Communications Market Report: Scotland

Research Document

Publication date: 6 August 2015

About this document

The report contains statistics and analysis of the Scotland communications sector and is a reference for industry, stakeholders and consumers. It also provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

The report contains data and analysis on broadcast television and radio, fixed and mobile telephony, internet take-up and consumption and post.

We publish this report to support Ofcom's regulatory goal to research markets constantly and to remain at the forefront of technological understanding. It also fulfils the requirements on Ofcom under Section 358 of the Communications Act 2003 to publish an annual factual and statistical report. It also addresses the requirement to undertake and make public our consumer research (as set out in Sections 14 and 15 of the same Act).

Introduction

This is Ofcom's tenth annual review of communications markets in Scotland, offering an overview of the take-up and use of communications services across the nation.

The report reveals the impact of the two major events of the year – the XX Commonwealth Games held in Glasgow and the Scottish Independence Referendum. Largely as a result, money spent on programmes for viewers in Scotland increased substantially – particularly on current affairs. It's worth noting that spending on Gaelic language programming also went up.

However, the evidence shows that people in Scotland are becoming less and less likely to watch content on TV at the time it is transmitted. Catch-up viewing is becoming increasingly popular.

As in previous years, we analyse the trends for broadband take-up in Glasgow. The fact that overall internet access has gone up, by nine percentage points in a year when access via mobile devices is included, is a positive finding.

In last year's *Communications Market Report* we noted that Scotland was becoming a more connected nation. There are signs of this continuing; the increases both in 4G service take-up and in tablet ownership are particularly noteworthy.

For radio, digital listening increased by only a small extent. However, over a third of all listening in Scotland is through a digital platform.

The section on post shows that people in Scotland are more likely than people in the other nations to send personal mail, and they continue to have high levels of satisfaction with Royal Mail.

The information set out in this report does not represent any proposal or conclusion by Ofcom in respect of the current or future definition of markets. Nor does it represent any proposal or conclusion about the assessment of significant market power for the purpose of the Communications Act 2003, the Competition Act 1998 or any other relevant legislation.

The full data set and charts are available in a searchable resource, which can be found at www.ofcom.org.uk/cmrscotland. Companion reports for the UK and each of the nations can be found at www.ofcom.org.uk/cmr.

Contents

Setting the scene

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

A note on our survey research

We conducted a face-to-face survey of 3,756 respondents aged 16+ in the UK, with 492 interviews conducted in Scotland. Quotas were set and weighting applied to ensure that the sample was representative of the population of Scotland in terms of age, gender, socio-economic group and geographic location. Fieldwork took place in January and February 2015.

Respondents were defined as urban if they lived in a settlement with a population of 2000 or more, and rural if they lived in areas with smaller populations. The survey sample in Scotland has error margins of approximately +/- 3-6% at the 95% confidence level. In urban and rural areas; survey error margins are approximately +/-4-7%.

In addition to the survey data, this report refers to information from a range of other sources, including data provided to Ofcom by stakeholders.Tables summarising the data collected in our survey are published on Ofcom's website.

1 Scotland's communications market

1.1 Key findings for Scotland

Introduction

This section sets out a selection of the key facts and figures relating to communications markets across Scotland in 2014[1], comparing and contrasting nations and highlighting changes that have taken place in the past year.

Key findings for Scotland

<u>Changes in audio-visual consumption in Scotland</u>

- **On average, viewers in Scotland watched 7 minutes less broadcast television per day in 2014, at 3 hours 50 minutes**. This was the smallest decline across the nations, compared to a fall of 15 minutes per day in Northern Ireland, 12 minutes per day in Wales, 9 minutes per day in England[2], and 11 minutes across the UK (network) as a whole.

- **Ofcom's consumer research found fewer people claiming to be watching traditional TV (i.e. at the time of broadcast) compared to the previous year in Scotland:** 7% of respondents said they were doing this more, while 41% said they were doing it less; a net change of -34%.

- **The research also showed increases in non-traditional viewing among Scottish respondents**. Net gains were +36% watching non-subscription catch-up (e.g. iPlayer), +24% watching content they had personally recorded and +15% saying they used subscription on-demand services (e.g. Netflix).

- **Claimed reductions in traditional TV viewing (i.e. at time of broadcast), viewing via a TV screen and viewing content from public service broadcasters were smaller than reductions in watching DVDs (net loss of -42% in Scotland) and going to the cinema (-34% in Scotland) over the same period.**

- **These findings are similar to the picture for the UK as a whole**, although the trends are more marked in Scotland.

- **Just over one in five (21%) adults in Scotland, had used standalone video subscription services in 2015, an increase of 12 percentage points since the same time in 2014.** Use of standalone video subscription services in Scotland (21%) is higher than in Northern Ireland (14%), Wales (14%) and the UK as a whole (15%). Just under half of adults in Scotland (49%) use catch-up services; in-line with Wales (48%); the UK as a whole (48%); and significantly higher than in Northern Ireland (32%). PVR usage in Scotland (58%) is similar to the UK average.

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[1] The Ofcom Technology Tracker also includes data from Q1 2015.
[2] The figure for England reflects the average across the English regions with the largest decline in North East (-17 minutes) and the smallest decline in Border (-2 minutes).

Social communication online and social networking

- **Two-thirds of internet users in Scotland agree that technology has changed the way they communicate, and three-fifths say that new communications methods have made life easier.** However, these new communication methods also bring some downsides. Around half of all online adults in Scotland (53%) agree that being online interrupts face-to-face conversations with friends and family, and a quarter (24%) agree that they spend too much time online, compared with spending actual time with friends and family.

- **People use a mix of communication methods, both new and old, to make contact with family and friends. Text messages and email are common weekly choices, but the more traditional methods of meeting face-to-face and talking on the phone are still integral to the mix.** Text messaging (73%) and email communications (73%) are the top two most common methods of contact on a weekly basis. However, meeting face-to-face (61%) and voice calls (60%) are also used by a majority.

- **One in five adults say they are 'hooked' on social media.** Overall, over one in five adults (23%) in Scotland indicated a rating of between 7 and 10 on a 10-point scale (where 1 equated to 'I'm not at all hooked on social media' up to 10, 'I'm completely hooked on social media').

- **In terms of reach, Facebook is the most popular social media site, followed by YouTube.** Eight in ten (80%) online adults in Scotland said they had ever used Facebook, when prompted with a list of websites. YouTube follows closely behind with 70% of online users in Scotland having 'ever used' it. Twitter (32%), WhatsApp (29%) and LinkedIn (28%) also used by a significant minority.

TV and audio-visual content

- **BBC/STV spend on first-run originated content for viewers in Scotland grew in nominal terms in 2014.** Due to unique events programming, PSB spend in 2014 on first-run originated programmes for viewers in Scotland increased by £16m (or 31%) in nominal terms since 2013 and by 35% since 2009.

- **Nominal spend on Gaelic-language programming, broadcast by BBC Alba, increased by 15% year on year in 2014.** Spend on news increased by a fifth (19%), while non-news increased by 15%. Spending on current affairs output remained stable in nominal terms.

- **Half of all households in Scotland have access to HDTV services, in line with the UK average.** Seventy-two per cent of households in Scotland claim to either have HDTV services or have an HD-ready television. This figure is in line with the UK average and is unchanged since 2014. Smart TV ownership in Scotland increased by 11pp to 19% of TV households, also on a par with the UK average.

- **BBC One Scotland's and STV's early evening local news bulletin attracted a greater share in Scotland than the UK average for the same slot in 2014.** BBC One's early evening local news bulletin attracted an average 30.5% share of TV viewing in Scotland, higher than the UK average for the same slot (28.2%). STV's counterpart bulletin attracted a lower share than BBC One's, although at 22.7% it was higher than the Channel 3 UK average (18.0%).

Radio and audio content

- **People in Scotland spend more time than the UK average with commercial stations.** Commercial stations accounted for almost half (48%) of all listening hours in Scotland in 2014. This is 5pp higher than the UK average and the highest share for commercial radio across the UK nations.

- **Over a third of all listening in Scotland is through a digital platform.** Digital listening in Scotland grew by 1.9pp year on year, and now over a third (35%) of listening hours are through a digital platform. This compares to the UK share of 37% for digital listening in 2014.

- **Four new community radio stations launched during the year,** bringing the total number of community stations on air in Scotland to 26.

Telecoms and networks

- **Seventy-three per cent of premises in Scotland were able to receive superfast broadband services in May 2015.** This was the lowest proportion among the UK nations; availability was highest in England at 84%.

- **Scotland had a substantial increase in 4G availability between June 2014 and May 2015.** The proportion of premises in Scotland in areas with outdoor 4G mobile coverage stood at 79.7% in May 2015.

- **Take-up of household fixed broadband is lower in Scotland than in the UK as a whole.** Across the UK, 78% of homes had a fixed broadband connection of some description in Q1 2015, compared to 71% in Scotland.

- **Just under one in five households in Scotland are mobile-only;** 17% of households in Scotland used mobiles as their only form of telephony in Q1 2015, a similar level to that across the UK as a whole (15%).

- **Take-up of fixed broadband in Glasgow continues to be lower than the UK average. (78% UK vs. 62% Glasgow).** Fixed broadband take-up in Glasgow has remained stable since 2014 (2014: 63%, 2015: 62%).

- **While broadband access in Glasgow is at 62%, overall internet access increases to 75% when access via web-enabled mobile devices (e.g. smartphones, PDAs and tablets) is included.** This compares to 63% and 66% respectively for the same Glasgow-specific analysis last year.

Internet and web-based content

- **Following growth in previous years, smartphone take-up has remained at the same level in 2015 as in 2014** at around six in ten adults (63%), against 66% for the UK as a whole.

