

# Scotland's communications market

## Key facts about Scotland

Figure	Scotland	UK
Population	5.328 million (mid-2013 estimate)	64.106 million (mid-2013 estimate)
Age profile	Population aged <16: 17.1% Population aged 65+: 17.8%	Population aged <16: 20.0% Population aged 65+: 17.4%
Population density	68 people per square kilometre	263 people per square kilometre
Language	87,000 people aged 3 and over (1.7% of the population) had some Gaelic language ability in 2011.	n/a
Unemployment	6.0% of economically active population, aged 16 and over	5.5% of economically active population, aged 16 and over
Income and expenditure	Weekly household income: £674 Weekly household expenditure: £449	Weekly household income: £711 Weekly household expenditure: £497

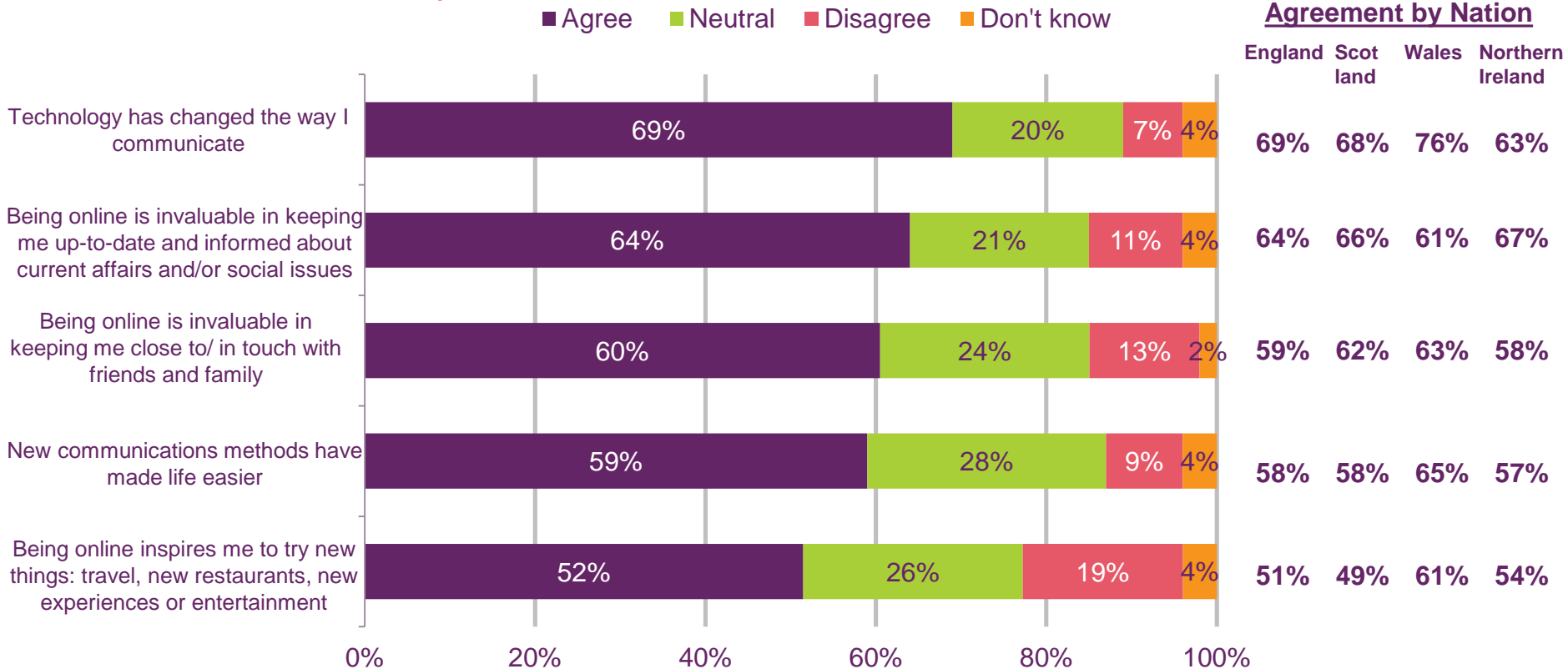
Source: Office for National Statistics: Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2013; Office for National Statistics: Regional Labour Market, May 2015; Office for National Statistics: Family Spending 2014 edition; National Records of Scotland, Statistical Bulletin – September 2013; 2011 Census, 2011 Census: Key Results

# Social communication online

# Figure 1.2



## Level of agreement with positive statements about online communications, by nation



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

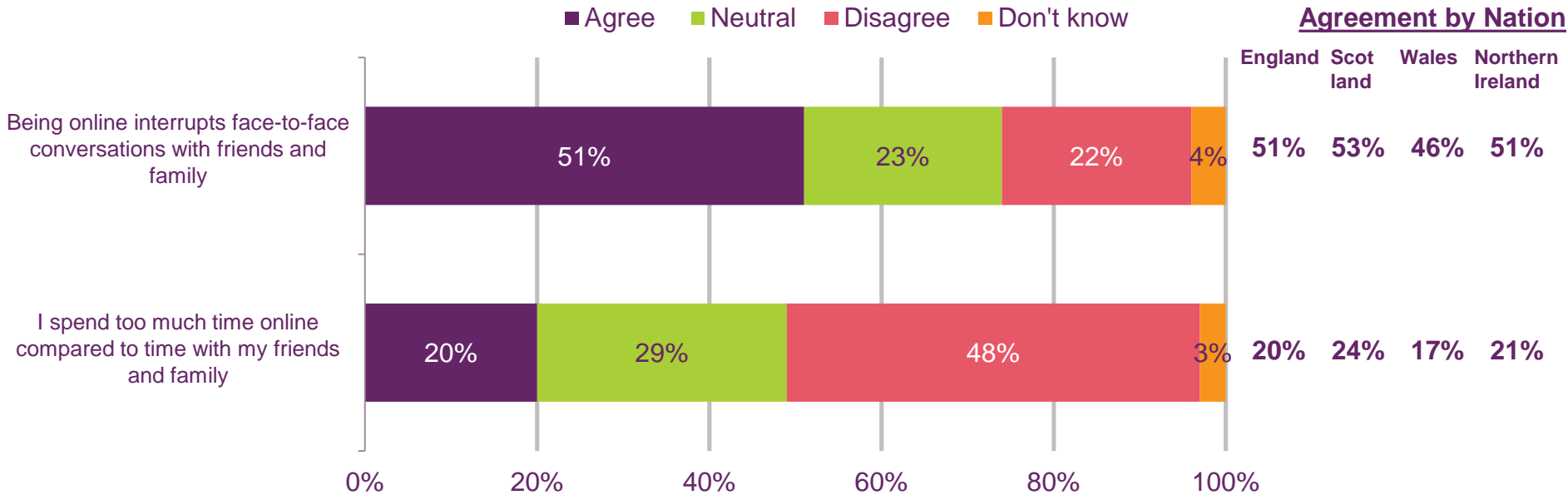
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q115. How much do you agree or disagree with the following statements?

# Figure 1.3



## Level of agreement with negative statements about online communications, by nation



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

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

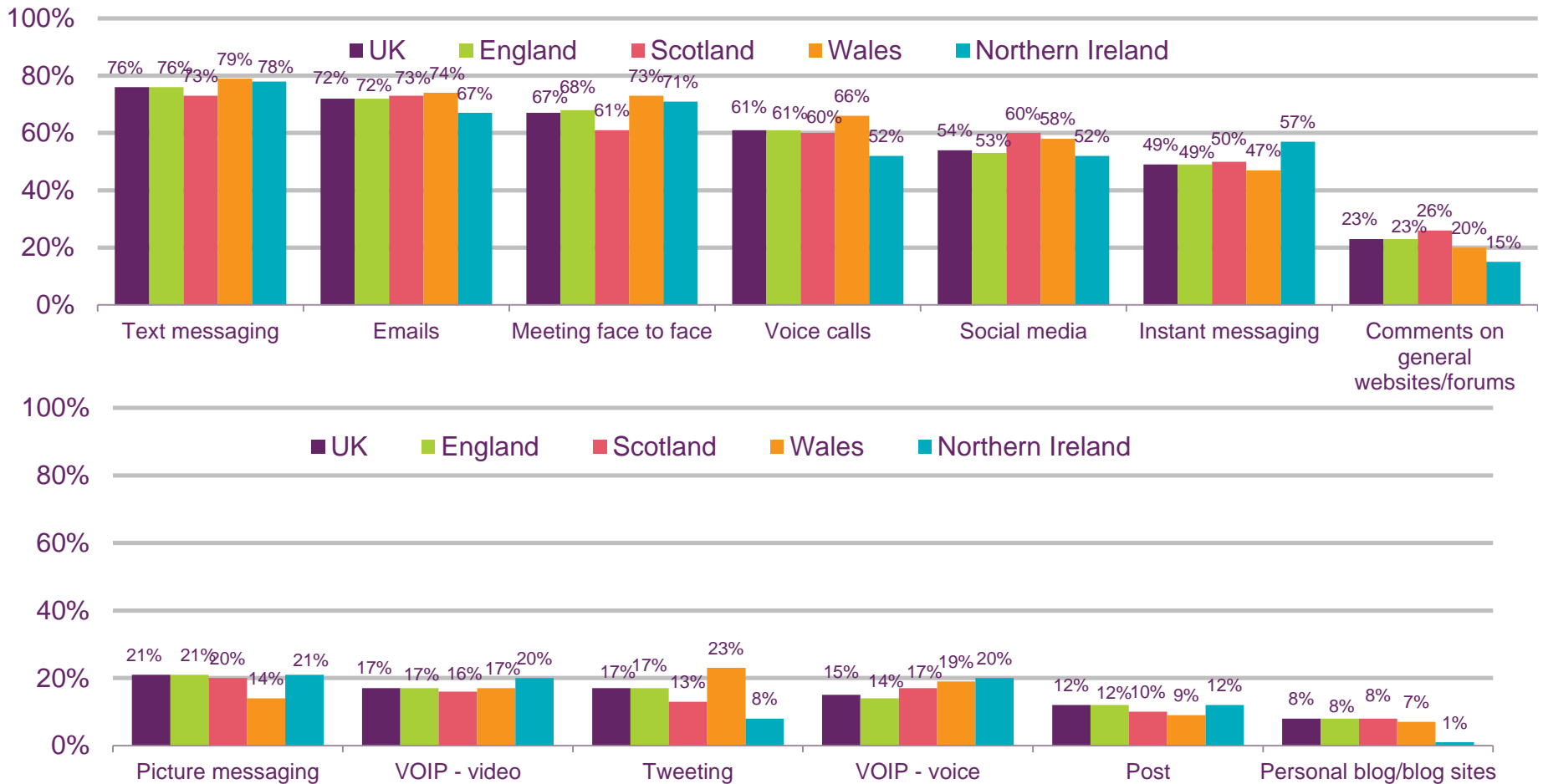
Q115 How much do you agree or disagree with the following statements?

