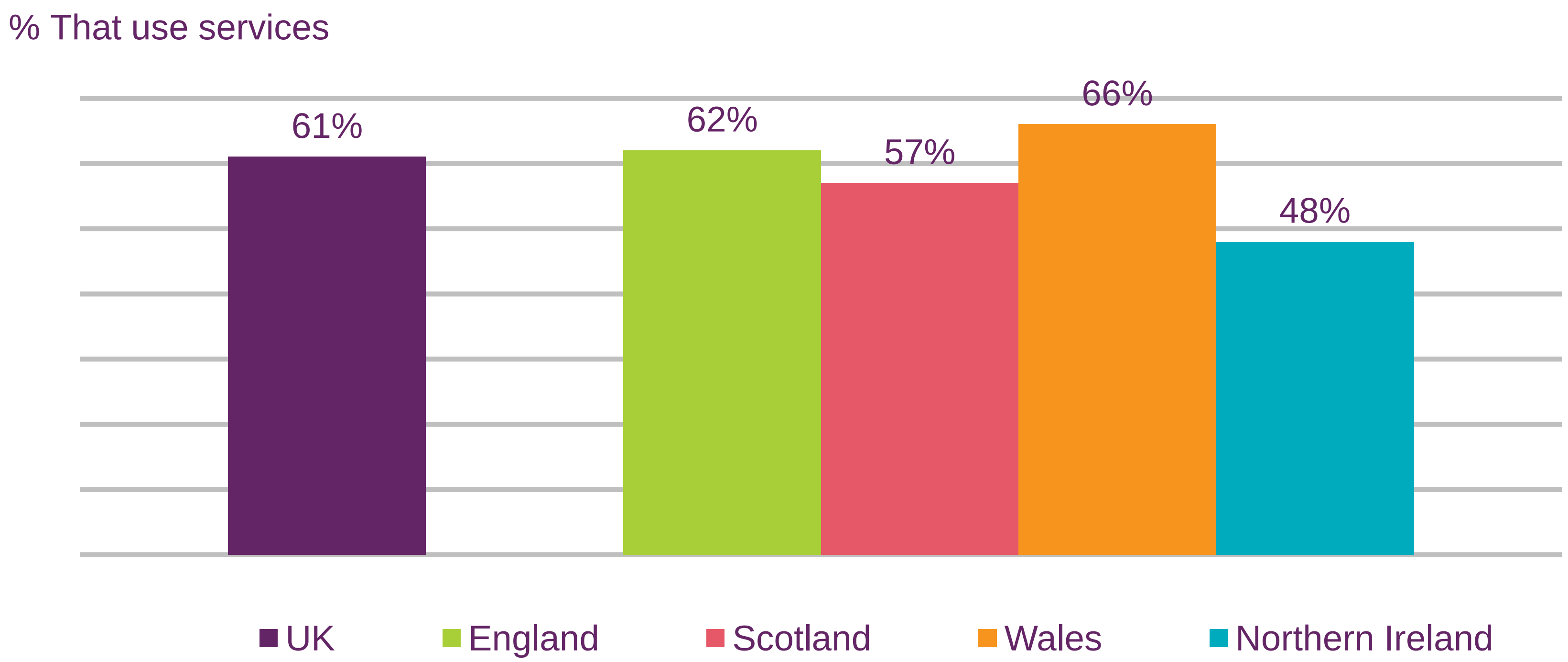
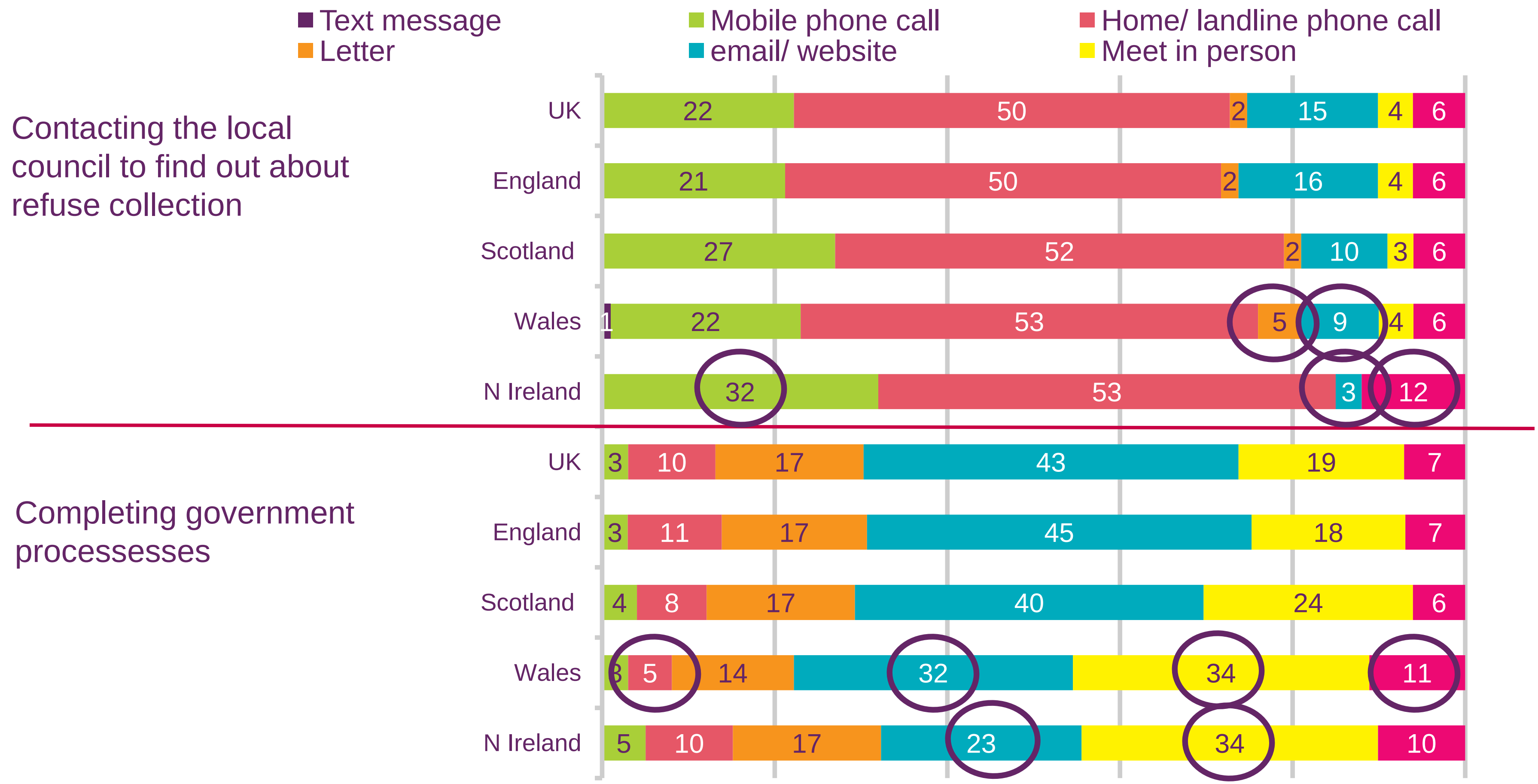
Scotland’s communications market

Figure 1.2 Proportion 'ever' using online government services, by nation



Source: Kantar Media Omnibus
Base: All with internet access in the UK (N=2271) England (N=1325) Scotland (N=399) Wales (N=297) Northern Ireland (N=250). Question: Q.8 Nowadays, many government services are available online. Some examples of these services include <Examples> Do you ever use government online services? (Examples included paying car tax, completing tax return, applying for benefits, completing the census, registering to vote, applying for a school place etc.)

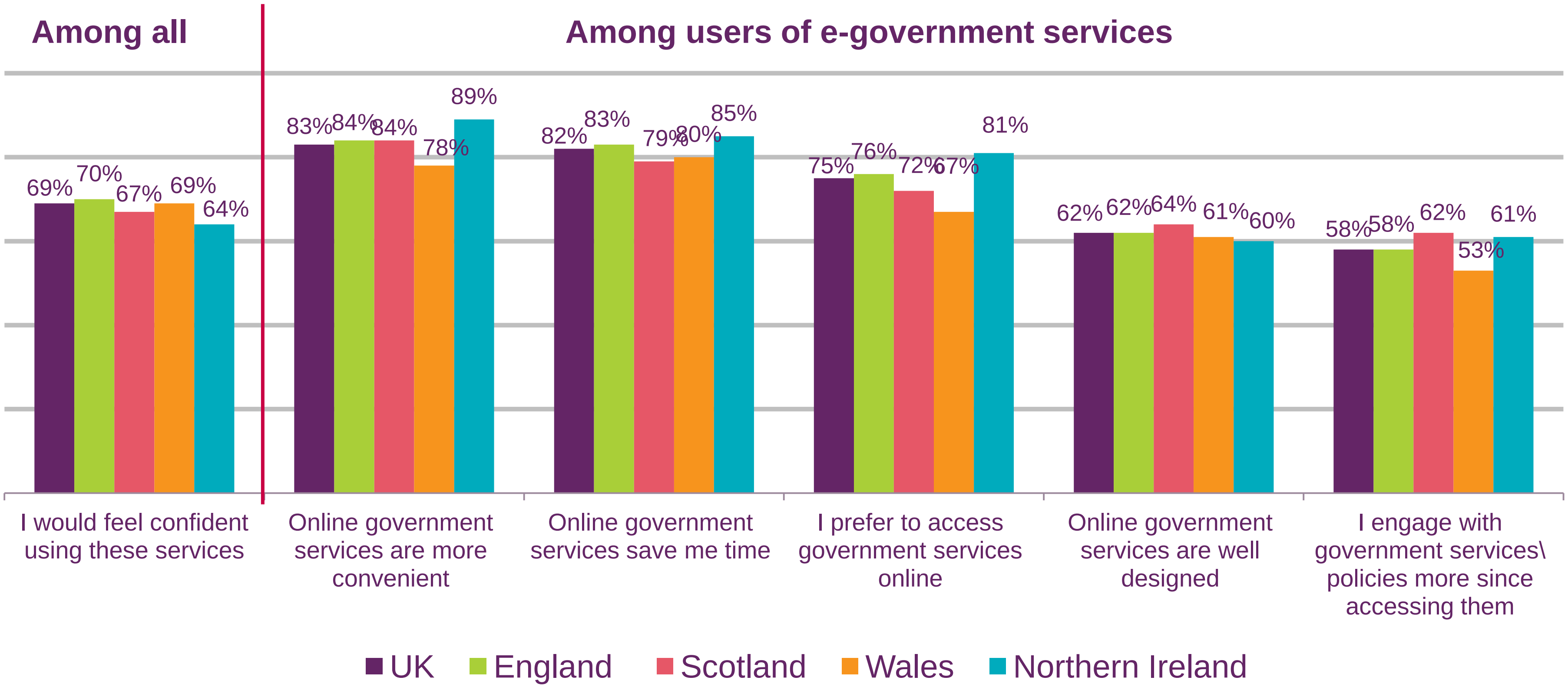
Figure 1.3 Preferred method of contact with local council, and for government processes, by nation



