

Scotland's communications market

Key facts about Scotland

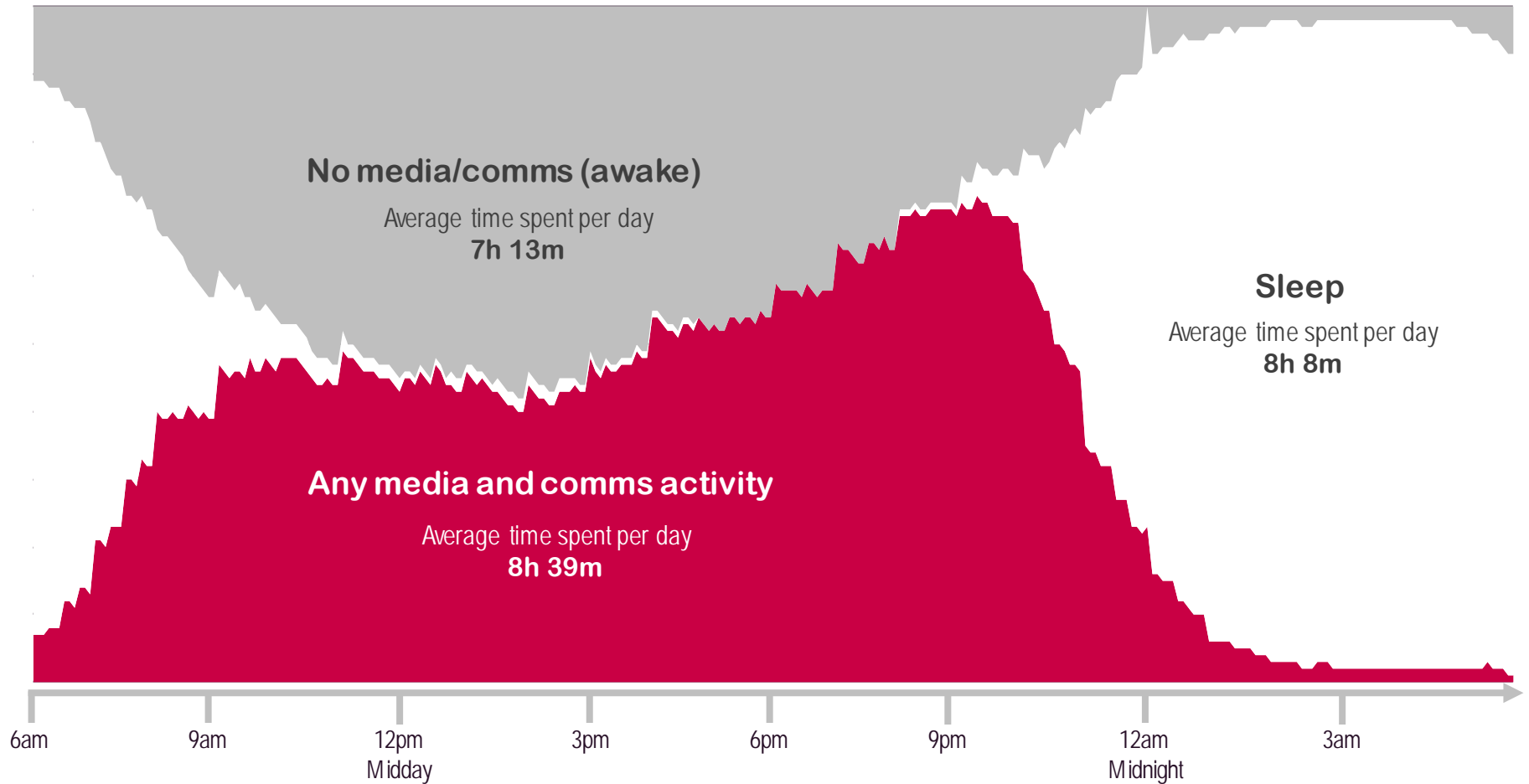
Figure	Scotland	UK
Population	5.373 million (mid-2015 estimate)	65.11 million (mid-2015 estimate)
Age profile	Population aged <16: 17.0% Population aged 65+: 18.3%	Population aged <16: 18.8% Population aged 65+: 17.8%
Population density	68 people per square kilometre	269 people per square kilometre
Language	87,503 people aged 3 and over (1.6% of the population) had some Gaelic language ability in 2015.	n/a
Unemployment	6.1% of economically active population, aged 16 and over	5.1% of economically active population, aged 16 and over
Income and expenditure	Weekly household income: £706 Weekly household expenditure: £474.40	Weekly household income: £747 Weekly household expenditure: £531.3

Source: Office for National Statistics: Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2015; Office for National Statistics: Regional Labour Market, June 2016; Office for National Statistics: Family Spending 2015 edition; National Records of Scotland, Statistical Bulletin – September 2013; 2011 Census, 2011 Census: Key Results

Digital Day

Figure 1.2

Media and comms versus non-media and comms activity, by time of day Among adults aged 16+ in Scotland



Source: Ofcom Digital Day 2016, Data book 6: D12 for main chart data, and Data book 1: B4 for average time spent per day

Adult diary: Chart shows the proportion of activity attributed to media & comms activity (D), sleep (C) and non-media & comms for each time slot across a week.

Base: Adults aged 16+ in Scotland (190)

Figure 1.3

Average daily media and comms time, by nation



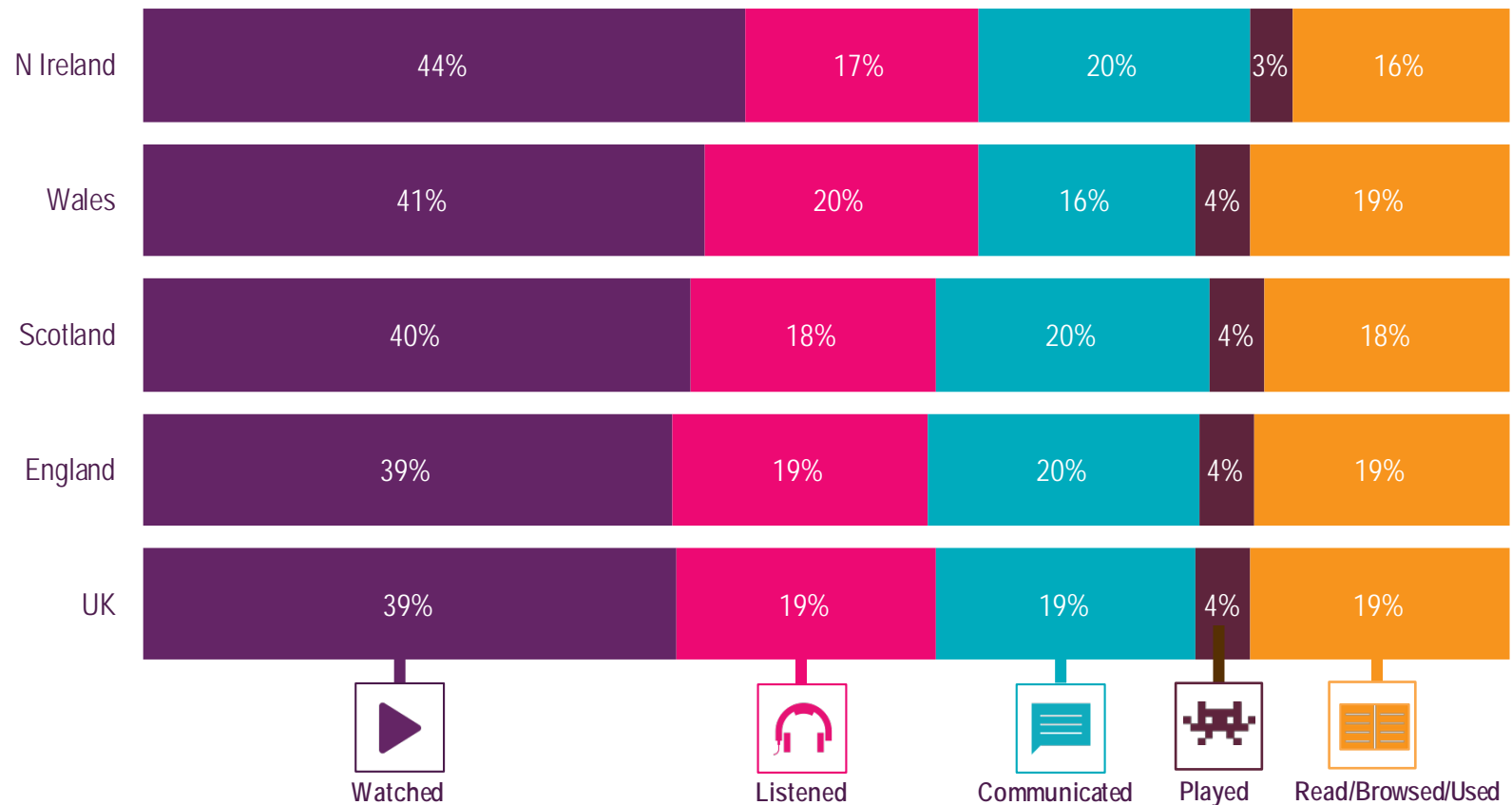
Source: Ofcom Digital Day 2016, Data book 1: B4(2)