- **Half of all adults in Scotland said they had a tablet computer in the household (52%), a 10pp increase since 2014 (42%).** Take-up of tablet computers in Scotland is in line with the UK as a whole (at 54% of households).

- **People in Scotland said they spent more time online in 2014** (an average of 19.9 hours a week) than in 2013 (16.5 hours a week).

Post

- **Adults in Scotland are the least likely to send post each month.** Over a third of adults in Scotland hade not sent any post in the past month. Those in Scotland also sent fewer items than other nations on average each month (5.0) except those in Northern Ireland who sent an average of 4.5 items.

- **Adults in Scotland send more personal mail than other nations.** Nearly two thirds of adults in Scotland (63%) said that they had sent invitations and greeting cards in the past month.

- **Adults in Scotland are more satisfied than the rest of the UK with the cost of postage**. Almost seven in ten (69%) of adults in Scotland were satisfied with this, compared to just 58% across the whole of the UK.

Figure 1.1 Fast facts for Scotland

Nations' Fast Facts: wave 1 2015 (%)– unless otherwise stated, figures relate to household take-up

	UK	England	Scotland	Wales	Northern Ireland	UK urban	UK rural	Scotland urban	Scotland rural
Digital TV take-up	97	97	96	98	97	96 -	98 +	95	98
Pay digital TV	59	58	58 -10	67[1] + +10	63	59 +	55 -	58 -12	60
Freeview-only TV	30	30 -3	35[2] +10	24 - -9	28	30 -	35 +	35 +11	34
Smart TV take-up (among TV homes)	21 +9	21 +9	19 +11	17 +8	15 - +8	20 +8	23 +12	20 +13	15
HDTV service (among those with a HDTV)	75 +5	75 +5	75	69 -	75	74 - +4	81 +	76	72
DAB ownership (among radio listeners)[3]	43	44	37	47	29 -	42 -	50 +	38	35
Catch-up TV/ film viewing online/ on-demand (via any device, among those who use the internet)	56 +5	56 +5	62	57	42 -	56 +4	56 +10	62	63
Total internet access at home (via any device)	85 +3	86 +4	78 -	86 +6	79 -	85 +3	85	79	77
Broadband take-up at home (fixed or broadband)	80 +3	81 +4	73 -	78 +7	72 -	79 +3	82	73	73
Use mobile to access internet	61 +4	62 +5	59	59	60 +9	62 + +4	55 -	60	54
Mobile phone take-up (personal use)	93	93	91	90	91	92	93	90	93
Smartphone take-up (personal use)	66 +5	67 +6	63	63	63 +8	67 + +5	59 -	64	60
4G service take-up (among smartphone owners)	45 +26	45 +26	55 + +25	36 - +16	40 +25	46 + +26	35 - +16	56 +24	46 +29
Fixed landline take-up	84	85	82	83	84	84 -	90 +	81	86
Desktop PC take-up	34	37	22 -	26 -	28 -	34	35	22	24 -10
Laptop take-up	65	66	55 -	65 +8	55 -	64	67	55	55
Tablet computer take-up	54 +10	54 +10	52 +10	60 + +15	54 +9	54 +11	55 +8	53 +12	47
E-reader take-up (personal use)	20 +3	20 +3	14 -	19	15 -	19 +3	22	14	16
Households taking bundles	63	64	61	67 +8	61 +7	63	67	62	56 -9

Key: +Figure is significantly higher for nation than UK average or significantly higher for nation's urban/ rural than for nation's rural/ urban; -Figure is significantly lower for nation than UK average or significantly lower for nation's urban/ rural than for nation's rural/ urban; +xx Figures have risen significantly by xx percentage points since W1 2014; +xxFigures havedecreased significantly by xx percentage points since W1 2014;

	UK	England	Scotland	Wales	Northern Ireland
Fixed telephony availability	100	100	100	100	100
Fixed broadband availability[4]	99.98	100	99.86	100	100
LLU ADSL broadband availability[5]	95	96	89	93	89
Virgin Media cable broadband availability[6]	44	47	36	21	27
BT Openreach / Kcom fibre broadband availability[7]	82	82	75	83	92
NGA broadband availability[8]	90	90	85	87	95
Superfast broadband availability	83	84	73	79	77
2G mobile availability[9]	99.7	99.8	99.5	98.9	98.9
3G mobile availability[10]	99.3	99.6	97.1	97.9	98.6
4G mobile availability[11]	89.5	92.1	79.7	62.8	91.1
DTT availability[12]	98.5	98.6	98.7	97.8	97.4
TV consumption (minutes per day) (2014)	220	221 *	239	251	227
Radio consumption (minutes per day)	183	184	171	138	185

Source: Ofcom Technology Tracker W1 2015, BARB 2014, RAJAR, industry data
Base: All adults aged 16+ (n = 3756 UK, 496 Wales, 2264 England, 492 Scotland, 504 Northern Ireland, 1974 England urban, 290 England rural, 246 Scotland urban, 246 Scotland rural, 249 Wales urban, 247 Wales rural, 249 Northern Ireland urban, 255 Northern Ireland rural)
1. This increase may be attributable to an anomalous decline in Wales of cable TV as main television set in 2014 - In 2015 cable take-up in Wales increased by 6 pp to 10% over the previous year, returning it to 2013 levels. Market research surveys are subject to sample error and will occasionally report anomalous results.
2. In 2014 the survey data indicated a decline in use of Freeview as a main television service in Scotland. The 2015 measure is similar to the previous measure from 2013. This may suggest that the apparent decrease in 2014 could have been accounted for by sample error.
3. DAB ownership in the nations and UK as reported here is sourced from Ofcom research. The UK CMR uses RAJAR data for DAB ownership
4. Proportion of premises connected to an ADSL-enabled BT local exchange based on BT data, December 2014
5. Proportion of premises connected to an LLU-enabled BT local exchange based on BT data, December 2014
6. Proportion of premises able to receive Virgin Media cable broadband services, May 2015
7. Proportion of premises able to receive BT Openreach/ KCom fibre broadband services, May 2015; under regulatory rules other providers can provide retail fibre broadband services to consumers using these networks.
8. Proportion of premises able to receive NGA broadband services, May 2015
9. Proportion of premises with outdoor 2G mobile coverage from at least one operator, May 2015
10. Proportion of premises with outdoor 3G mobile coverage from at least one operator, May 2015
11. Proportion of premises with outdoor 4G mobile coverage from at least one operator, May 2015
12. Estimated proportion of homes that can receive the PSB channels via DTT (3PSB Mux coverage). Joint TV planning project (Arqiva, BBC, Ofcom).
** This figure reflects the average across the English regions with the highest in Border at 250 minutes (4 hours 10 minutes) and lowest in West at 197 minutes (3 hours 17 minutes) respectively.*

1.2 Social communication online

Introduction

Ofcom conducted a survey among internet users to investigate how the internet, and being online and connected, has influenced the way in which people maintain their existing relationships, as well as build new contacts and friendships[3].

This section looks at Scotland. It is worth noting that there are no significant differences between Scotland and the other nations, so the story is consistent with the other nations throughout[4]. All figures reported in the narrative relate to Scotland unless stated otherwise.

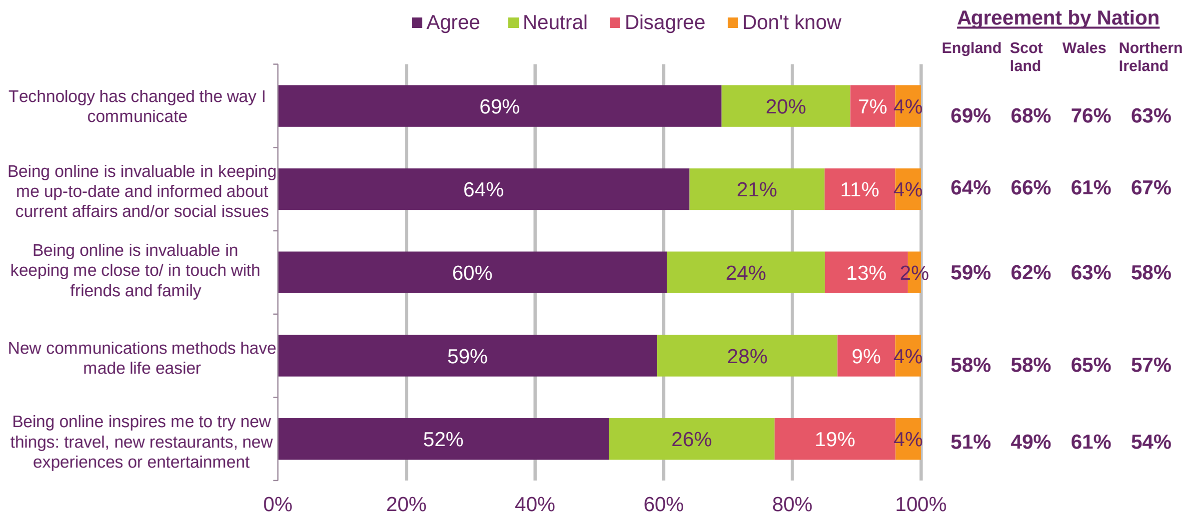
Attitudes to online communications

Two-thirds of internet users in Scotland agree that technology has changed the way they communicate

Two-thirds (68%) of internet users in Scotland agree that '*technology has changed the way they communicate*' and three-fifths (58%) agree that these new communication methods have '*made their life easier'*.

Digital communications are also seen to bring benefits. Around two-thirds (66%) of online adults in Scotland agree that '*being online is 'invaluable for keeping them informed about current affairs and social issues*' and agree that it helps them '*keep in touch with close family and friends*' (62%). Around half (49%) agree that it '*inspires them to try new things'*.

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).

