

# **Scotland – The Communications Market Report 2016**

## **Extended Chart Pack**



# Scotland's communications market



# 1. Market in Context

## Key facts about Scotland

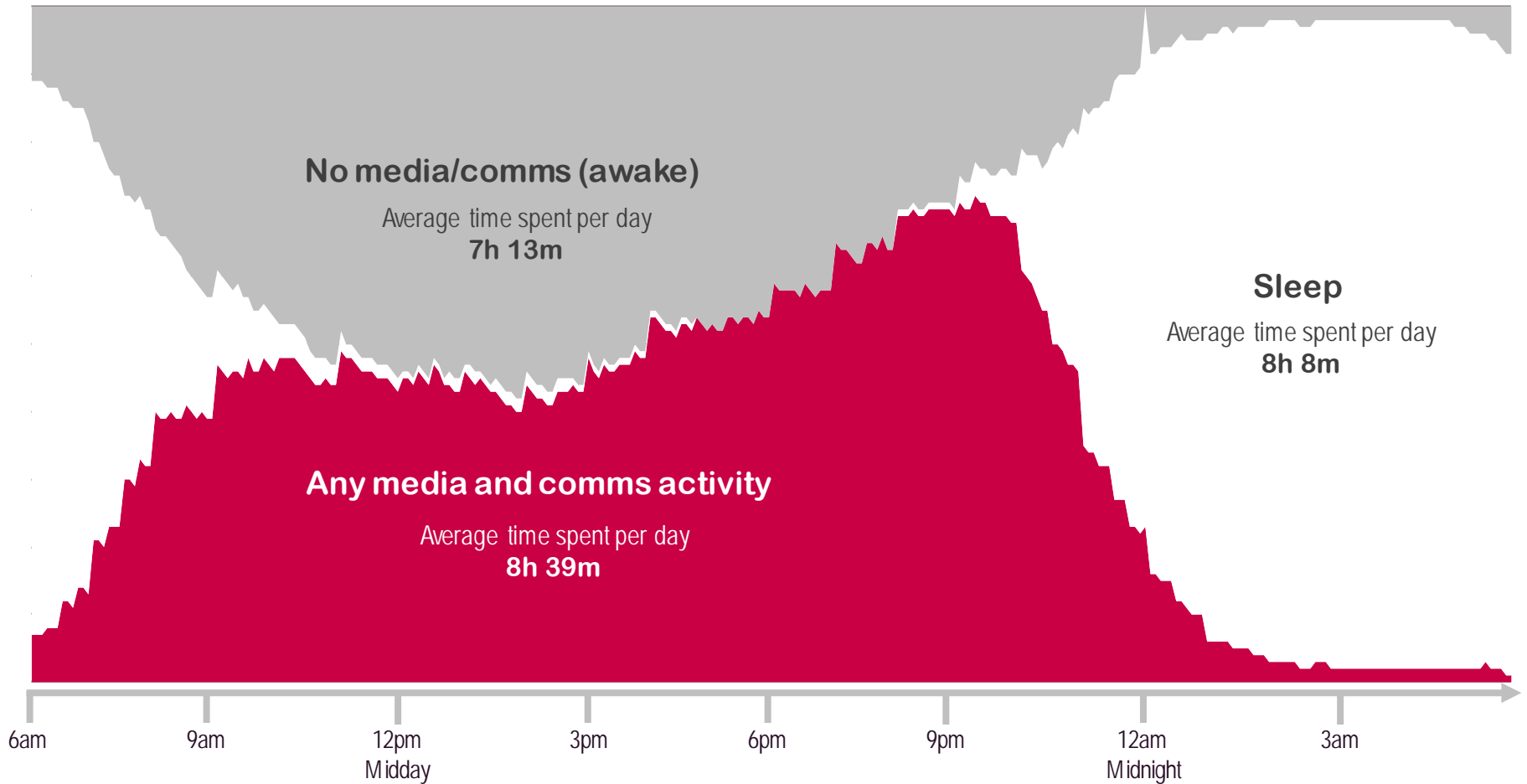
Figure	Scotland	UK
Population	5.373 million (mid-2015 estimate)	65.11 million (mid-2015 estimate)
Age profile	Population aged <16: 17.0% Population aged 65+: 18.3%	Population aged <16: 18.8% Population aged 65+: 17.8%
Population density	68 people per square kilometre	269 people per square kilometre
Language	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

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

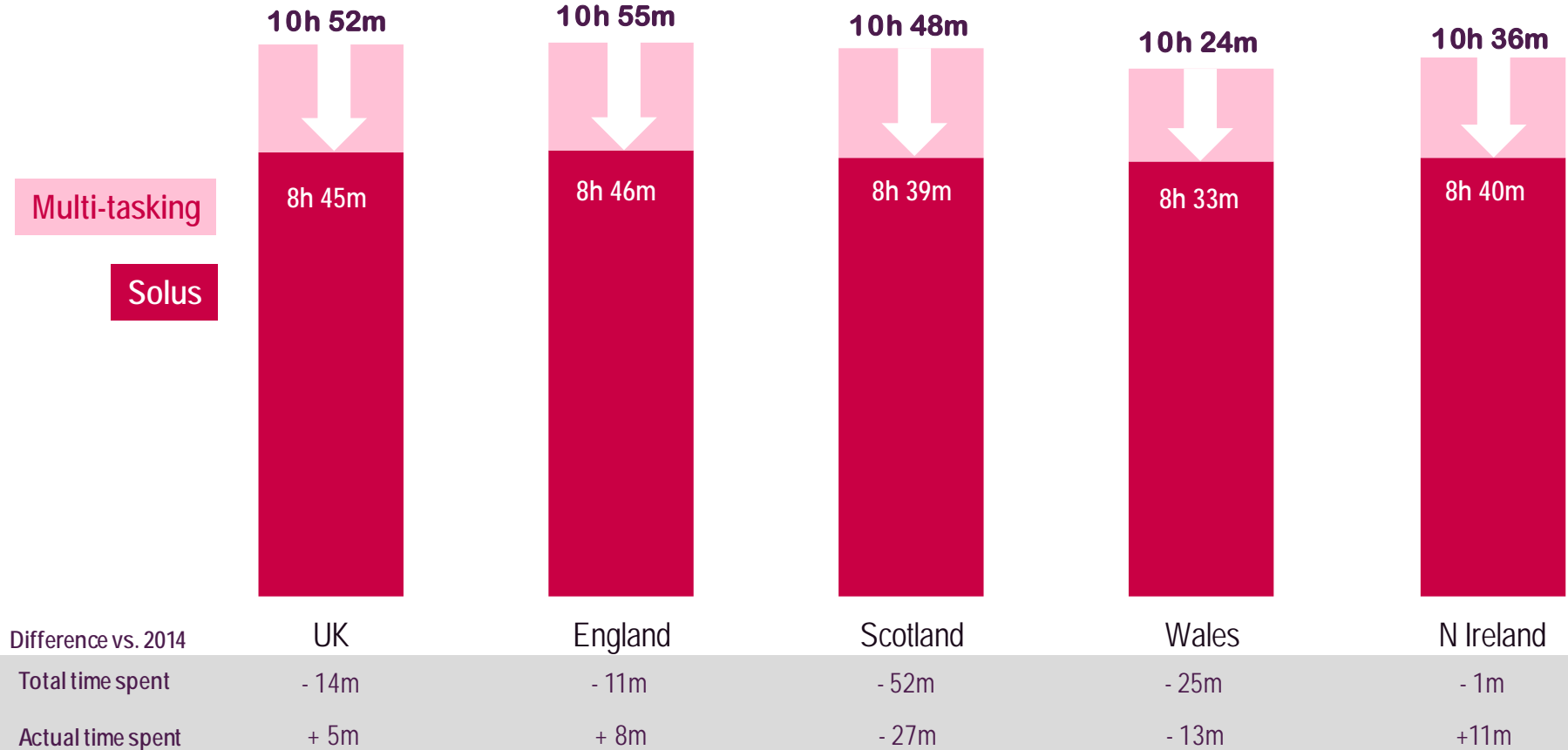


Source: Ofcom Digital Day 2016, Data book 6: D12 for main chart data, and Data book 1: B4 for average time spent per day

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)

## Average daily media and comms time, by nation

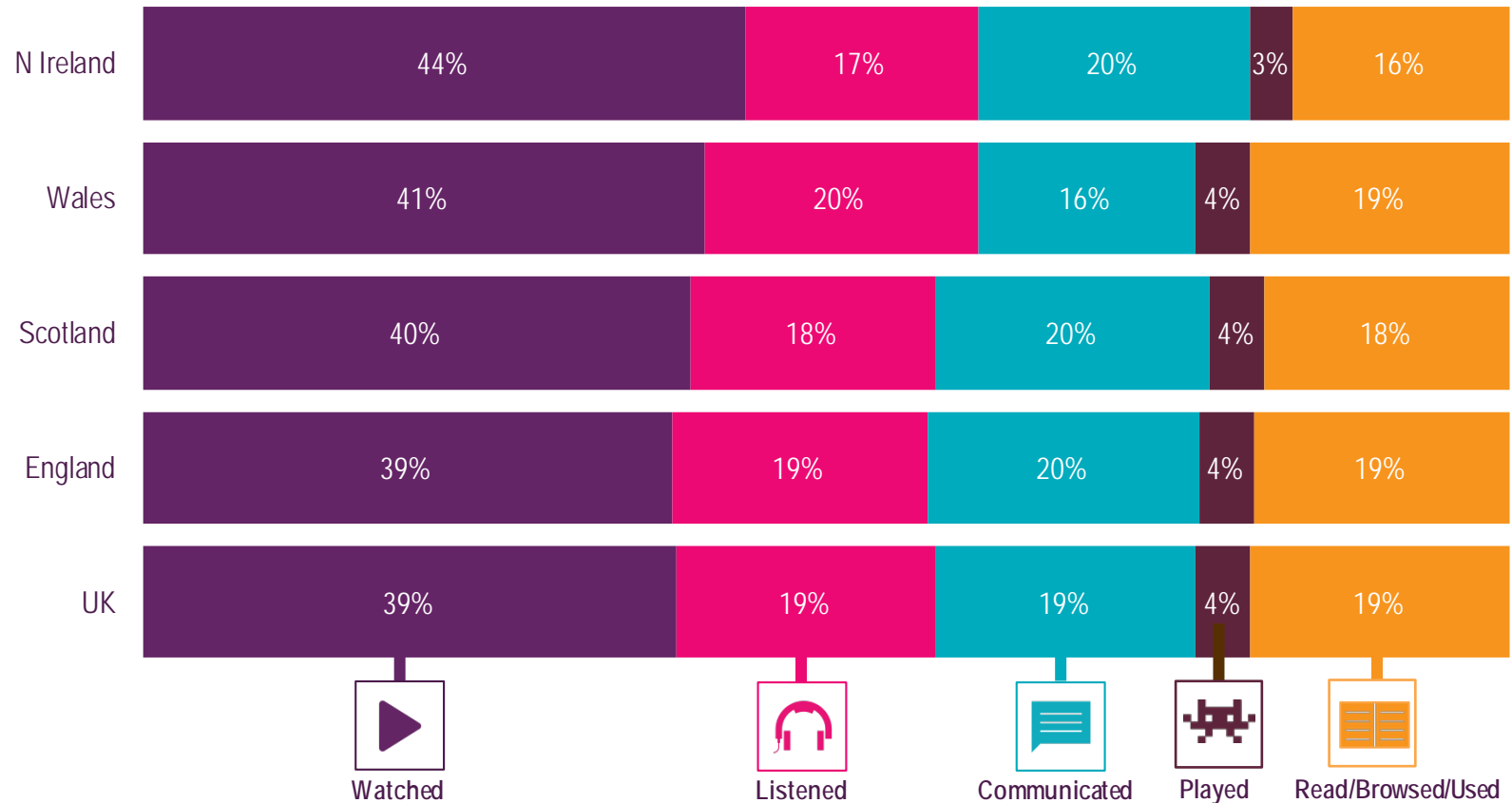


Source: Ofcom Digital Day 2016, Data book 1: B4(2)

\*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)

## 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

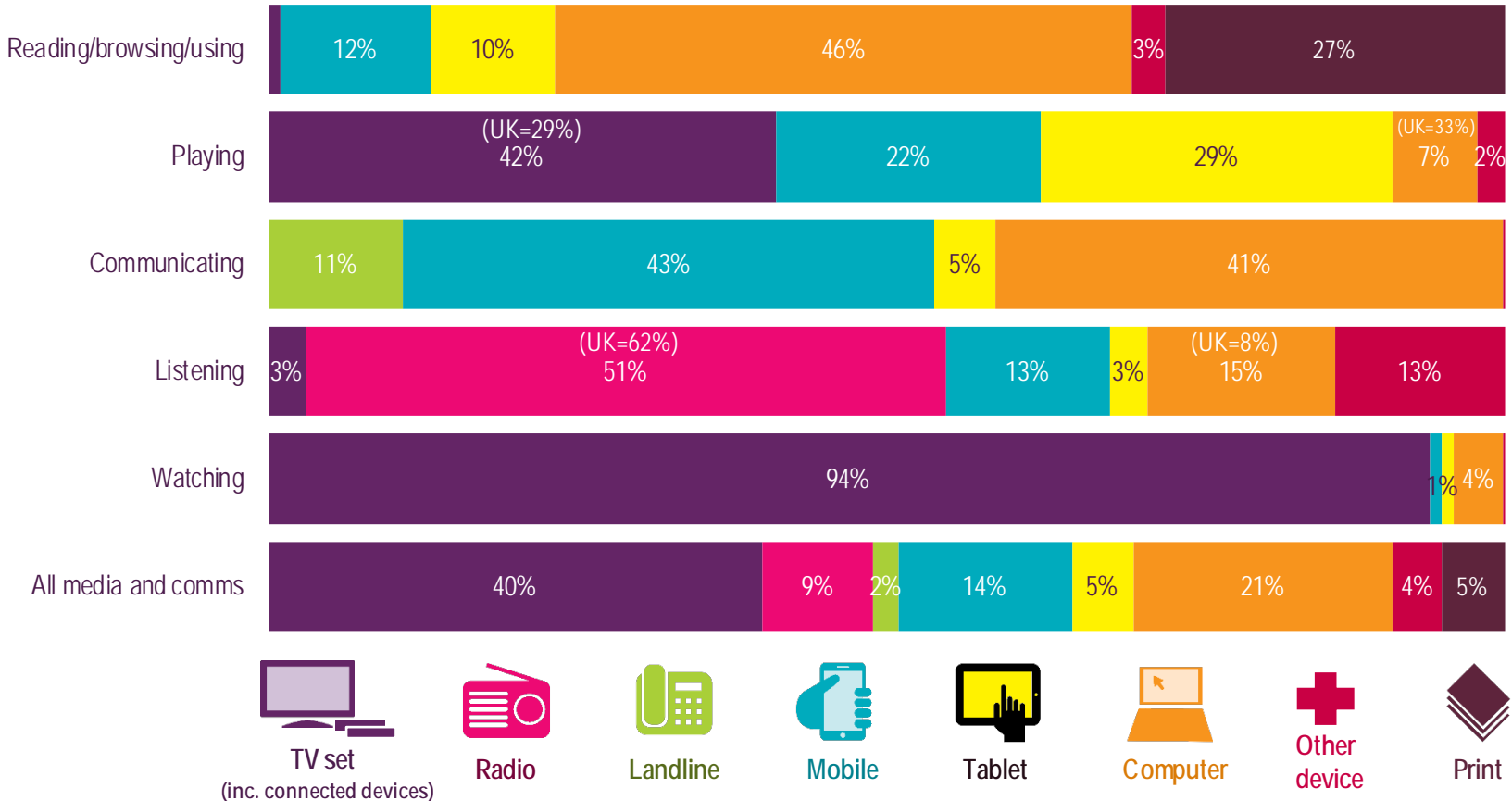
\*The average weekly minutes figure is among those who did any media and comms activity across their diary week and also includes simultaneous activity

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



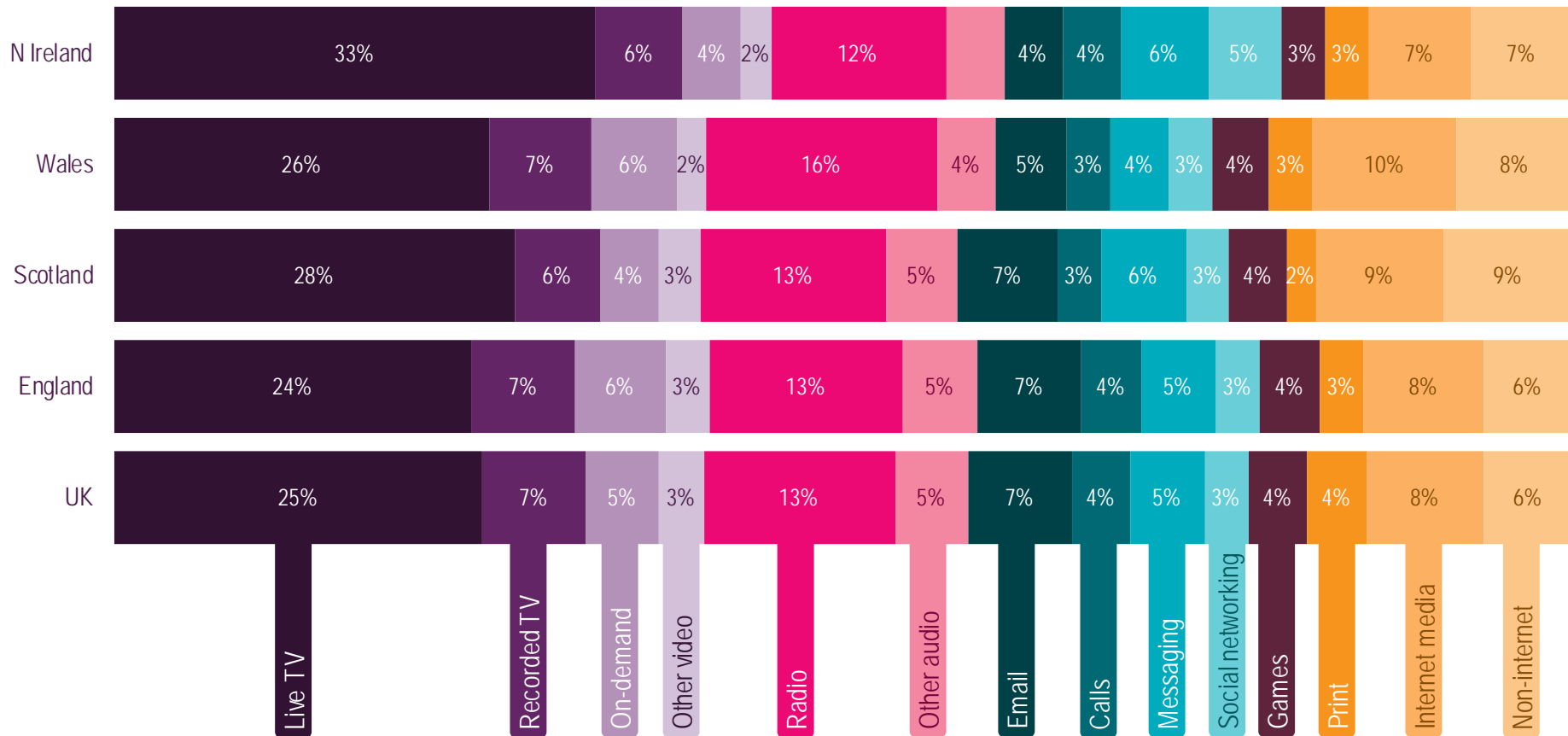
# Proportion of time spent on activity types attributed to devices