# Figure 1.4

## Methods of communicating with friends and family: once a week or more often, by nation



Proportion of online respondents %



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

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

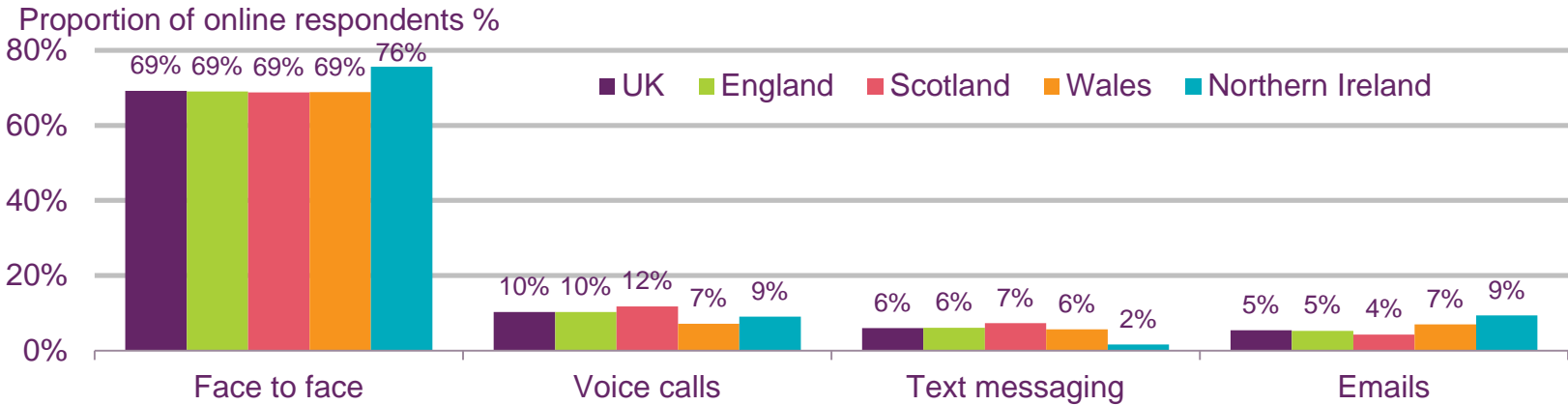
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

# Figure 1.5

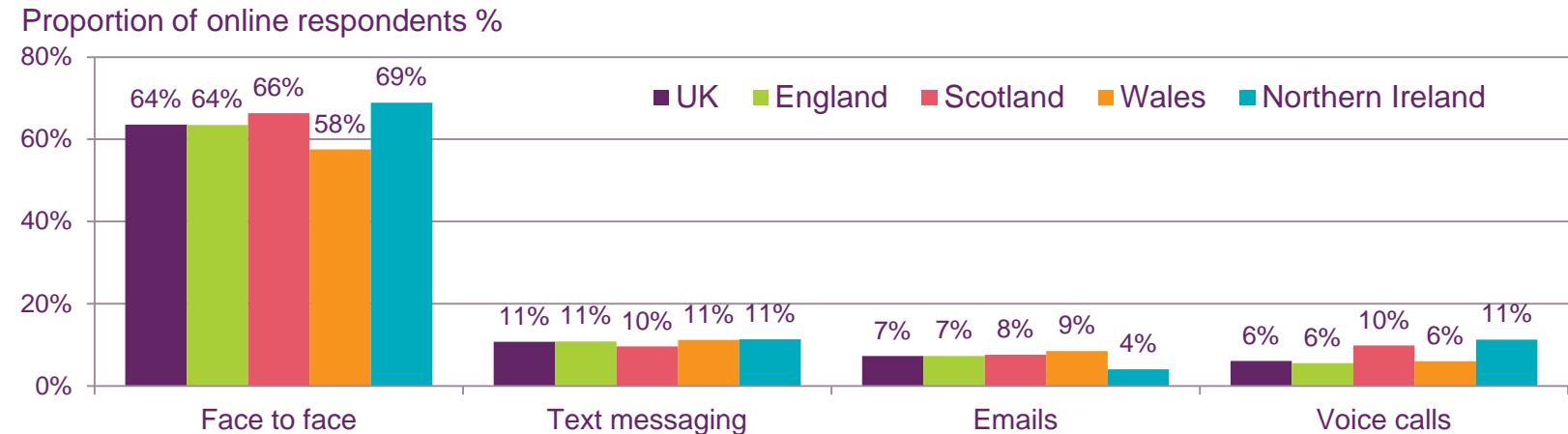


## Preferred methods of communicating with friends and family

### Family members



### Close friends



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

Base: All online adults aged 16+ who communicate with family members and close friends.

Q52. And which of these methods do you prefer to communicate with ..... ?

Chart includes data for all responses 5% or over.

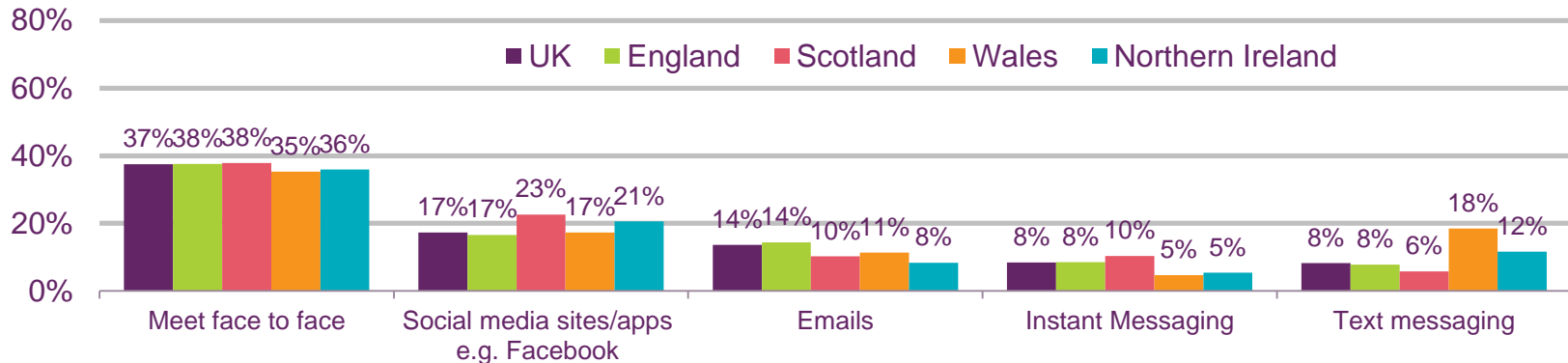
# Figure 1.6



## Preferred method of communicating with groups of friends and family: once a week or more often, by nation

### Groups of family and friends

Proportion of online respondents %



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

Base: All online adults aged 16+ who communicate with groups of family and friends.

Q52. And which of these methods do you prefer to communicate with ..... ?

Chart includes data for all responses 5% or over.