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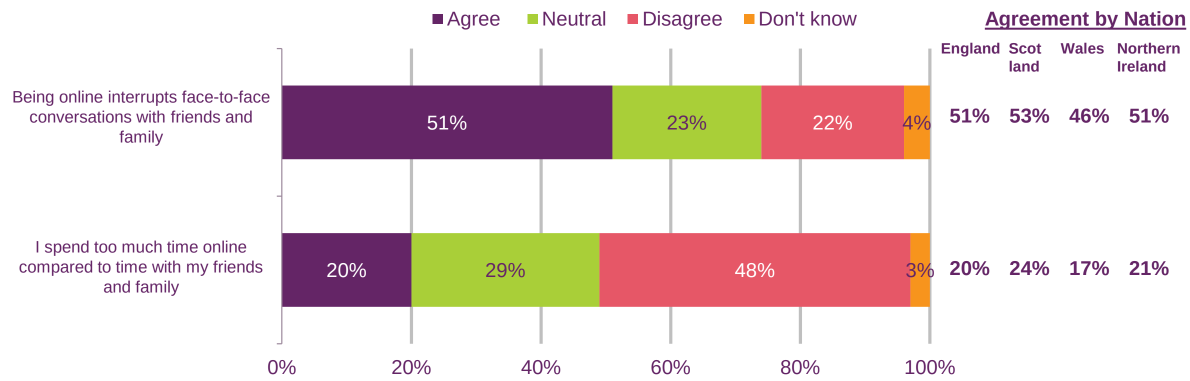
[3] The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults and provides a snapshot of people's personal communications. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.
[4] Due to low base sizes, the confidence with which the population average can be estimated within nation is limited. This means that only large differences between nations (between 8% and 18%) can be reported as significantly different at 95% confidence. No differences between nations are significant when these margins of confidence are applied.

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

A quarter (24%) of online adults in Scotland think that they spend too much time online compared to time spent with friends and family

Despite the benefits seen in Figure 1.2, these new communication methods also bring some downsides. Around half of all online adults in Scotland (53%) agree that '*being online interrupts face-to-face conversations with friends and family*' and a quarter (24%) agree that they '*spend too much time online compared with spending actual time with friends and family'*. There is no significant difference between the nations on these two 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?

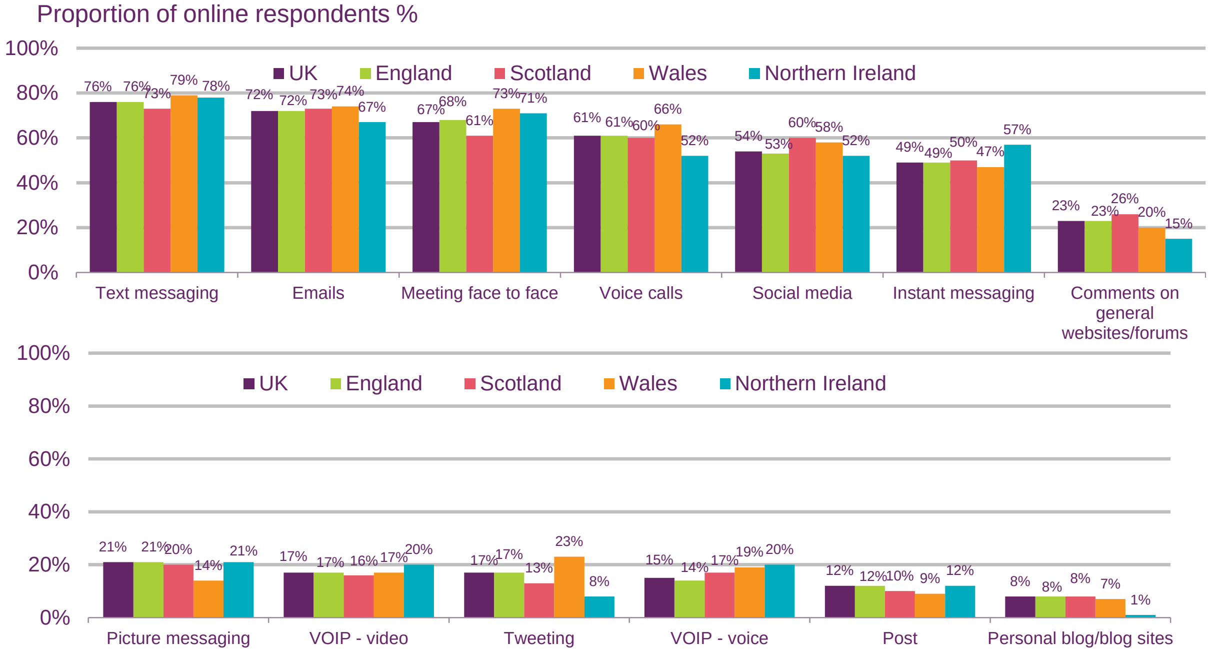
Communication methods

Text messaging and email are the most common weekly methods of communicating with family and friends

Figure 1.4 shows that text messaging (73%) and email communications (73%) are the top two most common methods of contact on a weekly basis. However, meeting face-to-face (61%) and voice calls (60%) are also used by a majority, alongside social media (60%). Instant messaging (50%) is used by half of online adults in Scotland. Around a quarter of online users make comments on websites (26%) and one in five (20%) use picture messaging services.

Postal communications such as letters or cards are used weekly or more often by one in ten (10%), increasing to a quarter (25%) when extending the time frame and considering usage once a month or more often.

Figure 1.4 Methods of communicating with friends and family: once a week or more often, 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).
Q50. Thinking about your personal communications in general, how often do you use the following to communicate with family and friends?

Communicating with friends and family

Over two-thirds of people in Scotland prefer to communicate with family members in person

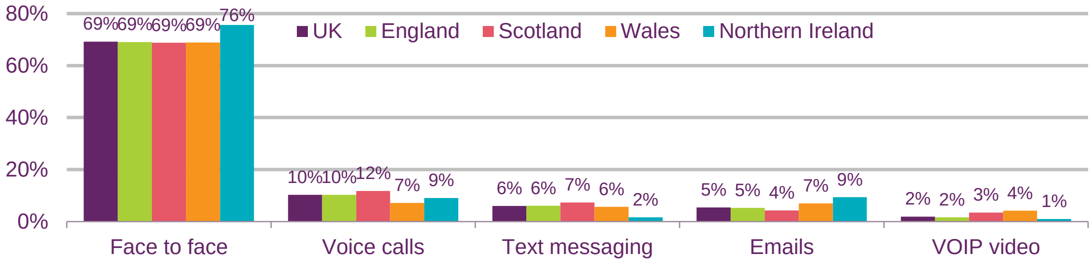
Figure 1.5 shows that the preferred methods of communication are the same for family and friends, with meeting people face-to-face being the dominant choice (69% for family and 66% for friends). This preference for face-to-face communication is consistent across all of the UK nations.

Voice calls (12% for family and 10% for friends), text messaging (7% for family and 10% for friends) and email (4% for family and 8% for friends) are the next most-preferred methods. Social media is notable in its low ranking for communicating with family members and close friends[5].

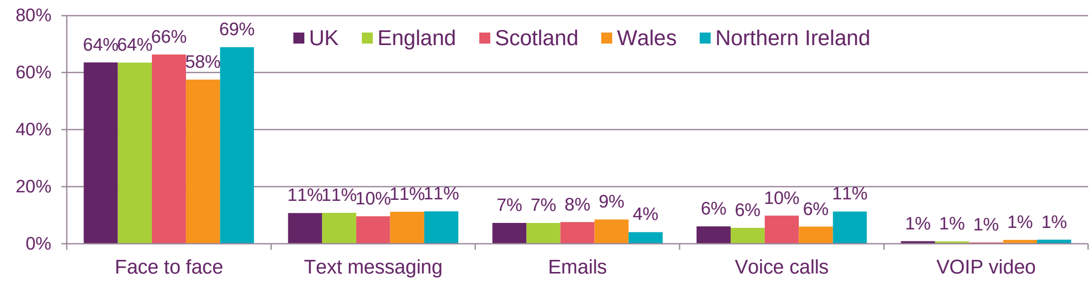
[5] Data are shown for responses 5% or greater on the charts.

Figure 1.5 Preferred methods of communicating with friends and family

Family members



Close friends



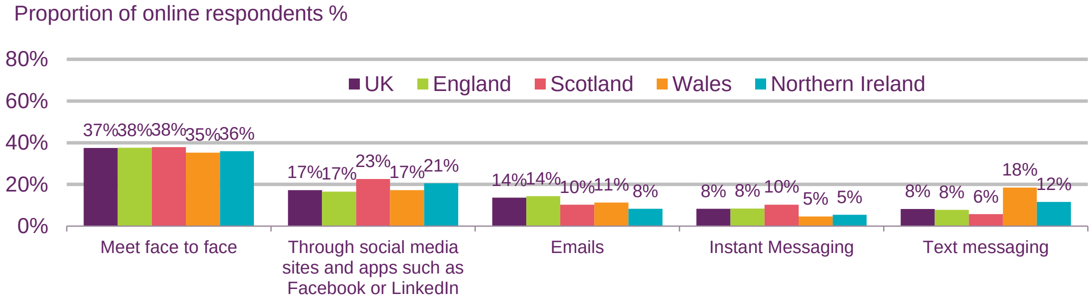
Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ who communicate with family members and close friends.
Q52. And which of these methods do you prefer to communicate with …… ?
Chart includes data for all responses 5% or over.

<u>When communicating with groups of friends and family, over one in five people prefer to use social media</u>

Figure 1.6 shows the preferred method for communicating with groups of family and friends. Whilst meeting face-to-face remains favourite for many (38% in Scotland), social media is favoured by 23% of people. Email (10%) and instant messaging (10%) are each chosen by one in ten.