## 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)

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



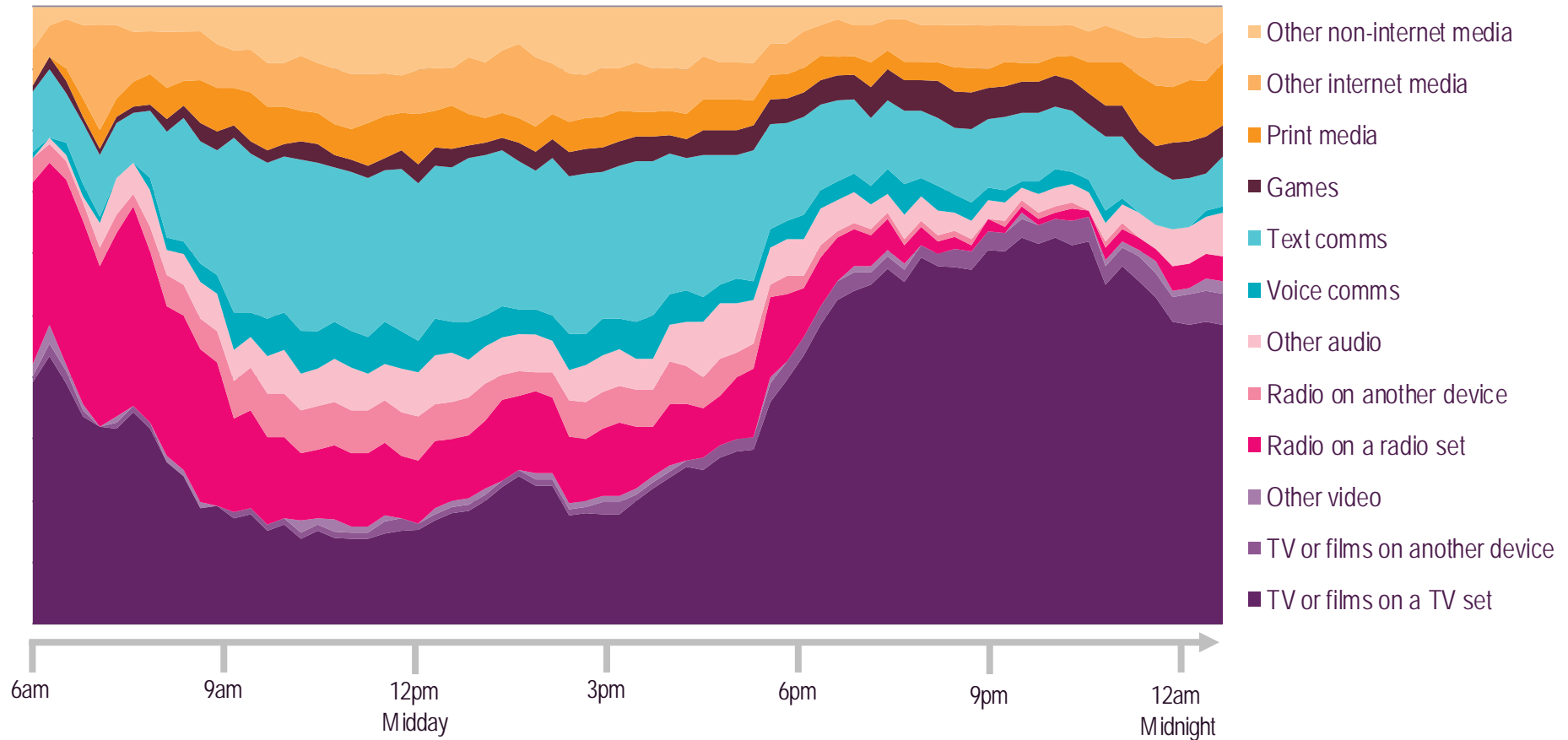
Source: Ofcom Digital Day 2016, Data book 1: C1 for main chart data and B1 for average weekly minutes

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)

## 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

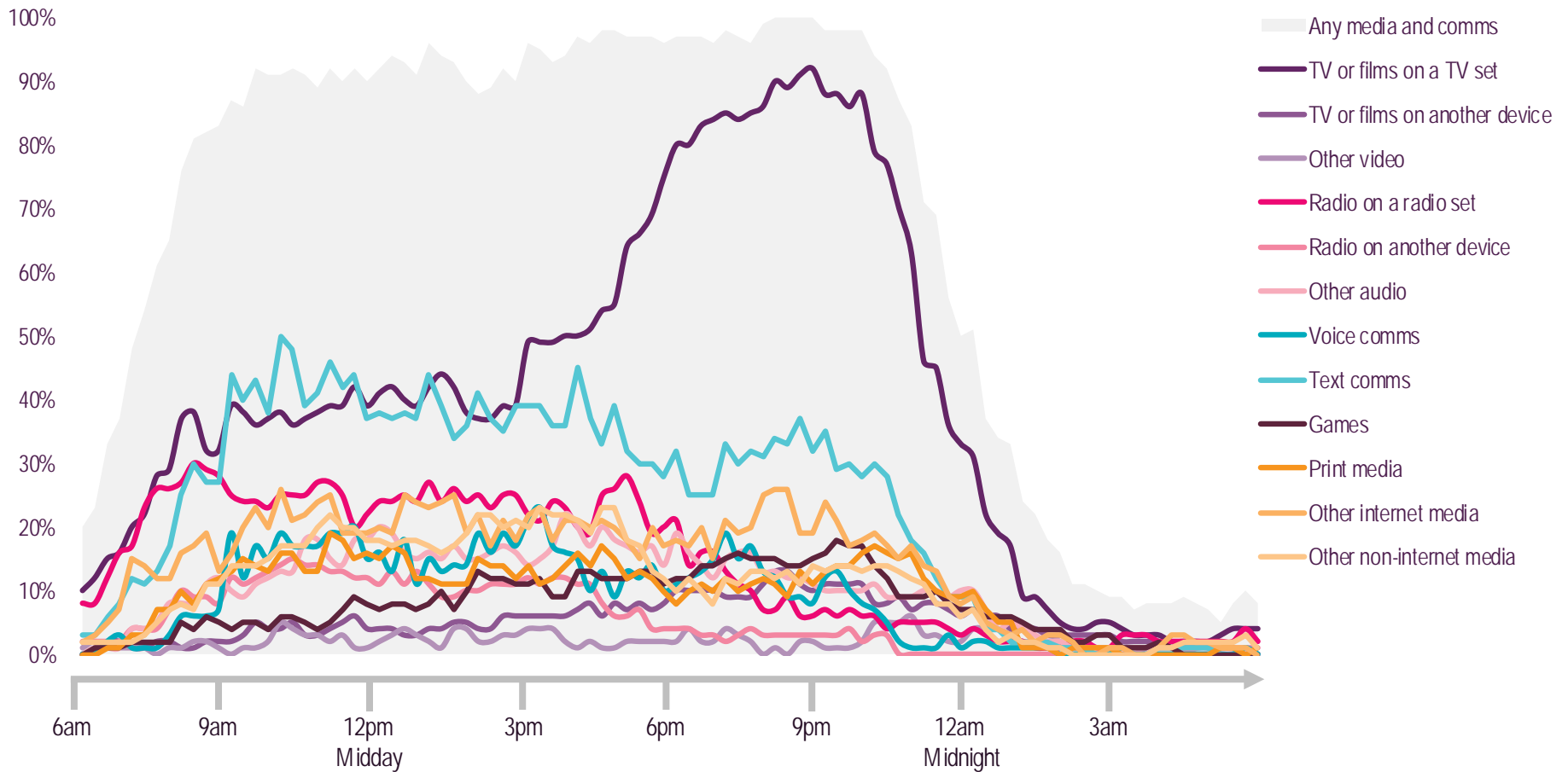
Adult diary: Chart shows the proportion of all media and comms activity attributed to each grouped activity for each time slot across a week.

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)



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



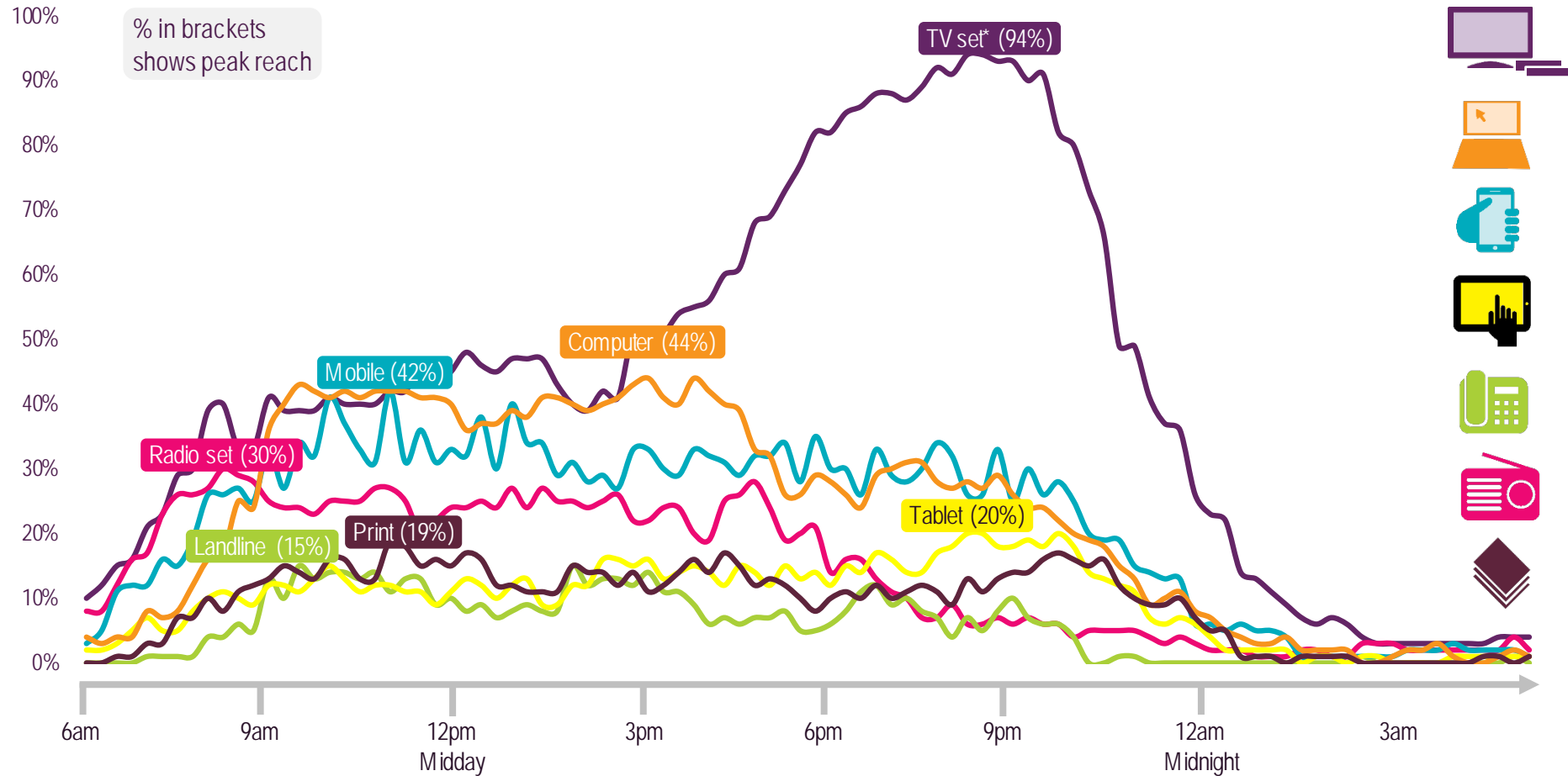
Source: Ofcom Digital Day 2016, Data book 6: A12

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)

# Weekly reach of devices, by time of day

## Among adults aged 16+ in Scotland



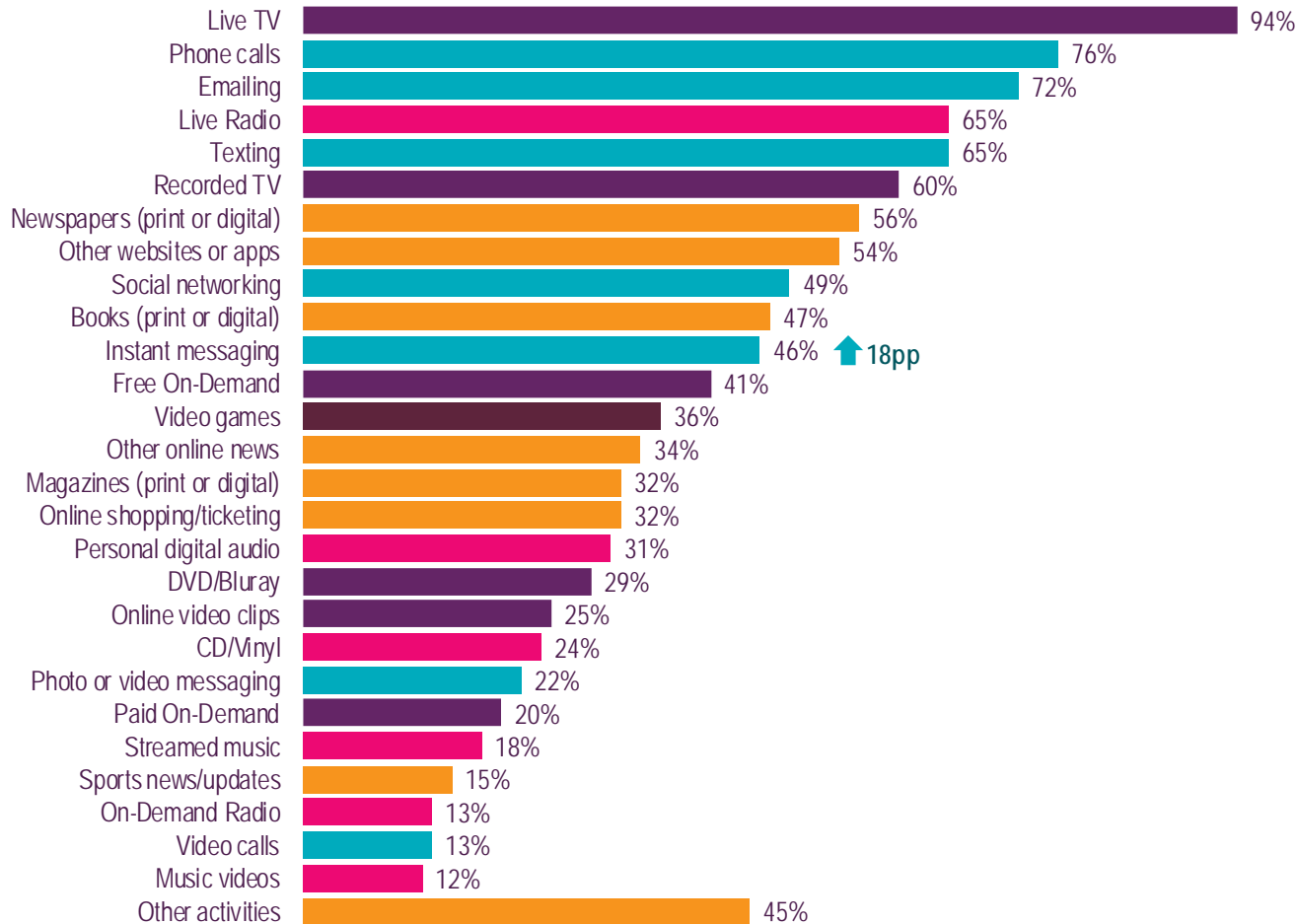
Source: Ofcom Digital Day 2016, Data book 7: A12

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

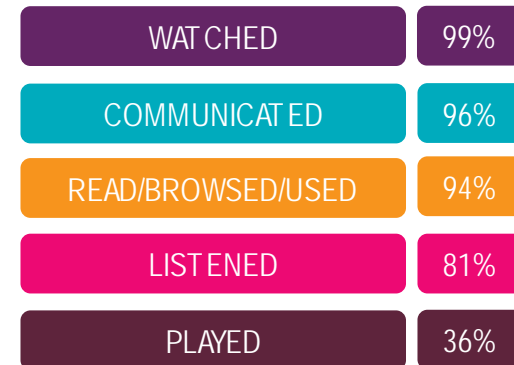
\* TV set includes all connected devices (games consoles, set top boxes, DVD/Blu-ray player and streaming media players)

Base: Adults aged 16+ in Scotland (190)

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



↑ ↓  
Arrows indicate  
significant changes since  
2014 (99% level)