*The total average (inc. simultaneous activity) is calculated by summing together the duration (B2) for each activity, dividing by the weighted base of respondents, and then by 7 days. The actual average net time spent (equivalent to solus) is then deducted in order to gauge simultaneous activity time, i.e. time spent doing more than one activity at the same time.

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Figure 1.4

Proportion of media and comms time attributed to activity types, by nation



Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

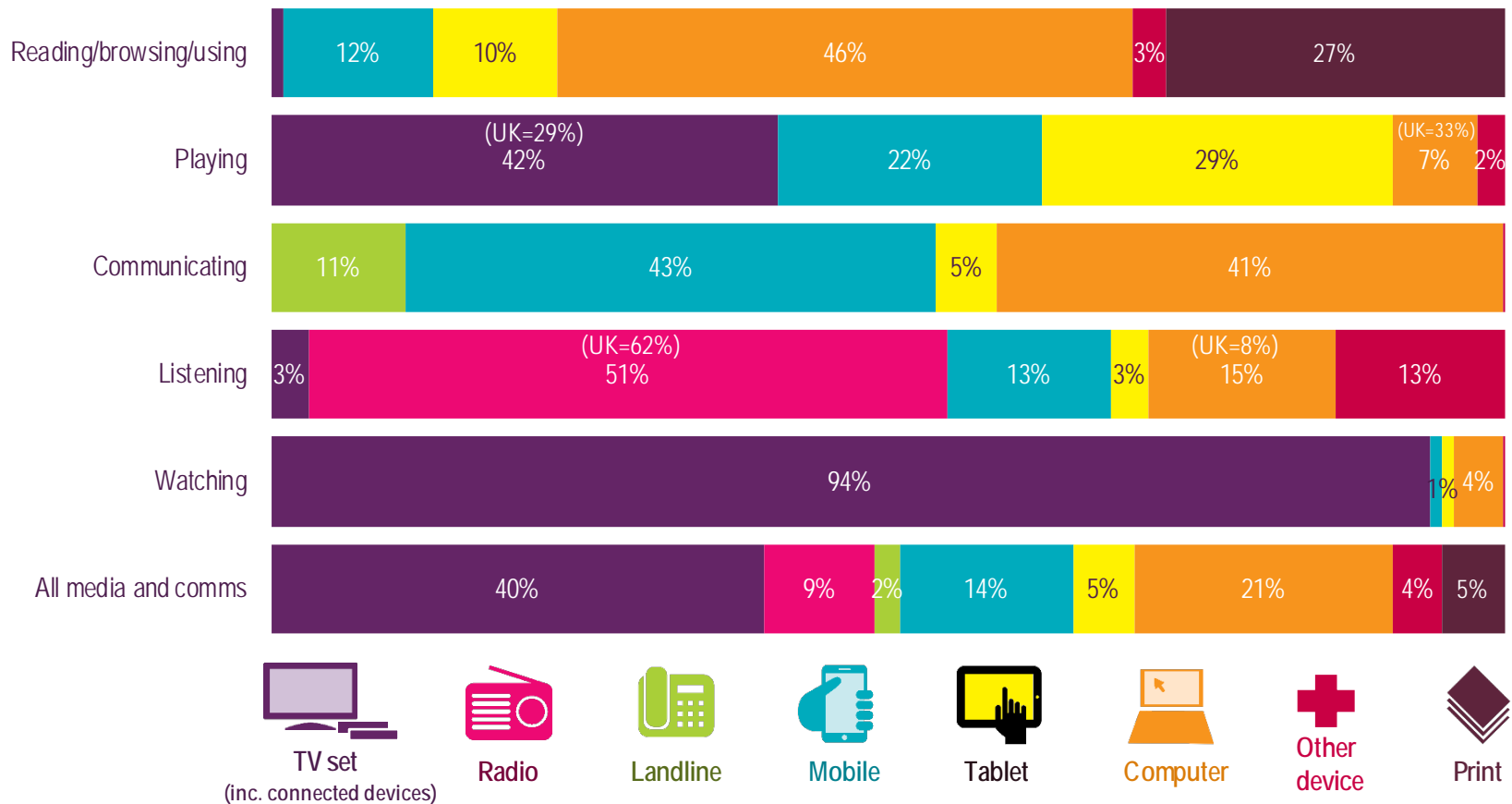
Adult diary: Chart shows the proportion of all media and comms time (B2) attributed to each activity type by nation

*The average weekly minutes figure is among those who did any media and comms activity across their diary week and also includes simultaneous activity

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Figure 1.5

Proportion of time spent on activity types attributed to devices Among adults aged 16+ in Scotland



Source: Ofcom Digital Day 2016, Data book 3: C28 for main chart data and Data book 1: B1 for average weekly minutes

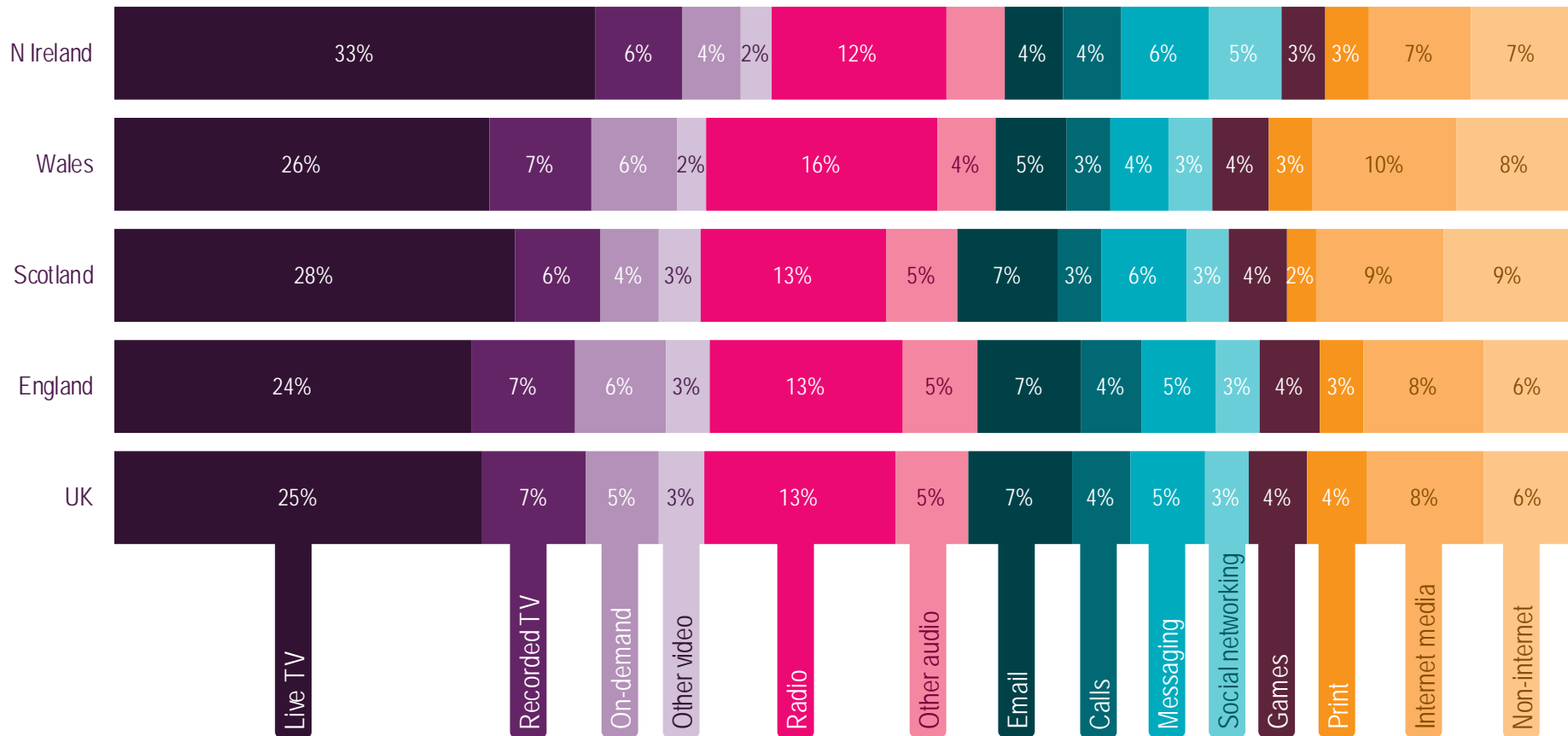
Adult diary: Chart shows the proportion of all time spent on activity types (B2) attributed to each device