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012
Base: All adults aged 16+ (1805 UK, 1125 England, 236 Scotland, 231 Wales, 213 Northern Ireland). Significance testing shows any difference between any nation and the UK. NZ2A-E. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded)

Figure 1.4 Attitude towards online government services, by nation

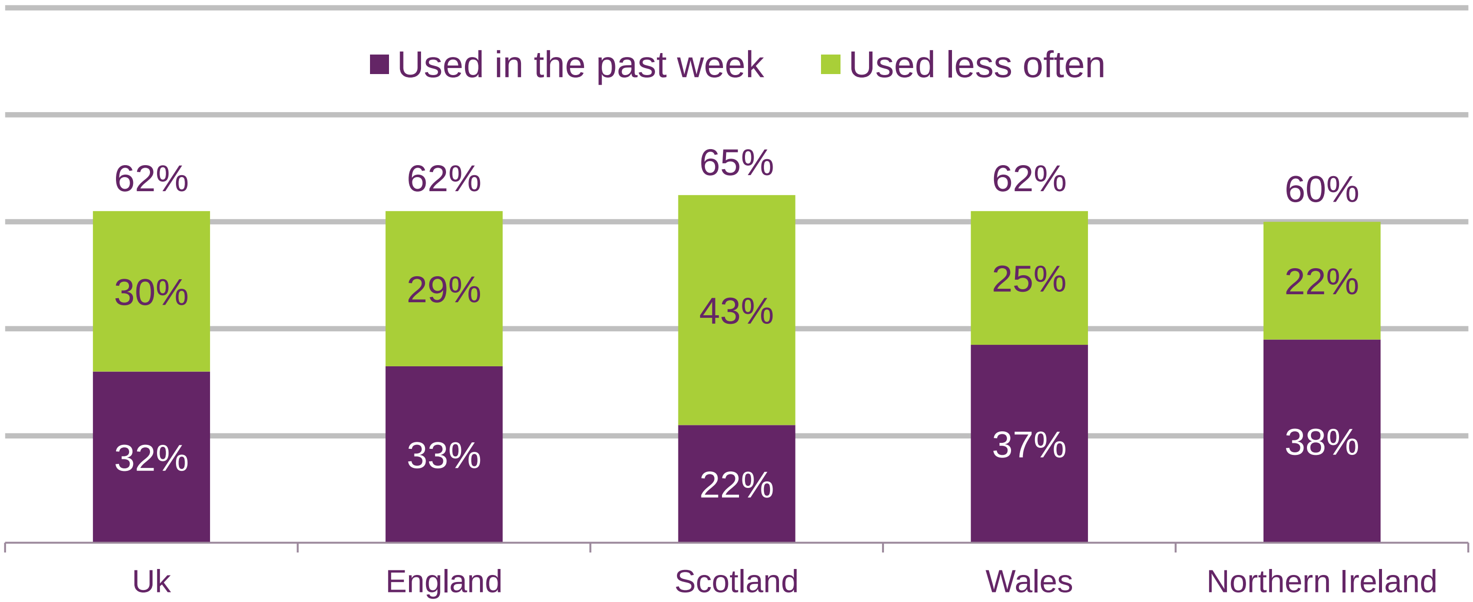
% Agree strongly or slightly



Source: Kantar Media Omnibus
Base: All with internet access: UK (N=2271), England (N=1325), Scotland (N=399), Wales (N=297), Northern Ireland (N=250). All ever used e-government services: the UK (N=1294), England (N=779), Scotland (N=217), Wales (N=187), Northern Ireland (N=109).Q.9 Thinking about the kinds of services I have just shown you please tell me to what extent you agree or disagree with each of the following statements.

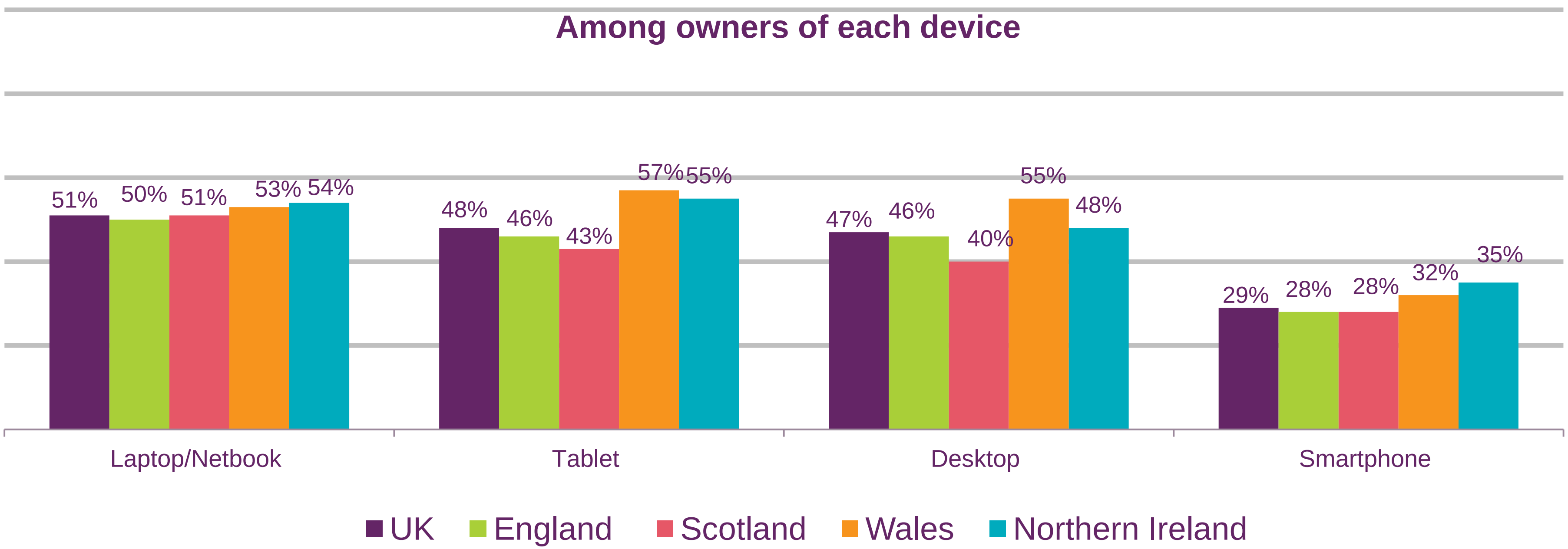
Figure 1.5 Proportion of internet users shopping online, by nation

%



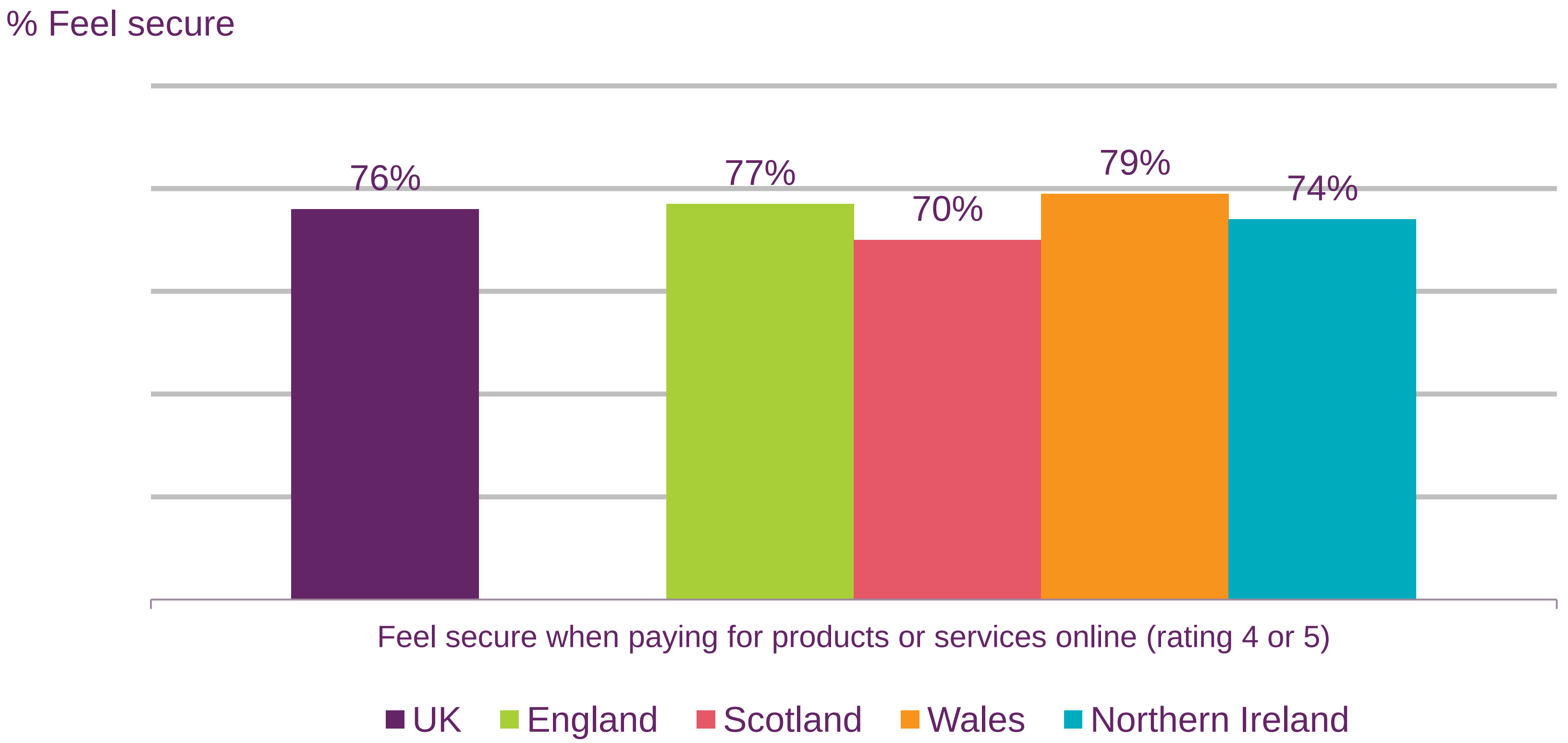
Source: Ofcom technology tracker research, Quarter 1 2013
Base: Adults aged 16+ who use the internet at home or elsewhere 2013. % purchasing good/services/tickets etc online. (UK= 2918, England=1787, Scotland=394,Wales=361, Northern Ireland=376). QE5. Which, if any, of these do you use the internet for? Note figures in the chart below are not directly comparable to figures on internet from previous years due to changes in question wording.