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

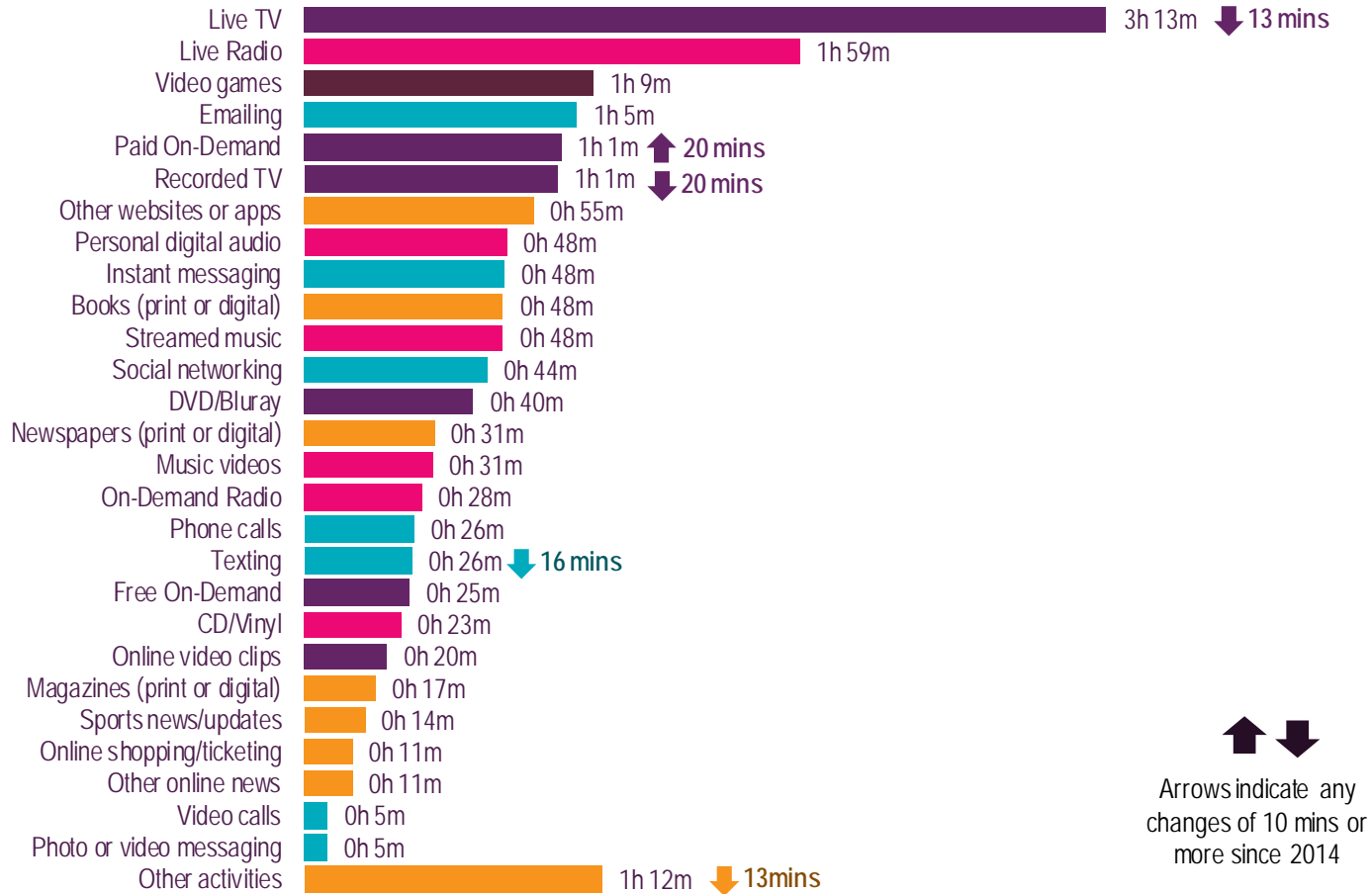
Adult diary: Chart shows the proportion of adults who recorded each activity (D) at any point across their diary week.

Base: Adults aged 16+ in Scotland (190)



## Average time spent on activities per day - Scotland

### Among those who did activity at all over a week



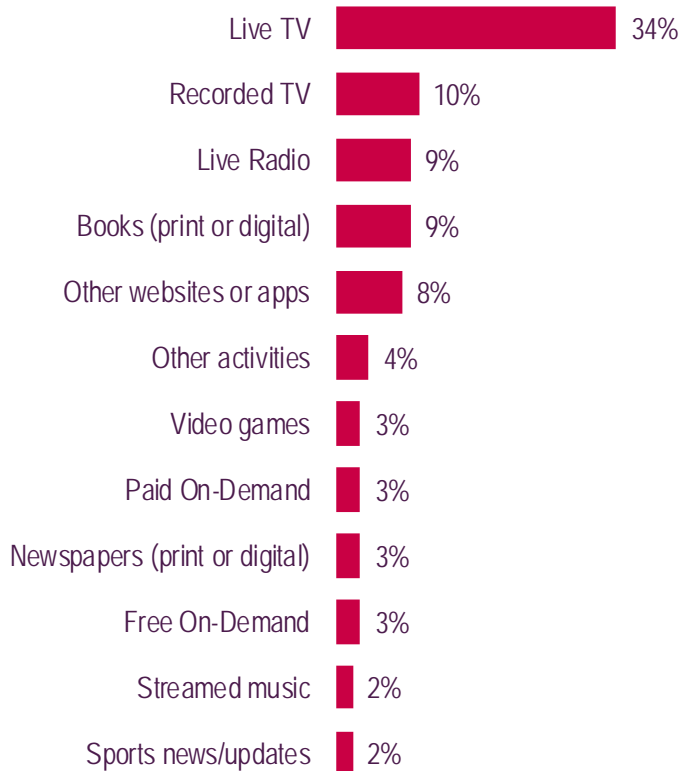
Source: Ofcom Digital Day 2016, Data book 1: B4

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.

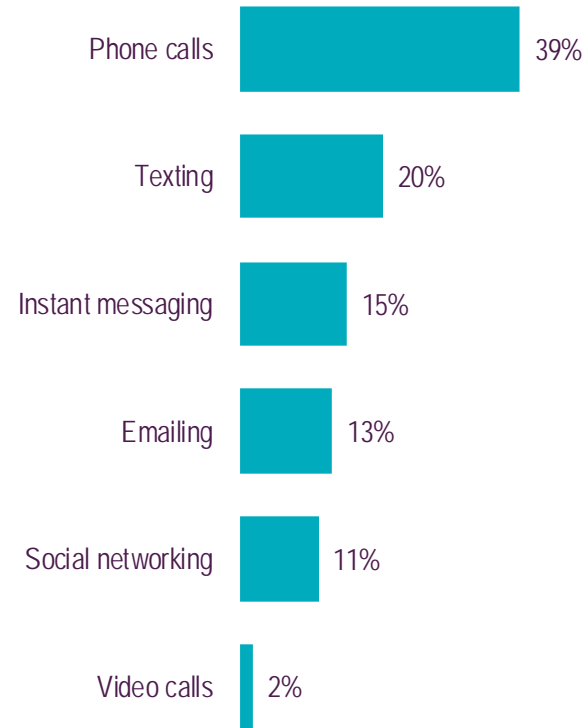
Base: Adults aged 16+ in Scotland (190)

## 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

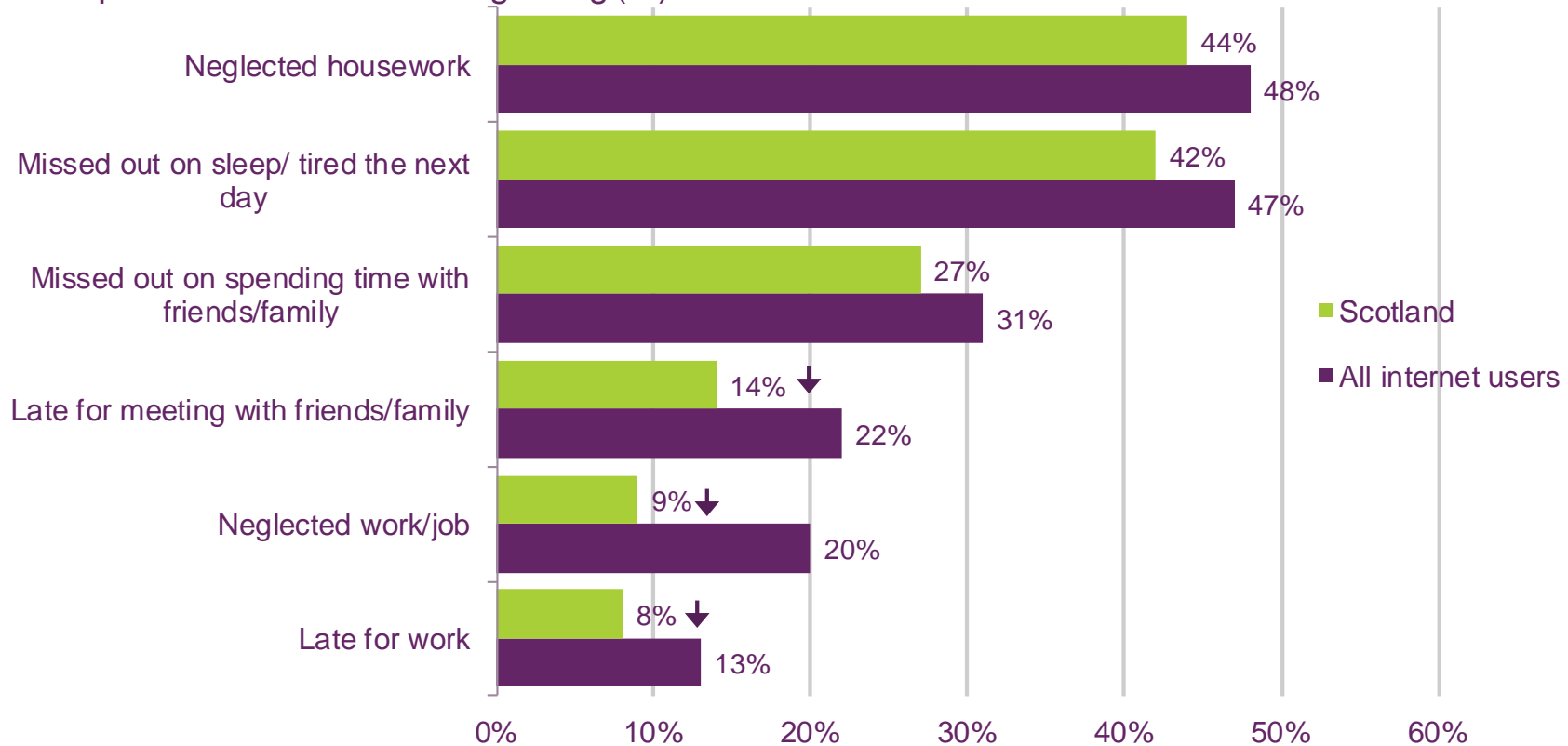
Base: Adults aged 16+ in Scotland (190)

# Coping in a connected society



## Negative effects caused by too much time online

Proportion of internet users agreeing (%)



Source: Ofcom research 2016

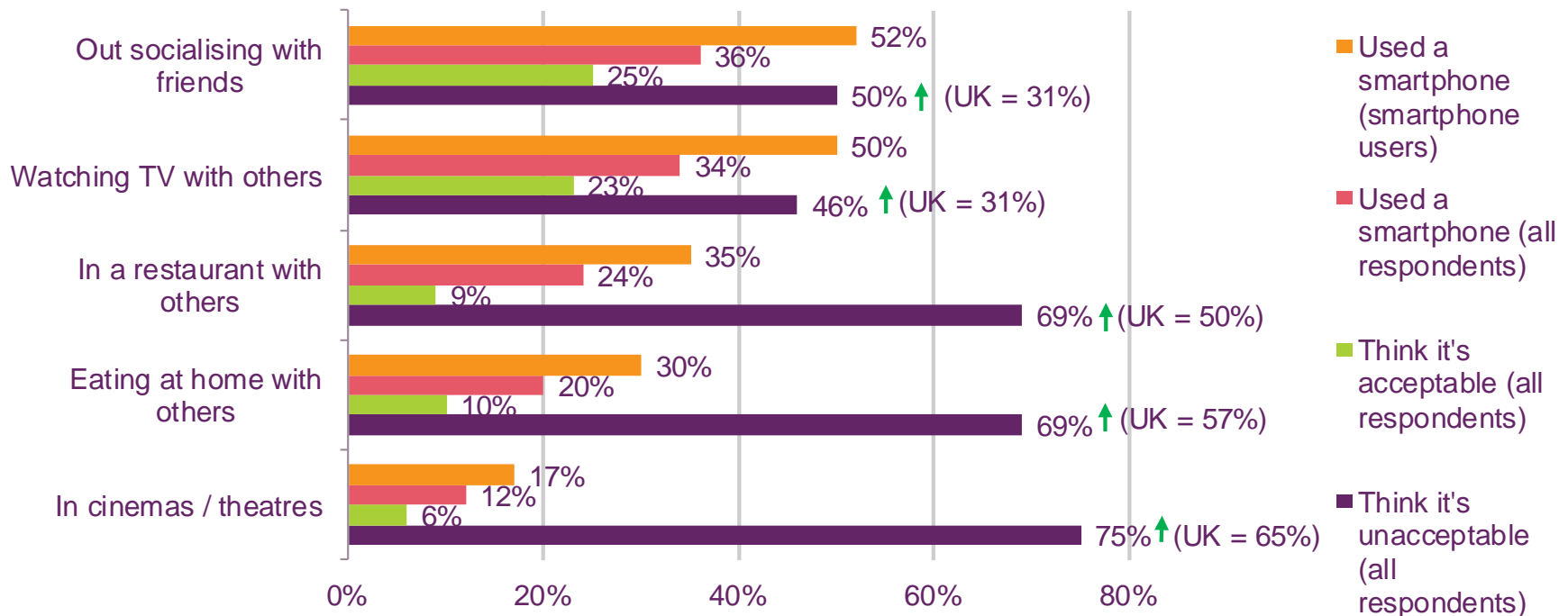
Base: All going online at least once a month (All: 1861, Scotland: 170)

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

# 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



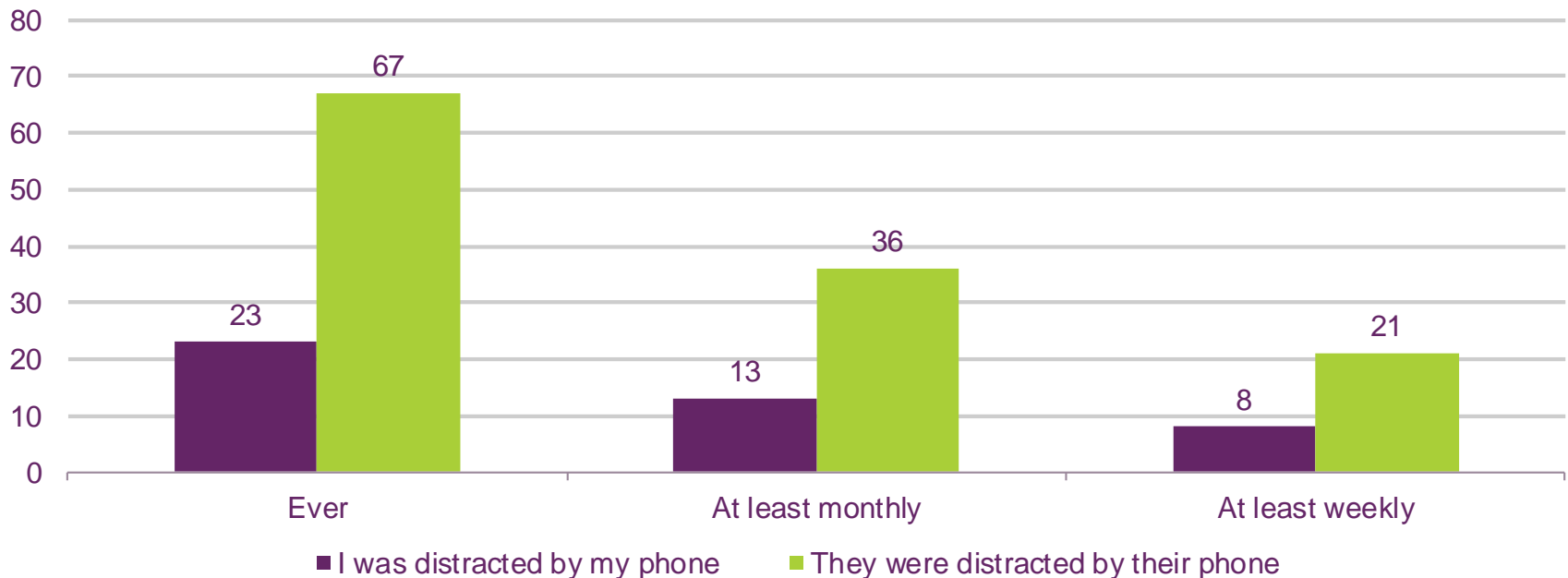
Source: Ofcom research, 2016

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?