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

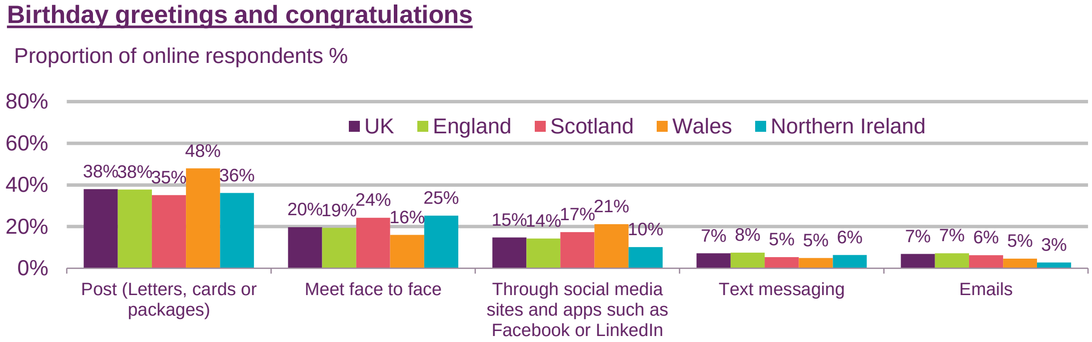


Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ who communicate with groups of family and friends.
Q52. And which of these methods do you prefer to communicate with …… ?
Chart includes data for all responses 5% or over.

Overall, post is the preferred way of sending a greeting for a third of online adults in Scotland

Figure 1.7 shows that around a third of online adults in Scotland (35%) use the postal service to send letters, cards or packets when they wish to send a greeting. A significant proportion (24%) prefer to meet face-to-face, while others (17%) prefer social media.

Figure 1.7 Preferred method of making birthday greetings and congratulations



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.

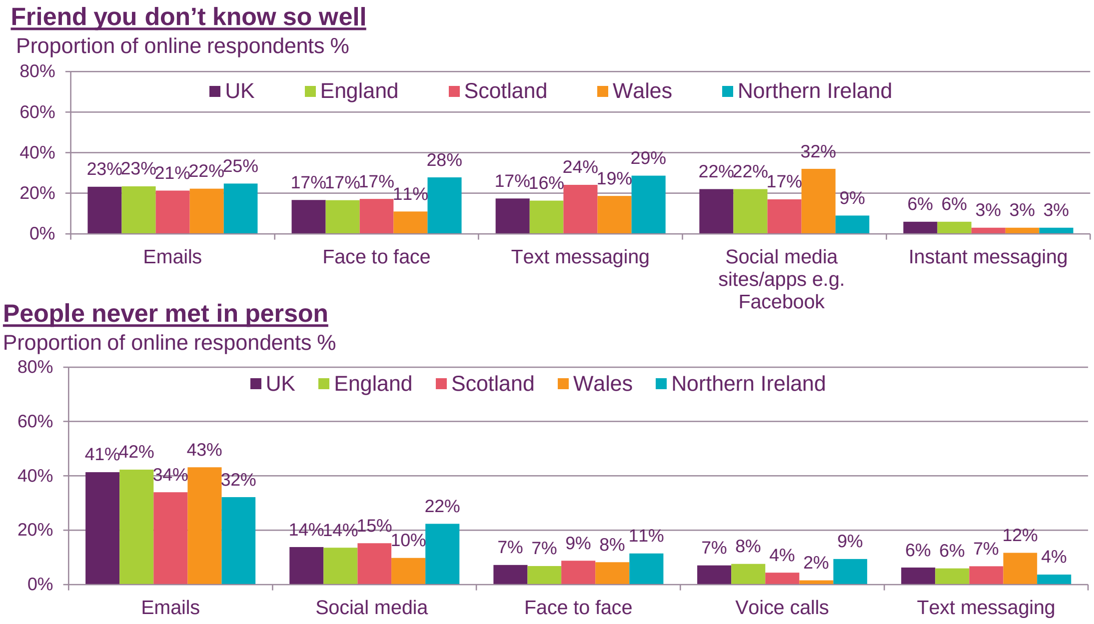
Communicating with people who are less well known

Text messaging and email are the preferred methods for communicating with people less well known

Figure 1.8 shows that the preferred method in Scotland for contacting people who are not so well-known is split between text messaging (24%) and email (21%), although face-to-face (17%) and social media (17%) are still preferred methods for many. Instant messaging (3%) is preferred by only a very small minority.

Email communications are becoming more popular for contacting people never met in real life (34%), followed by social media (15%).

Figure 1.8 Preferred method of communicating with people less well known



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.

Making new contacts online

Of the 15% of online adults in Scotland who have used dating sites, two in five have made new friendships through them

Much of the social media discussed in this section is one-way; that is, a user posts or creates information that another user can choose to read or view. However, some activities can facilitate introductions between people, enabling them to form new contacts or even friendships.

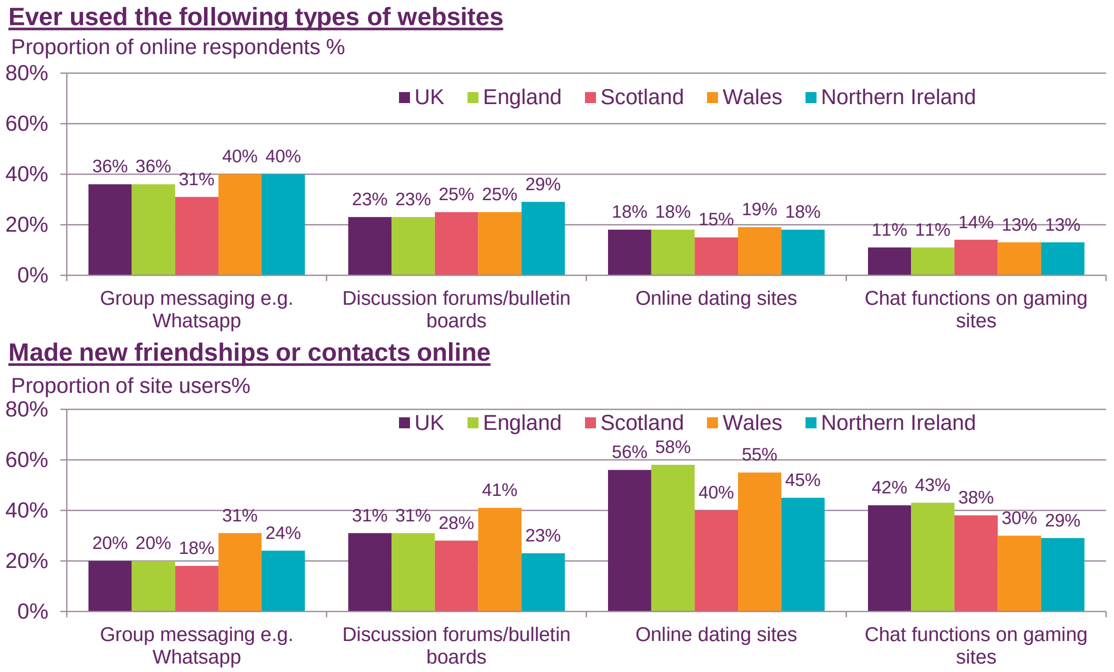
Figure 1.9 shows the extent to which people use different types of social media, and whether they have formed new relationships via these types of sites.

Of the four types of site covered in the survey, group messaging platforms such as WhatsApp and Snapchat are those used most commonly in Scotland (by 31% of online adults), followed by discussion forums and bulletin boards (25%).Online dating sites (15%) and chat functions within gaming websites (14%) have lower levels of reach in Scotland, used by around one in seven online adults.

Among the 15% of online adults in Scotland who claim to have used dating websites, 40% have made new friendships. Chat functions within gaming websites (38%) also generate new friendships for around two-fifths of their users.

Around one in three (28%) online adults users of these sites in Scotland have met new people within discussion forums and bulletin boards, and one in five (18%) have meet new people via group messaging platforms.

Figure 1.9 Use of different online activities to make new contacts



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 of contacts online?

1.3 Social media

Introduction

Ofcom conducted a survey among internet users to investigate social media use and attitudes towards it. The data are sourced from the same questionnaire as was used in the previous section on personal communication networks[6].

This section looks at Scotland. It is worth noting that there are no significant differences between Scotland and the other nations, so the story is consistent with the other nations throughout[7]. All figures reported in the narrative relate to Scotland unless stated otherwise.