Figure 1.6 Proportion of people shopping online through devices, by nation



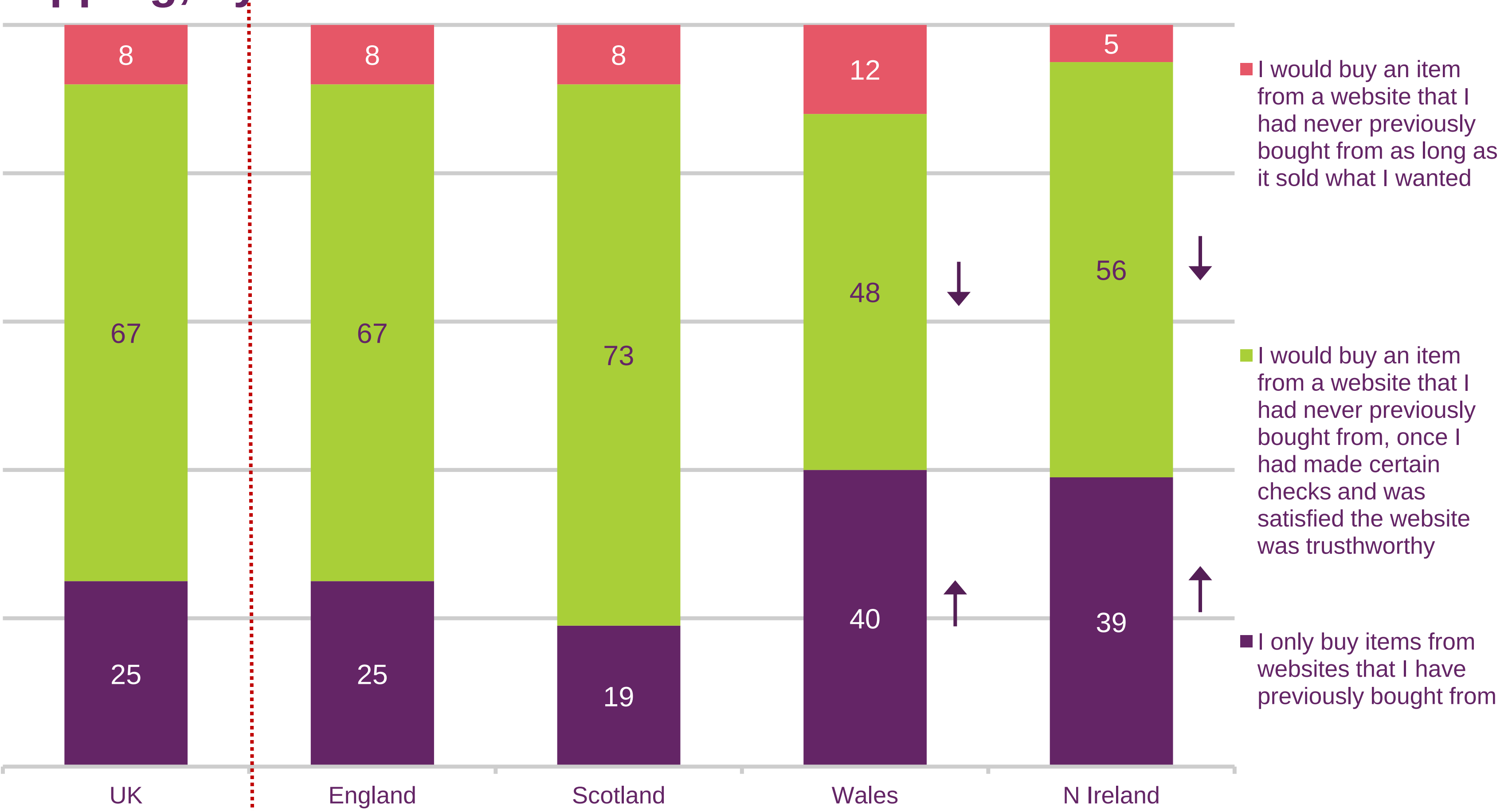
Source: Kantar Media Omnibus
Base: All who have each device. Desktop: UK (N=913) England (N=567) Scotland (N=133) Wales (N=119) Northern Ireland (N=94). Laptop/netbook: UK (N=1647) England (N=951) Scotland (N=303) Wales (N=211) Northern Ireland (N=182). Tablet: UK (N=608) England (N=334) Scotland (N=113) Wales (N=79) Northern Ireland (N=82). Smartphone: UK (N=1230) England (N=715) Scotland (N=213) Wales (N=157) Northern Ireland (N=145). Bases are 75+ respondents. Question: Q.1A Which of these activities do you use your device for nowadays?

Figure 1.7 Perceptions of security when shopping online, by nation



Source: Kantar Media Omnibus
Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Question: Q.11A Generally, when ordering online how secure do you feel when paying for products or services online? Using a scale form 1-5, where 1 means not at all secure and 5 means very secure.

Figure 1.8 Online shoppers' choice of websites for shopping, by nation



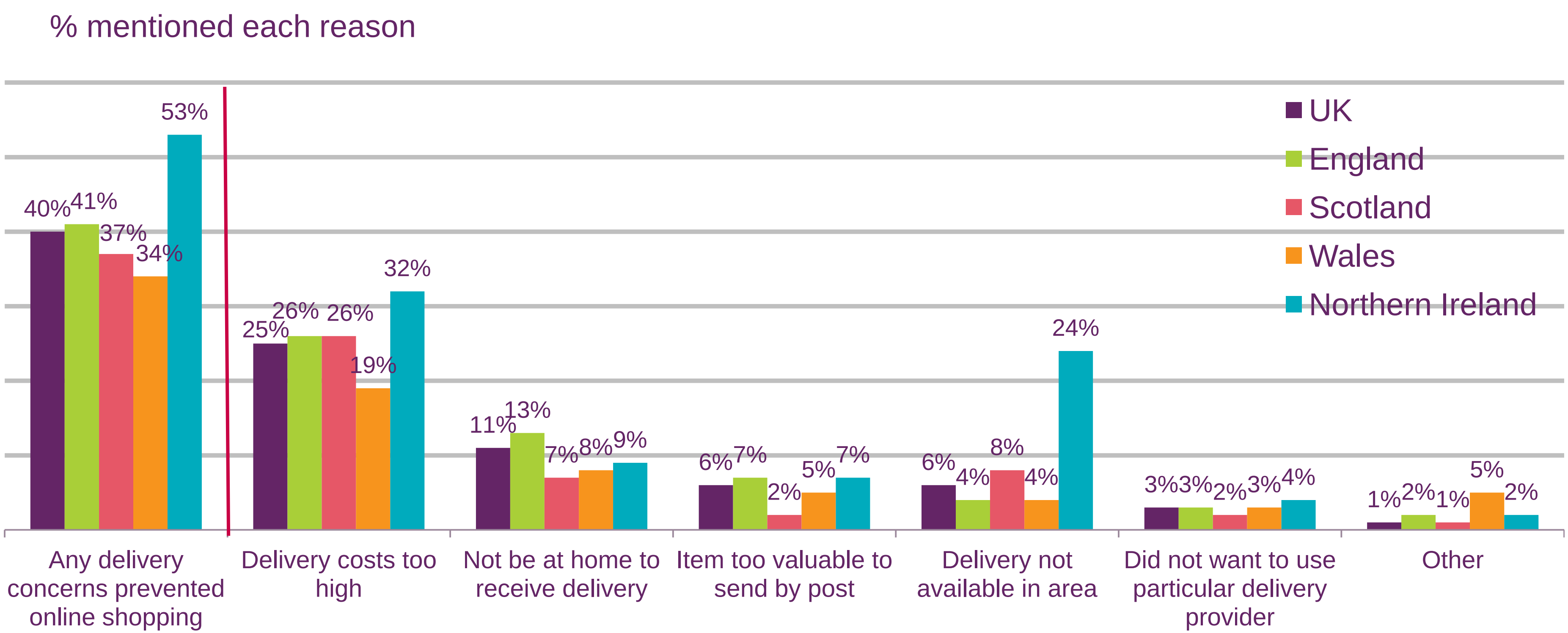
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012

Base: All who say they shop online (1076 UK, 667 England, 151 Scotland, 139 Wales, 119 Northern Ireland) Significance testing shows any difference between any nation and

Figure 1.9 Confidence in delivery when shopping online, by nation

Source: Kantar Media Omnibus
Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Q.11B Generally, when ordering online how confident are you that the goods will arrive on time and in good condition? Using a scale form 1-5, where 1 means not at all confident and 5 means very confident.