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

Proportion of respondents (%)



Source: Ofcom research, 2016

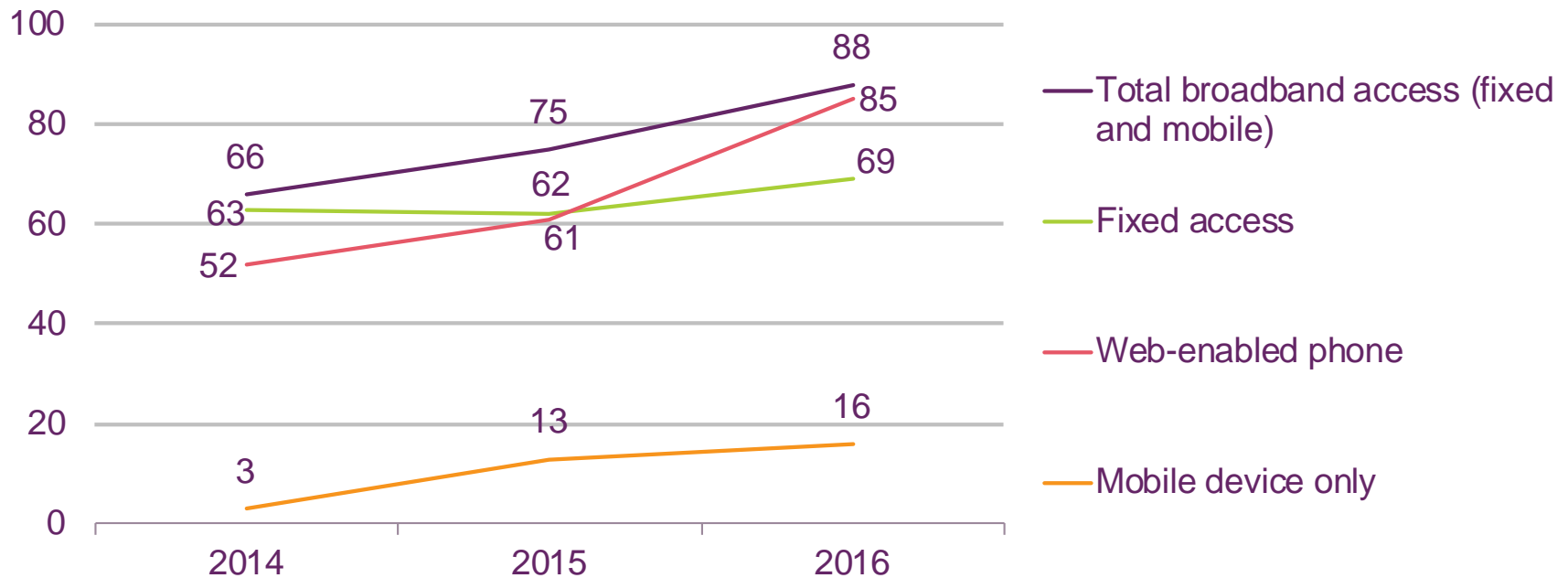
Base: All (Scotland: 192), all phone users (Scotland: 158)

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



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



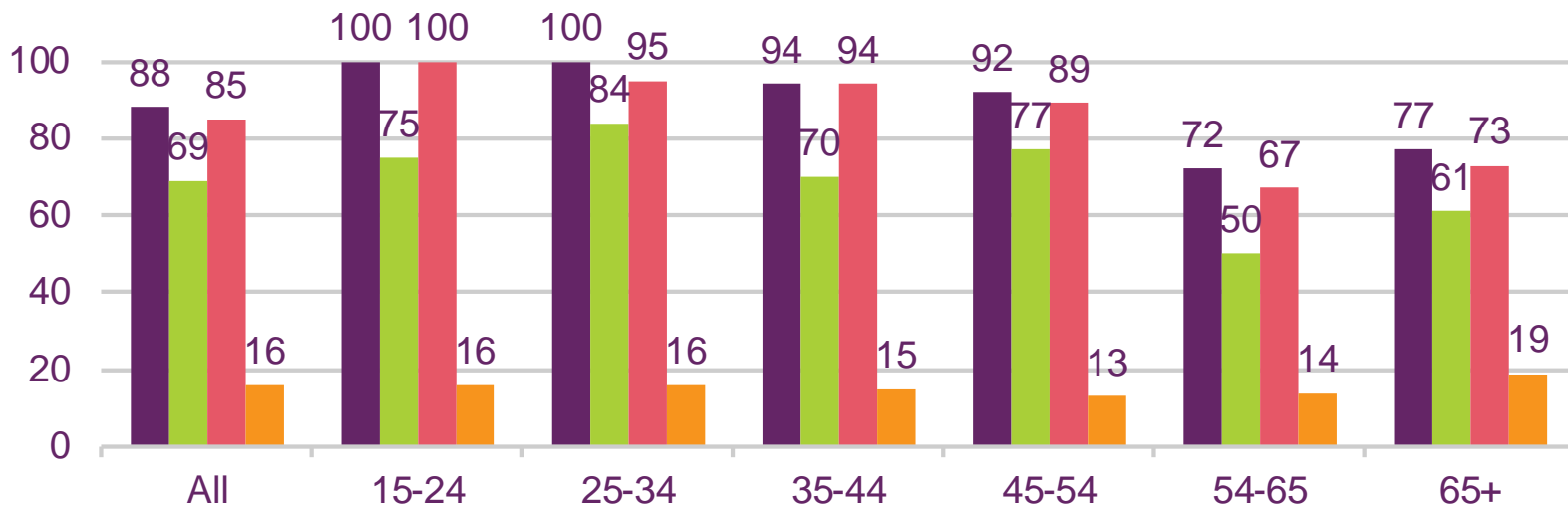
Source: British Population Survey

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?

## 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

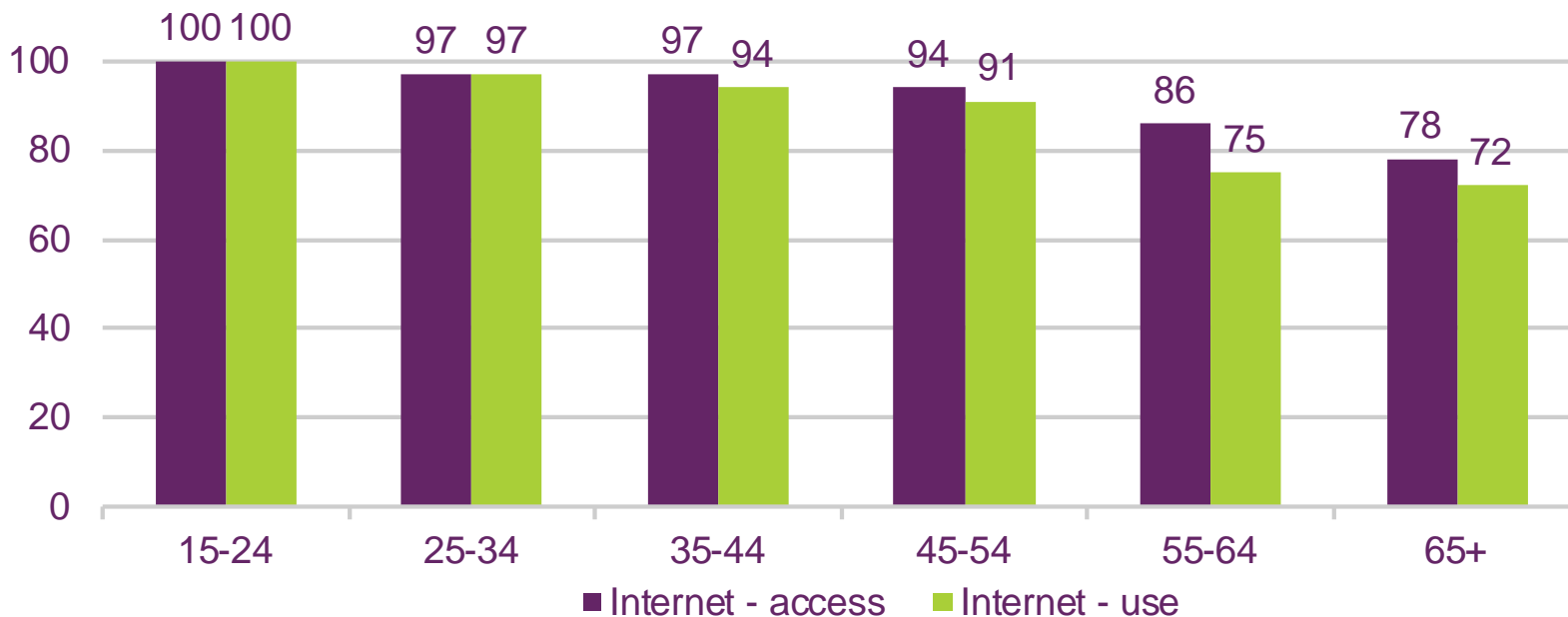
Base: All adults 15+ (Glasgow 2016 – 250)

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?

## Internet access and use in Glasgow, by age

Proportion of respondents (%)



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?

## 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

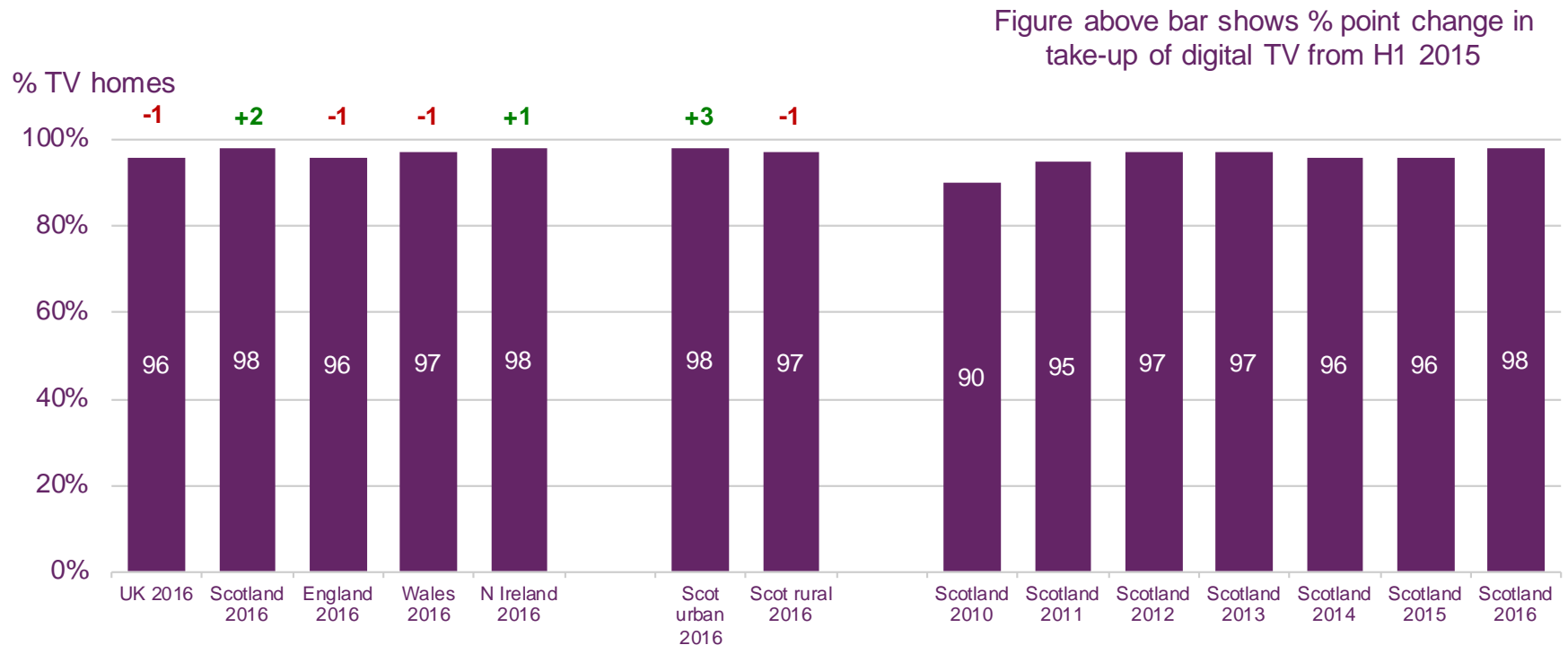
Base: All adults 15+ (Glasgow 2015 – 534, Glasgow 2014 - 1405, Glasgow - 2013 1398, Glasgow – 2011/2012 597 )

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?



## 2. Television and audio-visual

# Take-up digital TV

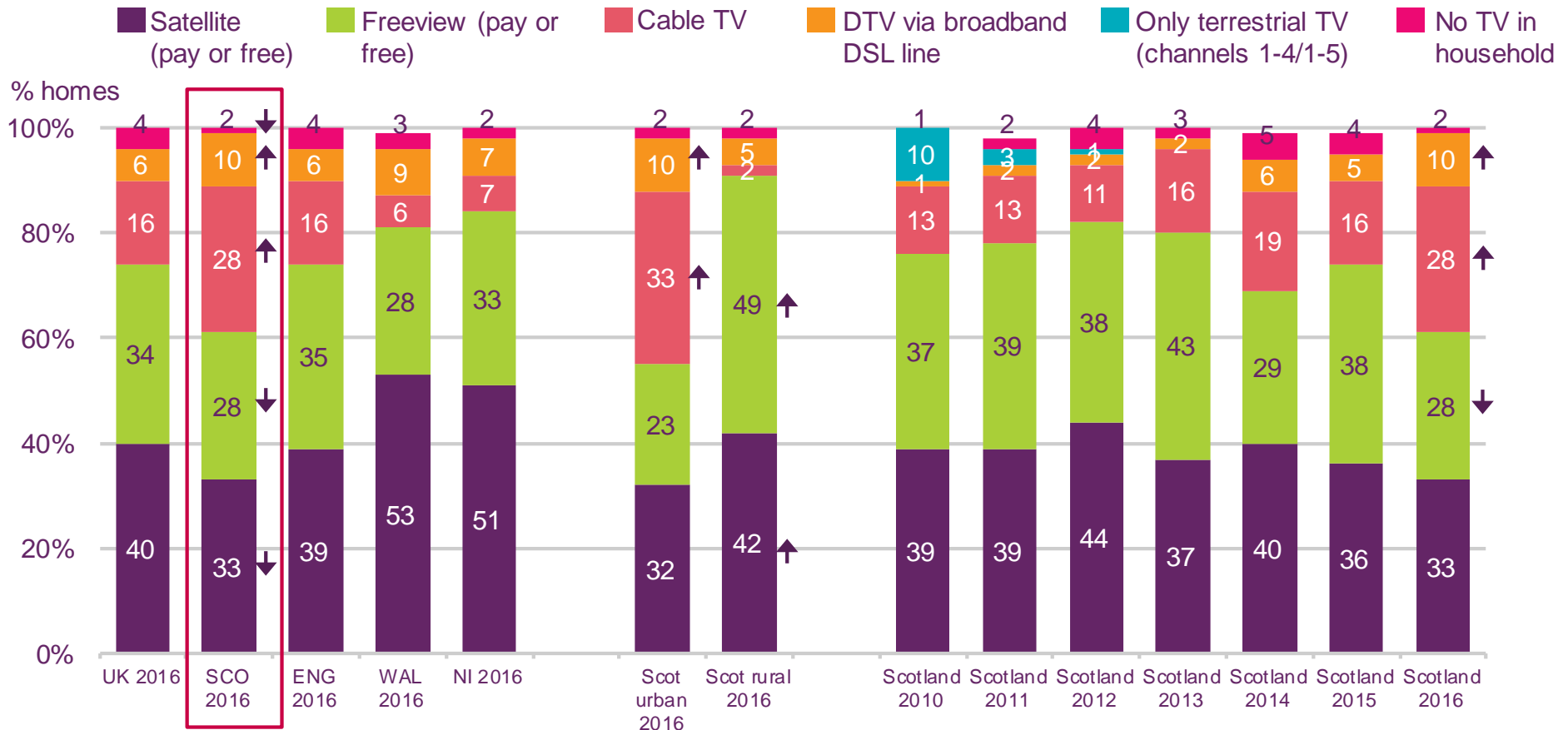


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QH1A: Which, if any, of these types of television does your household use at the moment?

# Main TV set share by platform: 2016



Source: Ofcom Technology Tracker, Half 1 2016

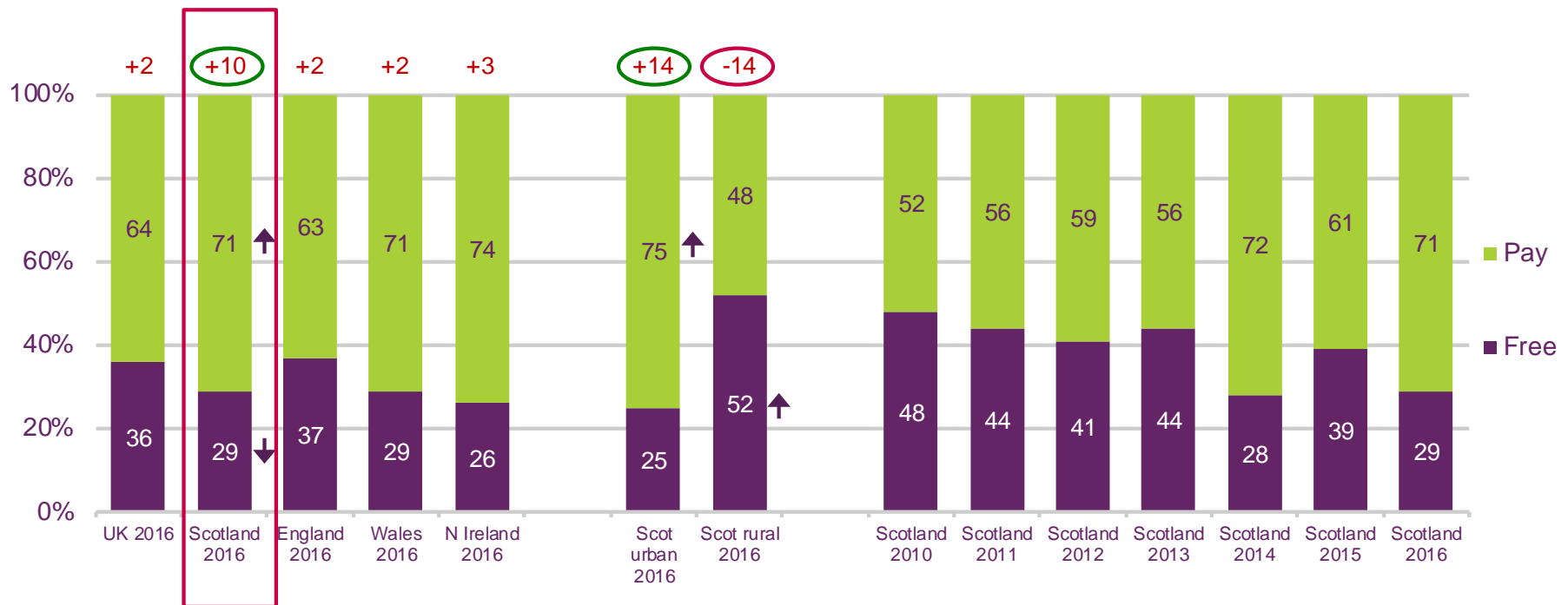
Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016

QH1A: Which, if any, of these types of television does your household use at the moment?