*The average daily minutes figure is among those who did each type of activity at all across their diary week, and also includes simultaneous activity

Base: Adults aged 16+ in Scotland (190)

Figure 1.6

Proportion of media and comms time attributed to activities, by nation



Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

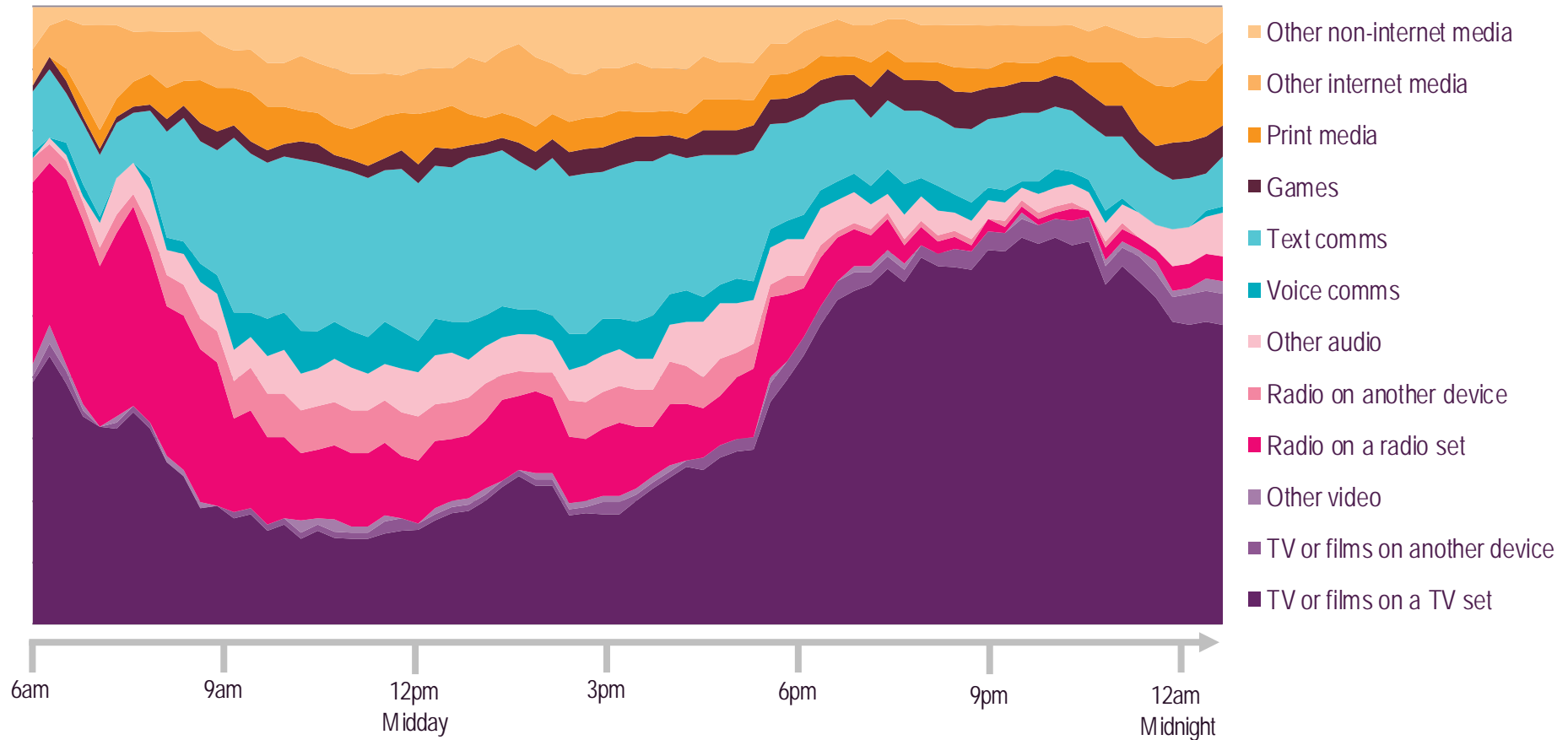
Adult diary: Chart shows the proportion of all media and comms time (B2) attributed to activities by age group.

Note: Messaging includes texts (SMS), Instant Messaging (IMS) and Photo/video messaging (MMS). Calls includes both phone calls and video calls (VoIP)

Base: Adults aged 16+ in UK (1512), England (991), Scotland (190), Wales (176), N Ireland (155)

Figure 1.7

Proportion of media and comms attributed to grouped activities, by time of day Among adults aged 16+ in Scotland