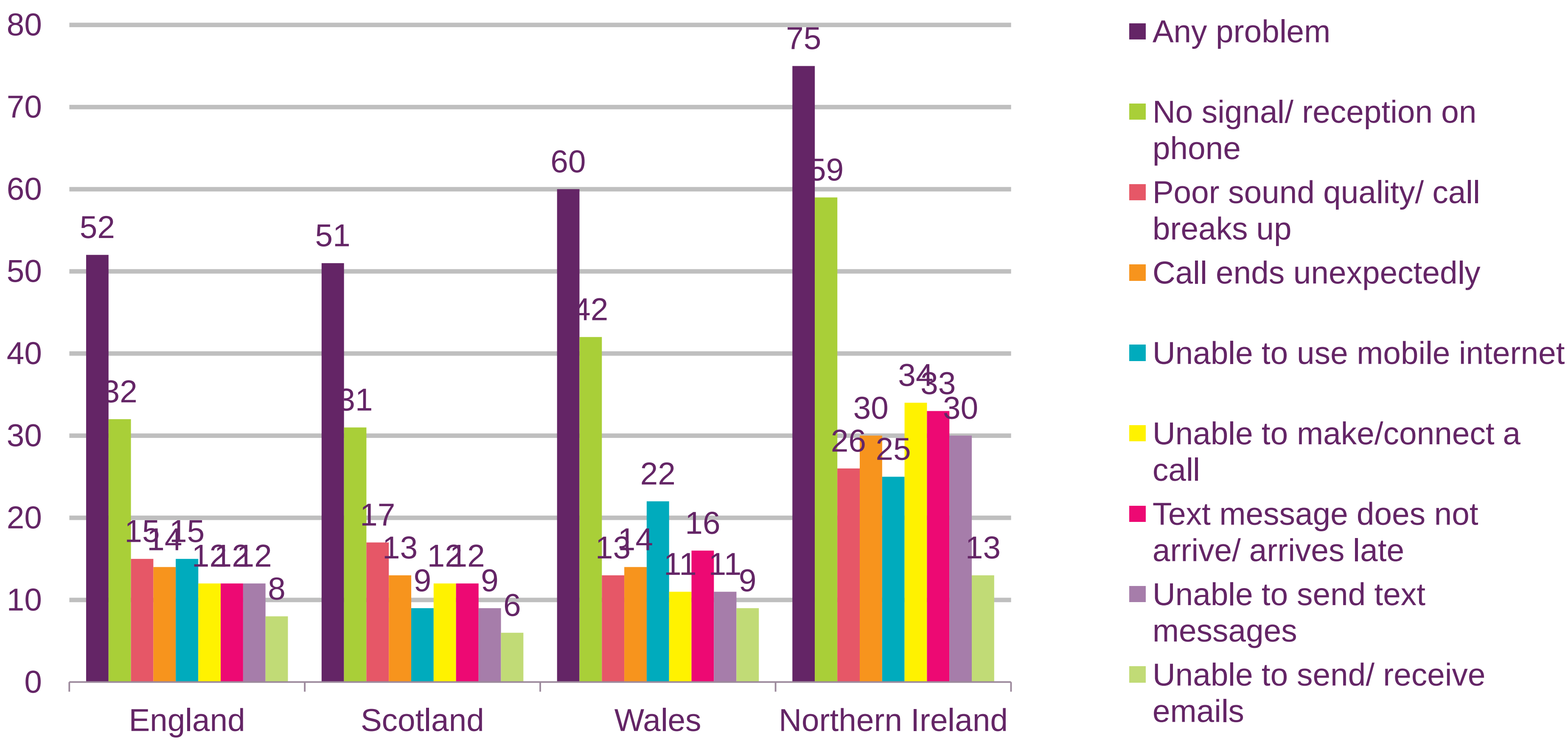
Figure 1.10 Delivery concerns preventing online purchasing, by nation



Source: Kantar Media Omnibus
Base: All who use online shopping in the UK (N=1221), England (N=689) Scotland (N=211) Wales (N=179) Northern Ireland (N=142). Question: Q.14 Have delivery concerns ever prevented you from buying items online? If yes, which of the following reasons prevented you from shopping?

Figure 1.11

Mobile phone users who have ever experienced problems with reception



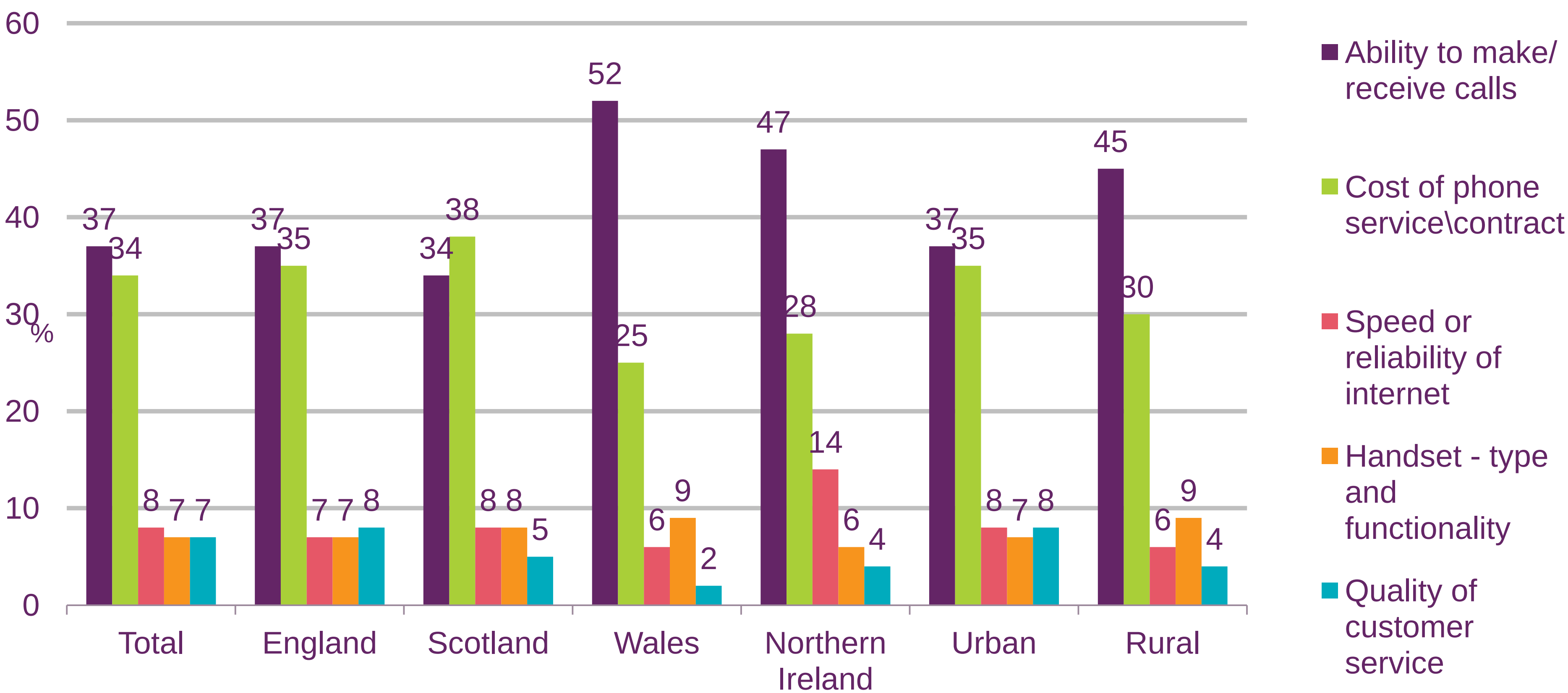
1.Source: Kantar Media omnibus, (14th – 20th November 2012)

2. Base: All who use a mobile phone (N=1743/195/95/103)

3.Q13: Thinking about your mobile reception with ... in the UK, do you ever experience any of the following issues?

Figure 1.12

Most important element when considering mobile provider, by nation and urban/rural



1.Source: Kantar Media omnibus, (14th – 20th November 2012)

2.Base: All who use a mobile phone (N=2136/1743/195/95/103/1757/379)

3. Q.10 And which is the ... important to you when thinking about your mobile operator? Most important.

Figure 1.13

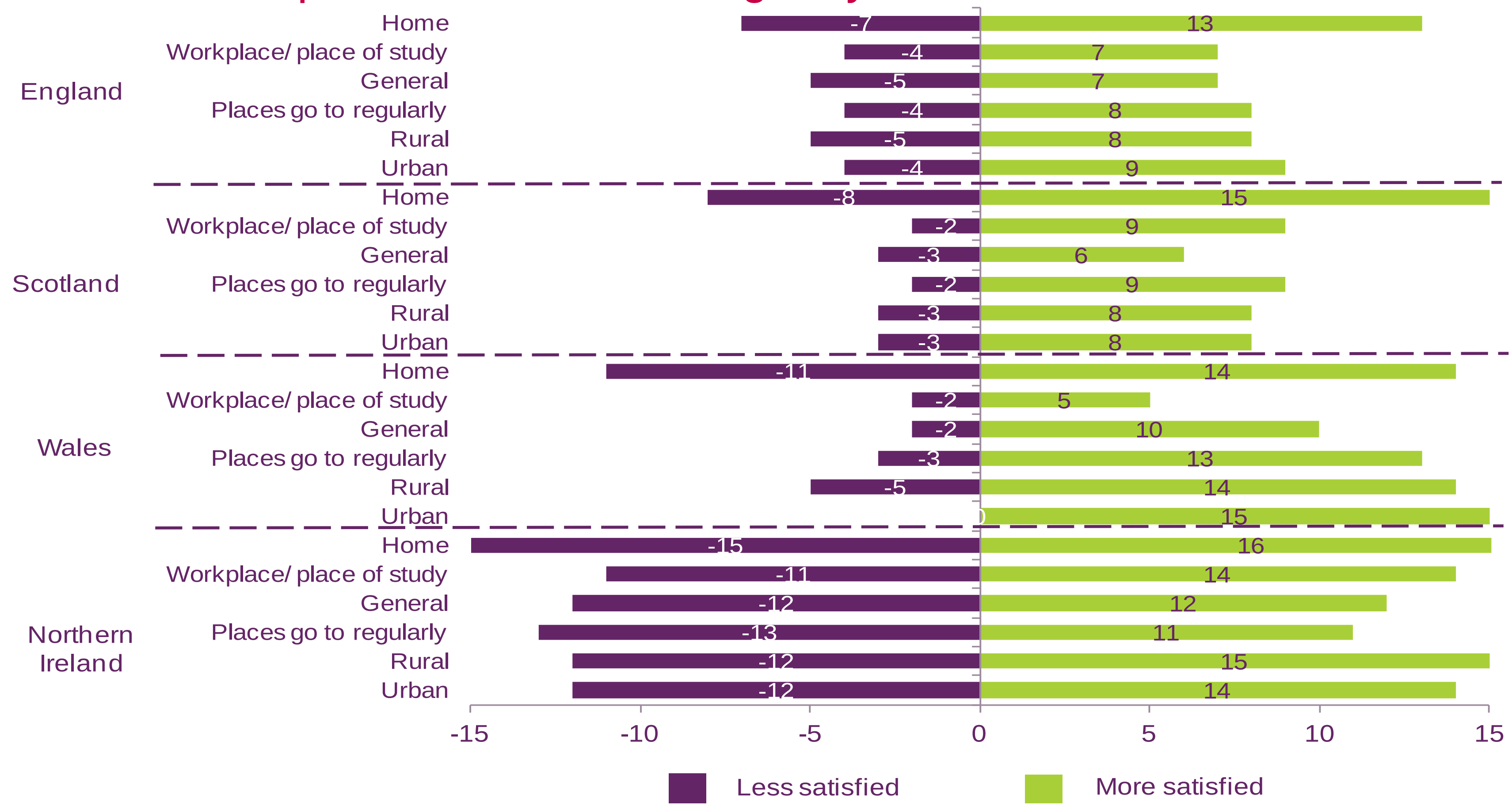
Net satisfaction/importance – ability to make calls in different locations (Q17/Q18)