# Proportion of homes with free and pay television

Proportion of TV homes (%)



Source: Ofcom Technology Tracker, Half 1 2016

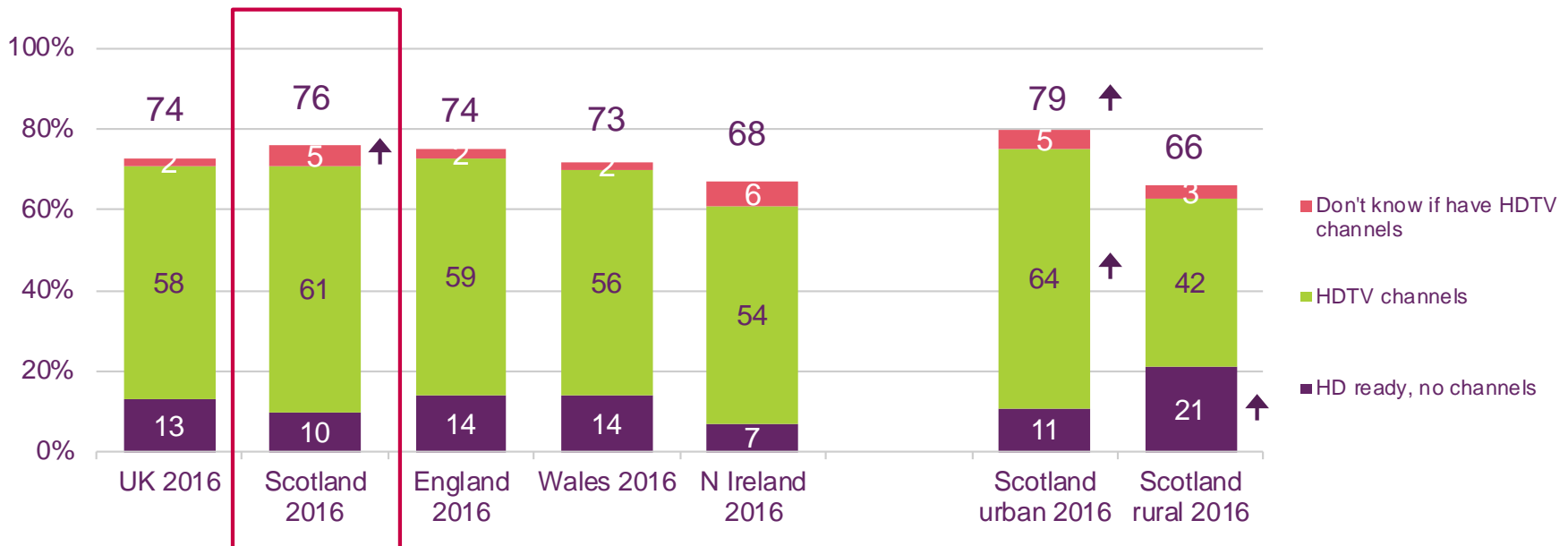
Base: All adults aged 16+ with a TV in household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural, 1060 Wales 2010, 483 Wales 2011, 508 Wales 2012, 485 Wales 2013, 480 Wales 2014, 485 Wales 2015, 471 Wales 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Wales and UK in 2016, between Wales urban and rural in 2016 and between Wales 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Wales, urban and rural.

QH1A: Which, if any, of these types of television does your household use at the moment?



## Proportion of homes with HD television



Source: Ofcom Technology Tracker, Half 1 2016

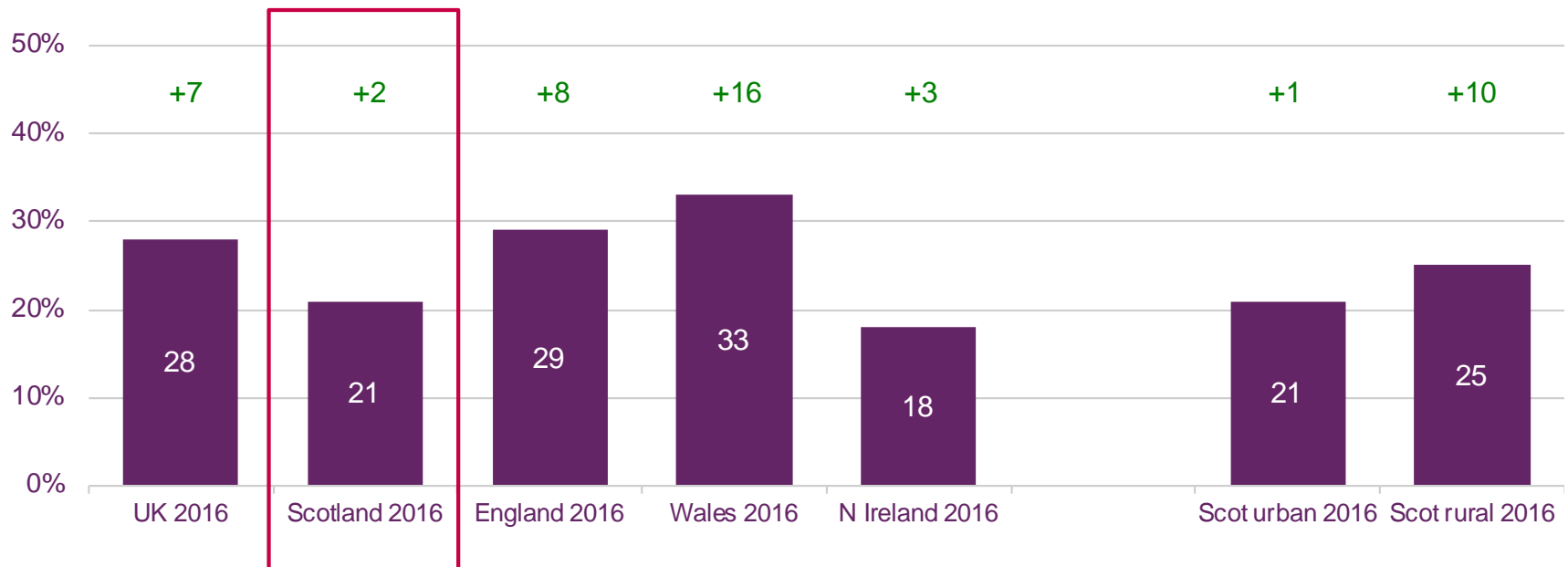
Base: All adults aged 16+ with a TV in the household (n = 3606 UK, 471 Wales, 2148 England, 491 Scotland, 496 Northern Ireland, 231 Wales urban, 240 Wales rural)

Significance testing: Arrows indicate any significant differences between Wales and UK in 2016 and between Wales urban and rural in 2016

QH53: Is the main TV in your household an HDTV set or HD ready?/ QH54: Although you have an HDTV ready set, to actually watch TV channels and programmes that are broadcast in high definition, you need an HD set top box or a TV with built-in HDTV receiver. For the main TV set, does your household have an HD TV

## Smart TV take-up in Scotland

Figure above bar shows % point change in take-up of Smart TVs from H1 2015



Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ with a TV in household (n = 3606 UK, 491 Scotland, 2148 England, 471 Wales, 496 Northern Ireland, 246 Scotland urban, 245 Scotland rural)

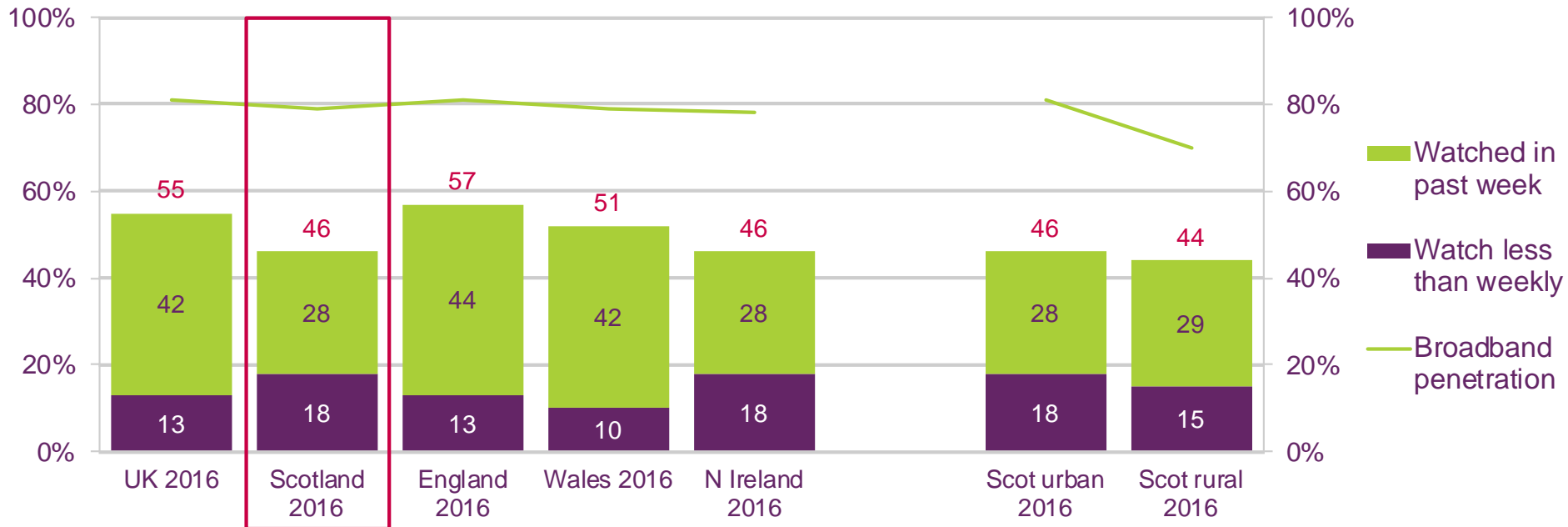
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 and between Scotland urban and rural in 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QH62: Are any of your TV sets "Smart TVs"? These are new types of TV that are connected to the internet and can stream video directly onto your television screen, without the need for a computer, set-top box or games console.

# Online TV/ video viewing

Online TV/ video viewing on PC or mobile

Proportion of individuals with broadband at home

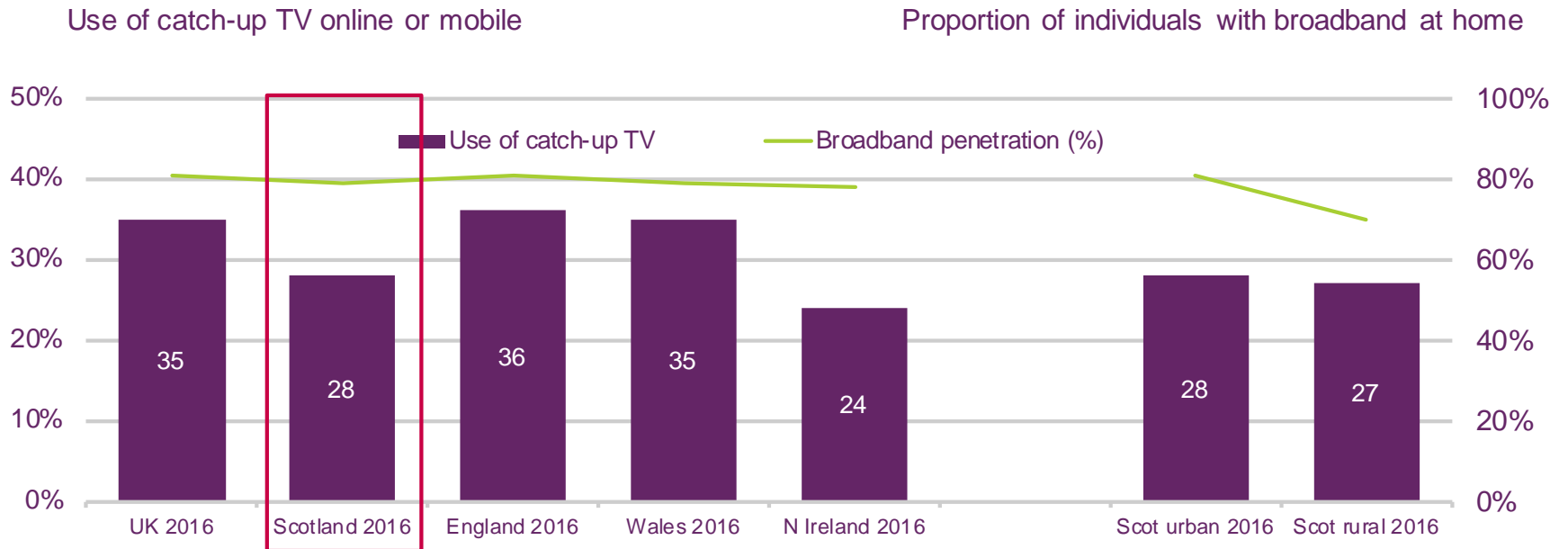


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE5A: Which, if any, of these do you use the internet for? QE5B: And, which, if any, of these activities have you used the internet for in the last week? QD28A: Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for? QD28B: And which of these activities have you used your mobile for in the last week?

# Use of catch-up TV

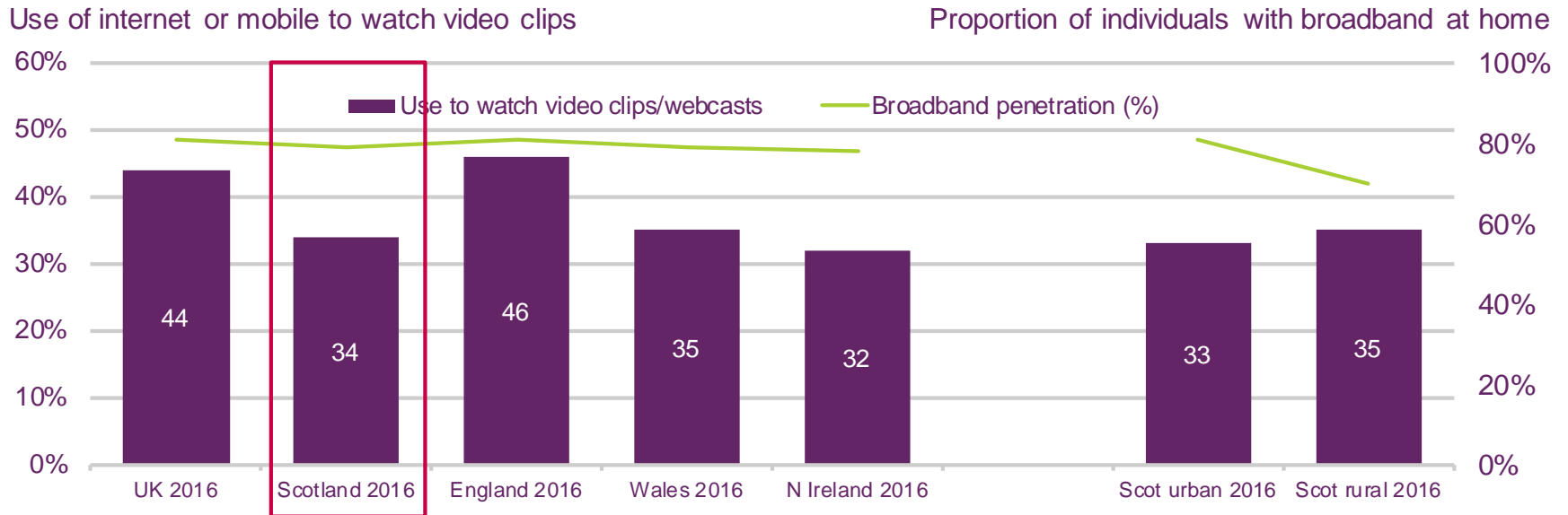


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?/ QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

## Use of internet for watching short video clips (e.g. YouTube)



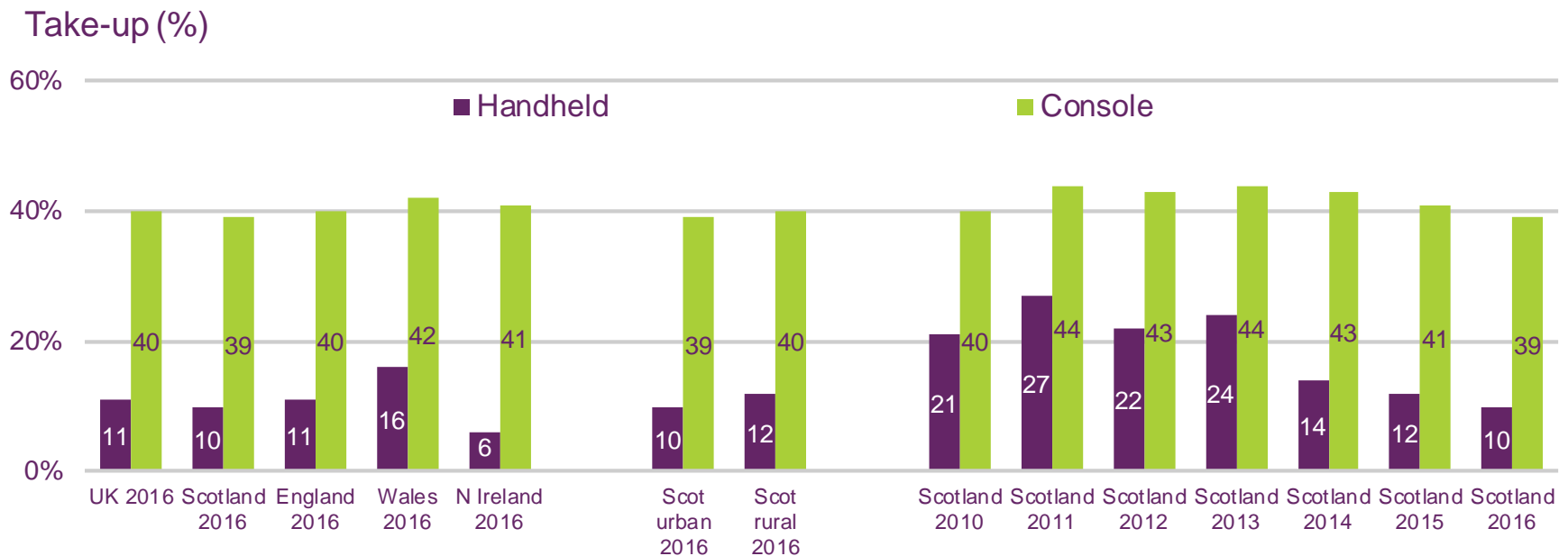
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?/ QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?