Source: Ofcom Digital Day 2016, Data book 6: B12

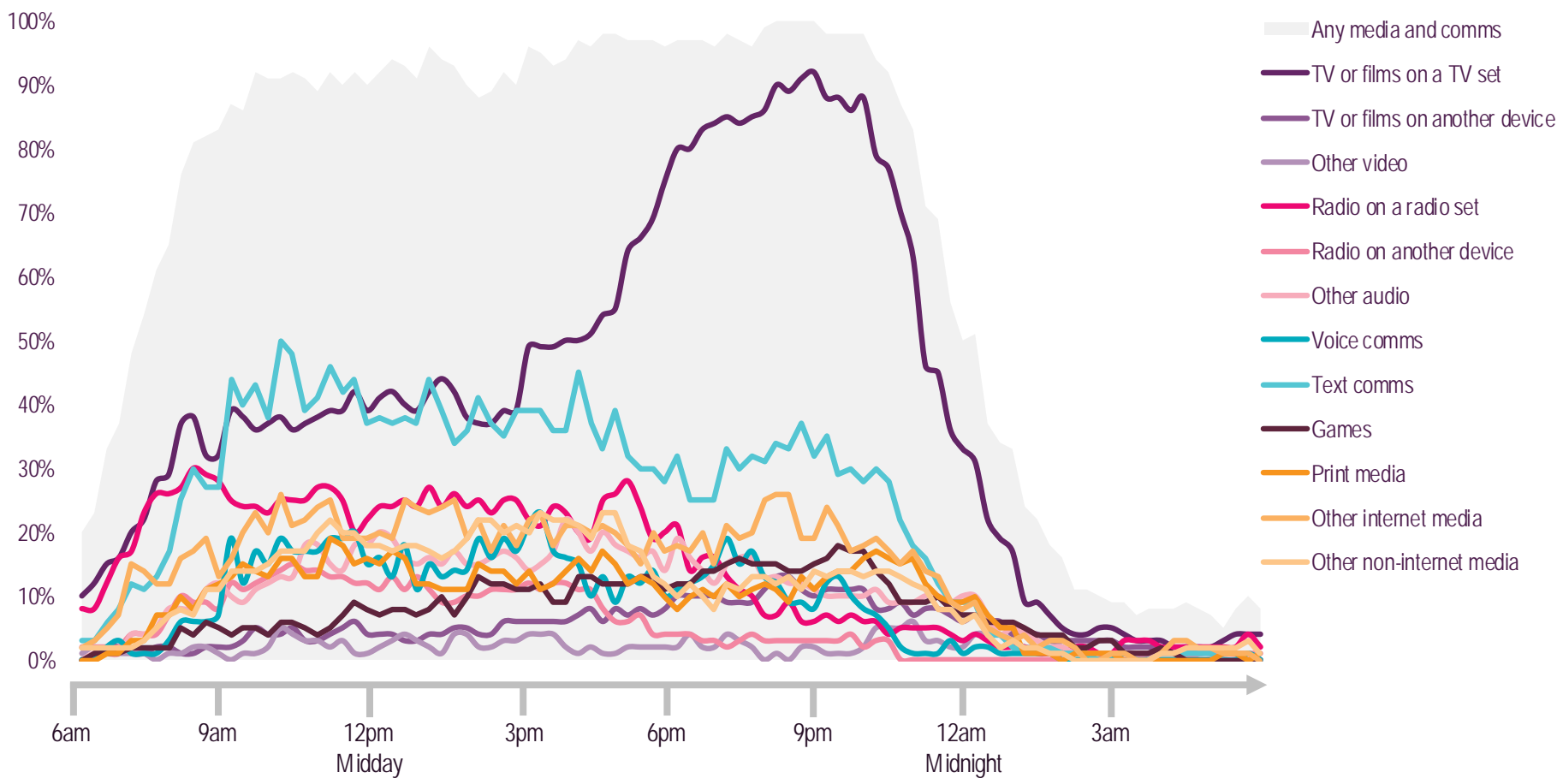
Adult diary: Chart shows the proportion of all media and comms activity attributed to each grouped activity for each time slot across a week.

Note: the base of media and comms activity varies by time, and so relatively low activity during late night time periods should be treated with caution

Base: Adults aged 16+ in Scotland (190)

Figure 1.8

Weekly reach of grouped activities, by time of day Among adults 16+ in Scotland



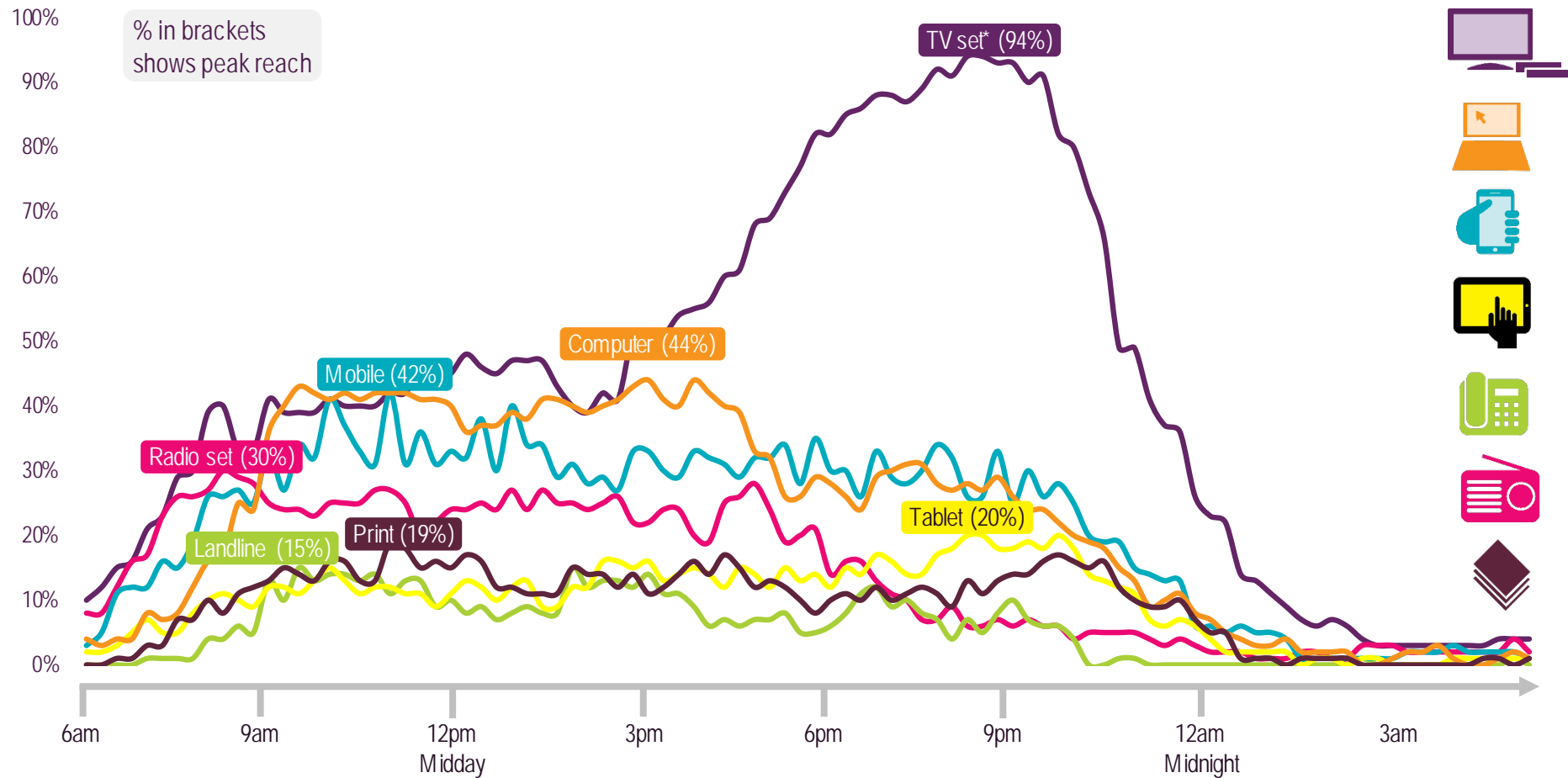
Source: Ofcom Digital Day 2016, Data book 6: A12

Adult diary: Chart shows the proportion of adults who recorded each grouped activity (D) at each time slot across a week.

Base: Adults aged 16+ in Scotland (190)