		Indoor			Outdoor		
		Home	Work / place of study	General	Places go to regularly	Rural	Urban
UK	Importance	83	70	82	87	80	84
	Satisfaction	76	66	75	78	67	78
	S-I	-7	-4	-7	-9	-13	-6
England	Importance	82	70	81	86	79	83
	Satisfaction	76	66	74	78	67	77
	S-I	-6	-4	-7	-8	-12	-6
Scotland	Importance	86	71	89	90	84	88
	Satisfaction	80	66	80	82	71	80
	S-I	-6	-5	-9	-8	-13	-8
Wales	Importance	83	73	85	96	87	90
	Satisfaction	77	68	75	84	62	77
	S-I	-6	-5	-10	-12	-25	-13
Northern Ireland	Importance	92	76	91	94	93	90
	Satisfaction	72	58	77	76	70	80
	S-I	-20	-18	-14	-18	-23	-10

1.Source: Kantar Media omnibus, (14th – 20th November 2012)
2. Base: All who use a mobile phone (N=2136/1743/195/95/103)
3.Q17: How important is it for you to be able to make calls in the following locations?
4.Q18: How satisfied do you feel with the ability to make calls in each of these locations?
5.Net figures shown for very important/somewhat important and very satisfied/somewhat satisfied

Figure 1.14

Change in levels of satisfaction with ability to make calls in different locations compared to 12 months ago, by nation



1.Source: Kantar Media omnibus, (14th – 20th November 2012)
2.Base: All who use a mobile phone (N=2136/1743/195/95/103/1757/379)
3. Q.10 And which is the ... important to you when thinking about your mobile operator? Most important.

Figure 1.15

City population and premises data

City	Population	Total premises	Business premises	Residential premises
Glasgow	c.0.59 million	c.315,000	c.15,000	c.300,000

Source: Analysys Mason

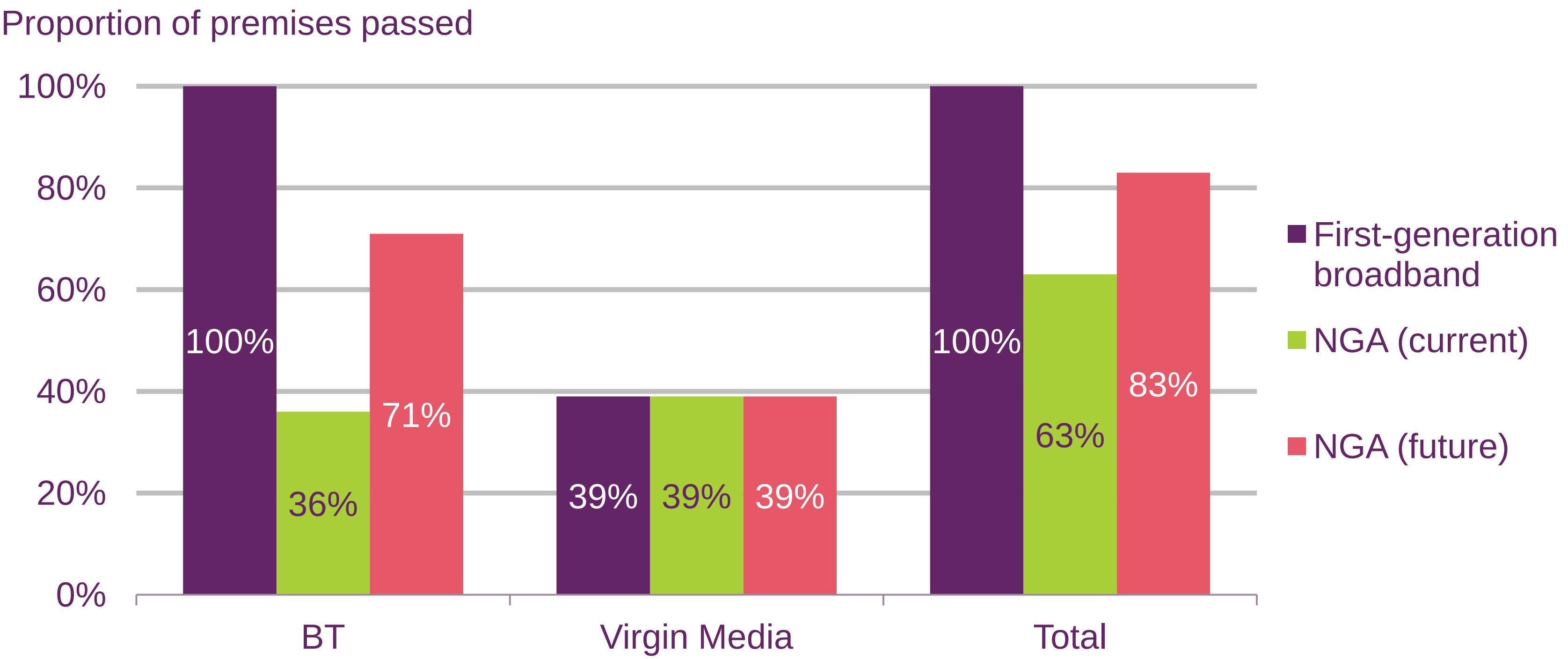
Figure 1.16

Map of area local to Glasgow highlighting city boundary

Source: Analysys Mason

Figure 1.17

Fixed network infrastructure premises passed availability



Source: Analysys Mason, Ofcom Infrastructure Report

Figure 1.18

Percentage of lines that have a speed of less than 2Mbit/s, and relative positioning

Source: Analysys Mason, Ofcom Infrastructure Report

Figure 1.19

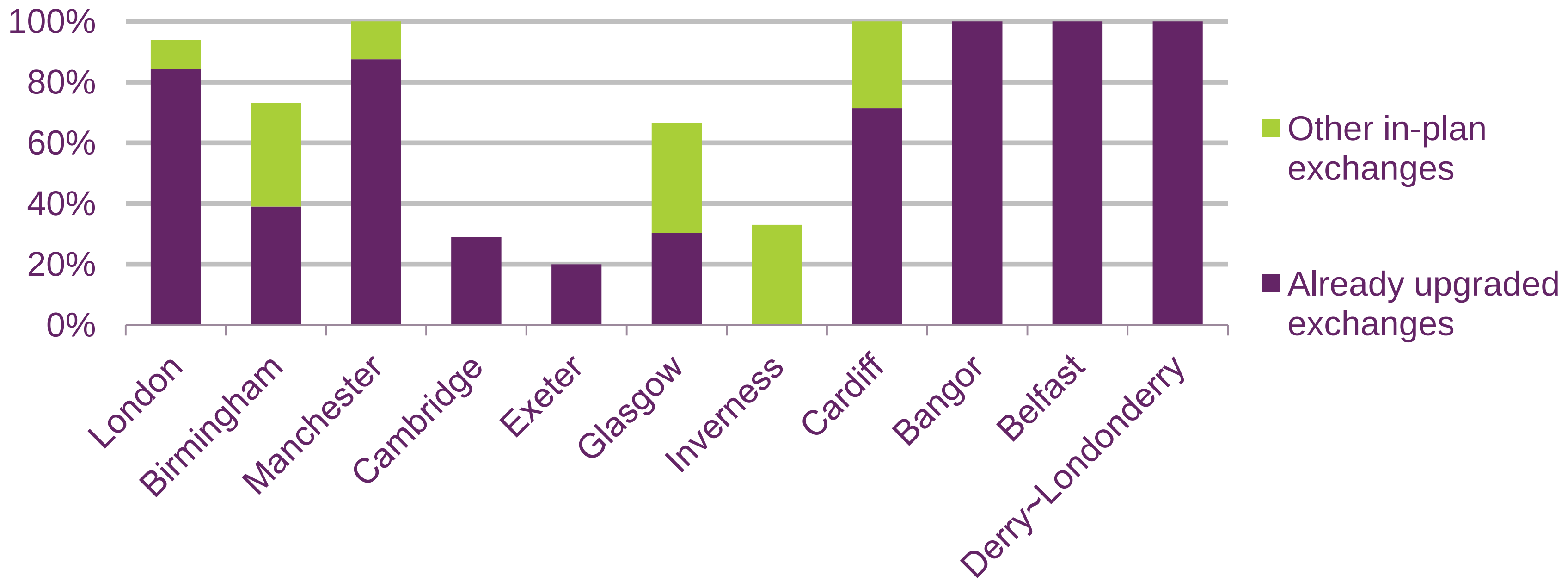
Number of exchanges and % of lines with access to basic broadband

No. of exchanges serving city postcodes	% of lines that have access to both ADSL & ADSL Max	Average number of lines per exchange
33	100%	9,600

Source: Analysys Mason

Figure 1.20

FTTC status of exchanges serving city postcodes according to BT's roll-out plans



Source: Analysys Mason

Figure 1.21

Key city hotspot data

City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
350	6	6.2	-3%

Source: Analysys Mason

Figure 1.22

3G mobile coverage in city

% of premises with 3G signal from 4 operators (city benchmark)	% of premises with 3G signal from 4 operators (11 city average)	% of premises with 3G signal from 4 operators (UK average)	Percentage difference from 11 city average
100%	95.7%	77.3%	+4.3%

Source: Analysys Mason ,Ofcom Infrastructure Report

Figure 1.23

Key city exchange data

Ofcom classification	Number of the city exchanges	% of total exchanges	% of premises passed
3	32	97%	>99%
2	0	0%	0%
1	1	3%	<1%