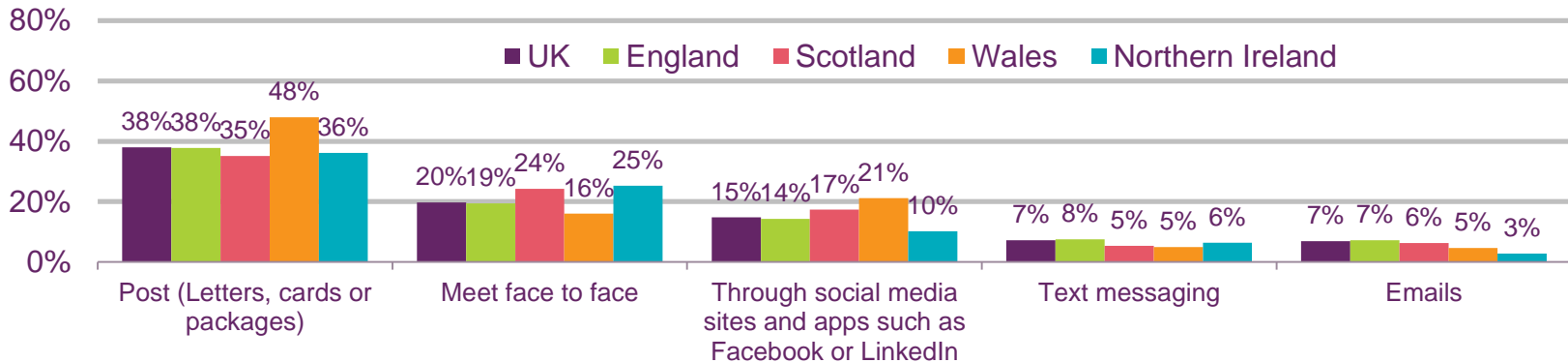


# Figure 1.7

## Preferred method of making birthday greetings and congratulations

### Birthday greetings and congratulations

Proportion of online respondents %



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

Base: All online adults aged 16+ who send greetings for occasions and events such as birthdays, get well, congratulations, etc.

Q52. And which of these methods do you prefer to communicate for ..... ?

Chart includes data for all responses 5% or over.

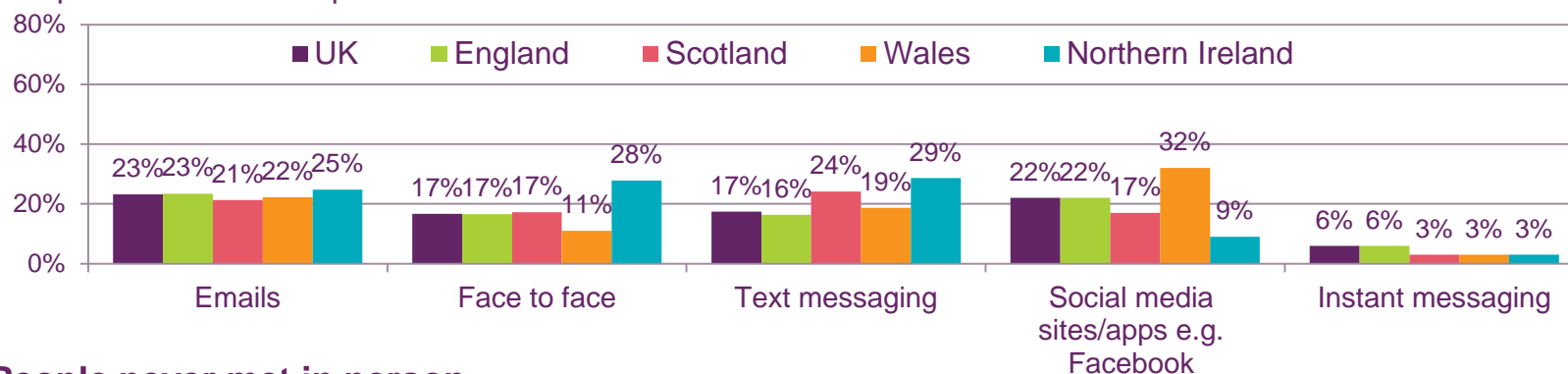
# Figure 1.8



## Preferred method of communicating with people less well known

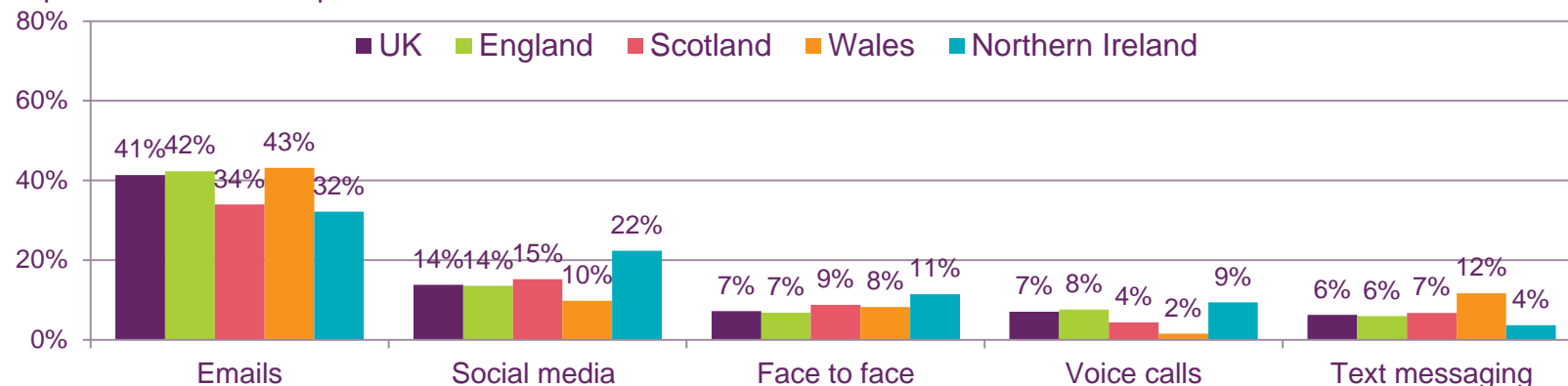
### Friend you don't know so well

Proportion of online respondents %



### People never met in person

Proportion of online respondents %



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

Base: All online adults aged 16+ who communicate with friends not known so well and people never met in person.

Q52. And which of these methods do you prefer to communicate with ..... ?

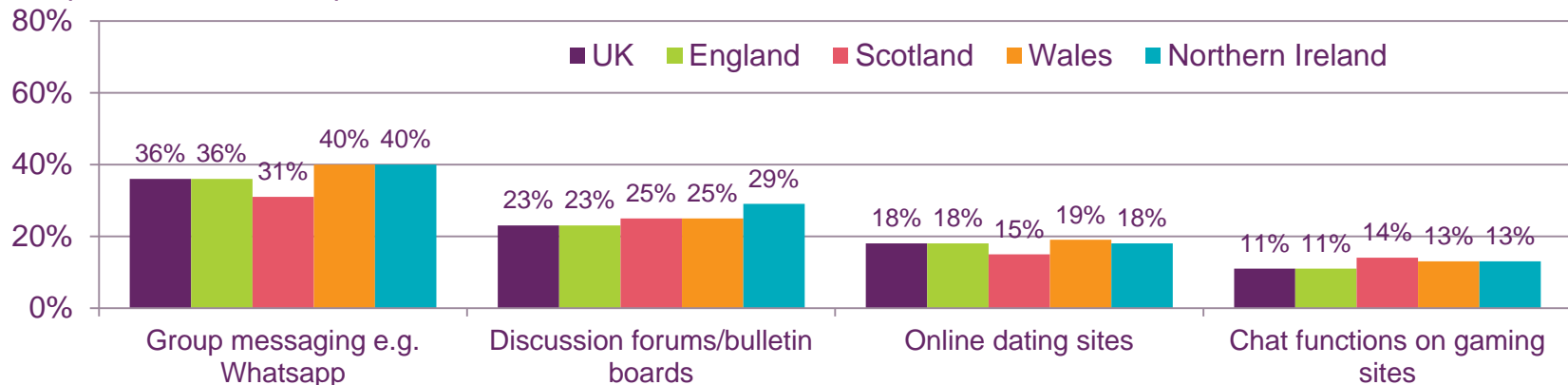
Chart includes data for all responses 5% or over.

# Figure 1.9

## Use of different online activities to make new contacts

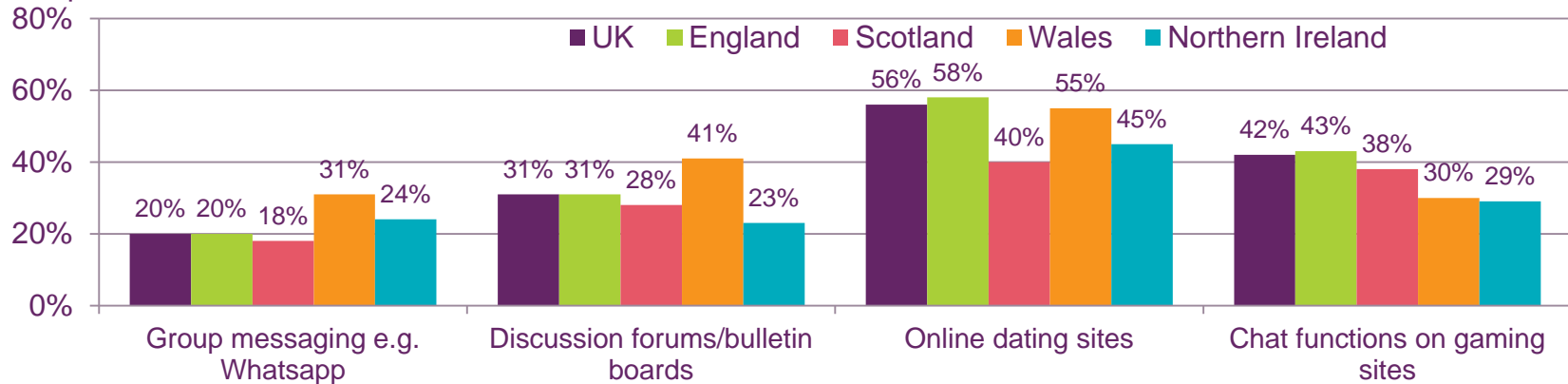
### Ever used the following types of websites

Proportion of online respondents %



### Made new friendships or contacts online

Proportion of site users%



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

Base: All online adults aged 16+ and all website users aged 16+.

