorder	48%	+9%	+12%	+7%	+8%	+7%	+12%	+8%	+9%	+15%	+20%	+10%	+13%	+1%	+12%
Mobile phone w/ media player	46%	+12%	+14%	+12%	+15%	+18%	+20%	+21%	+8%	+16%	+38%	+13%	+15%	+25%	+33%
Satellite television / Sky	44%	+3%	+11%	+4%	+14%	+9%	+20%	+6%	+10%	+10%	+21%	+10%	+11%	+10%	+14%
Personal digital music plyr (excl iPod)	40%	+16%	+13%	+13%	+15%	+14%	+17%	+15%	+16%	+21%	+20%	+20%	+13%	+20%	+22%
HD-ready tv set	39%	+7%	+17%	+11%	+16%	+10%	+16%	+9%	+11%	+14%	+23%	+14%	+10%	+15%	+7%
iPod	36%	+14%	+13%	+14%	+17%	+19%	+19%	+8%	+15%	+15%	+26%	+34%	+23%	+13%	+18%
External HDD to store media	35%	+11%	+11%	+9%	+16%	+15%	+18%	+13%	+9%	+27%	+28%	+25%	+20%	+14%	+22%
Windows Media Center	33%	+9%	+14%	+11%	+12%	+12%	+16%	+13%	+11%	+23%	+18%	+16%	+13%	+12%	+18%
Cable television	31%	+2%	+11%	+5%	+10%	+11%	+9%	+15%	+16%	+14%	+10%	+15%	+13%	+13%	+23%
Sky +	25%	+8%	+11%	+7%	+18%	+14%	+22%	+10%	+16%	+21%	+28%	+16%	+22%	+15%	+24%
Freeview plus Top Up	24%	+9%	+11%	+9%	+14%	+15%	+15%	+9%	+12%	+14%	+16%	+18%	+18%	+12%	+22%
Nintendo Wii	24%	+7%	+22%	+10%	+25%	+11%	+21%	+11%	+14%	+10%	+26%	+18%	+11%	+15%	+26%
DVR ie HDD recorder (excl Sky+)	24%	+4%	+10%	+9%	+13%	+9%	+14%	+6%	+7%	+19%	+26%	+14%	+15%	+9%	+19%
Non-portable DAB radio	23%	+11%	+8%	+9%	+11%	+13%	+13%	+8%	+14%	+19%	+20%	+18%	+20%	+11%	+26%
Computer with TV viewing card	22%	+14%	+12%	+13%	+17%	+14%	+19%	+15%	+20%	+28%	+25%	+21%	+18%	+19%	+20%
Portable DAB radio	21%	+12%	+10%	+10%	+14%	+16%	+16%	+13%	+13%	+16%	+25%	+27%	+21%	+13%	+32%
iPod with video	20%	+11%	+14%	+15%	+20%	+15%	+22%	+16%	+14%	+21%	+32%	+31%	+21%	+18%	+25%
Xbox 360	20%	+5%	+16%	+10%	+25%	+15%	+32%	+13%	+11%	+14%	+22%	+13%	+17%	+16%	+23%
Personal video plyr, excl video iPod	18%	+12%	+15%	+14%	+18%	+15%	+20%	+13%	+17%	+22%	+22%	+23%	+18%	+14%	+19%
An HD-DVD Player	16%	+11%	+10%	+13%	+12%	+19%	+19%	+12%	+20%	+23%	+31%	+22%	+20%	+18%	+19%
Playstation 3	16%	+9%	+18%	+13%	+23%	+17%	+25%	+11%	+18%	+16%	+21%	+16%	+19%	+17%	+27%
iPhone / N95 or similar	16%	+10%	+9%	+10%	+15%	+18%	+15%	+15%	+14%	+25%	+36%	+25%	+20%	+18%	+26%
PDA/Blackberry	13%	+6%	+9%	+10%	+11%	+12%	+16%	+12%	+17%	+27%	+28%	+20%	+18%	+16%	+21%
iPod with touchscreen	10%	+9%	+14%	+13%	+14%	+17%	+14%	+14%	+19%	+19%	+22%	+22%	+19%	+17%	+23%
An e-book reader	9%	+8%	+10%	+10%	+10%	+14%	+14%	+11%	+17%	+19%	+19%	+21%	+17%	+16%	+22%
Blu-ray player (not PS3)	7%	+10%	+9%	+10%	+12%	+16%	+14%	+13%	+15%	+19%	+21%	+19%	+19%	+19%	+22%
Apple TV set top box	6%	+6%	+8%	+10%	+13%	+14%	+14%	+10%	+17%	+19%	+17%	+19%	+16%	+17%	+21%