Figure 1.9

Weekly reach of devices, by time of day Among adults aged 16+ in Scotland



Source: Ofcom Digital Day 2016, Data book 7: A12

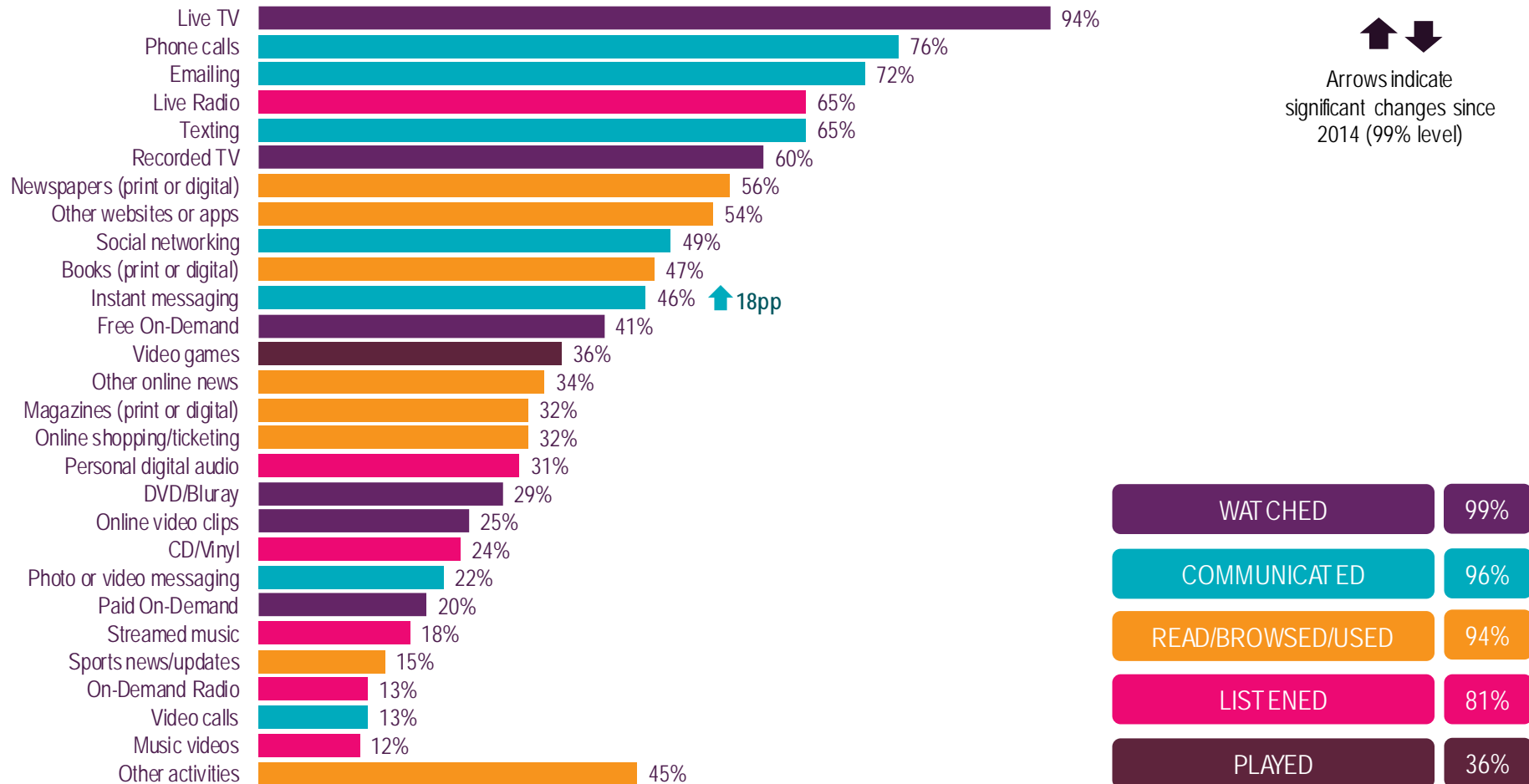
Adult diary: Chart shows the proportion of adults who recorded using each device (E) at each time slot across a week.

* TV set includes all connected devices (games consoles, set top boxes, DVD/Blu-ray player and streaming media players)

Base: Adults aged 16+ in Scotland (190)

Figure 1.10

Weekly reach of media and comms activities Among adults 16+ in Scotland



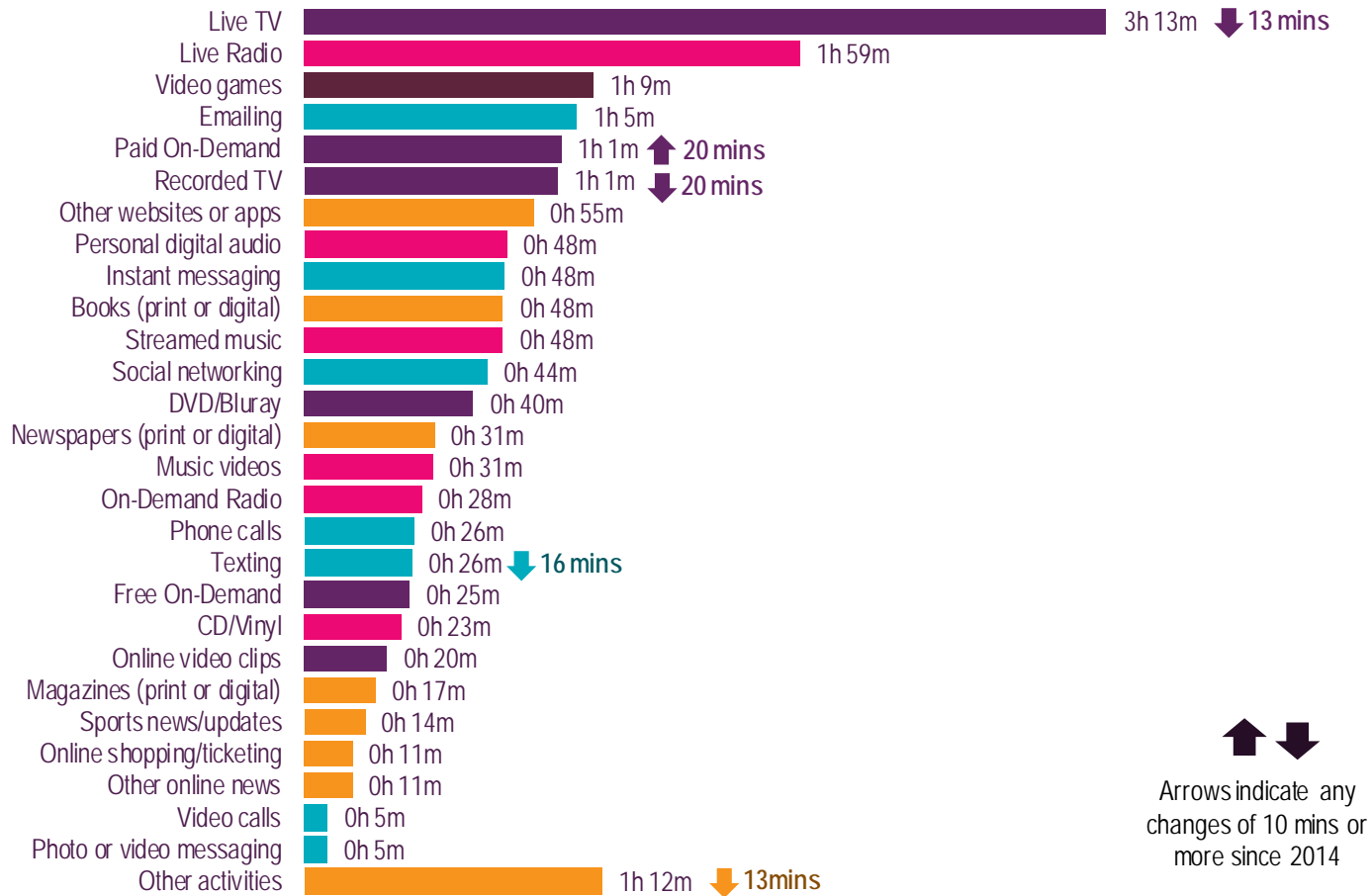
Source: Ofcom Digital Day 2016, Data book 1: A1

Adult diary: Chart shows the proportion of adults who recorded each activity (D) at any point across their diary week.

Base: Adults aged 16+ in Scotland (190)

Figure 1.11

Average time spent on activities per day - Scotland Among those who did activity at all over a week



Source: Ofcom Digital Day 2016, Data book 1: B4

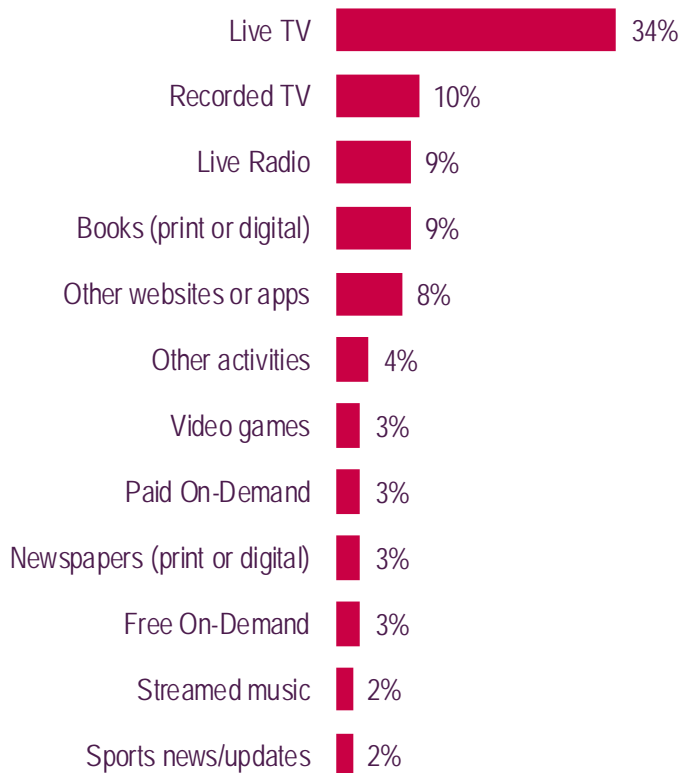
Adult diary: Chart shows the mean number of minutes recorded per day for each activity (D) among those who did each one at any point across their diary week i.e. excludes zeros.