Use of social networking sites

Facebook is the most extensively used social media site, followed by YouTube

According to Ofcom's Media Literacy study, in terms of reach, Facebook is the most popular social media brand, with 97% of adults with a social media profile using the site[8].The online survey findings support this high use of Facebook, with eight in ten (80%) online adults in

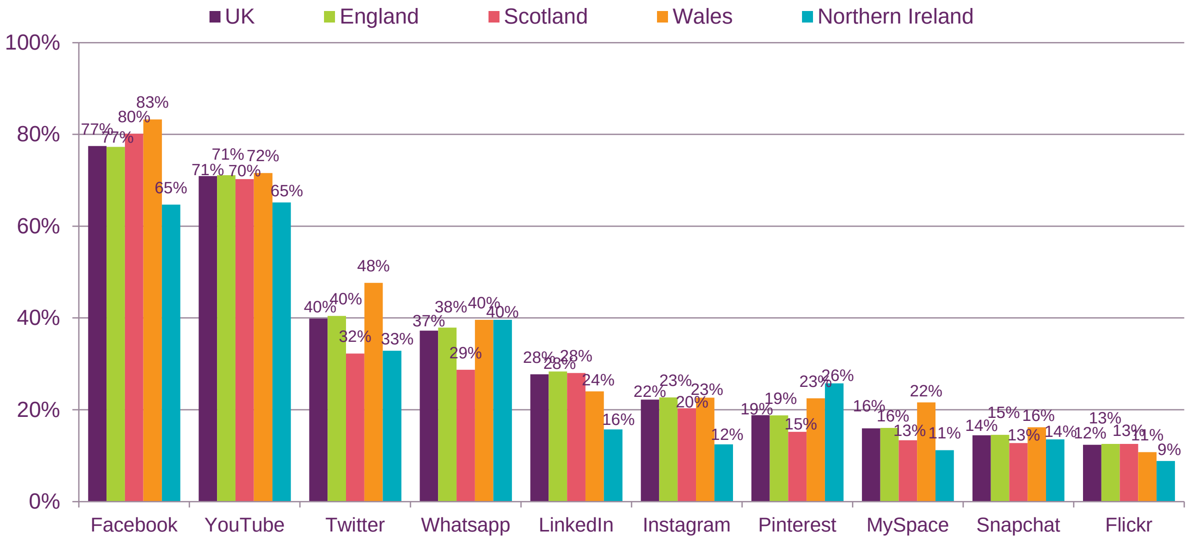
[6] The survey was conducted by YouGov in May 2015 among an online sample of 2,290 UK adults. The number of interviews achieved by nation are: England = 1879, Scotland = 200, Wales = 113 and Northern Ireland = 98.
[7] Due to low base sizes, the confidence with which the population average can be estimated within nation is limited. This means that only large differences between nations (between 8% and 18%) can be reported as significantly different at 95% confidence. No differences between nations are significant when these margins of confidence are applied.
[8] http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/. Page 38.

Scotland claiming to have ever used Facebook, when prompted with a list of websites. YouTube follows quite closely behind, with 70% of online users in Scotland having ‘ever used’ it. Twitter (32%), WhatsApp (29%) and LinkedIn (28%) are also used by an increasing number of people in Scotland.

Video- and photo-based communications such as Instagram, Pinterest and Snapchat are becoming increasingly popular

One-fifth of online users in Scotland have used Instagram (20%). Around one in seven have used Pinterest (15%), Snapchat (13%) and Flickr (13%).

Figure 1.10 Websites and apps ever used, by nation: top ten responses

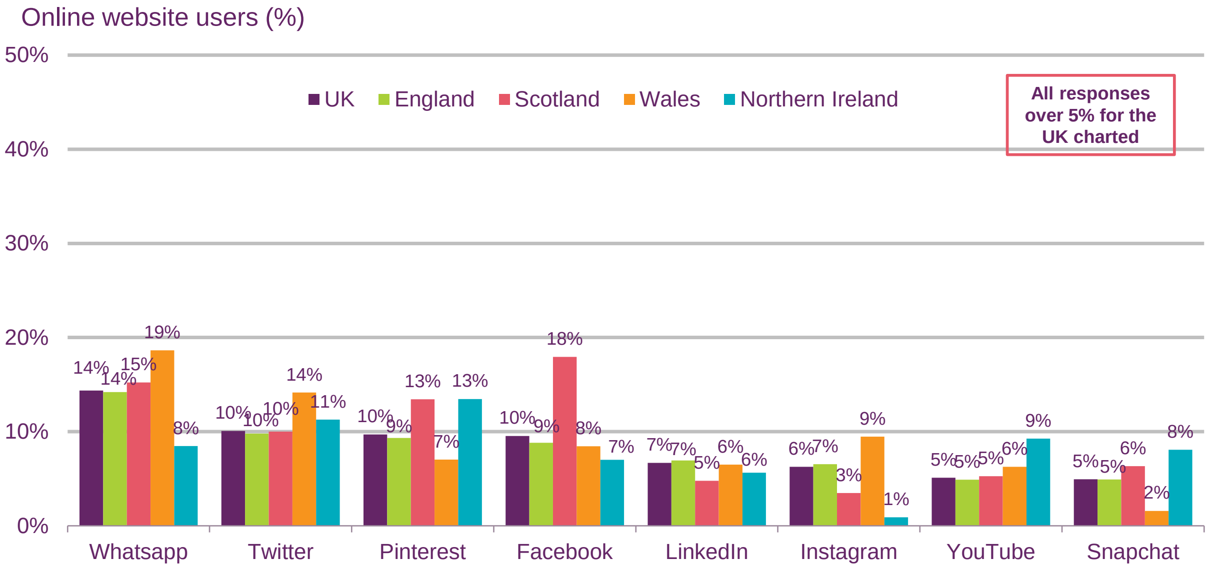


Source: Ofcom research, ‘Connected Devices’, May 2015
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).
Q60. Which of the following websites have you ever used? (Top ten responses shown)

WhatsApp and Pinterest feature as most recent additions for some online users, as do Snapchat and Instagram

As a method of identifying recent trends in website and app use, a question was asked regarding people’s most recent addition. Among those who claimed to use any of the social networking/ communication portals with which they were prompted (see Figure 1.11), Facebook was cited by 18% of website users as ‘the most recent addition’. Twitter was cited as a recent addition for one in ten (10%). However, newer types of site are also fairly prevalent. WhatsApp (15%) and Pinterest (13%) are recent additions for one in seven, and although incidence is lower, Snapchat (6%) and Instagram (3%) also feature. These findings support the signs of early growth for these newer image- and photo-based websites.

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.

<u>Nearly half of Scots who take digital photos say they share them on social media</u>

The use of photo and image based sites is also supported by Ofcom research into how people take and share photos[9]. Fifty seven per cent of adults in Scotland take digital photos and the mobile phone is the device most often used for this: 70% of Scottish adults have ever taken photos with a mobile phone and 50% say this is the device they use most often.

Nearly half (46%) of Scots who take digital photos say they share their photos using social media. Many of these are likely to be selfies. Nearly a quarter (23%) of Scots, say they have ever taken a selfie and 8% say they take selfies at least once a week.

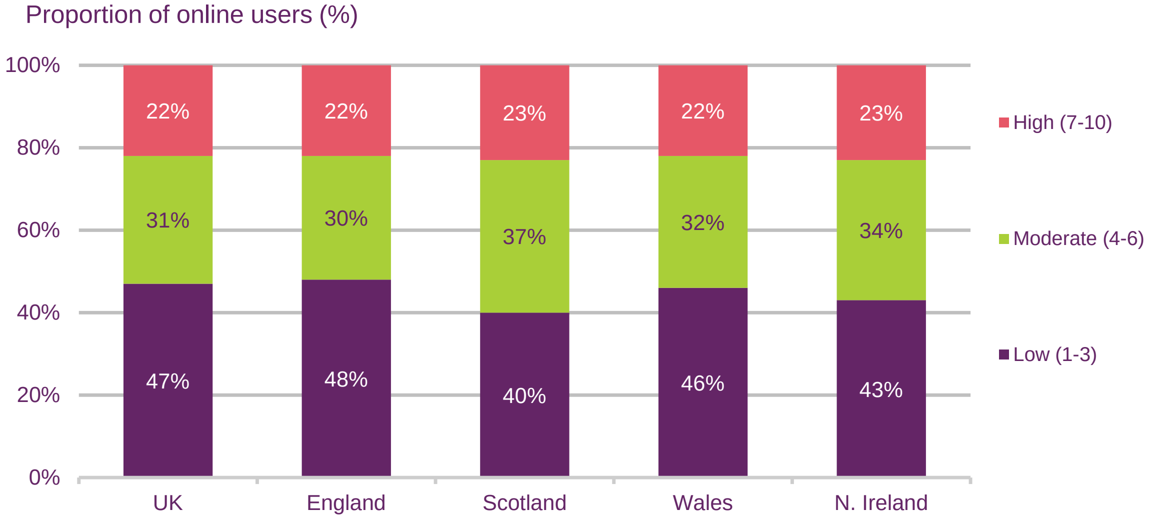
Attitudes to social media

<u>Over one in five people say that they are 'hooked' on social media</u>

In order to understand the extent to which social media is a part of people's lives, we asked people to indicate a number on a scale, where 1 equated to '*I'm not at all hooked on social media'* up to 10: '*I'm completely hooked on social media'*. Overall, just over one in five adults (23%) in Scotland indicated a rating of between 7 and 10 (see Figure 1.12), suggesting that these people perceive themselves as 'hooked on social media'. A similar and consistent pattern is seen across all the nations.

[9] Findings taken from the Kantar Media Omnibus, a Face to Face survey commissioned by Ofcom and representative of all UK adults.