Technology owned/accessed by activity

Part 3 of 4

Shown as relative to total

% Own / access versus do regularly	Total	PPV Sky et al	HD-DVD	Stream TV	Stream movies	Online gamble	p2p movies	Pirate DVDs	MMO-RPG	TV via PC	Write blog	Online bingo	Swap HDDs	Audio books	eBooks
Digital Camera (not on mobile)	79%	+7%	+7%	+6%	+8%	+7%	-1%	-1%	+6%	+7%	+8%	+4%	+1%	+4%	+11%
Mobile phone access the Internet	68%	+8%	+15%	+12%	+12%	+12%	+8%	+12%	+11%	+15%	+13%	+13%	+4%	+12%	+20%
Wireless network at home	56%	+12%	+11%	+13%	+13%	+9%	+18%	+10%	+20%	+15%	+24%	+11%	+17%	+10%	+23%
Freeview (but not Top Up)	53%	+3%	+24%	+15%	+11%	+6%	+8%	+13%	+18%	+24%	+20%	+19%	+16%	+18%	+30%
Basic mobile phone	49%	+8%	+13%	+16%	+18%	+19%	+11%	+9%	+12%	+19%	+16%	+20%	+20%	+20%	+18%
DVD Recorder	48%	+23%	+26%	+12%	+21%	+13%	+9%	+21%	+15%	+26%	+19%	+16%	+26%	+26%	+29%
Mobile phone w/ media player	46%	+17%	+18%	+24%	+27%	+20%	+22%	+29%	+21%	+28%	+19%	+24%	+25%	+26%	+32%
Satellite television / Sky	44%	+27%	+9%	+11%	+13%	+20%	+13%	+20%	+13%	+14%	+16%	+19%	+16%	+9%	+18%
Personal digital music plyr (excl iPod)	40%	+17%	+13%	+20%	+29%	+26%	+20%	+20%	+23%	+31%	+25%	+18%	+20%	+24%	+30%
HD-ready tv set	39%	+21%	+36%	+12%	+20%	+13%	+17%	+23%	+10%	+21%	+18%	+20%	+21%	+25%	+32%
iPod	36%	+17%	+17%	+21%	+29%	+21%	+14%	+15%	+17%	+25%	+27%	+24%	+23%	+32%	+36%
External HDD to store media	35%	+19%	+21%	+22%	+21%	+21%	+15%	+24%	+17%	+40%	+26%	+15%	+31%	+31%	+40%
Windows Media Center	33%	+20%	+20%	+21%	+25%	+18%	+15%	+21%	+18%	+44%	+20%	+25%	+25%	+22%	+32%
Cable television	31%	+28%	+22%	+19%	+25%	+20%	+22%	+27%	+20%	+29%	+23%	+20%	+26%	+35%	+38%
Sky +	25%	+32%	+23%	+26%	+24%	+23%	+19%	+21%	+14%	+29%	+26%	+27%	+26%	+25%	+38%
Freeview plus Top Up	24%	+23%	+29%	+23%	+26%	+19%	+12%	+24%	+17%	+29%	+20%	+30%	+24%	+35%	+40%
Nintendo Wii	24%	+25%	+23%	+23%	+21%	+23%	+21%	+27%	+27%	+23%	+21%	+28%	+20%	+30%	+36%
DVR ie HDD recorder (excl Sky+)	24%	+20%	+27%	+22%	+19%	+16%	+16%	+18%	+21%	+36%	+27%	+19%	+27%	+27%	+38%
Non-portable DAB radio	23%	+22%	+22%	+18%	+25%	+26%	+16%	+24%	+24%	+29%	+15%	+19%	+30%	+30%	+33%
Computer with TV viewing card	22%	+25%	+30%	+29%	+33%	+20%	+26%	+25%	+30%	+61%	+25%	+30%	+32%	+32%	+48%
Portable DAB radio	21%	+28%	+27%	+18%	+32%	+19%	+20%	+29%	+18%	+33%	+25%	+25%	+35%	+31%	+41%
iPod with video	20%	+22%	+27%	+29%	+32%	+23%	+23%	+30%	+26%	+41%	+36%	+30%	+32%	+48%	+46%
Xbox 360	20%	+22%	+24%	+25%	+29%	+20%	+21%	+30%	+25%	+33%	+29%	+31%	+24%	+33%	+36%
Personal video plyr, excl video iPod	18%	+21%	+28%	+28%	+32%	+16%	+22%	+30%	+29%	+37%	+25%	+26%	+35%	+31%	+38%
An HD-DVD Player	16%	+32%	+58%	+27%	+36%	+24%	+24%	+31%	+28%	+32%	+30%	+35%	+41%	+44%	+51%
Playstation 3	16%	+26%	+27%	+27%	+29%	+19%	+20%	+29%	+21%	+26%	+28%	+30%	+29%	+28%	+32%
iPhone / N95 or similar	16%	+26%	+25%	+20%	+29%	+18%	+23%	+29%	+27%	+36%	+28%	+28%	+30%	+36%	+42%
PDA/Blackberry	13%	+25%	+29%	+23%	+24%	+24%	+19%	+28%	+28%	+35%	+30%	+30%	+30%	+41%	+47%
iPod with touchscreen	10%	+29%	+28%	+23%	+30%	+24%	+22%	+31%	+24%	+31%	+28%	+31%	+36%	+36%	+43%
An e-book reader	9%	+25%	+27%	+26%	+27%	+21%	+20%	+29%	+31%	+37%	+30%	+32%	+38%	+42%	+49%
Blu-ray player (not PS3)	7%	+24%	+27%	+26%	+34%	+24%	+25%	+29%	+27%	+30%	+31%	+30%	+37%	+37%	+40%
Apple TV set top box	6%	+22%	+25%	+23%	+28%	+16%	+23%	+28%	+27%	+34%	+29%	+33%	+32%	+32%	+42%