Q70. And have you ever used the following types of site ?

Q70a. And have you ever made new friendships or contacts online?

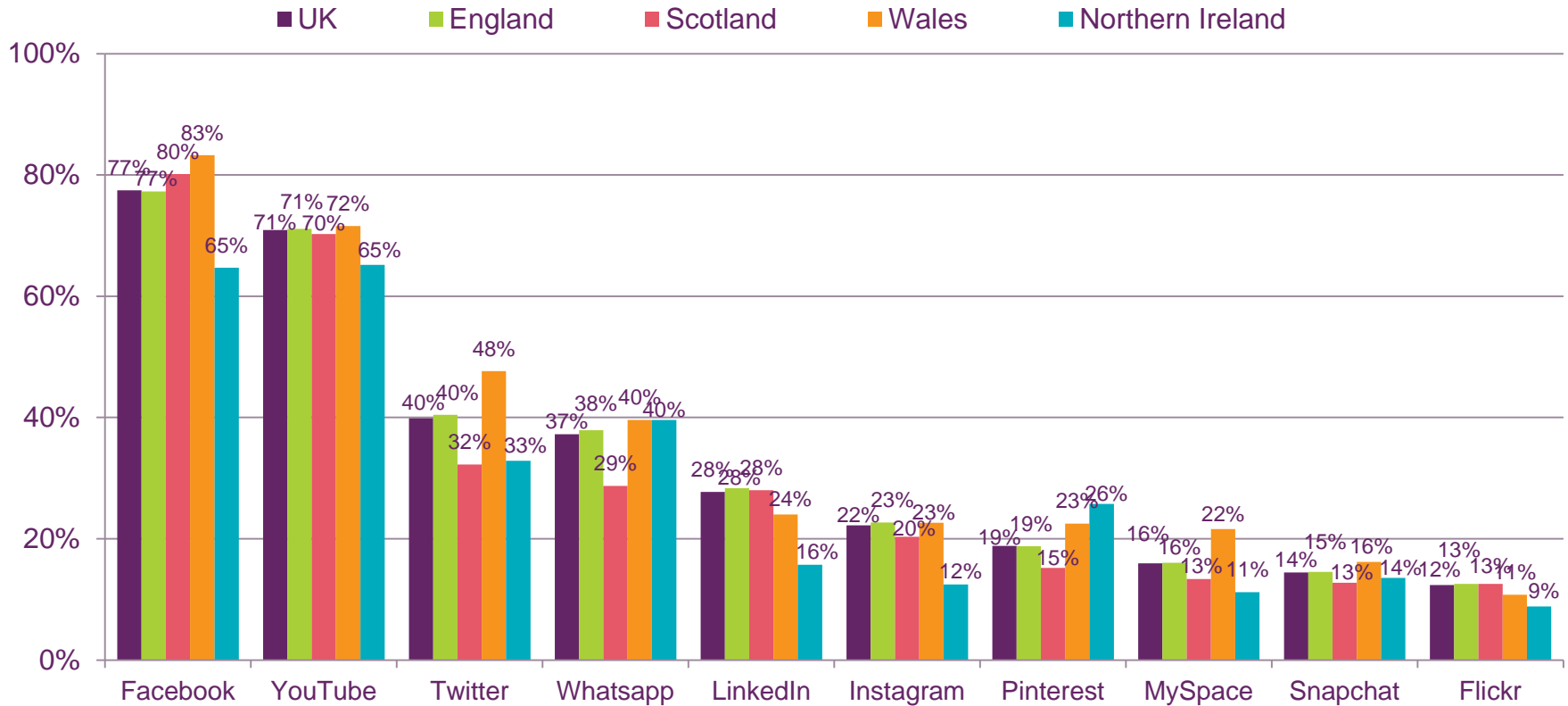
# Social networking

# Figure 1.10



## Websites and apps ever used, by nation: top ten responses

Proportion of online users (%)



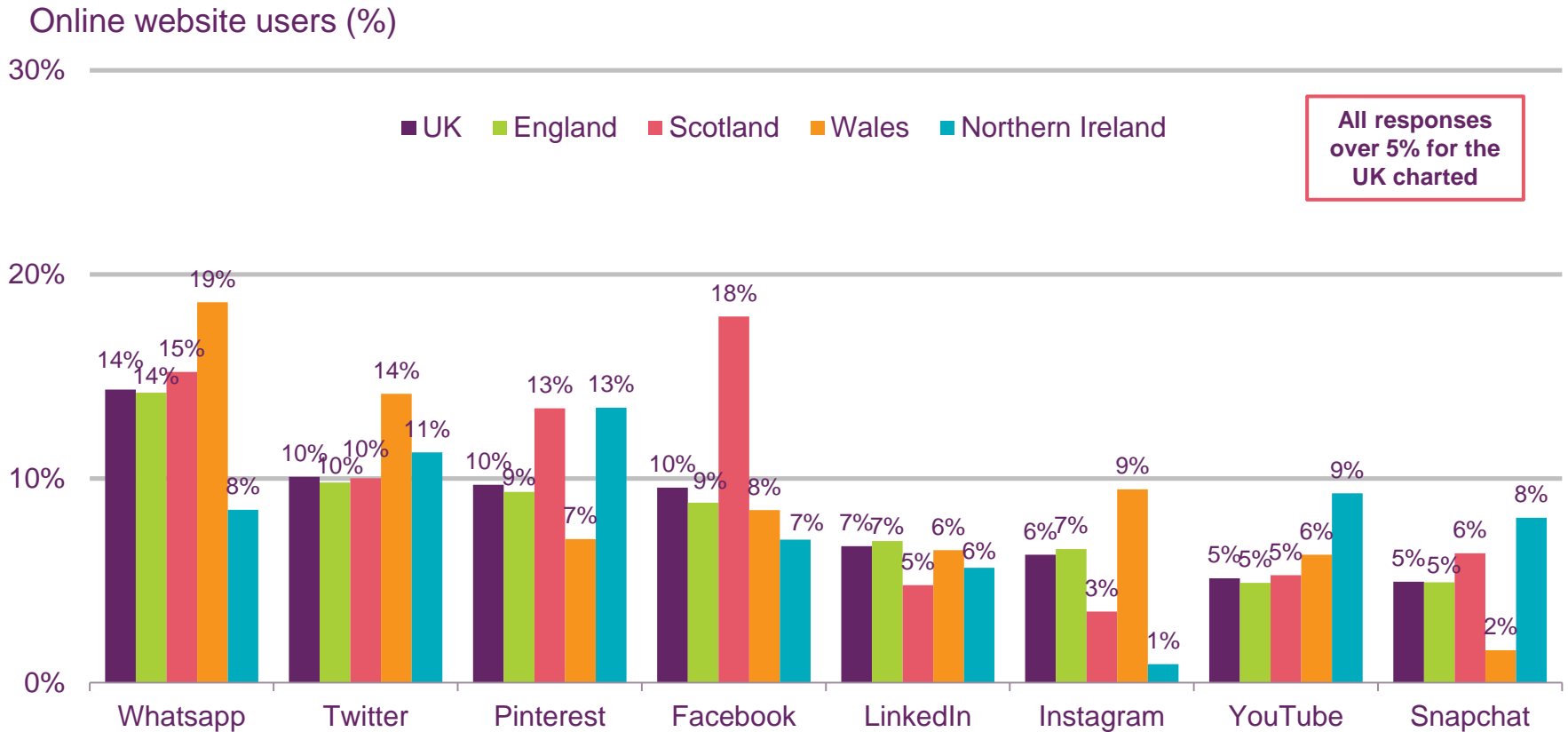
Source: Ofcom research, 'Connected Devices', May 2015

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q60. Which of the following websites have you ever used? (Top ten responses shown)