Figure 1.12 Extent to which people are 'hooked' on social media, by nation

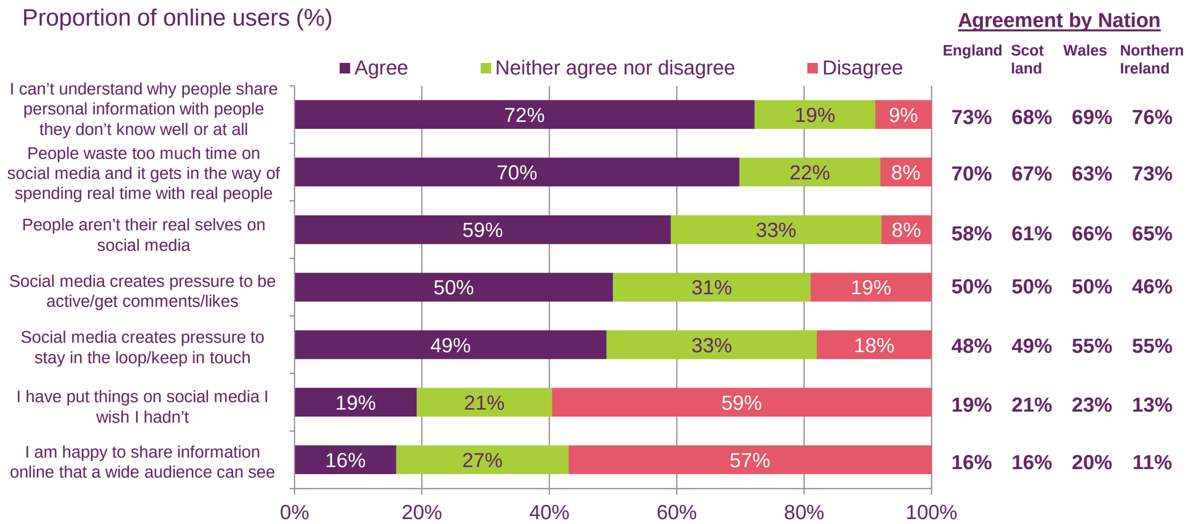


Source: Ofcom research, 'Connected Devices', May 2015
Base: All online adults aged 16+ (n=2290), England (n=1879), Scotland (n=200), Wales (n=113), Northern Ireland (n=98).
Q91. If you had to choose a number between 1 and 10, where 1 represented 'I'm not at all hooked on social media' and 10 represented 'I'm completely hooked on social media', which number would you choose for yourself?

<u>One in five have posted things online they wish they hadn't</u>

There are concerns about privacy in relation to social media use; Figure 1.13 shows that almost seven in ten adults in Scotland (68%) agree that they '*can't understand why people share personal information with people they don't know well or at all*'. A similar proportion of people (67%) in Scotland agree that '*people waste too much time on social media*'. One in five (21%) have put things online they wish they hadn't.

Figure 1.13 Level of agreement with statements about social media



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?

1.4 Changes in audio-visual consumption in Scotland

Broadcast TV viewing

BARB analysis is based on viewing to scheduled TV programmes such as those listed in TV listings magazines or on electronic programme guides (EPG) on TV sets. 'Broadcast TV viewing' refers to watching TV programmes on the TV set live at the time of broadcast (traditional TV viewing), watching recordings of these programmes, or viewing them through catch-up player services (referred to as time-shifted), up to seven days after they were televised.

Traditional TV viewing

'Traditional TV viewing' refers to TV programmes watched live at the time of broadcast on the TV set.

Non-traditional TV viewing

'Non-traditional TV viewing' refers to TV programmes which are not watched live at the time of broadcast. This includes viewing of TV programmes through the use of DVRs, video recorders, catch-up services, on-demand subscription services and pay-per-view services.

People in Scotland spend an average of 3 hours 59 minutes per day watching TV, seven minutes less than in 2013

The average TV individual in STV licence areas (referred to throughout as 'Scotland') watched 239 minutes (3 hours 59 minutes) of broadcast TV a day in 2014[10] [11]; 7 minutes less per day than in 2013 (Figure 1.14)[12]. This was the smallest decline across the nations and was below the UK average fall of 11 minutes. In comparison, TV viewing minutes fell by 15 minutes per day in Northern Ireland and 12 minutes per day in Wales. Despite this, Scotland had a greater year-on-year decline than the other nations in average TV viewing between 2012 and 2013, at 12 minutes less per day (compared to 7 minutes in Wales and 2 minutes in Northern Ireland).

[10] When analysing BARB data we refer to viewing of programmes at the time of broadcast (live), any recordings of these programmes, and if watched through a broadcaster catch-up service (eg BBC iPlayer) within seven days of initial transmission.
[11] Individuals in the Scottish regions of the ITV Border region watched 276 minutes (3 hours 36 minutes) of TV each on an average day across 2014 (source: BARB). This figure is indicative due to low sample sizes. There are no BARB reported sub-regions for the Scottish and English regions with the ITV Border area and we have therefore created customised audience segments to undertake this analysis. Segmenting the ITV Border population into the Scottish and English regions is open to fluctuations in reported viewing because the ITV Border region is representative at an overall level rather than by geographical segments. Data should therefore be treated with caution. Only average daily minutes and average weekly reach viewing measures are robust enough for indicative analysis. The respective audiences were created using BARB's 'BBC/ITV area segments' feature by selecting the BBC regions that comprise the Border area and running the viewing analysis against the ITV Border panel.
[12] The rise in viewing seen in Figure 1.14 and Figure 1.15 between 2009 and 2010 across some regions such as Wales, North East, and Border may be linked to specific regional BARB panel changes that occurred when the new BARB panel was introduced on 1 Jan 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line).

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)

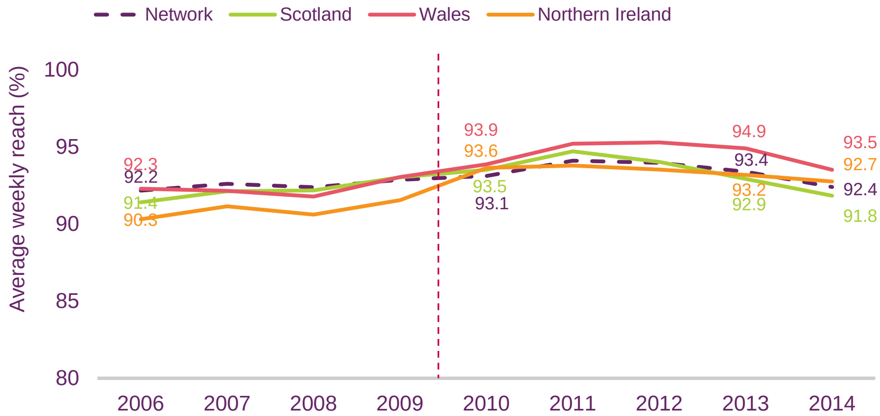
Source: BARB. Note: New BARB panel introduced 1 January 2010. As a result pre- and post-panel change data must be treated with caution (see dotted line). Note: Year-on-year percentage changes are calculated on data to two decimal places.

Over nine in ten (91.8%) individuals in Scotland watch TV every week; 1.1 percentage point less than in 2013

In each of the nations, the proportion of individuals who watched TV in an average week was over 90% (Figure 1.15). However, average weekly reach in Scotland (91.8%)[13] remains the lowest compared to the UK's (92.4%) other devolved nations, falling by 1.1 percentage points in 2014.

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).

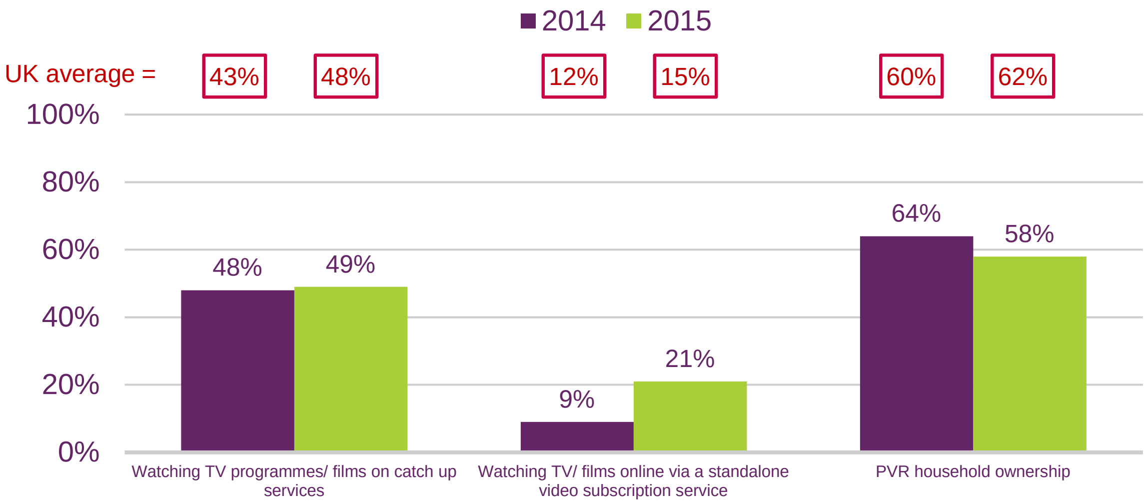
[13] The average weekly reach to all TV among individuals in the Scottish regions of ITV Border was 96.0% in 2014. This figure is indicative due to low sample sizes and because segmenting the ITV Border population into the Scottish and English regions is open to fluctuations in reported viewing (see footnote 11 for methodology). Data should therefore be treated with caution.

One in five adults in Scotland used standalone video subscription services such as Netflix and Amazon Instant in 2015; 12 percentage points higher than in 2014

Figure 1.16 shows the year on year change in the use of 'non-traditional TV viewing' methods in Scotland from the Ofcom Technology Tracker. The three methods covered are: catch-up services (e.g. iPlayer, ITV Player, All 4), standalone video subscription services (e.g. Netflix, Amazon Instant) and personal video recorders (PVRs).

Just over one in five (21%) adults in Scotland, had used standalone video subscription services in 2015, an increase of 12 percentage points since the same time in 2014. Use of standalone video subscription services in Scotland (21%) is higher than in Northern Ireland (14%), Wales (14%) and the UK as a whole (15%). Just under half of adults in Scotland (49%) use catch-up services; in-line with Wales (48%); the UK as a whole (48%); and significantly higher than in Northern Ireland (32%). PVR usage in Scotland is similar to the UK average.

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?

Consumer research on the decline in traditional TV viewing

In order to better understand the decline in traditional TV viewing,[14] as identified through the previous BARB analysis, Ofcom commissioned omnibus research in April 2015. The research was carried out by Gfk NOP among 1,878 UK adults aged 16 years and over, with

[14] Traditional TV viewing refers to TV programmes watched live at the time of broadcast on the TV set.

additional boost interviews in Northern Ireland to allow individual nations' reporting[15]. The research resulted in 163 interviews in Scotland, 99 interviews in Wales and 110 interviews in Northern Ireland[16].

