

# Internet Quarterly - UK - September 2009

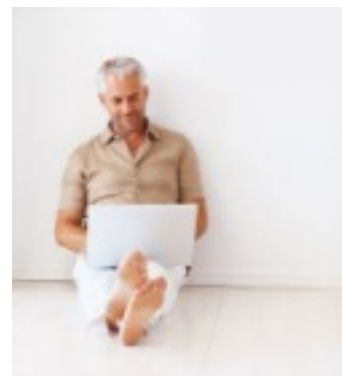
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## What is this report about?

The focus for this month's Internet Quarterly is on the usage of bundled services (ie when consumers take out more than one service from a single telecoms provider). In particular, it looks at the number and range of services users are likely to take out as well as the motivations for consumers to switch providers. Finally, the section assesses the challenges ahead in the sector, especially with the launch of Freeview HD in December.

## Key issues covered in the analysis

- Intel's research for this report shows that we own more technology than ever, with the greatest gains this quarter made by HD-Ready TV sets, up by 23 percentage points. This is being driven by the digital switchover, as well as falling prices.
- Looking more specifically at the profile of console users, the Wii has the broadest appeal although both the Xbox 360 and PS3 are putting in place strategies to become more family friendly, driven by new motion control technology.
- Whilst social networking has never been far out of the news, research indicates that amongst core 16-24 year olds usage is now at saturation point (just over 71%). Future growth will depend on attracting older users, in particular over 55's.
- Mobile browsing activities are still niche (with only 27% of adults getting online this way at all). Penetration is currently hampered by low penetration of web-orientated smart phones (at 11% of internet users) and slower-than-fixed connection speeds.
- Despite the recession, fashion retail continues to profit, although the downturn has led to an 11 percentage point fall in purchases by 16-24 years old this quarter. With youth unemployment at 17.3% in August, the problem could get worse.
- Intel's research also shows that, despite the wide availability of triple play packages, only a third of respondents subscribe to three services with another third avoiding them altogether. The greatest growth opportunities lie in the additional provision of mobile broadband and handset deals.



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