# Figure 1.11

## Site or app most recently added



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

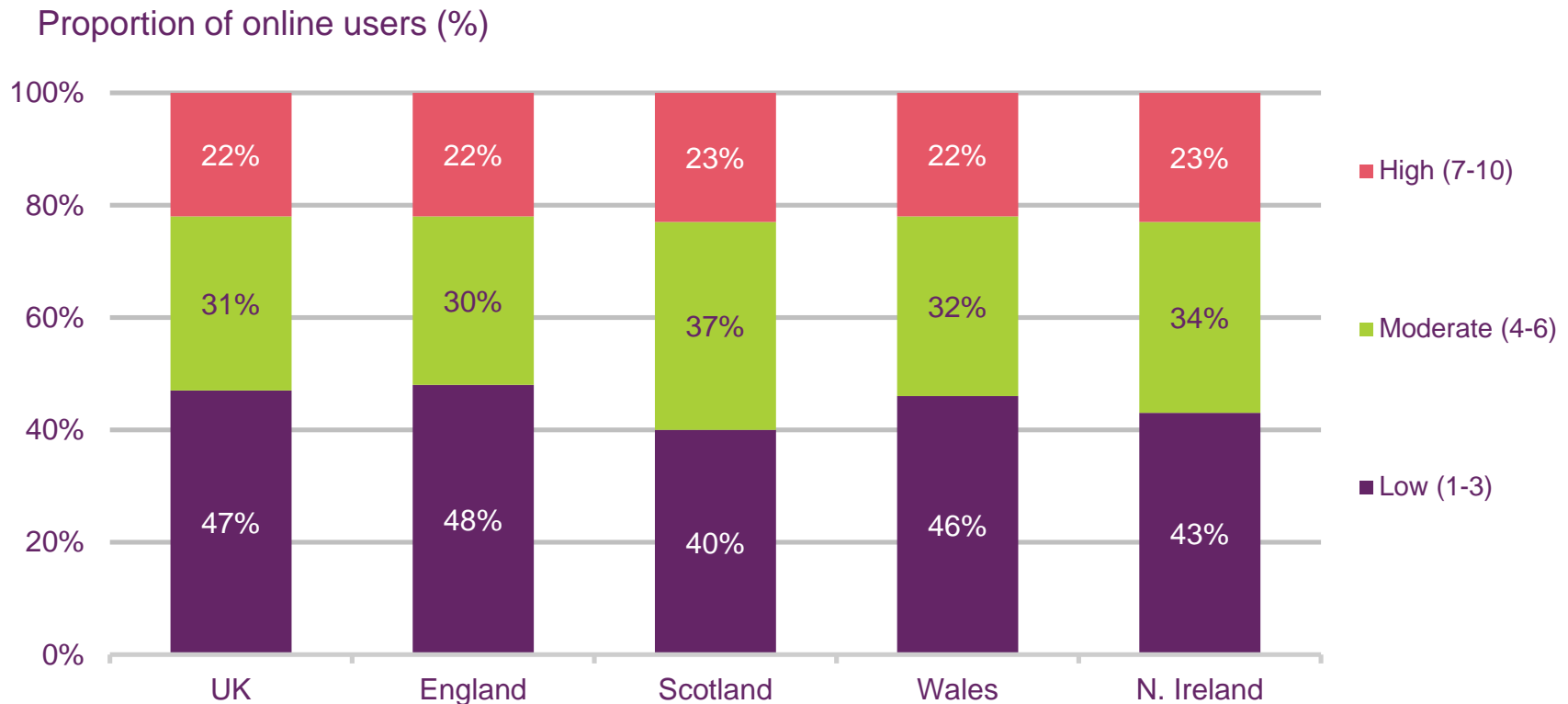
Base: All website users aged 16+ (n=1179), England (n=1457), Scotland (n=161), Wales (n=90), Northern Ireland (n=71).

Q61d. Which one is your most recent addition?

Chart includes data for all responses 5% or over.

# Figure 1.12

## Extent to which people are 'hooked' on social media, by nation



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

Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).

Q91. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on social media' and 10 represented 'I'm completely hooked on social media', which number would you choose for yourself?

# Figure 1.13



## Level of agreement with statements about social media

Proportion of online users (%)

### Agreement by nation

England Scot land Wales Northern Ireland



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

Base: All online adults 16+ =2290

Q90 How much do you agree or disagree with the following statements regarding social media?

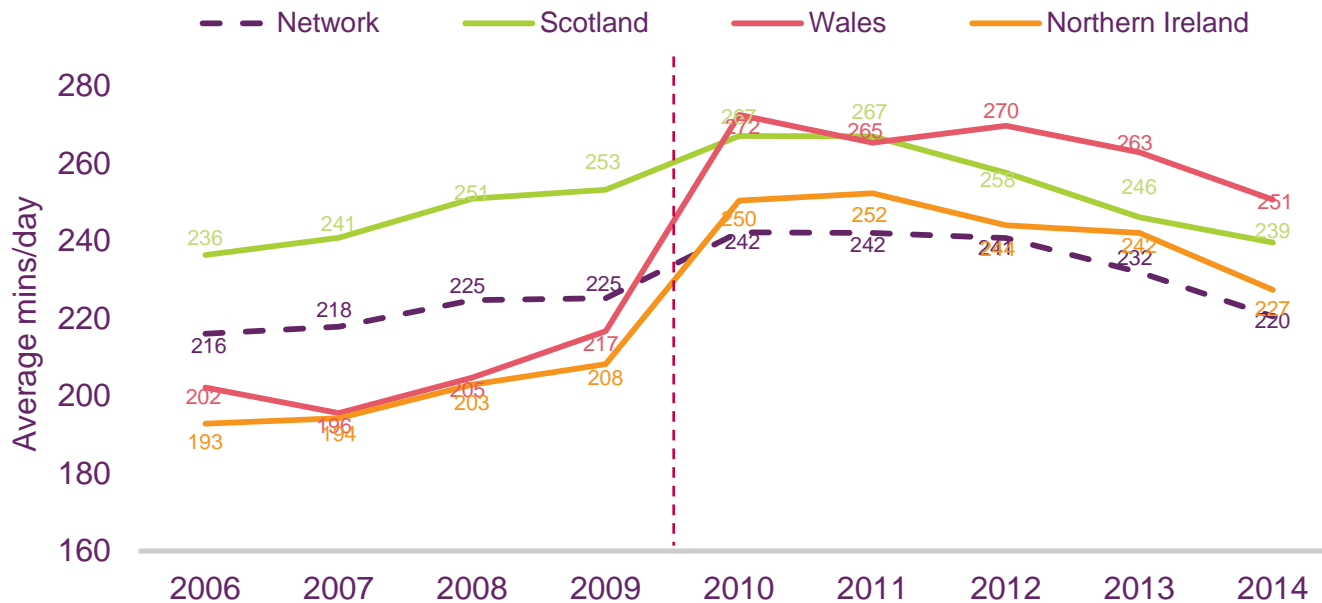


# Changes in audio-visual consumption in Scotland

# Figure 1.14

## Average minutes of television viewing per day, by nation: all homes

Average minutes of viewing/day by TV region: Total TV, Individuals 4+



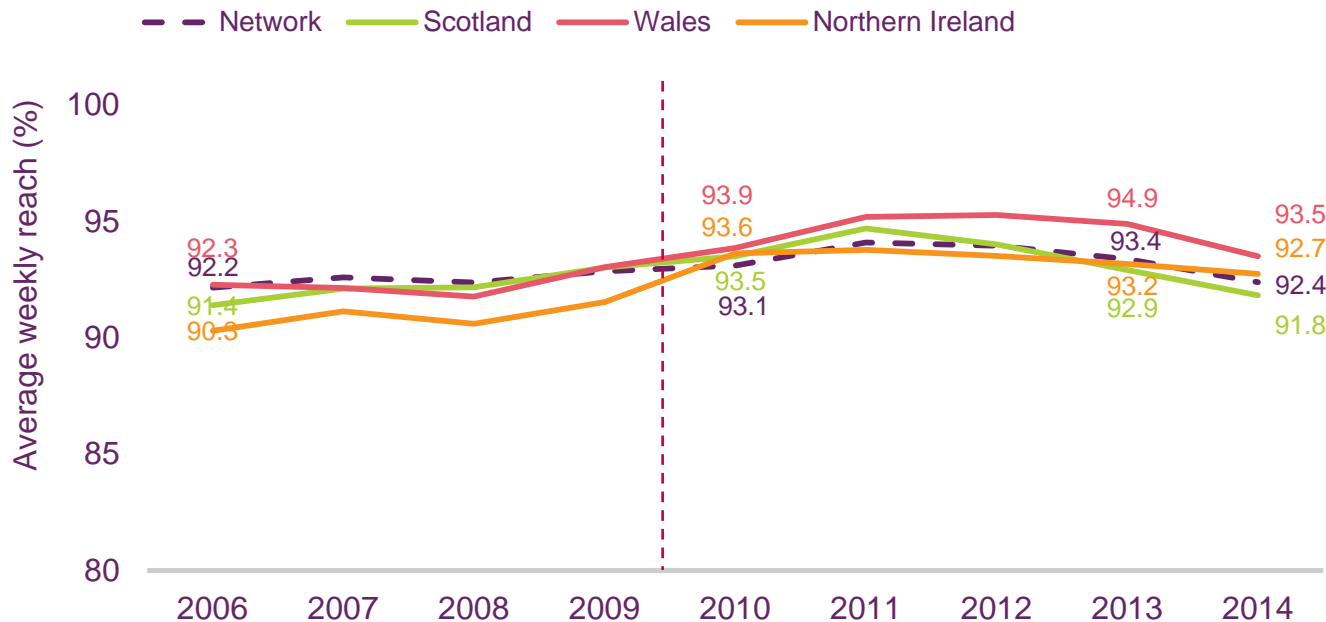
	% change: 2013-2014
Northern Ireland	-6.1%(-15min)
Wales	-4.7%(-12min)
Network	-4.9% (-11min)
Scotland	-2.7%(-7min)

Source: BARB. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line). Note: Year-on-year percentage changes are calculated on data to two decimal places.