Base: Adults aged 16+ in Scotland (190)

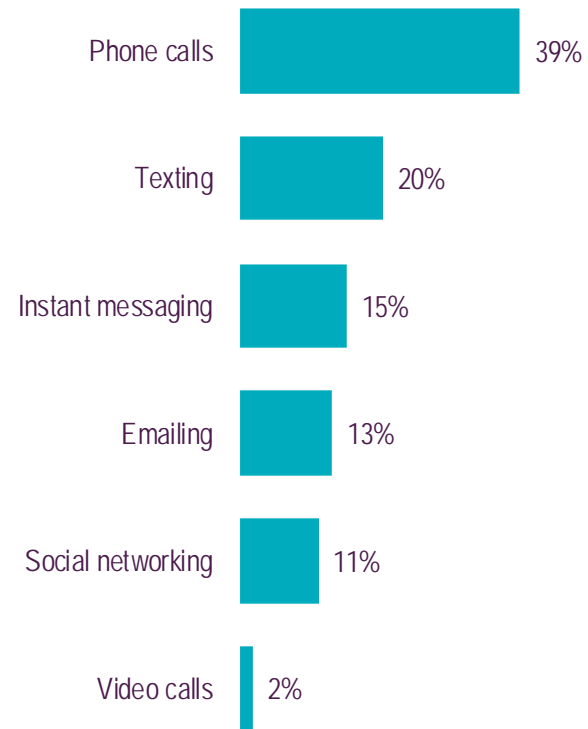
Figure 1.12

Media and comms activities cited as being of highest personal importance Among adults aged 16+ in Scotland

Media activities



Communication



Source: Ofcom Digital Day 2016, Data book 9: A2

Follow up survey: A2A. Which of the following media activities is most important to you personally?

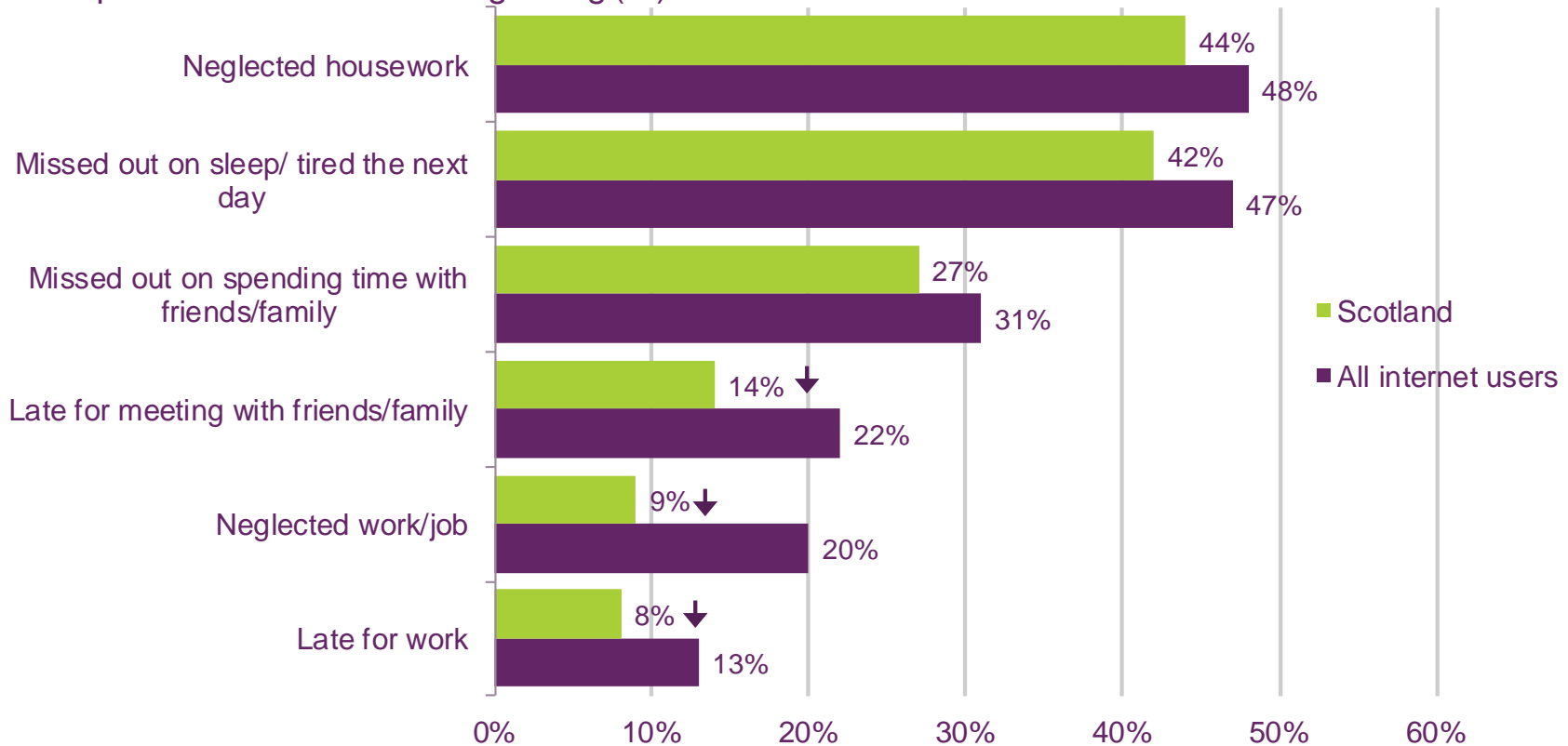
A2B. Which of the following communication activities is most important to you personally? Only responses above 1% are charted

Base: Adults aged 16+ in Scotland (190)

Coping in a connected society

Figure 1.13 – Negative effects caused by too much time online

Proportion of internet users agreeing (%)