Technology Owned/Accessed by Activity

Part 4 of 4

Shown as relative to total

% Own / access versus do regularly	Total	Rent music	Buy movie download	p2p software	PPV online	Online poker	Blu-ray	Pay podcast
Digital Camera (not on mobile)	79%	+8%	+5%	0%	+8%	+8%	+5%	+14%
Mobile phone access the Internet	68%	+17%	+24%	+10%	+14%	+16%	+16%	+22%
Wireless network at home	56%	+17%	+18%	+13%	+23%	+19%	+22%	+26%
Freeview (but not Top Up)	53%	+29%	+28%	+18%	+22%	+14%	+33%	+32%
Basic mobile phone	49%	+24%	+21%	+14%	+29%	+29%	+18%	+30%
DVD Recorder	48%	+27%	+28%	+26%	+35%	+22%	+28%	+32%
Mobile phone w/ media player	46%	+35%	+36%	+28%	+42%	+30%	+33%	+40%
Satellite television / Sky	44%	+33%	+32%	+24%	+31%	+31%	+26%	+32%
Personal digital music plyr (excl iPod)	40%	+38%	+35%	+29%	+40%	+29%	+32%	+45%
HD-ready tv set	39%	+29%	+32%	+29%	+28%	+21%	+42%	+40%
iPod	36%	+39%	+39%	+27%	+40%	+28%	+35%	+51%
External HDD to store media	35%	+34%	+44%	+23%	+36%	+20%	+35%	+47%
Windows Media Center	33%	+37%	+32%	+25%	+41%	+29%	+33%	+47%
Cable television	31%	+42%	+44%	+34%	+46%	+29%	+37%	+57%
Sky +	25%	+44%	+45%	+33%	+53%	+36%	+44%	+57%
Freeview plus Top Up	24%	+41%	+54%	+32%	+51%	+32%	+35%	+60%
Nintendo Wii	24%	+43%	+46%	+39%	+47%	+35%	+47%	+56%
DVR ie HDD recorder (excl Sky+)	24%	+42%	+44%	+28%	+38%	+29%	+38%	+57%
Non-portable DAB radio	23%	+40%	+44%	+36%	+43%	+34%	+44%	+57%
Computer with TV viewing card	22%	+47%	+50%	+37%	+51%	+36%	+46%	+58%
Portable DAB radio	21%	+43%	+51%	+41%	+50%	+30%	+44%	+67%
iPod with video	20%	+51%	+55%	+44%	+55%	+38%	+55%	+63%
Xbox 360	20%	+45%	+50%	+39%	+50%	+39%	+49%	+61%
Personal video plyr, excl video iPod	18%	+46%	+54%	+42%	+50%	+28%	+51%	+58%
An HD-DVD Player	16%	+49%	+59%	+45%	+56%	+38%	+55%	+66%
Playstation 3	16%	+45%	+49%	+42%	+56%	+39%	+64%	+57%
iPhone / N95 or similar	16%	+44%	+49%	+43%	+54%	+38%	+50%	+63%
PDA/Blackberry	13%	+44%	+50%	+42%	+55%	+39%	+45%	+66%
iPod with touchscreen	10%	+46%	+53%	+44%	+57%	+39%	+52%	+70%
An e-book reader	9%	+48%	+51%	+41%	+57%	+35%	+55%	+64%
Blu-ray player (not PS3)	7%	+48%	+56%	+45%	+55%	+35%	+51%	+69%
Apple TV set top box	6%	+49%	+50%	+41%	+57%	+38%	+54%	+70%

Caution:

Base sizes decrease as activity becomes increasingly niche

Activity (Regular)	Base
Subscribe paid mthly music d/l service	59
Buy authorised digital download movie	59
Filesharing games / software	59
Watch PPV movies over Internet	55
Play online poker for money	54
Watch movies on Blu-ray disk	48
Subscribe to paid-for podcast	35

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