The research asked consumers to identify which audio-visual related activities they were doing more or less of, compared to a year ago[17]. The purpose of this was to provide a view of changes in behaviour across different features, e.g. screen used (TV vs. other), location of viewing (in home vs. out and about), traditional or non-traditional (e.g. at time of broadcast vs. catch-up, personally recorded, subscription on-demand or pay-per-view), and content viewed (e.g. programmes from BBC/ ITV/ UTV/ STV/Channel 4 or Channel 5, short clips, box sets/ series, films). As abbreviations are used in this section, the full question wording and list of activities asked about are shown at the end of the section.

Research found increases in use of non-traditional viewing methods: non-subscription catch-up, watching recorded content and subscription on-demand services.

Figure 1.17 shows claimed changes in specific audio-visual activities among respondents in the nations and the UK as a whole, and Figure 1.18 shows the findings for Scotland in more detail.

In the UK overall, the research identified claimed decreases in traditional TV viewing (that is, viewing 'at the time of broadcast') and also viewing 'via the TV set' over the last year. In parallel, respondents claimed to have made increases in their 'non-traditional' TV viewing, i.e. net gains were found for watching non-subscription catch-up, watching content they had personally recorded and using subscription on-demand services.

Respondents in Scotland also indicated these overall trends, but to a greater extent. Seven per cent said they were doing more traditional TV viewing (that is, watching at the time of broadcast) in April 2015 compared to the previous year, while 41% said they were doing this less, resulting in a net change of -34%.

Claimed increases in 'non-traditional' TV viewing were also more marked in Scotland compared to the UK overall, i.e. net gains were +36% for watching non-subscription catch-up, +24% for watching content personally recorded and +15% of respondents saying they used subscription on-demand services.

As context to the findings above, it is worth noting that claimed decreases for 'traditional TV' (i.e. viewing at time of broadcast) , viewing via TV set and viewing PSB TV were smaller than the decreases noted for watching DVDs (net loss of -42% in Scotland) and going to the cinema (net loss of -34% in Scotland) over the same time period. Again, this mirrors the findings in the UK overall.

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[15] Only a boost in Northern Ireland was needed, as sample sizes in the other nations were sufficient in the main sample.

[16] The Northern Ireland boost interviews and main interviews are reported together as a sample within the nations CMR, however the Northern Ireland boost interviews were not included in the overall UK sample.

[17] The research identified respondents' own views on changes in their viewing and related behaviours, however it does not indicate the *volume* of change, e.g. minutes of viewing increased or decreased.

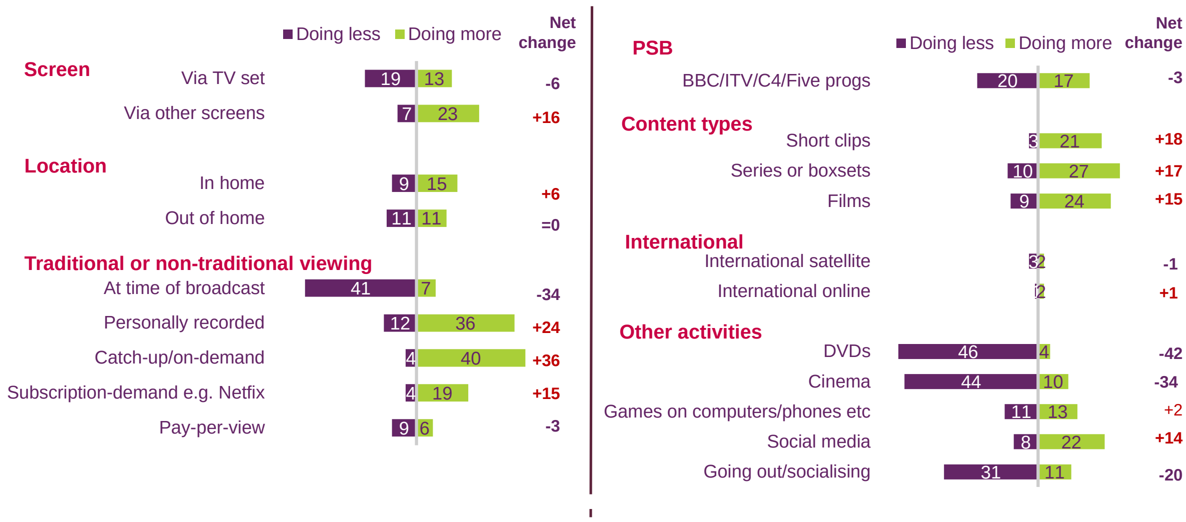
Figure 1.17 Claimed changes in key audio-visual activities over the past year (%), by nation

		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 go? 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 go?

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 (though 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

1.5 Analysis of fixed broadband take-up in Glasgow

Introduction

In the previous *Communications Market Reports*, we highlighted that broadband take-up was particularly low in the Glasgow area (at 50% in 2011). In order to explore this in more detail, Ofcom undertook analysis of broadband take-up in the City of Glasgow in the 2011 CMR. Data from the British Population Survey (BPS) were used and the period under study was January to September 2011. We repeated this analysis for the 2013 and 2014 reports. In 2013, broadband take-up was still at 50%, but increased to 63% in 2014.

Ofcom has decided to repeat this analysis for the current report, maintaining comparability by using data from BPS. The purpose of this analysis is to understand if take-up of broadband in the City of Glasgow has remained stable, and whether demographic variables continue to explain at least part of the difference.

Methodology

The BPS asks consumers in Great Britain about internet and fixed broadband, and comprises around 2,000 face-to-face, in-home interviews with adults (aged 15+) every week, allowing detailed regional and sub-demographic analysis

Using data from the BPS between April 2013 to March 2014, analysis was undertaken on Glasgow[18]. The sample size was 543 respondents. For this analysis, not all respondents were asked about broadband access, and this group has been excluded.

[18] The City of Glasgow is defined as the area under the control of Glasgow City Council.

The BPS uses a different methodology from Ofcom's Technology Tracker, in that quotas and question wordings are different. Therefore discrepancies between the BPS and Ofcom's quoted figures are not unexpected, or of concern.

Differences in demographic profiles between 2013/2014 and 2014/2015 do not affect our analysis

The BPS is designed to monitor the UK population at a regional level but not to look at relatively small areas such as the City of Glasgow. Therefore, the respondents' profile may shift from year to year. From analysis of Ofcom's *Technology Tracker*, we know that a respondent's age, socio-economic status and gender influence how likely they are to have broadband in the home. It was therefore important to compare the 2013/2014 and 2014/2015 samples.

There were differences between the two profiles, particularly with regard to socio-economic status. Some of this may be due to the areas interviewers were sent to. If the 2014/2015 is weighted to be the same as the 2013/2014 sample in terms of age and socio-economic status, the take-up of fixed broadband would increase to 63% and that of fixed and mobile broadband to 76%. Therefore, demographic differences do not have a significant impact.

The key differences between the 2012/2013 and 2013/2014 Glasgow profiles are shown below.

Figure 1.19 shows that the main changes between the years relate to age and socio-economic status. The 2013/2014 sample contained more respondents aged 25-34 and fewer aged 65+. For socio-economic status, the 2014/2015 sample is more clustered in social classes CD and has respondents in social classes AB and E. This is important, as the lower the socio-economic status or the greater the age; the less likely a person is to have broadband at home.

Figure 1.19 Differences between 2013/2014 and 2014/2015 Glasgow sample

Glasgow Profile	2013/2014	2014/2015	Difference
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)

Glasgow's low fixed broadband take-up continues, but has remained stable since 2014. Access to web-enabled mobile phones has increased from 52% to 61%

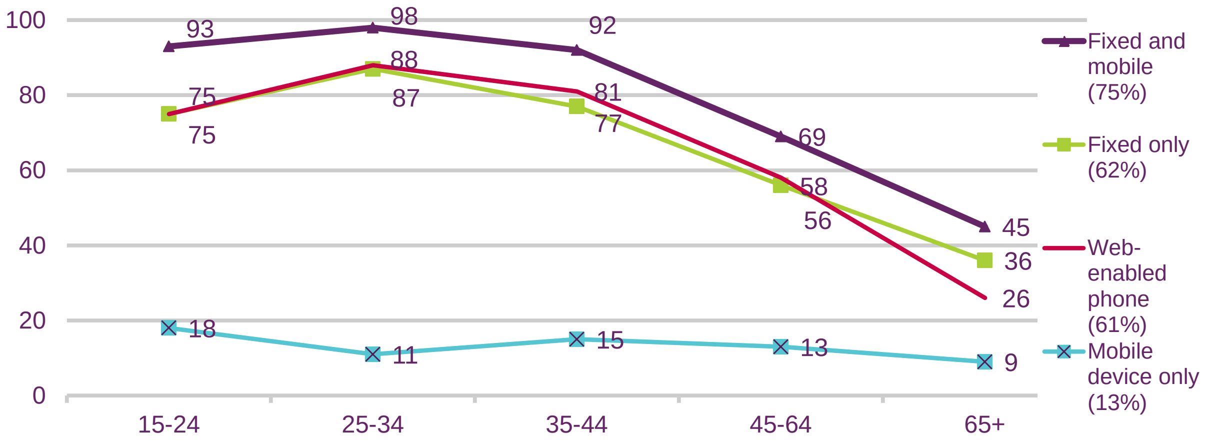
As the *Communications Market Report* highlighted between 2010 and 2013, broadband take-up has remained relatively low in Glasgow. For this report, the BPS provided data for respondents within Glasgow only, and therefore it is not possible to compare to the UK as a whole or to other cities. However, Ofcom's *Technology Tracker* shows that the percentage of the UK population with broadband (excluding mobile devices) is 78%, or 85% if mobile devices are included.