Source: Ofcom research 2016

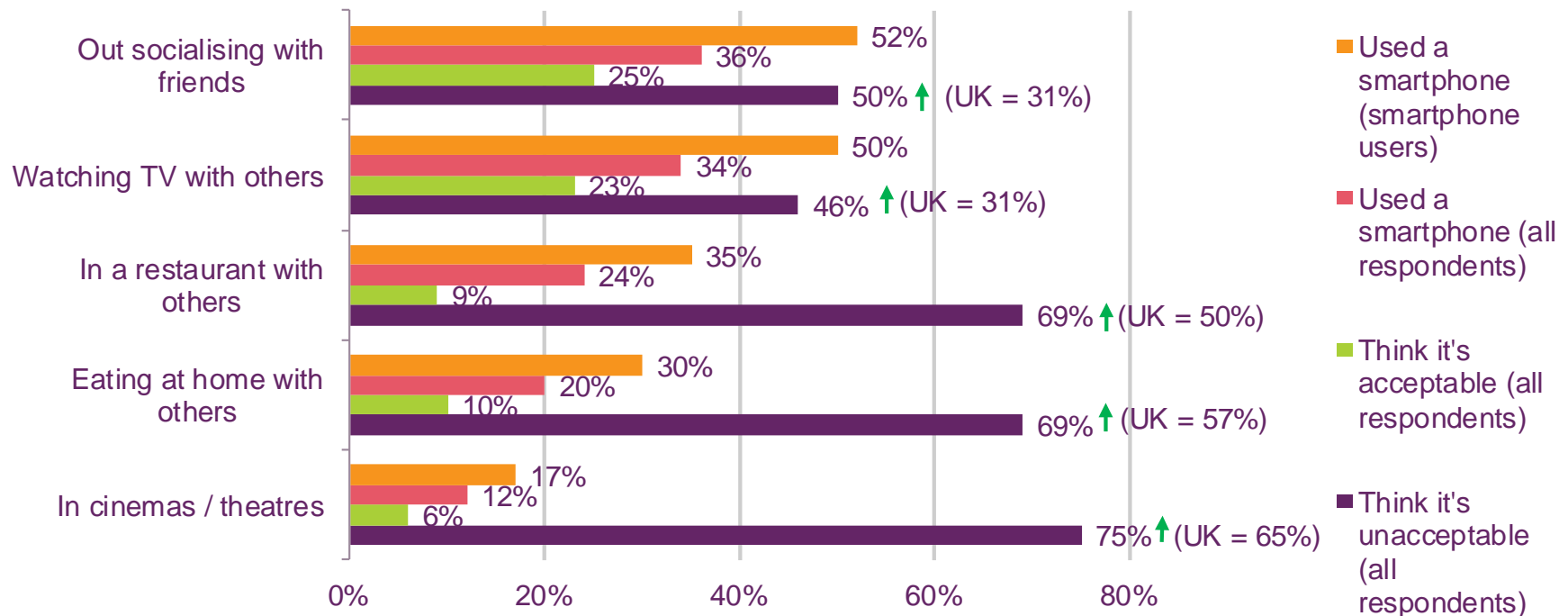
Base: All going online at least once a month (All: 1861, Scotland: 170)

Q.D7 Have any of these parts of your work or personal life ever been negatively affected by spending too much time online?

Figure 1.14 – Use and acceptability if using a smartphone with others in different situations

Proportion of respondents (%)

Proportion of UK respondents who think it's unacceptable displayed in brackets



Source: Ofcom research, 2016

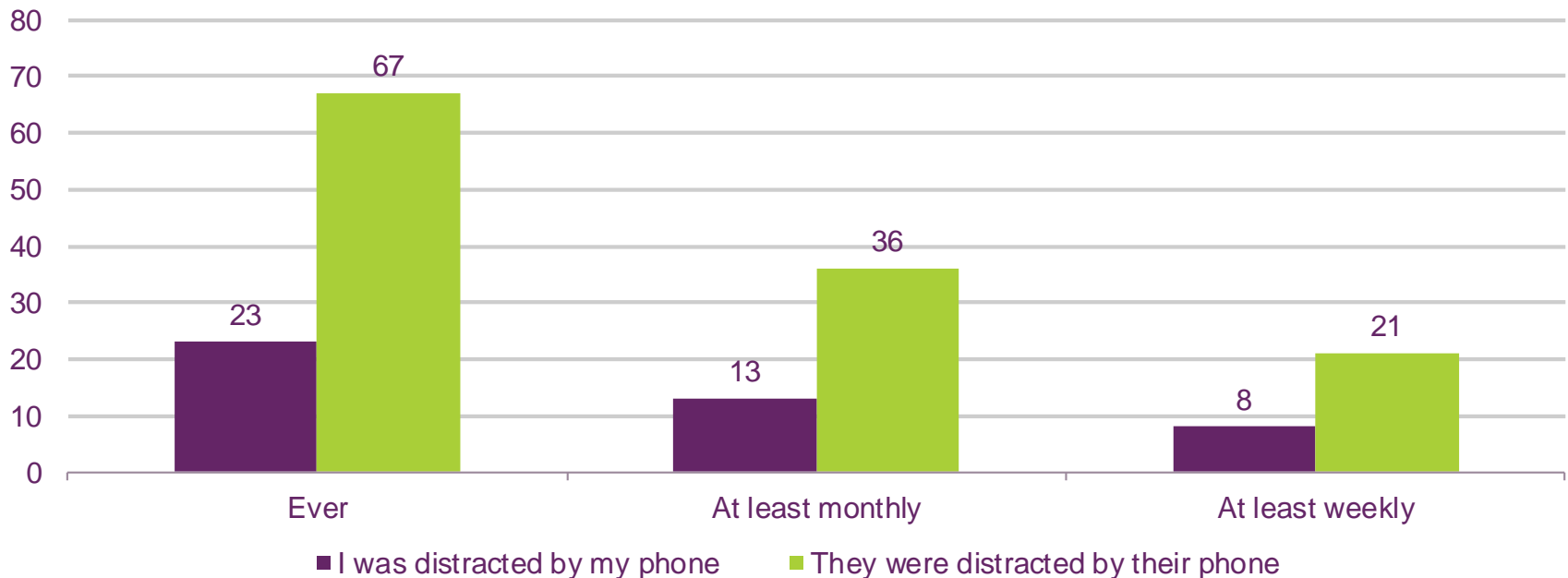
Base: All (Scotland: 192), smartphone users (Scotland: 125)

Q: For each of the following situations, please indicate if you have personally used and/or have been with others when they have used a smartphone or tablet on each occasion? And for each occasion, could you indicate the extent to which you think using a smartphone at this time is acceptable?

Figure 1.15

Distracted by a phone – bumpers, bumpees and the frequency of collision

Proportion of respondents (%)



Source: Ofcom research, 2016

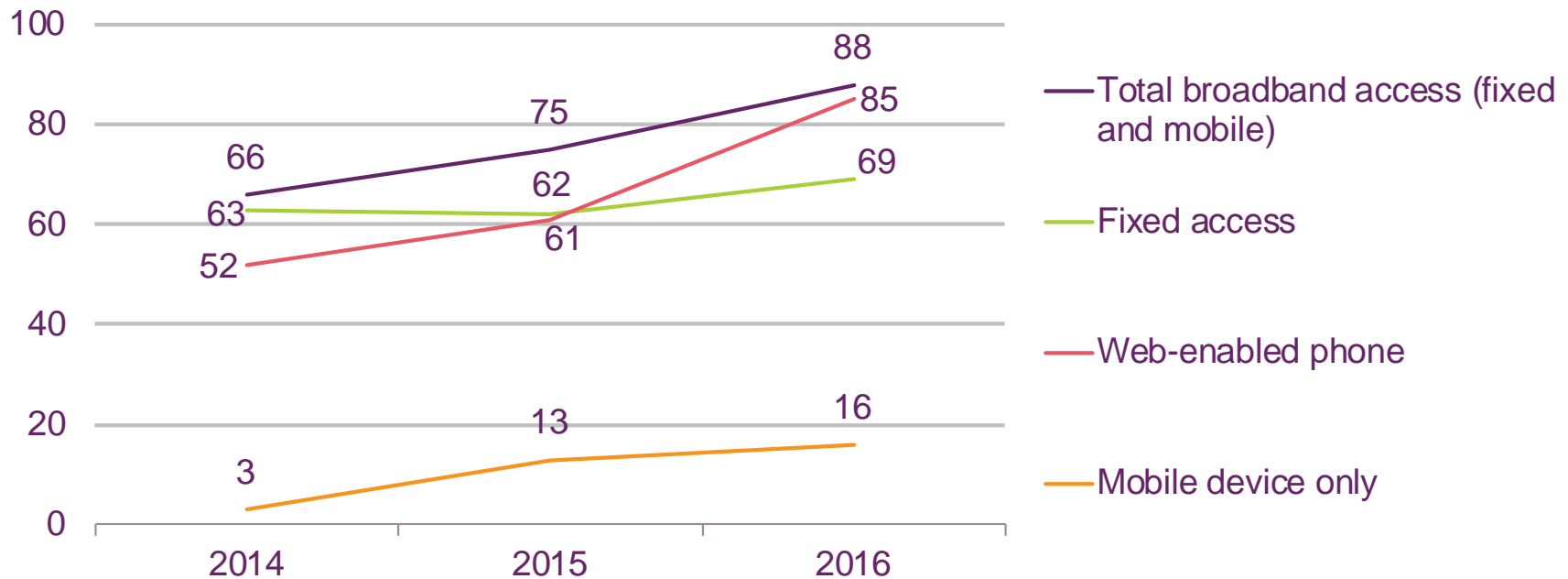
Base: All (Scotland: 192), all phone users (Scotland: 158)

Q: How often, if ever, do people bump into you while walking on the street because they are too busy looking at their phone? Q: How often, if ever, do you bump into people or anything else while walking on the street because you are too busy looking at your phone?