# Figure 1.15

## Average weekly reach of total TV, by nation

Average weekly reach by TV region: Total TV, Individuals 4+ (15 min+)

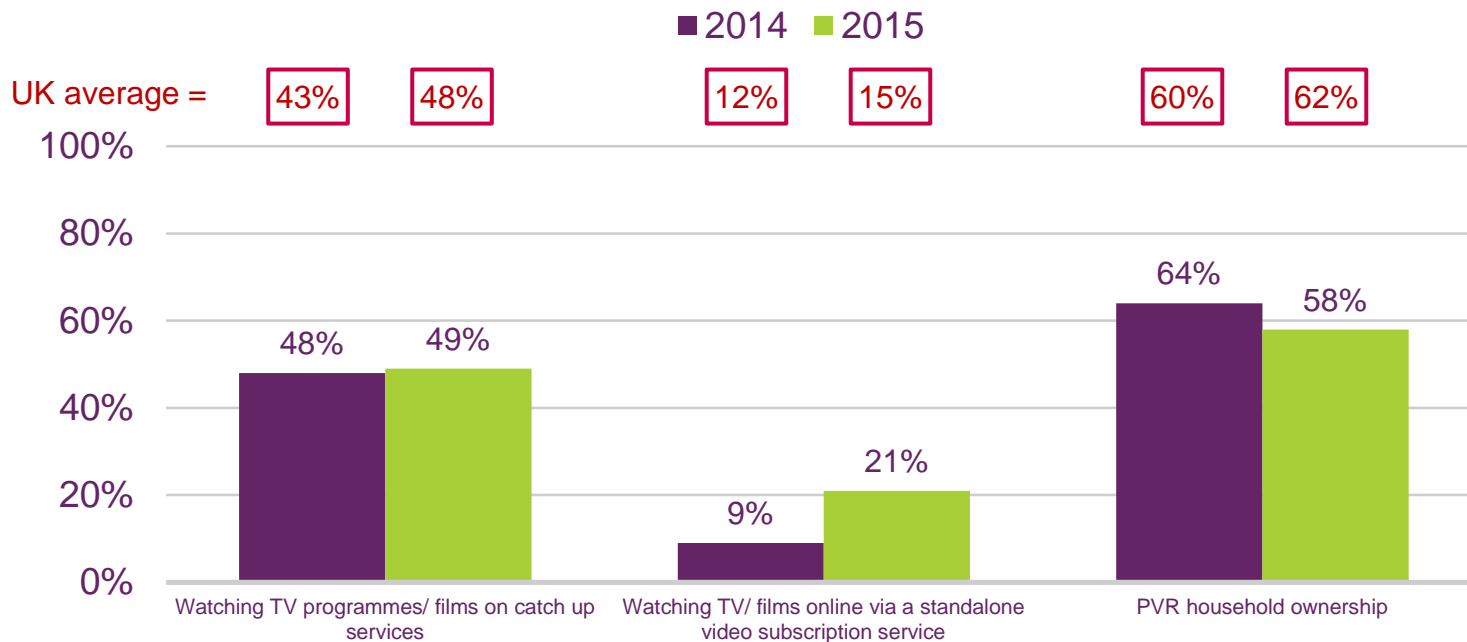


	Percentage point change: 2013-2014
Wales	-1.4
Scotland	-1.1
Network	-1.0
Northern Ireland	-0.4

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

# Figure 1.16

## Use of Catch-up, standalone video subscription and PVRs in Scotland



Source: Ofcom Technology Tracker, W1 2015

Base: All adults aged 16+ (UK 2014 = 3740, Scotland 2014 = 501; UK 2015 = 3756, Scotland 2015 = 492)

QH17 (QH46): Thinking about your personal use of TV programmes and films online and on demand services that you may use on any device (e.g. smartphone, TV set, tablet or laptop) anywhere, which of the following, if any, have you personally ever used? QR1A-B: Does your household have Sky+/ Virgin TiVo or V+? QR1C-E: Does your Freesat set top box/ Freeview box or Freeview TV set / broadband TV service allow you to record and store TV programmes, and also pause and rewind live TV programmes? QR1F-G: Do you have a YouView/ Now TV set top box?

# Figure 1.17

## Claimed changes in key audio-visual activities over the past year (%), by nation

		Net change				
		UK (1878)	England (1568)	Scotland (163)	Wales (99)	Northern Ireland (110)
Screen	Watching via TV set	-7%	-7%	-6%	+15%	-10%
	Watching via other screens	+13%	+13%	+16%	+25%	+23%
Location of viewing	In home	0	-2%	+6%	+12%	+2%
	Out of home	-4%	-6%	0	+7%	+7%
Traditional or non-traditional viewing	At time of broadcast	-19%	-17%	-34%	-19%	-25%
	Personally recorded	+13%	+11%	+24%	+18%	+32%
	Catch-up/on-demand	+26%	+23%	+36%	+40%	+39%
	Subscription-demand e.g. Netflix	+8%	+7%	+15%	+13%	+22%
	Pay-per-view	-3%	-3%	-3%	-2%	+4%
Public Service Broadcasting	Watching BBC, ITV/STV/UTV, C4, Five programmes	-6%	-5%	-3%	-9%	-28%

Source: GfK NOP omnibus, April 2015.

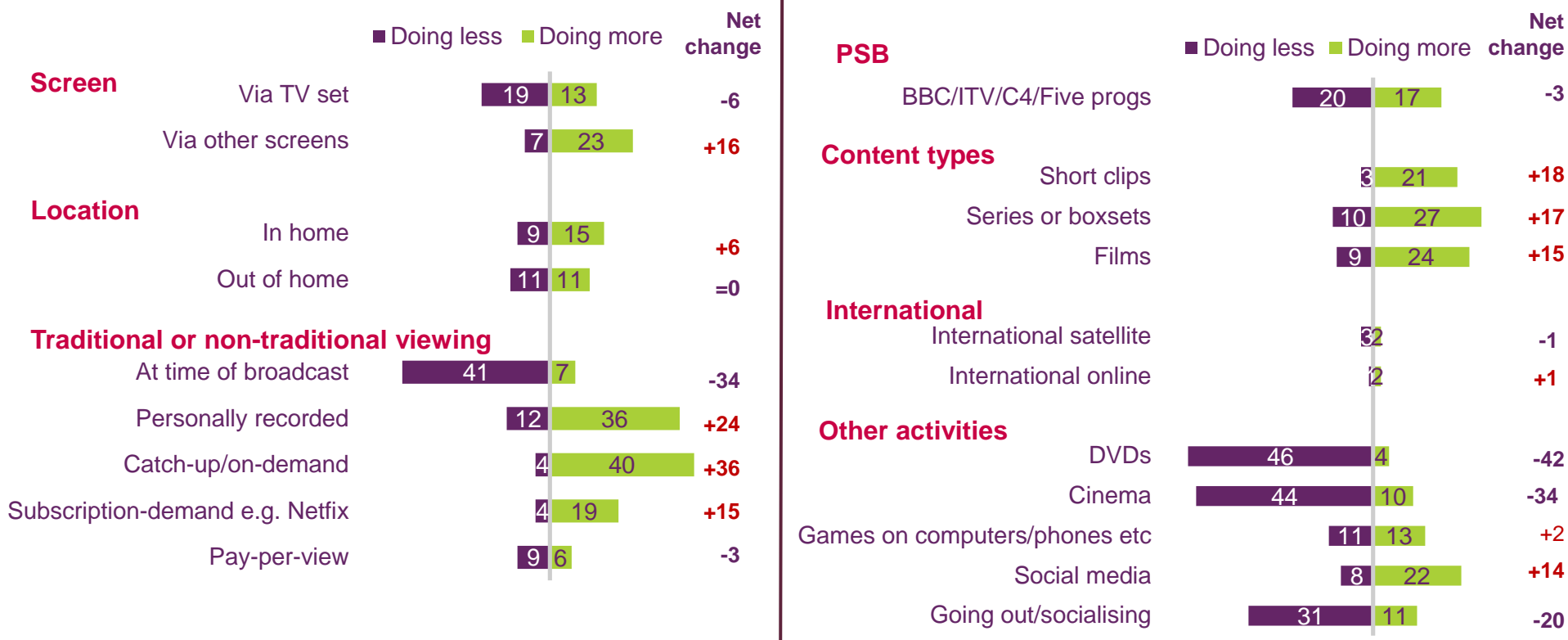
Base: All adults (1878). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount, or less, now compared to a year ago? This reports the 'net gain' or 'net loss' for an activity. For example, if 20% of respondents said they did an activity more and 5% said they did an activity less, the net gain would be +15% doing the activity more.

# Figure 1.18



## Claimed changes in activities over the past year (%): Scotland

Claimed changes in viewing over last year (%)



Source: GfK NOP omnibus, April 2015.

Base: All adults 16+ in Scotland (163). Question wording: QA, For each of the following activities please say if you are doing this more, the same amount or less now compared to a year ago?