In contrast, the percentage of Glaswegians living in households with broadband (excluding mobile devices) is 62%, or 75% if mobile devices are included. This compares to 63% and 66% respectively for the same Glasgow-specific analysis in the 2014 CMR report. This would suggest that take-up of fixed services has remained stable since 2014 and take-up of web-enabled mobile phones has increased significantly. Access to web-enabled phones has increased from 52% in the 2014 CMR report to 61% in this report. The percentage of people who can access the internet only via a mobile device (phone or tablet) rose from 3% in 2013/2014 to 9% in 2014/2015.

Across Glasgow, 13% use only a web-enabled mobile device to access the internet

Three-quarters (75%) of the Glasgow sample have access either to fixed broadband at home or a web-enabled mobile phone. Access to a web-enabled mobile is highest among the 25-34 year-olds, at 88%, and lowest among the over-65s at 26% (Figure 1.20). Across Glasgow, 13% of respondents use only a web-enabled mobile device[19] to access the internet. This is most common among those aged 15-24 (18%), and least common among those aged 65+ (9%) This includes smartphones, PDAs and tablets.

Figure 1.20 Comparison of fixed broadband and mobile take-up in Glasgow



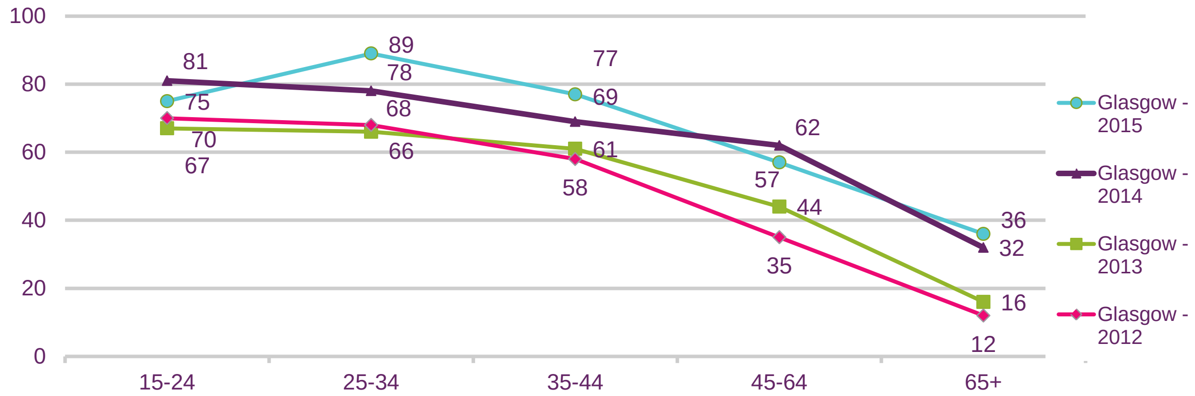
Source: British Population Survey
The perctange in brackets gives the percentage of all Glasgow respondents in that category.
Base: All adults 15+ (Glasgow 2015 – 543, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597)
Q: Is your access to the internet at home cable broadband, ADSL broadband, or broadband but you don't know type?
Q: Do you have a web-enabled phone?

[19] A web-enabled device is a smartphone, tablet or a personal digital assistant (PDA).

Overall, fixed home internet take-up has remained stable. However, there are some demographic differences

As shown in Figure 1.21, between 2014 and 2015 there has been a significant decrease in the number of people aged 15-24, and a significant increase in those aged 25-34, who have fixed home internet (-19% 15-24; +11% 25-34) .

Figure 1.21 Changes in fixed home internet, by age group: 2012-2015

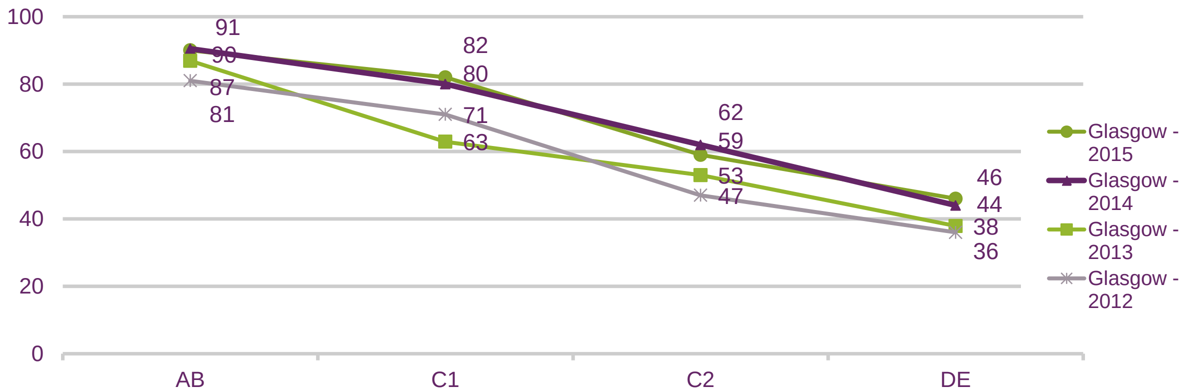


Source: British Population Survey
Base: All adults 15+ (Glasgow 2015 – 543, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597)
Q: Is your access to the internet at home cable broadband, ADSL broadband, broadband but you don't know type or non-broadband?

Fixed internet take-up has remained stable for all socio-economic groups

As shown in Figure 1.22, there has been no significant change in the proportion of fixed internet take-up across each socio-economic group. Take-up, however, continues to decrease among those in the DE socio-economic group.

Figure 1.22 Changes in take-up, by socio-economic status: 2012-2015

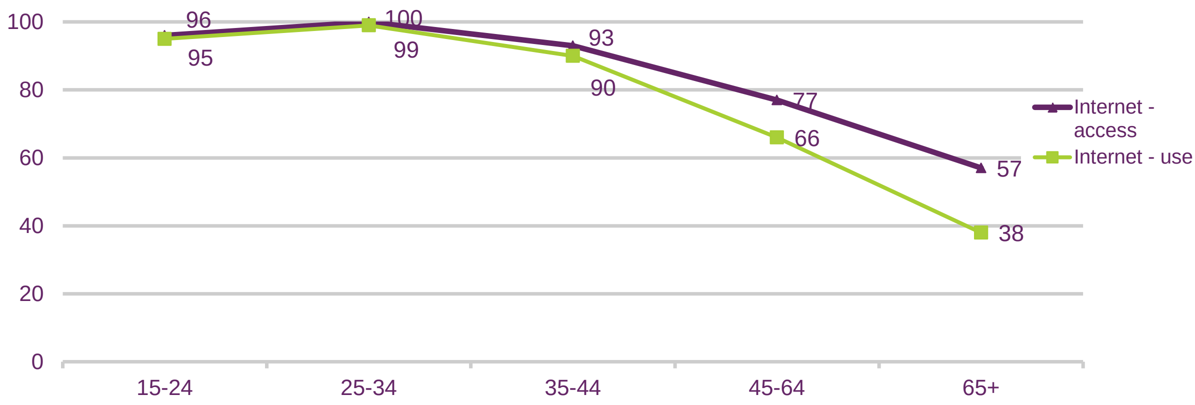


Source: British Population Survey
Base: All adults 15+ (Glasgow 2015 – 543, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597)
Q: Is your access to the internet at home cable broadband, ADSL broadband, broadband but you don't know type, or non-broadband?

Almost all individuals under 35 have access to the internet and use it, whether in or outside the home

Across the sample, 89% of the sample who had access to the internet also used it. Among those under 35, 99% of those with access make use of the internet. However, among over-65s, 33% of those who have access do not use it.

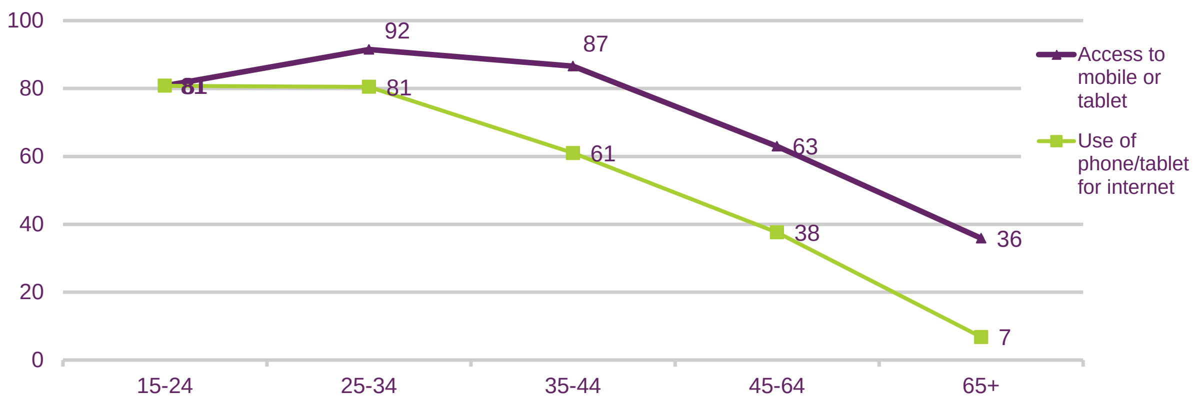
Figure 1.23 Internet access and internet use, by age



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?

As shown in Figure 1.24 and Figure 1.25, This discrepancy between access and use is most marked for mobile terminals, such as web-enabled phones and tablets. Ninety-seven per cent of people aged 15-24 with such a device use it. However, among people aged 25 or over, the percentage of those with such a device who use it online declines with age.

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?