## Take up of leading games consoles in Scotland

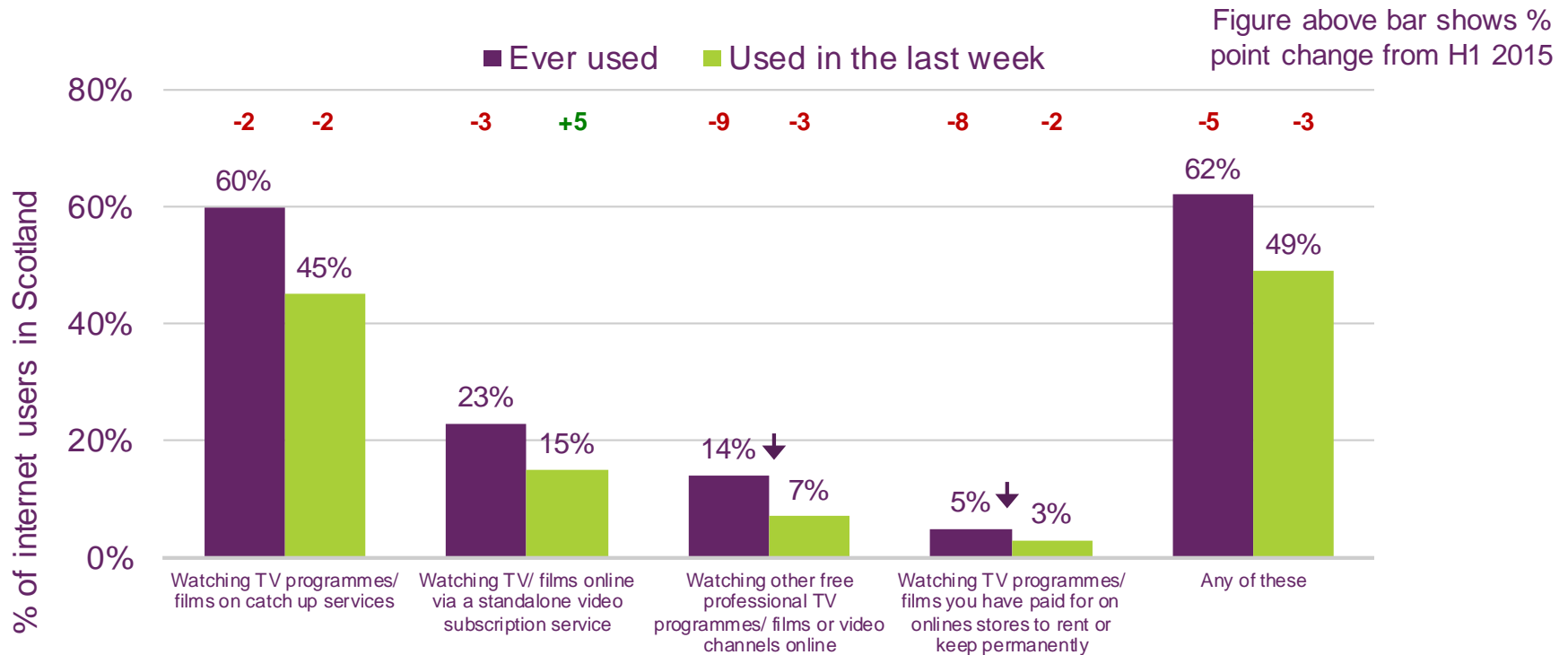


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QB4: Which games console/s do you or does anyone in your household have at the moment?

## TV programmes, films and on-demand on any device



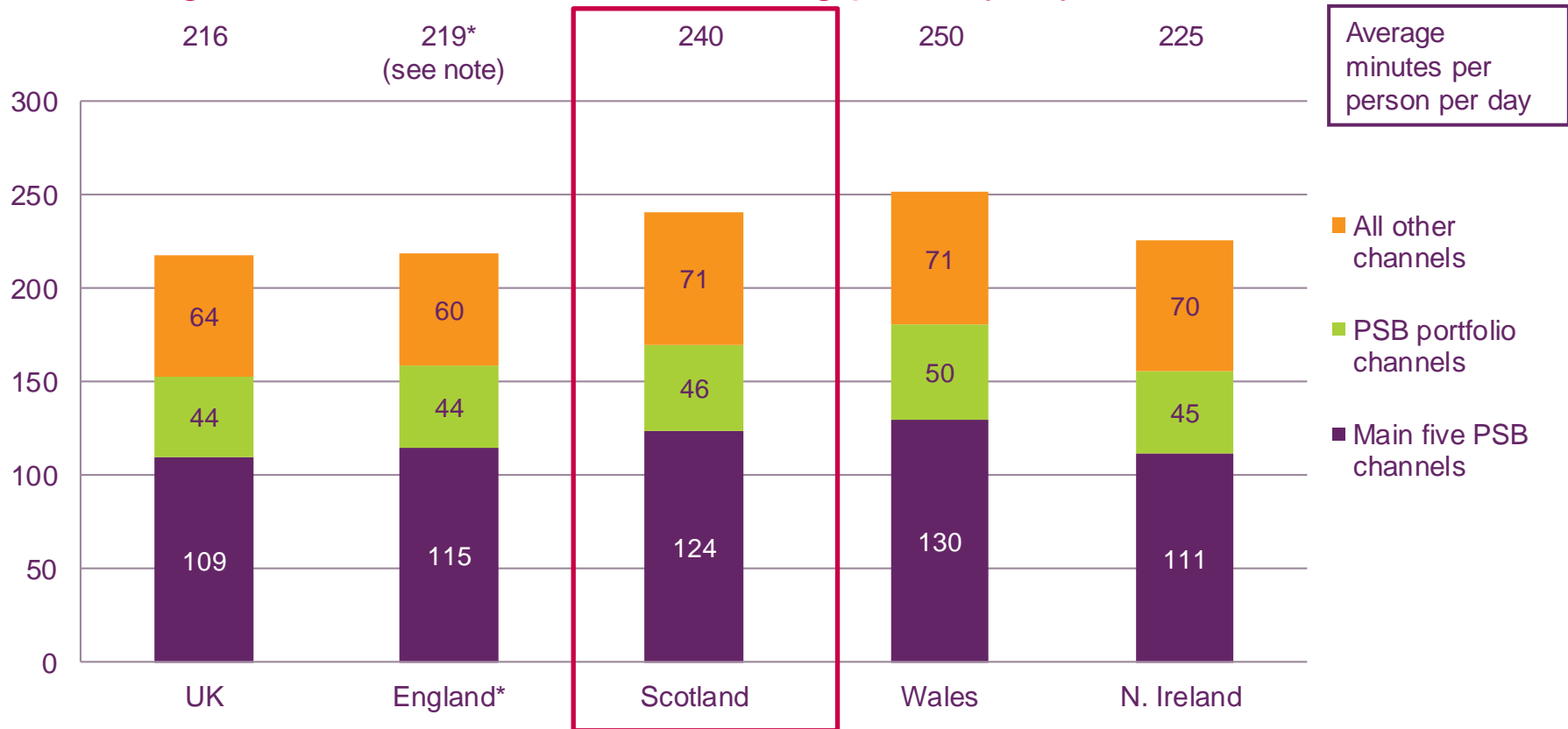
Source: Ofcom Technology Tracker, Half 1 2016

Base: All Scotland adults aged 16+ who use the internet at home or elsewhere (n = 405)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland 2015 and 2016.

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? / QH47: And which, if any, of these have you used in the last week?

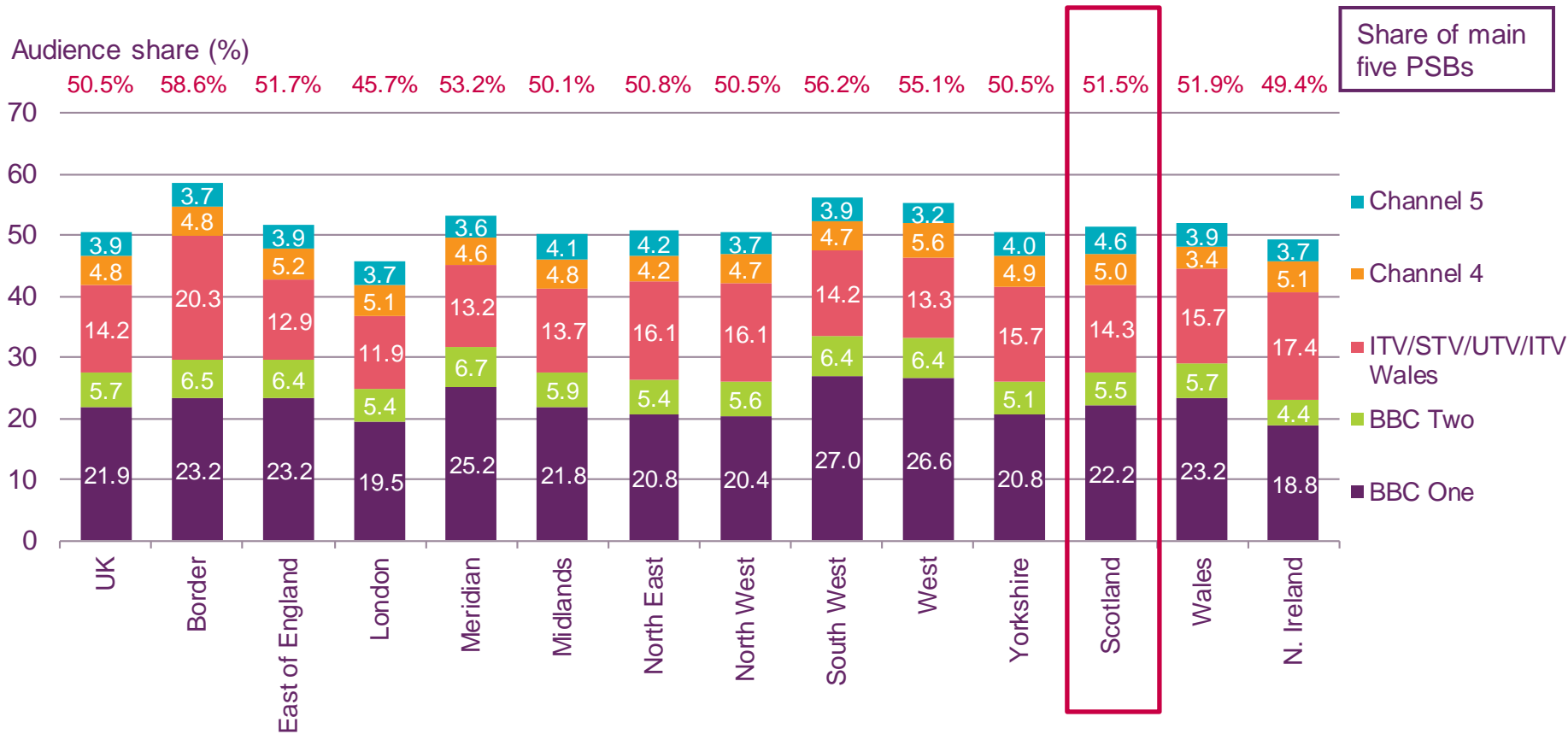
## Average minutes of television viewing per day, by nation: 2015



Source: BARB, Individuals (4+). Please see definitions for list of PSB channels

\*Note: This figure reflects the average across the English regions with the highest in Border at 243 minutes (4 hours 03 minutes) and lowest in London at 197 minutes (3 hours 17 minutes) respectively.

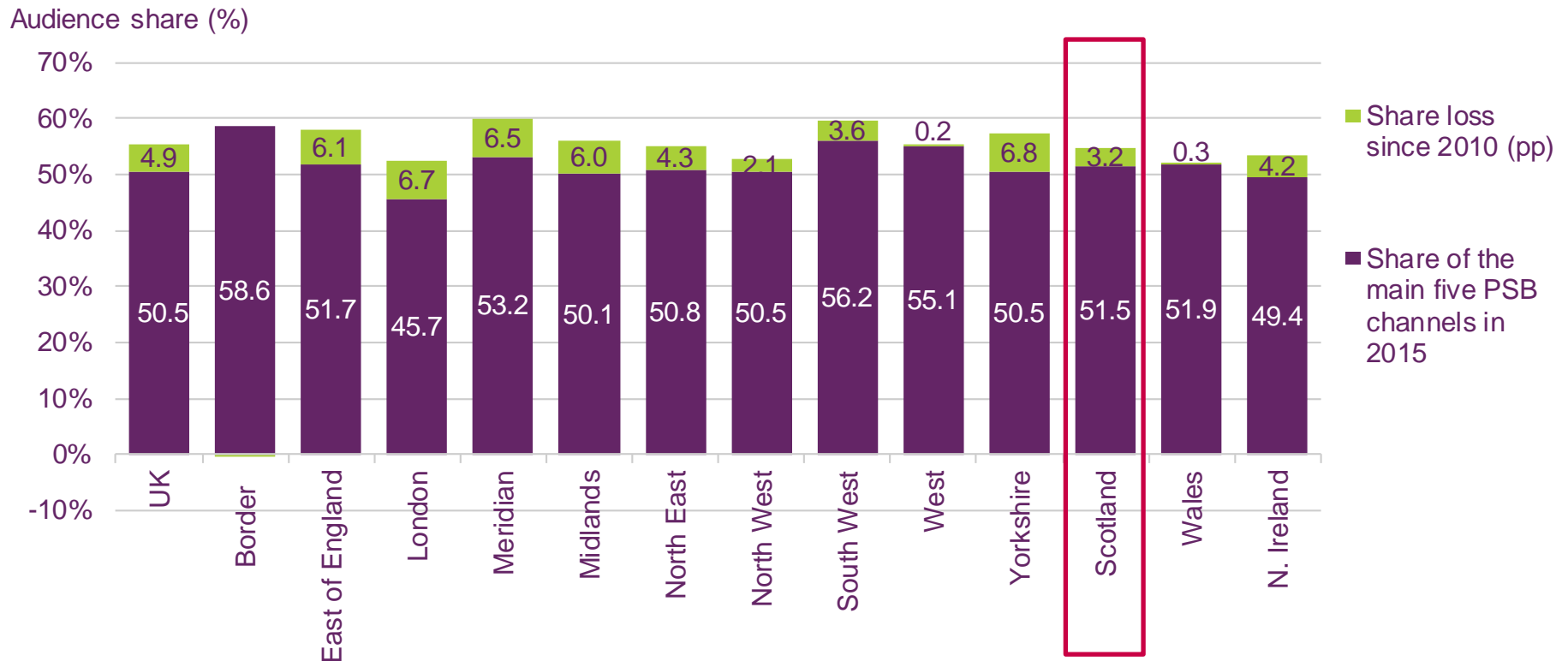
# Share of the main five PSB channels in all homes, by UK nations and regions: 2015



Source: BARB, Individuals (4+). HD channel variants are included but not +1s.

Note: Chart shows figures rounded to one decimal place. Numbers may not appear to sum up to total share of main five PSBs due to rounding.

## Change in combined share of the main five PSB channels, all homes: 2010 and 2015

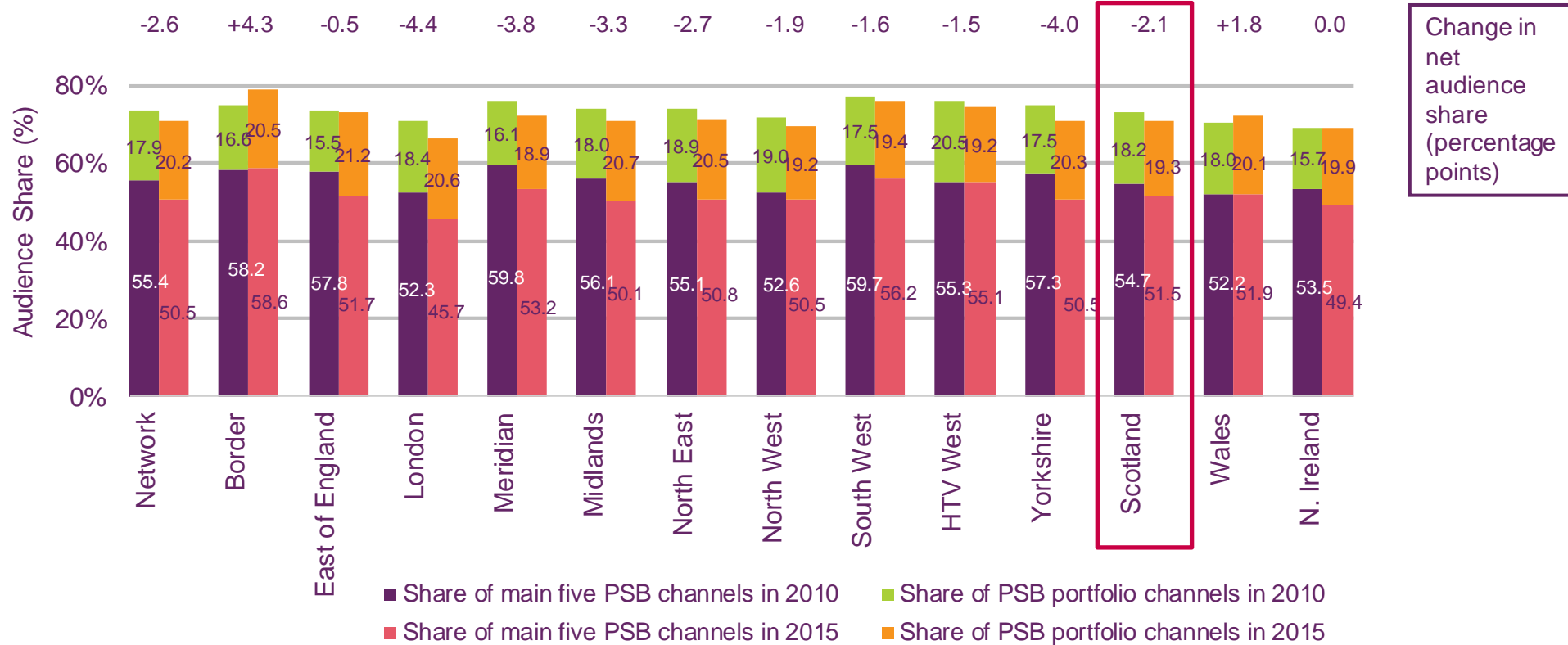


Source: BARB, individuals (4+). Please see definitions for list of PSB channels.

Note: Border refers to the region as a whole including viewers in the two sub-regions of ITV Border Scotland and ITV Border England.



## Net change in the audience share of the main five PSB channels and their portfolio channels, all homes: 2010 and 2015



Source: BARB, individuals 4+. Please see definitions for list of PSB channels. Shares may not add to 100% due to rounding.

Note: Border refers to region as a whole, including viewers in the two sub-regions of ITV Border Scotland and ITV Border England.

# BBC One and ITV/ STV/ UTV/ ITV Wales early evening news bulletin shares, all homes: 2015



Source: BARB, Individuals (4+).BBC One includes HD variant. ITV excludes HD variants and +1.

Note: Early evening ('local') news bulletin figures based on 'regional news' genre programmes, start time 17:55-18:35, 10mins+ duration, BBC One & ITV (exc HD), weekdays. UK figures based on share to respective early evening news bulletin day parts. BBC One's early evening news bulletin is transmitted between 18:30 – 19:00 and ITV/STV/UTV/ITV Wales' is transmitted between 18:00 – 18:30.

Note: Border refers to the region as a whole including viewers in the two sub-regions of ITV Border Scotland and ITV Border England.