# Ofcom omnibus: research question wording



For each of the following activities I read out can you say whether you are doing this more, the same amount or less now compared to a year ago? If you have never done the activity at all, please just tell me. INTERVIEWER: READ OUT EACH STATEMENT INDIVIDUALLY. SINGLE CODE FOR EACH STATEMENT

## Screen

- Using a TV set to watch any programmes/films/clips i.e. watching any programmes/films/clips using any service (e.g. Freeview, Sky, Netflix, BBC iplayer, via a games console etc)
- Using other screens to watch any programmes/films/clips e.g. home computers, tablets, smartphones (rather than the TV set)

## Location

- Watching any TV, clip, programme when in your own home (watching could be on any screen e.g. TV, home computers, tablets, smartphones)
- Watching any TV, clip, programme when out and about (watching could be on any screen e.g. TVs, computers, tablets, smartphones)

## Traditional or non-traditional viewing

- Watching TV programmes as they are broadcast on TV (e.g. watching EastEnders when it is shown on BBC1 at 7.30pm or watching Game of Thrones at 9pm on Sky Atlantic when it is broadcast)
- Watching TV that you have personally recorded, i.e. after recording it onto a set-top box, or PVR
- Watching any 'catch-up' or on-demand TV where you watch programmes/films that have been shown on TV recently (via services like BBC iplayer, itv player, 4OD, SkyGo, Virgin Catch-up etc).
- Watching programmes/films through on-demand services that you pay a monthly subscription for like Netflix, Amazon Prime, Now TV etc
- Paying to watch individual programmes/films e.g. films through Sky's Box Office service or 'Pay per movie' with Virgin Movies

## PSB

- Watching BBC, ITV/STV/UTV, Channel 4 or Five programmes in particular (through any channel, any screen and at any time)

## Content

- Watching short clips e.g. like those found on Youtube, or linked on social media like Facebook
- Watching series or boxsets in any way, e.g. on TV, tablets, DVDs, Netflix etc
- Watching films (through any service, e.g. Netflix, Now TV, DVDs on either your TV set, computers or smartphones)

## International

- Watching international channels via satellite services from other countries e.g. Hotbird, Turksat, Hellas Sat), Hispasat, Canal+, Cyfra.
- Watching programmes/films through international online video services from other countries, e.g. RTÉ Player, Hulu, My TF1, nc+

## Other activities

- Watching DVDs
- Going to the cinema to watch films
- Playing games on a console, computer, tablet or smartphone etc
- Using social media e.g. Facebook, etc
- Going out and socialising

# Analysis of fixed broadband take-up in Glasgow



# Figure 1.19



Differences between 2013/2014 and 2014/2015 Glasgow sample

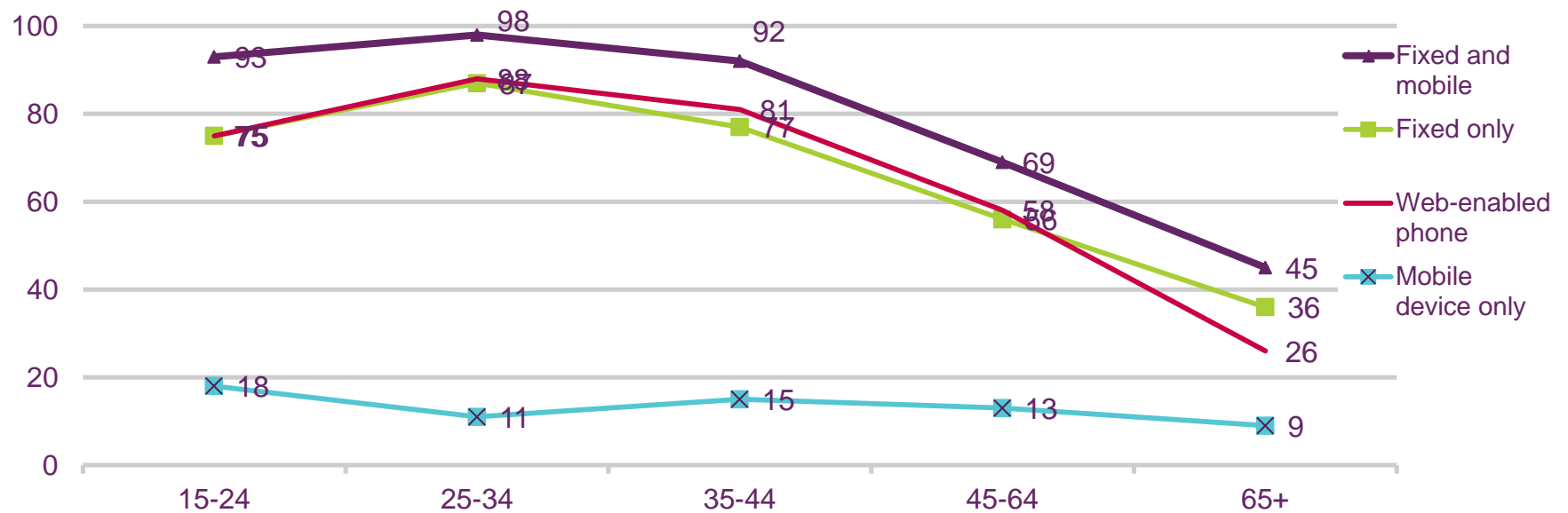
Glasgow Profile	2013/2014	2014/2015	Difference
Male	50%	50%	0%
Female	50%	50%	0%
15-24	13%	13%	+0%
25-34	19%	15%	-4%
35-44	15%	15%	0%
45-54	18%	19%	+1%
55-64	15%	16%	+1%
65+	19%	22%	+3%
AB	16%	11%	-5%
C1	23%	24%	+1%
C2	17%	24%	+7%
D	24%	31%	+7%
E	21%	10%	-11%

Source: British Population Survey. Base: All adults 15+ (Glasgow 2014/2015 – 542 Glasgow 2013/2014 - 1405)

# Figure 1.20



## Comparison of fixed broadband and mobile take-up in Glasgow



Source: British Population Survey

The percentage in brackets gives the percentage of all Glasgow respondents in that category.

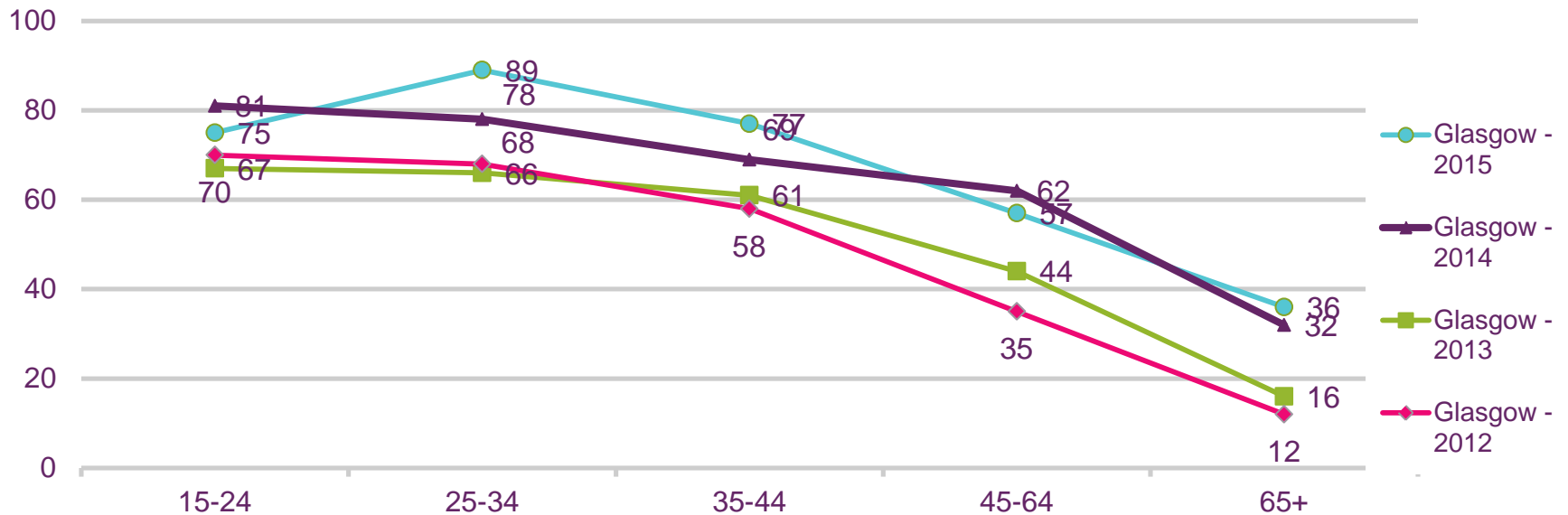
Base: All adults 15+ (Glasgow 2015 – 543, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

Q: Is your access to the internet at home cable broadband, ADSL broadband, or broadband but you don't know type?

Q: Do you have a web-enabled phone?