Source: Analysys Mason

Figure 1.24

Average maximum modem synch. speed compared to other cities

Excluding SFBB lines			Including SFBB lines			
Average maximum speed (Mbit/s)	City average (Mbit/s)	% difference from city average	Average maximum speed (Mbit/s)	City average (Mbit/s)	UK average (Mbit/s)	% difference from city average
14.2	14.1	+1%	27.3	29.9	12.7	-9%

Source: Analysys Mason ,Ofcom Infrastructure Report

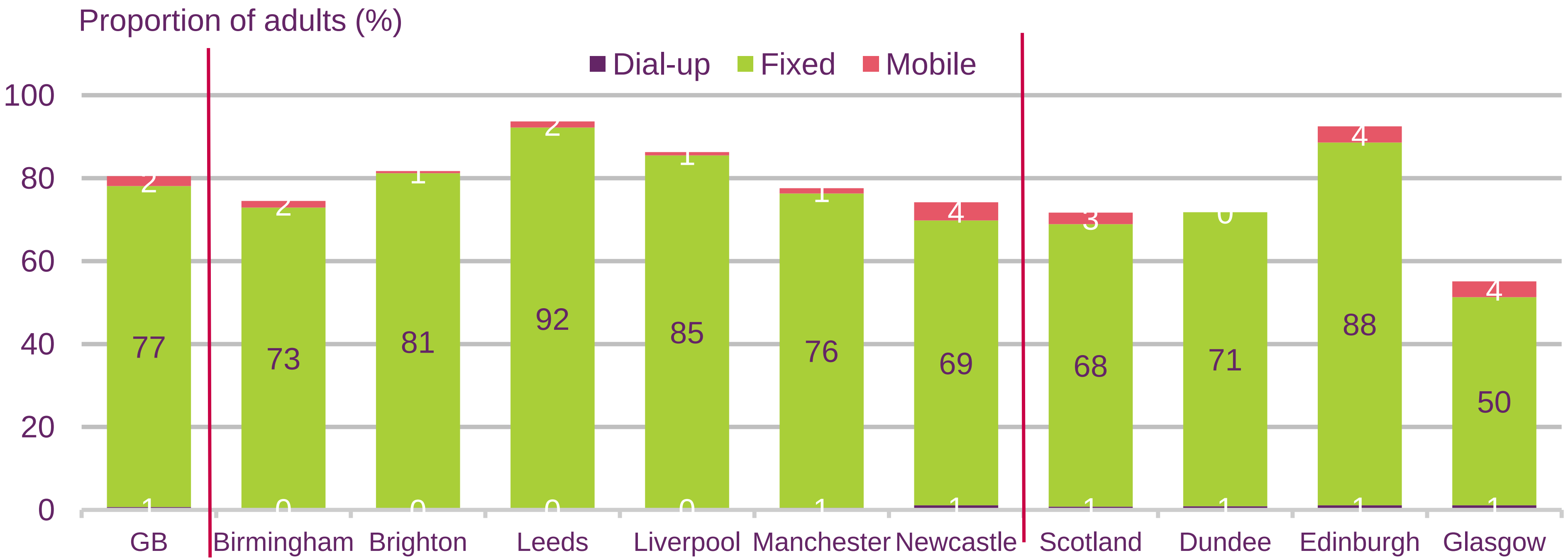
Figure 1.25

Fixed broadband take-up, by city

Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Birmingham 2557, Brighton 1090, Glasgow 1398, Leeds, 1412, Newcastle 1149; Scotland 6840; Dundee 90; Edinburgh 89)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.26

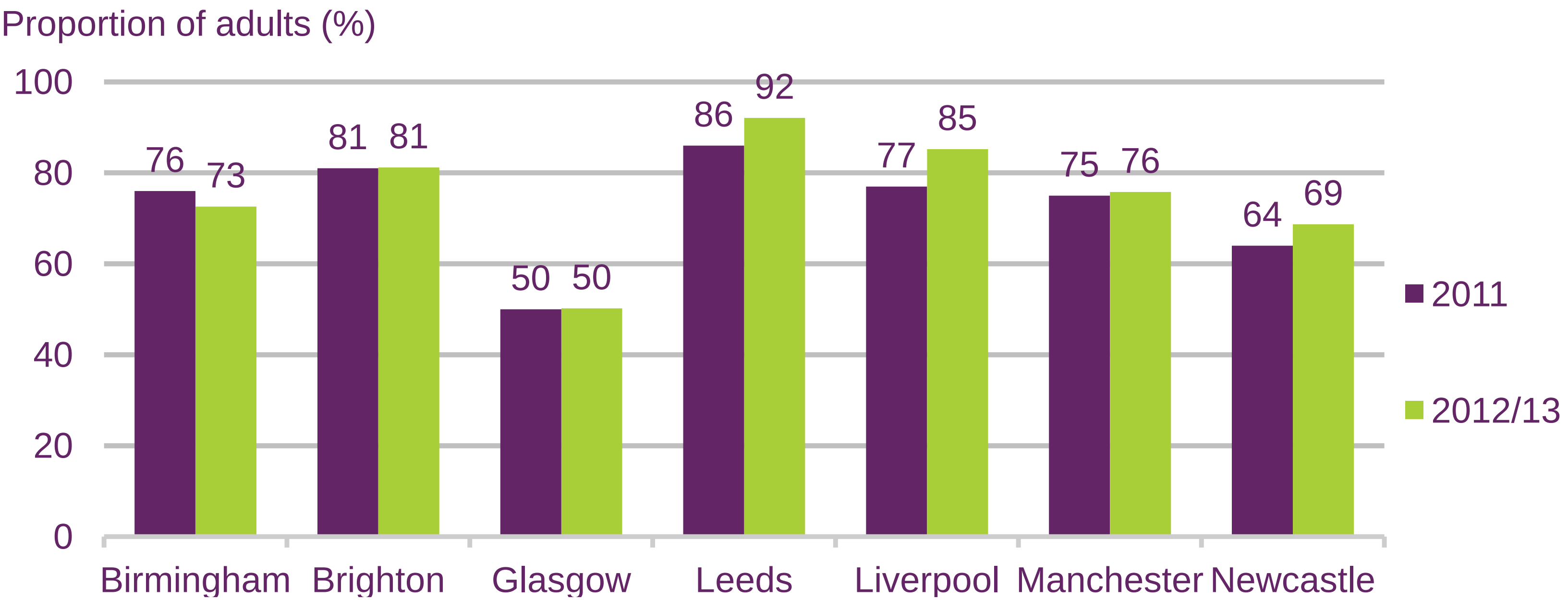
Home internet access, by technology, by city



Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Birmingham 2557, Brighton 1090, Glasgow 1398, Leeds, 1412, Newcastle 1149; Scotland 6840; Dundee 90; Edinburgh 89)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.27

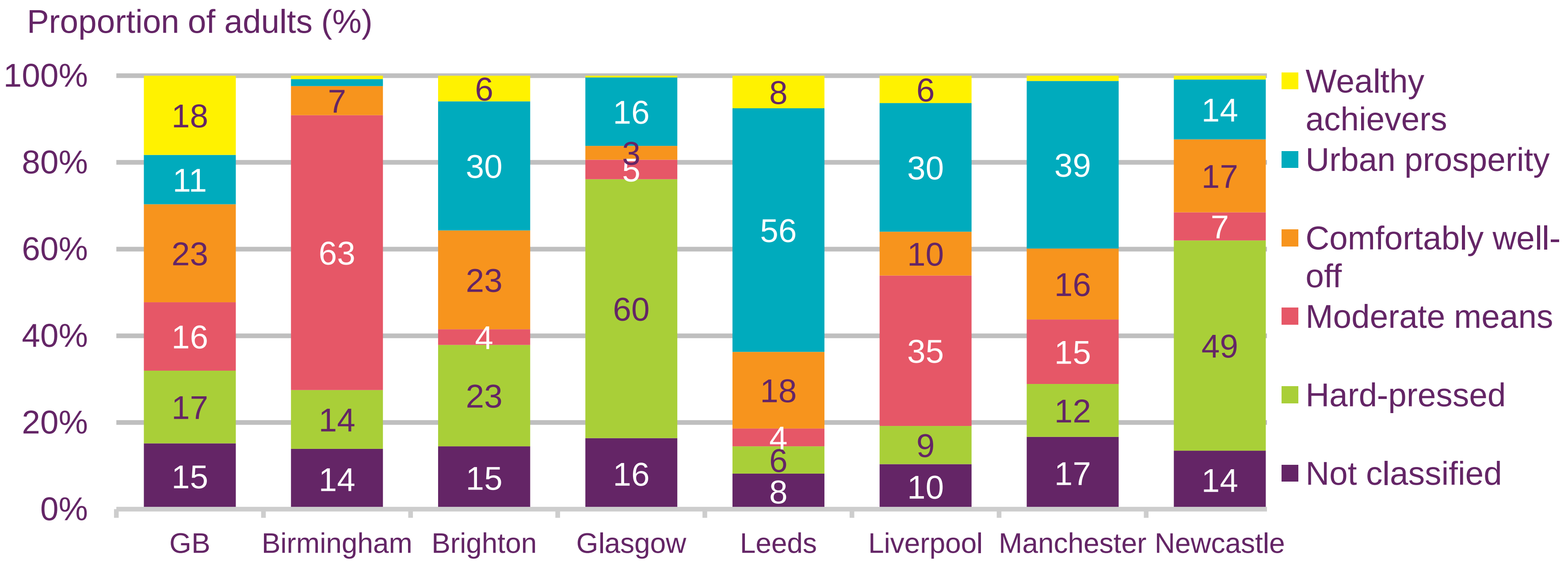
Fixed broadband take-up, by city: 2011 and 2012/2013



Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Birmingham 2557, Brighton 1090, Glasgow 1398, Leeds, 1412, Newcastle 1149, January to September 2011 GB 62669, Birmingham 1880, Brighton 590, Glasgow 594, Leeds 648, Liverpool 671, Manchester 1423, Newcastle 731)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.28