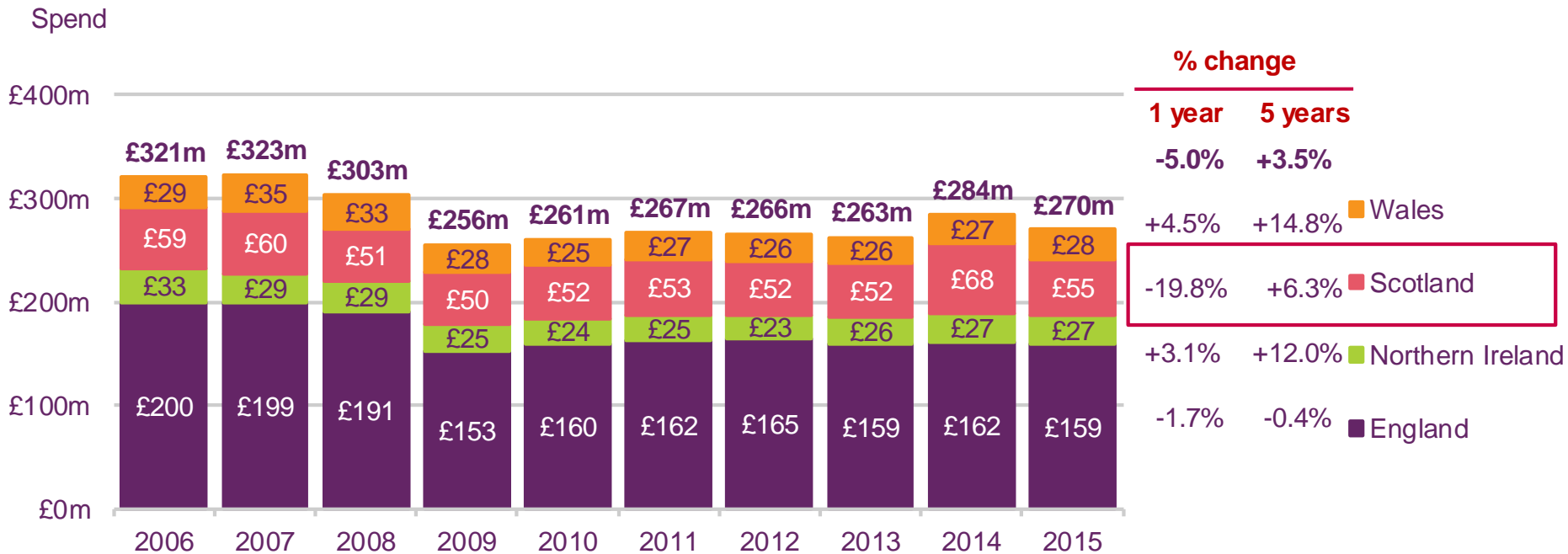
## Respondents' main media source for UK and world news



Source: Ofcom Media Tracker 2015.

Base: All (2,107); England (1,607); Scotland (180); Wales (164); Northern Ireland (156). Prompted, single code. Responses  $\geq 3\%$  labelled. Significance testing shows any difference in the main source of news between any nation and all adults in 2015

# Spend on first-run originated nations' and regions' output by the BBC/ITV/STV/UTV



Source: Broadcasters. All figures are nominal.

Note: Spend data for first-run originations only. Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. Spend on content broadcast in the Scottish part of the ITV Border region is included within England from 2006 to 2013, but in Scotland thereafter. These figures do not include spend on network content. For more information on BBC Alba please see Section 1.5.

## Change in total spend on nations and regions output, by genre and nation: 2010-2015

	UK		England		N. Ireland		Scotland		Wales	
	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)	1yr (%)	5yr (%)
<b>Current affairs</b>	-10%	-1%	-1%	-28%	11%	68%	-19%	34%	-7%	11%
<b>News</b>	0%	2%	-1%	-1%	4%	17%	1%	16%	-3%	0%
<b>Non-news/non-current affairs</b>	-14%	1%	0%	-25%	1%	-4%	-28%	-4%	14%	28%
<b>Total spend in 2015</b>	£271m		£159m		£27m		£56m		£29m	

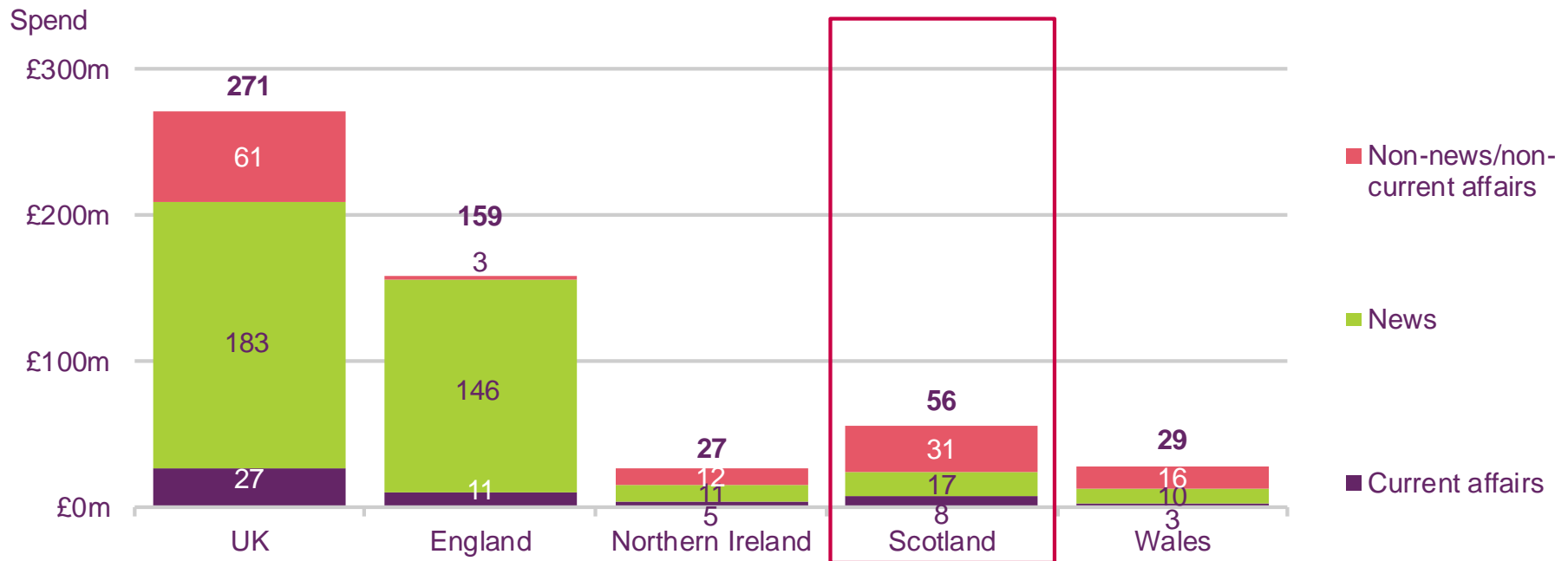
	UK		England		N. Ireland		Scotland		Wales	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
<b>Change in spend</b>	-5%	1%	-2%	-4%	3%	12%	-20%	6%	5%	15%

Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Spend on programming for the ITV Border region is divided between England and Scotland in 2014-2015 and attributed to England only prior to 2014.



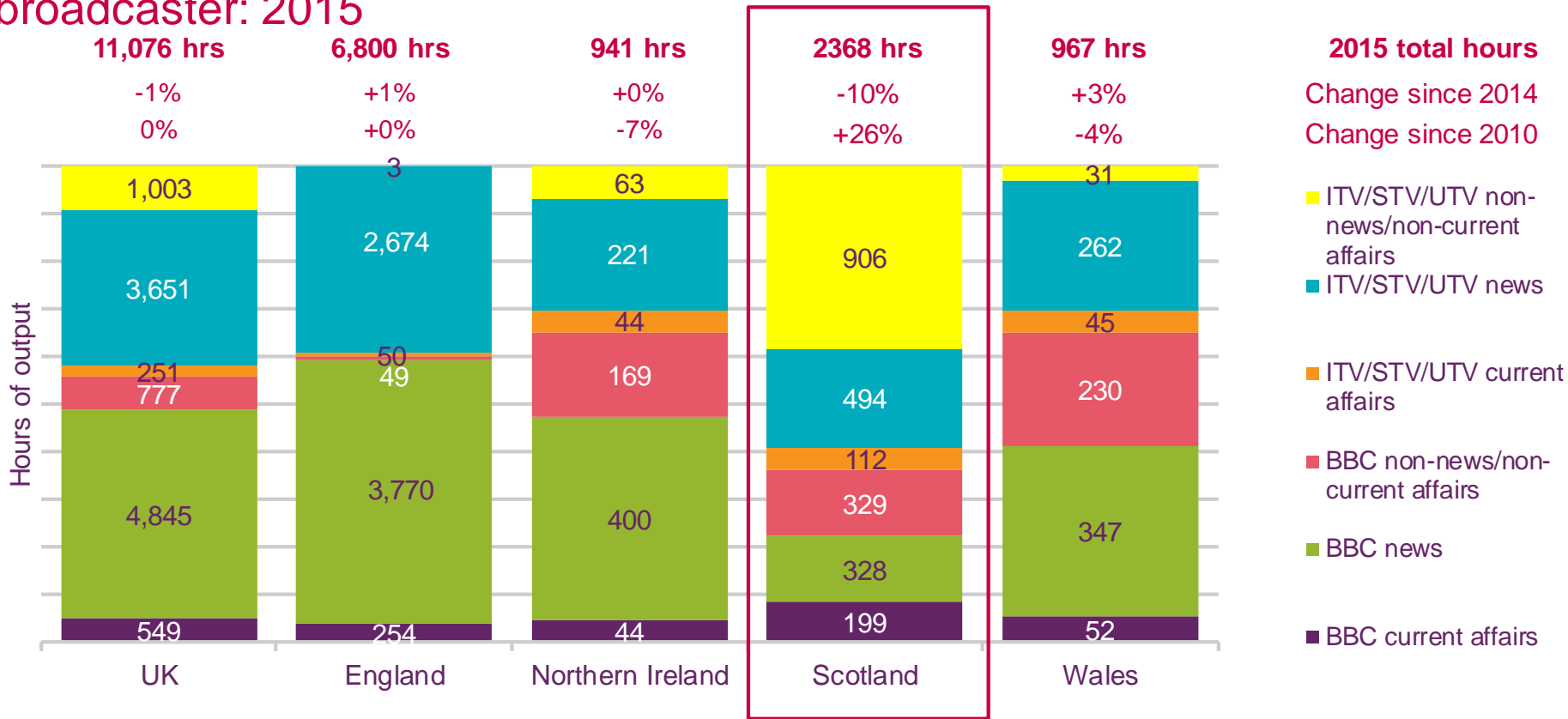
## Total spend by the BBC/ ITV/ STV/ UTV on non-network nations/regions output for the main PSB channels: 2015



Source: Broadcasters.

Note: Excludes spend on BBC Alba and S4C output, but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015. BBC includes BBC One and BBC Two channels.

# First-run originated hours of nations/regions output, by genre and broadcaster: 2015



Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

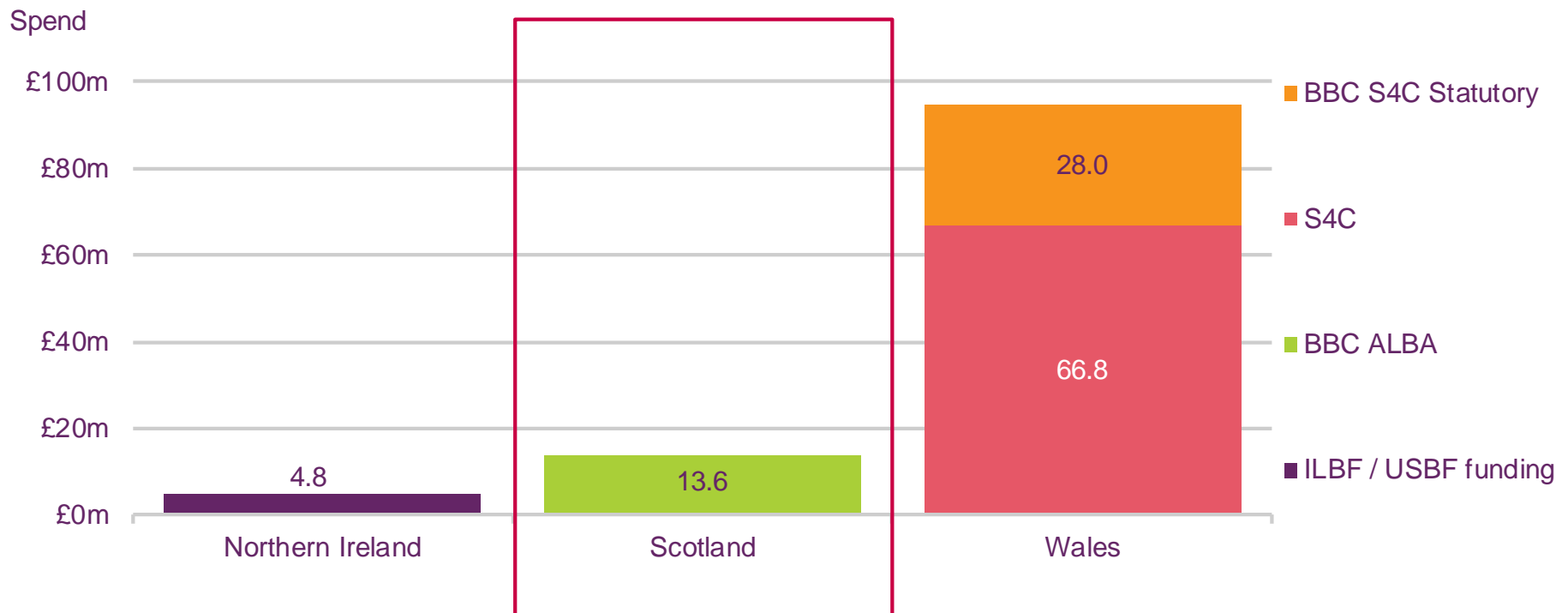
## Cost per hour for total nations' and regions' output, by nation: 2010-2015



Source: Broadcasters. All figures are nominal.

Note: Excludes spend on BBC Alba and S4C output but includes some spend on Irish-language programming by the BBC. These figures do not include spend on network content. Scotland figures include programming for viewers of ITV Border in Scotland. This was 73 hours of current affairs in 2015.

## Other spend on other programming in the devolved nations: 2015



Source: Broadcasters.

Note: BBC S4C Statutory refers to the cost to the BBC of programming supplied to S4C by the BBC as part of their statutory agreement. ILBF / USBF refers to additional production contributions by the Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund. S4C figures cover the 2015/2016 financial year, BBC Alba and ILBF / USBF figures cover the 2015 calendar year

## BBC Alba total spend: 2008-2015

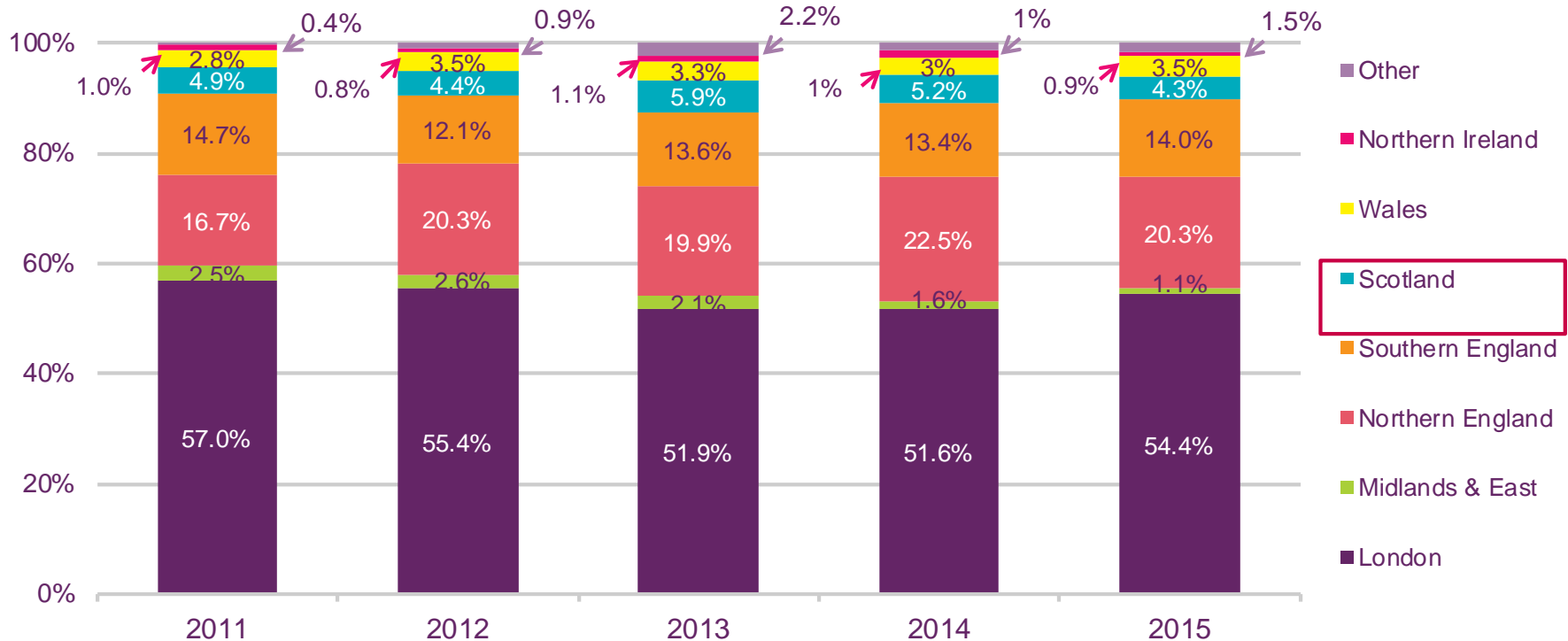


Source: BBC, total hours and spend. All figures are nominal



# Expenditure on originated network productions: 2011-2015

Percentage of production by value

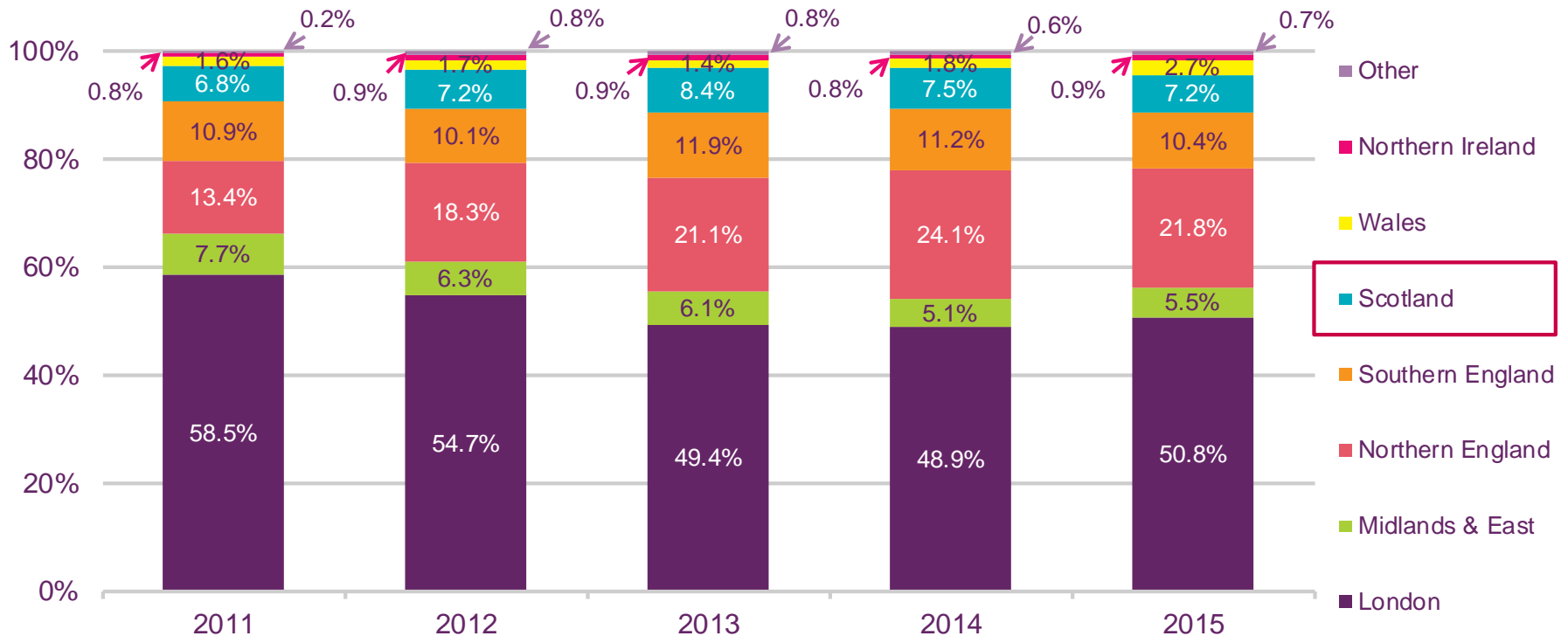


Source: Ofcom/broadcasters

Note: This expenditure does not include network news production. The category 'other' refers to programmes made by producers based within the M25 that qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25, but not all in one macro-region, and therefore cannot be attributed to a single region. See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details.