# Figure 1.21

## Changes in fixed home internet, by age group: 2012-2015



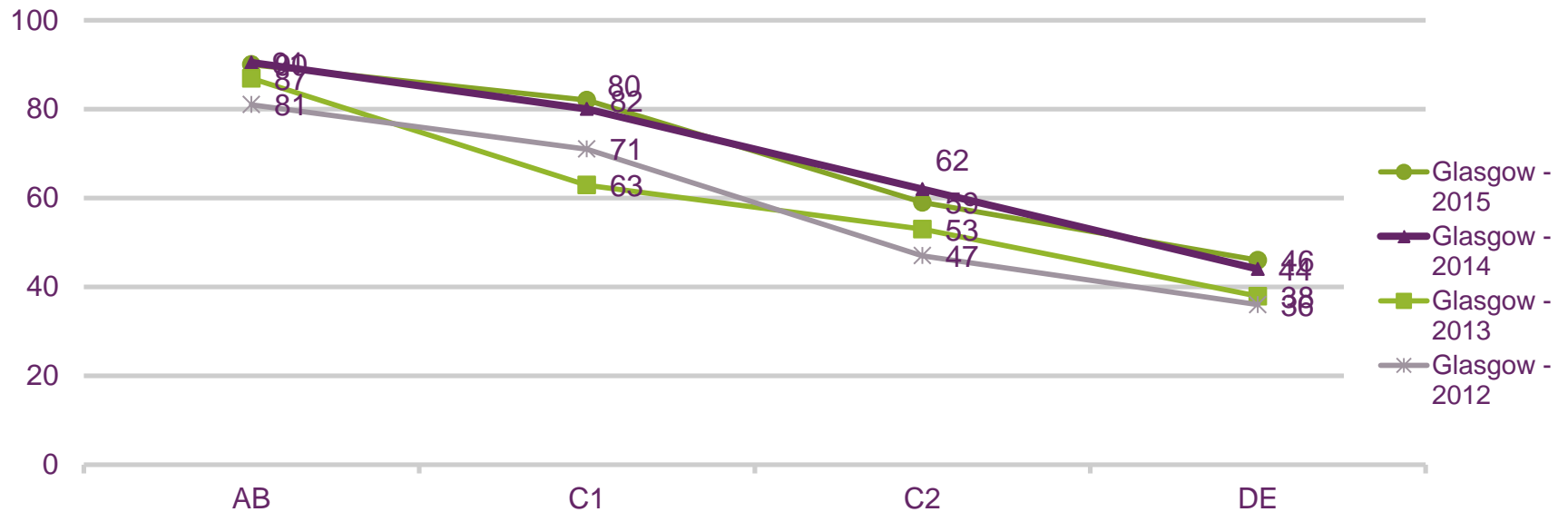
Source: British Population Survey

Base: All adults 15+ (Glasgow 2015 – 543, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

Q: Is your access to the internet at home cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

# Figure 1.22

## Changes in take-up, by socio-economic status: 2012-2015



Source: British Population Survey

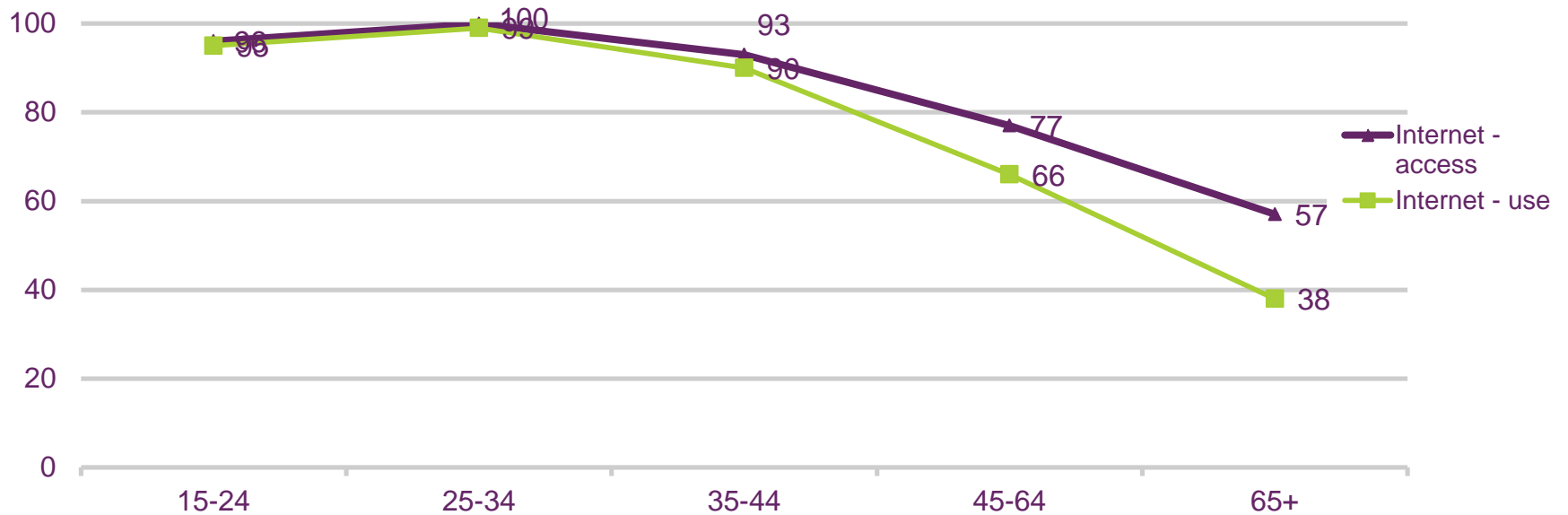
Base: All adults 15+ (Glasgow 2015 – 543, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

Q: Is your access to the internet at home cable broadband, ADSL broadband, broadband but you don't know type, or non-broadband?

# Figure 1.23



## Internet access and internet use, by age



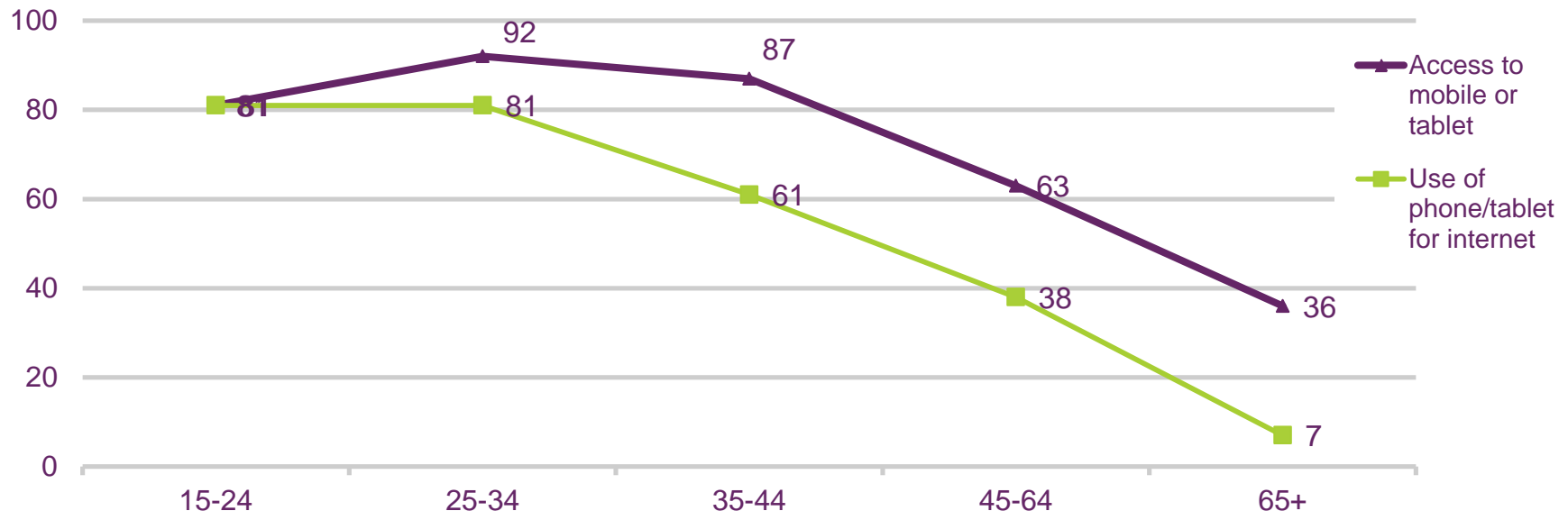
Source: British Population Survey

Base: All adults 15+ (Glasgow 2015 – 542 Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

Q: How frequently do you use the internet?

# Figure 1.24

Access to and use of web-enabled mobile devices, by age.



Source: British Population Survey

Base: All adults 15+ (Glasgow 2015 – 534, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

Q: Do you have a web-enabled phone?

Q: Do you have access to a tablet?

Q: Do you access the internet via a mobile terminal?

# Figure 1.25



Access to and use of web-enabled mobile devices, by age.

Age band	Access to web-enabled mobile device	Use of web-enabled mobile device	Percentage of those with access who use
15-24	81%	81%	100%
25-34	92%	81%	88%
35-44	87%	61%	70%
45-64	63%	38%	60%
65+	36%	7%	19%

Source: British Population Survey

Base: All adults 15+ (Glasgow 2015 – 534, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

Q: Do you have a web-enabled phone?

Q: Do you have access to a tablet?

Q: Do you access the internet via a mobile terminal?