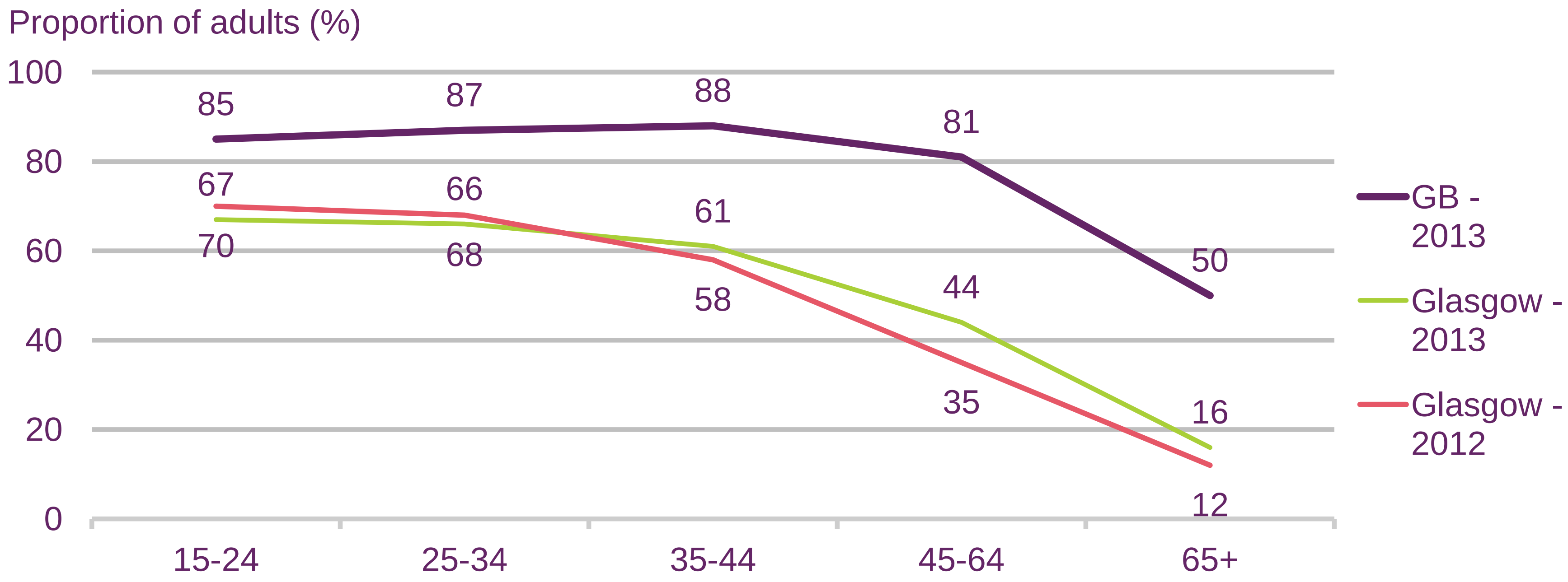
Demographic profile, by city



Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Birmingham 2557, Brighton 1090, Glasgow 1398, Leeds, 1412, Newcastle 1149)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.29

Fixed broadband take-up, by age-group

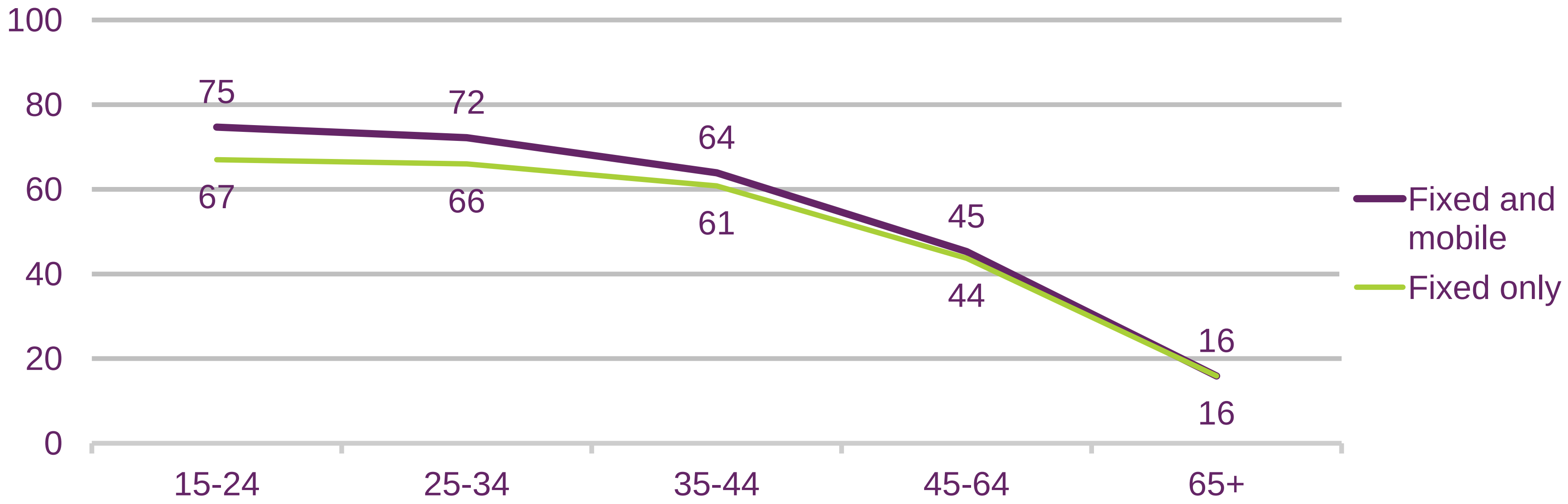


Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Glasgow - 2013 1398, Glasgow – 2011/2012 597)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.30

Fixed versus combined (mobile and/or fixed) broadband take-up, by age-group

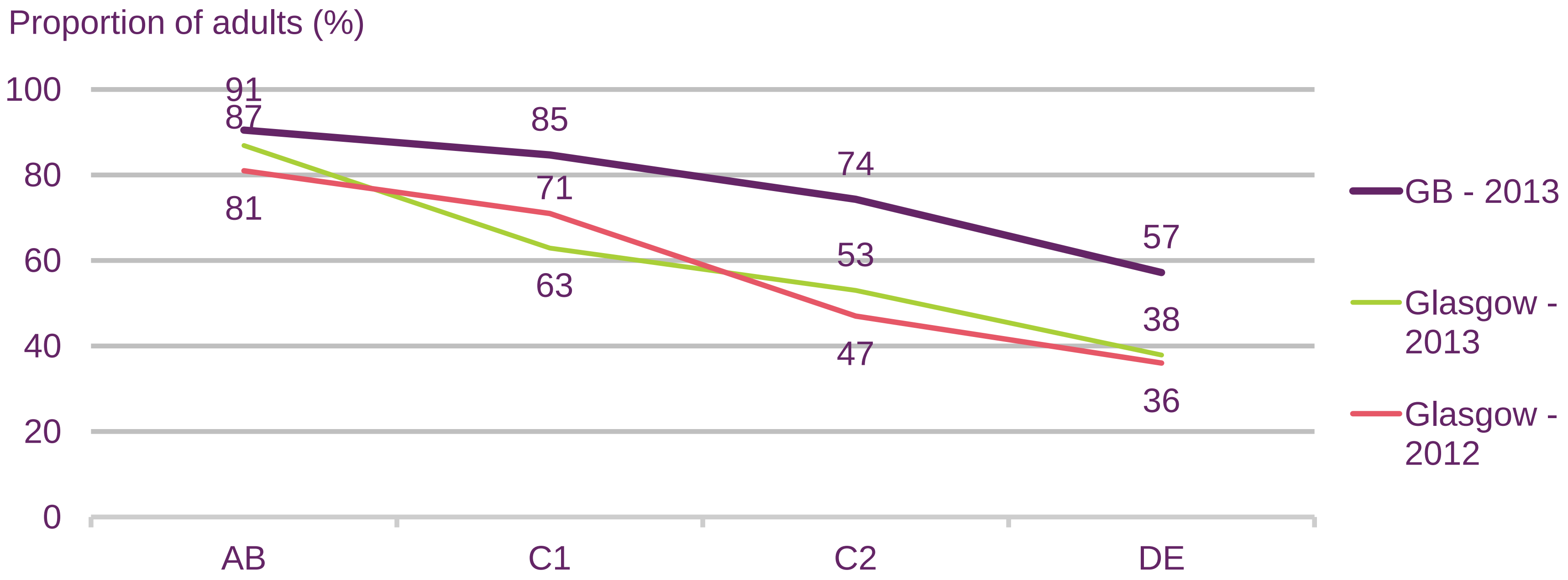
Proportion of adults (%)



Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; 15-24 280, 25-34 218; 35-44 188; 45-64 456, 65+ 258;)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.31

Fixed broadband take-up, by socio-economic status



Source: British Population Survey
Base: All adults 15+ (April 2012 to March 2013; GB 79406, Glasgow 1398,)
Q: Is your access to the internet AT HOME cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Figure 1.32

City population and premises data

City	Population	Total premises	Business premises	Residential premises
Inverness	c.37,000	c.20,300	c.1500	c.18,800