Analysis of fixed and mobile broadband take-up in Glasgow

Figure 1.16

Fixed broadband and mobile take-up in Glasgow: 2014 – 2016



Source: British Population Survey

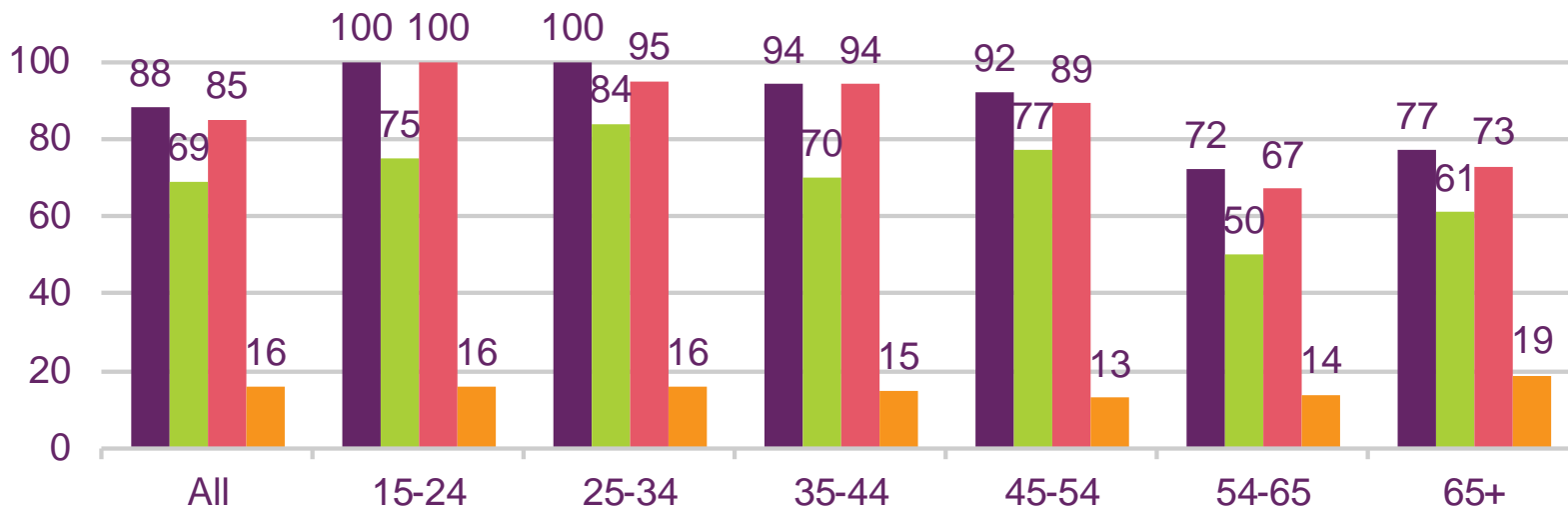
Base: All adults 15+ (Glasgow 2016 – 250, Glasgow 2015 – 542, Glasgow 2014 - 1405)

Q: How do you access the internet – personal computer at home, via a mobile terminal, through a TV-set, through a games console ?

Q: Do you have a web-enabled phone?

Figure 1.17

Comparison of fixed and mobile broadband take-up in Glasgow, by age



■ Total internet (fixed and mobile) ■ Fixed access ■ Web-enabled phone ■ Mobile device only

Source: British Population Survey

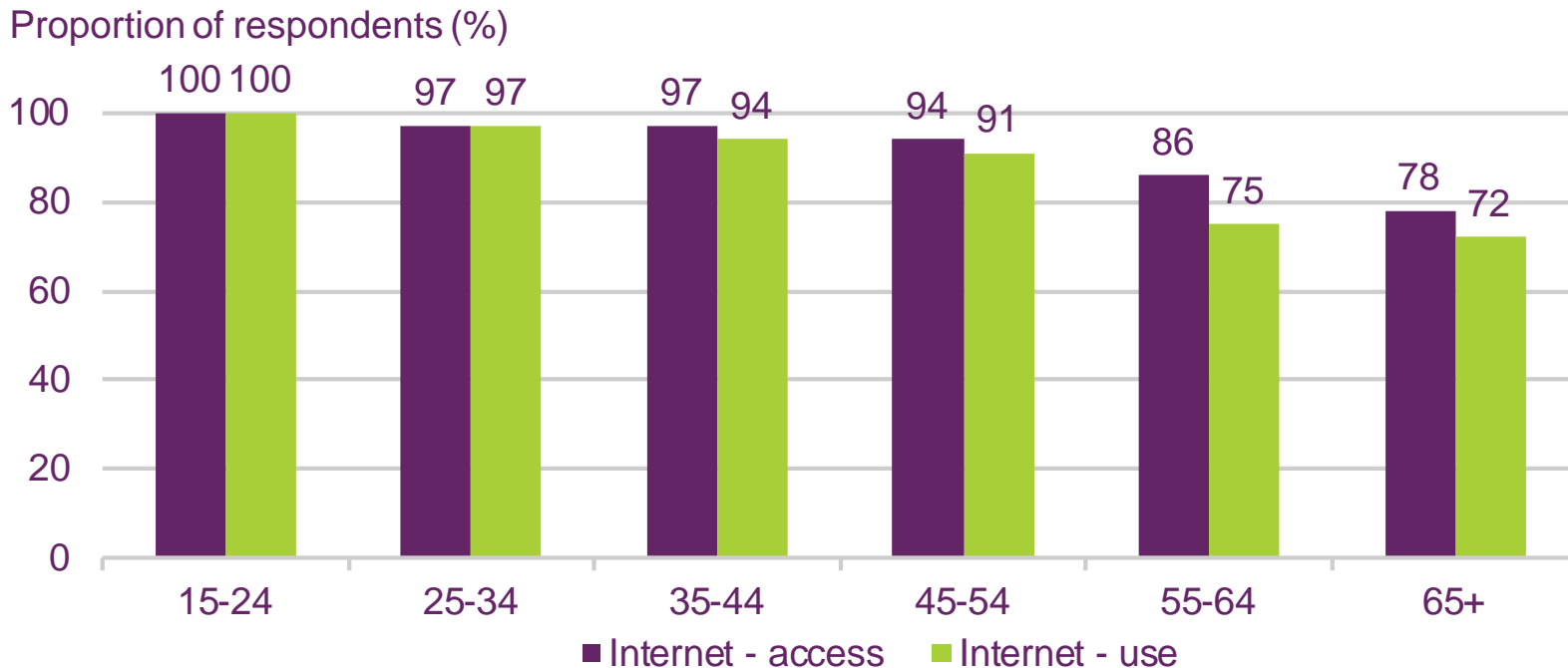
Base: All adults 15+ (Glasgow 2016 – 250)

Q: How do you access the internet – personal computer at home, via a mobile terminal, through a TV-set, through a games console ?

Q: Do you have a web-enabled phone?

Figure 1.18

Internet access and use in Glasgow, by age



Source: British Population Survey

Base: All adults 15+ (Glasgow 2016 - 250)

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 1.19

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	100%	78%	78%
25-34	95%	79%	83%
35-44	94%	67%	71%
45-54	89%	60%	67%
55-64	67%	31%	46%
65+	73%	25%	34%
Net: Under 55	94%	75%	78%
Net: 55+	71%	27%	38%

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?