Source: Analysys Mason

Figure 1.33

Map of Inverness area, highlighting city boundary

Source: Analysys Mason

Figure 1.34

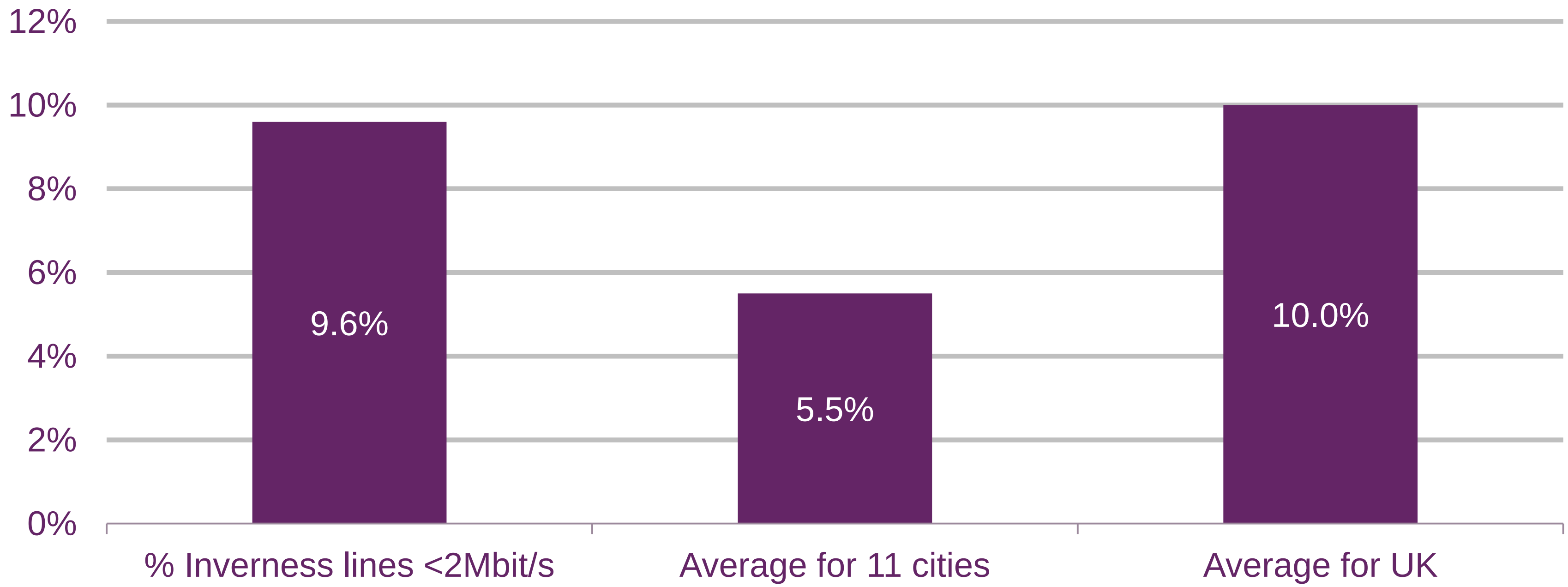
Fixed network infrastructure premises passed availability

Operator	First-generation broadband	NGA (current)	NGA (future)
BT	100%	0%	45%
Virgin Media	0%	0%	0%
Total	100%	0%	45%

Source: Analysys Mason ,Ofcom Infrastructure Report

Figure 1.35

Percentage of lines that have a speed less than 2Mbit/s, and relative positioning



Source: Analysys Mason, Ofcom Infrastructure Report

Figure 1.36

Number of exchanges and % of lines with access to basic broadband

No. of exchanges serving city postcodes	% of lines that have access to both ADSL & ADSL Max	Average number of lines per exchange
3	100%	6,800

Source: Analysys Mason

Figure 1.37

Key city hotspots data

City total	Total hotspots per 10,000 city residents (city benchmark)	Total hotspots per 10,000 city residents (11 city average)	Percentage difference from 11 city average
30	8.1	6.2	+31%

Source: Analysys Mason

Figure 1.38

3G mobile coverage in city

% of premises with 3G signal from 4 operators (city benchmark)	% of premises with 3G signal from 4 operators (11 city average)	% of premises with 3G signal from 4 operators (UK average)	Percentage difference from 11 city average
98%	95.7%	77.3%	+2.3%

Source: Analysys Mason ,Ofcom Infrastructure Report

Figure 1.39

Key city exchange data

Ofcom classification	% of total exchanges	% of premises passed
3	0%	0%
2	33%	52%
1	67%	48%

Source: Analysys Mason

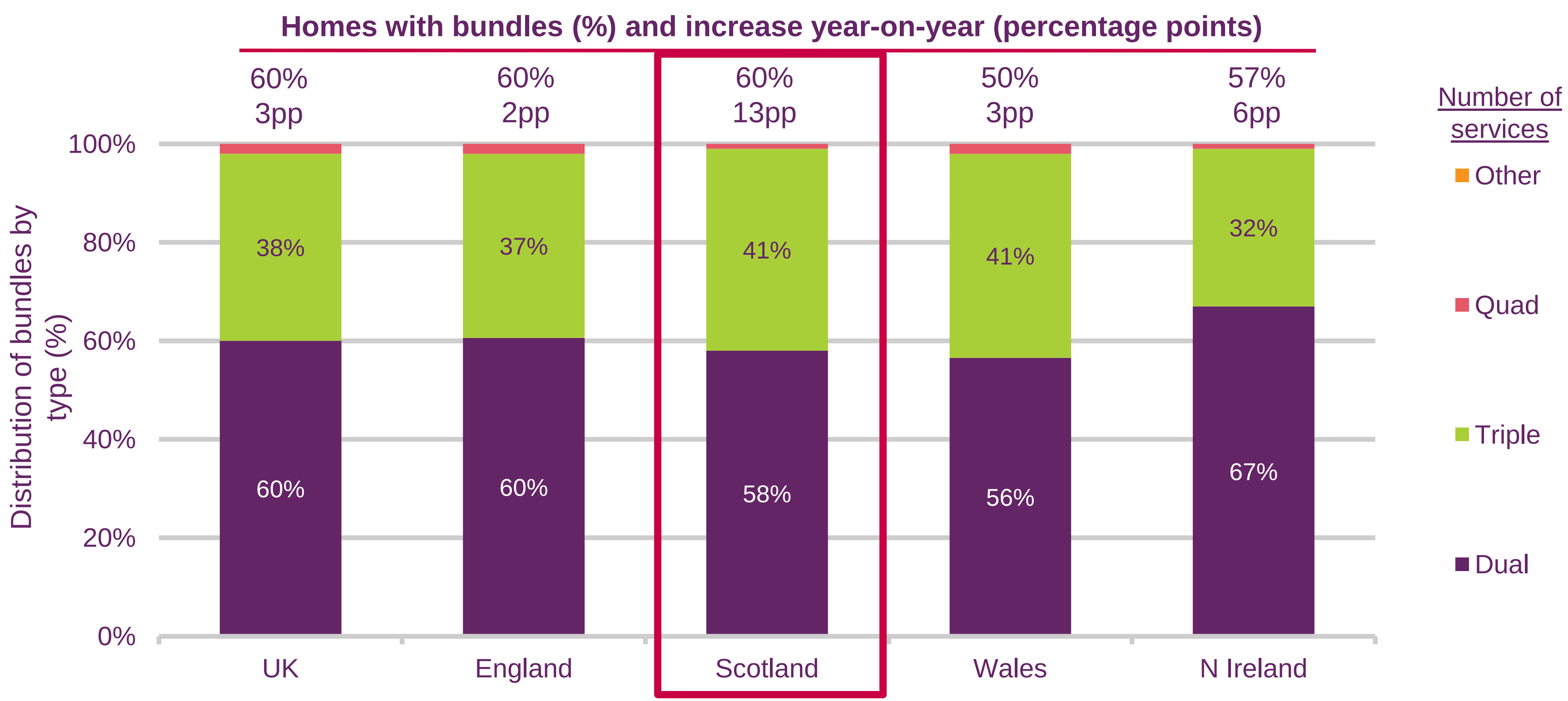
Figure 1.40

Average maximum modem synch. speed compared to other cities

Excluding SFBB lines			Including SFBB lines			
Average maximum speed (Mbit/s)	City average (Mbit/s)	% difference	Average maximum speed (Mbit/s)	City average (Mbit/s)	UK average (Mbit/s)	% difference
12.2	14.1	-13%	12.2	29.9	12.7	-59%

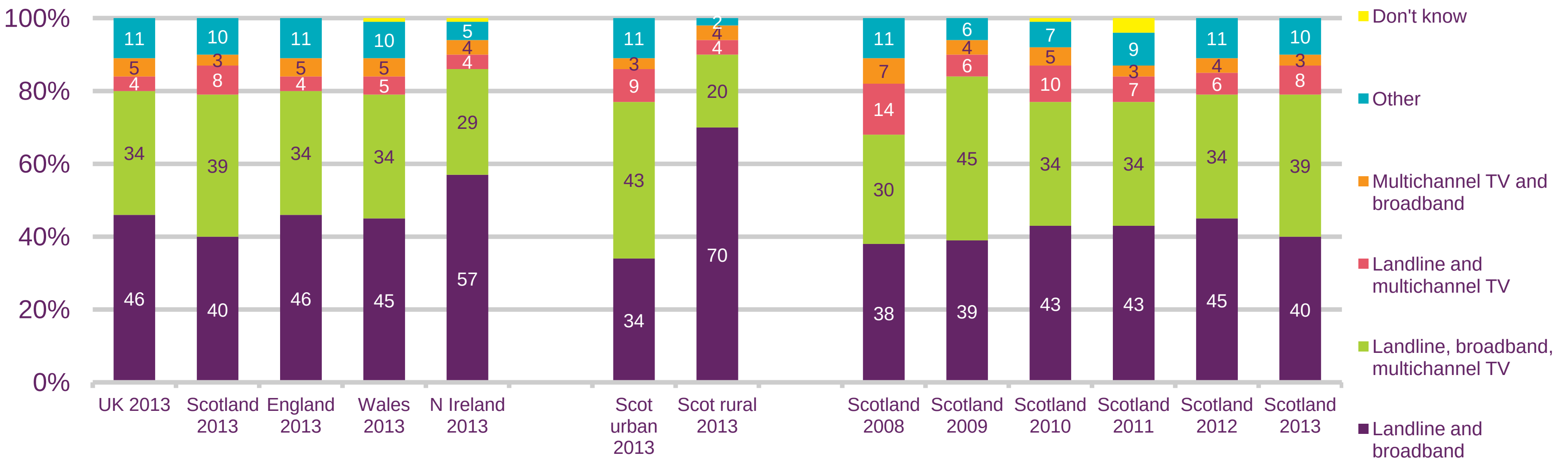
Source: Analysys Mason ,Ofcom Infrastructure Report

Figure 1.41 Proportion of homes in Scotland with a bundle of services



Source: Ofcom research, Q1 2013
Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2104 UK, 1309 England, 297 Scotland, 220 Wales, 278 Northern Ireland)
Note: Remaining percentages are Don't know responses

Figure 1.42 Types of services in bundle in Scotland



Source: Ofcom research, Q1 2013

Base: All adults aged 16+ with a package of services regardless of whether or not these include a discount (n = 2104 UK, 297 Scotland, 1309 England, 220 Wales, 278 Northern Ireland, 154 Scotland urban, 143 Scotland rural, 324 Scotland 2008, 351 Scotland 2009, 605 Scotland 2010, 226 Scotland 2011, 254 Scotland 2012, 297 Scotland 2013)

Question. Do you receive more than one of these services as part of an overall deal or package from the same supplier?