# Volume of originated network productions: 2011-2015

Percentage of production by volume

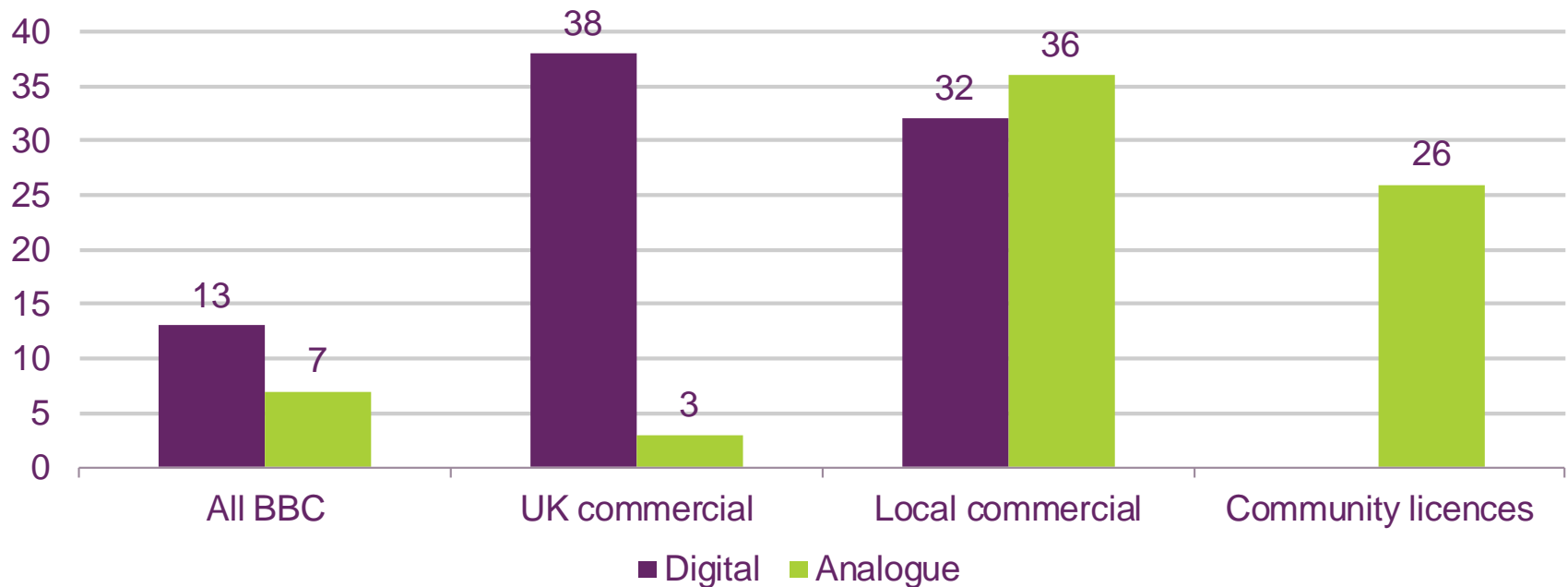


Source: Ofcom/broadcasters

Note: These hours do not include network news production . The category 'other' refers to programmes made by producers based within the M25 that qualify as regional productions on the grounds that 70% of total spend and 50% of off-screen talent spend was outside the M25 but not all in one macro-region, and therefore cannot be attributed to a single region. See [http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg\\_prod/](http://stakeholders.ofcom.org.uk/broadcasting/guidance/programme-guidance/reg_prod/) on Ofcom website for further details.

# 3. Radio and audio

## Radio station availability

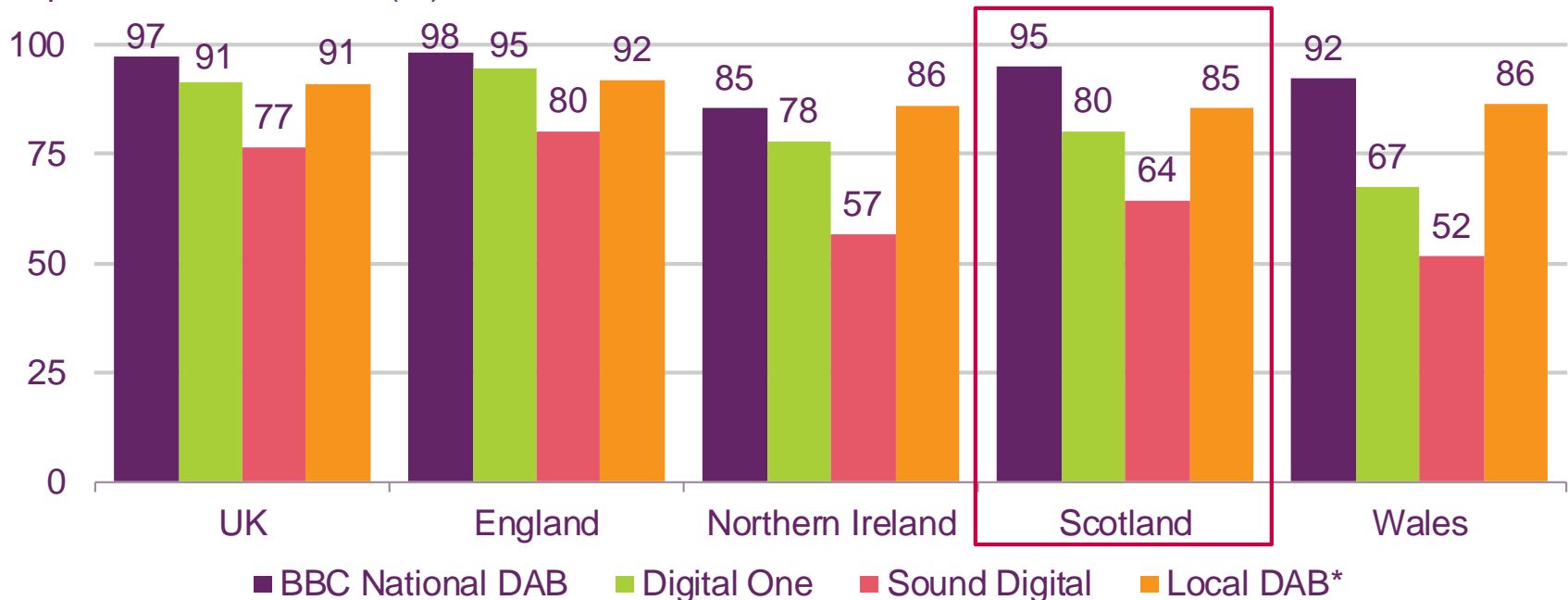


Source: Ofcom, May 2016

Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them.

## Household coverage of DAB

Proportion of households (%)



Source: BBC, Arqiva, Ofcom, May 2016. 'Figures for local DAB are projections of expected coverage for Autumn 2016 based upon a planned list of transmitter sites. The plan is continuing to be refined and actual coverage may differ slightly from those figures when the current programme of expansion completes.'



## Average weekly reach and listening hours: 2015



Average weekly listening

21.4 hours

21.1 hours

22.1 hours

20.2 hours

21.4 hours

Reach

89.6%

87.9%

93.6%

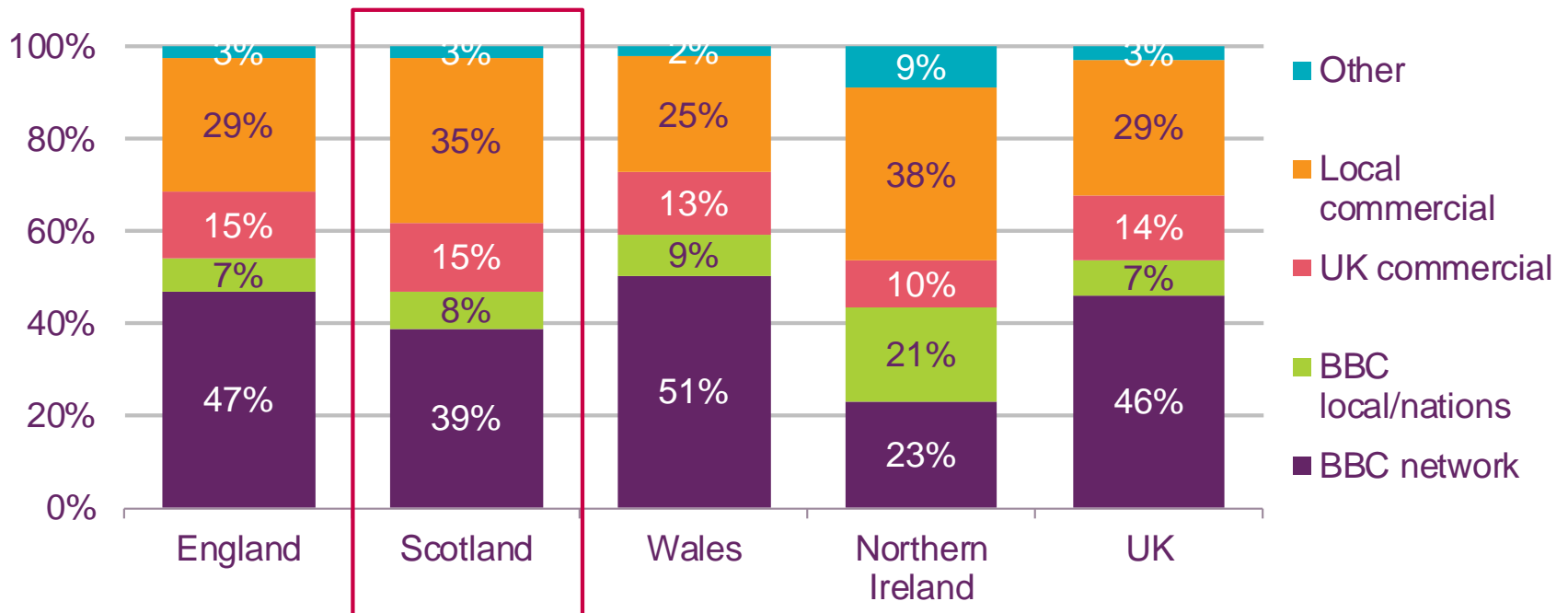
86.6%

89.6%

Source: RAJAR, All adults (15+), year ended Q4 2015. Reach is defined as a percentage of the area adult population who listen to a station for at least 5 minutes in the course of an average week.

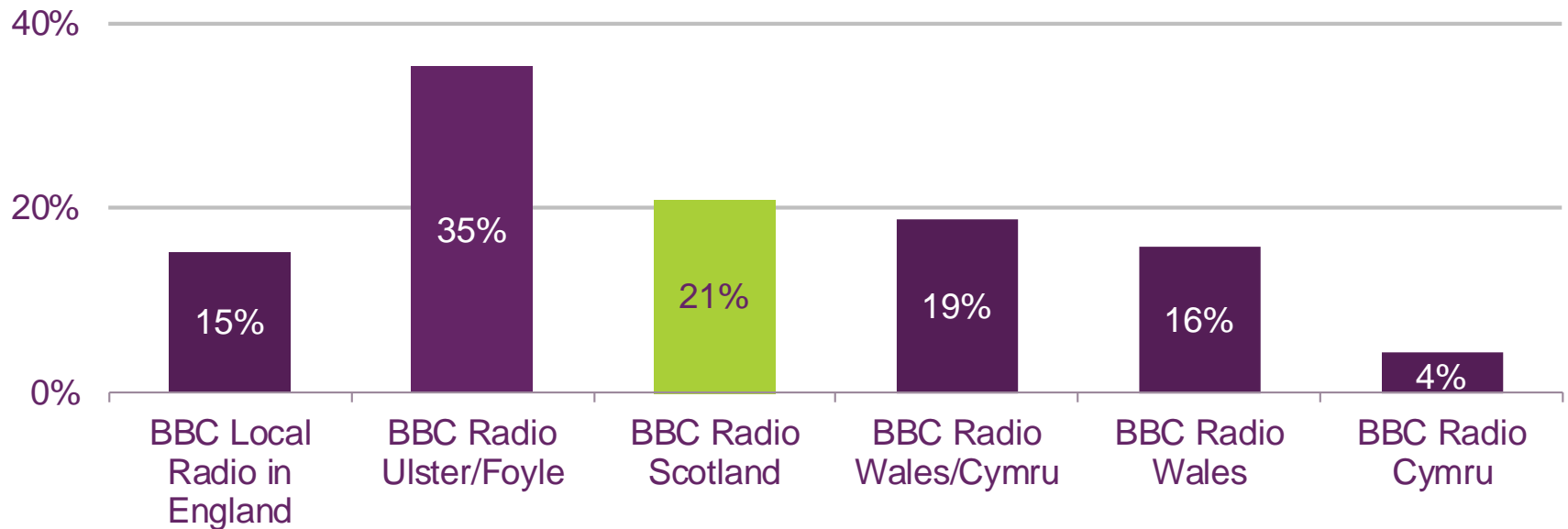


## Share of listening hours, by nation: 2015



Source: RAJAR, All adults (15+), year ended Q4 2015

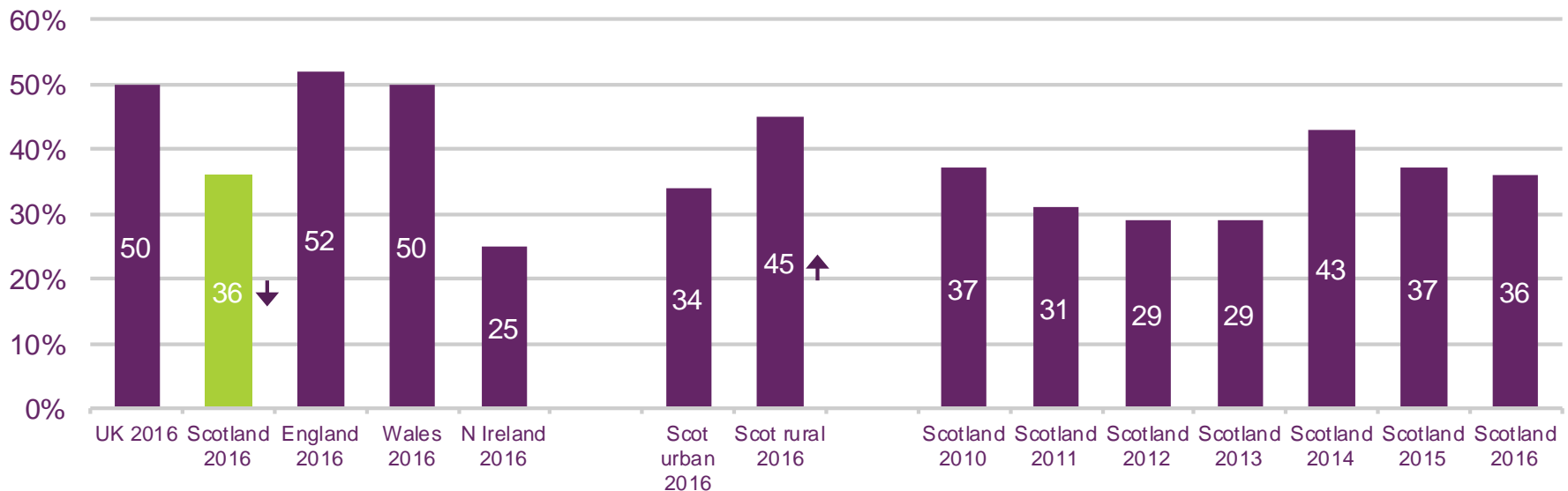
## Weekly reach for nations'/local BBC services



Source: RAJAR, All adults (15+), year ended Q4 2015

# Ownership of DAB digital radios

Percentage of respondents



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who listen to radio (n = 2832 UK, 384 Scotland, 1693 England, 399 Wales, 356 Northern Ireland, 196 Scotland urban, 188 Scotland rural, 1034 Scotland 2010, 357 Scotland 2011, 364 Scotland 2012, 375 Scotland 2013, 392 Scotland 2014, 386 Scotland 2015, 384 Scotland 2016)

NB. Data in 2011 based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks

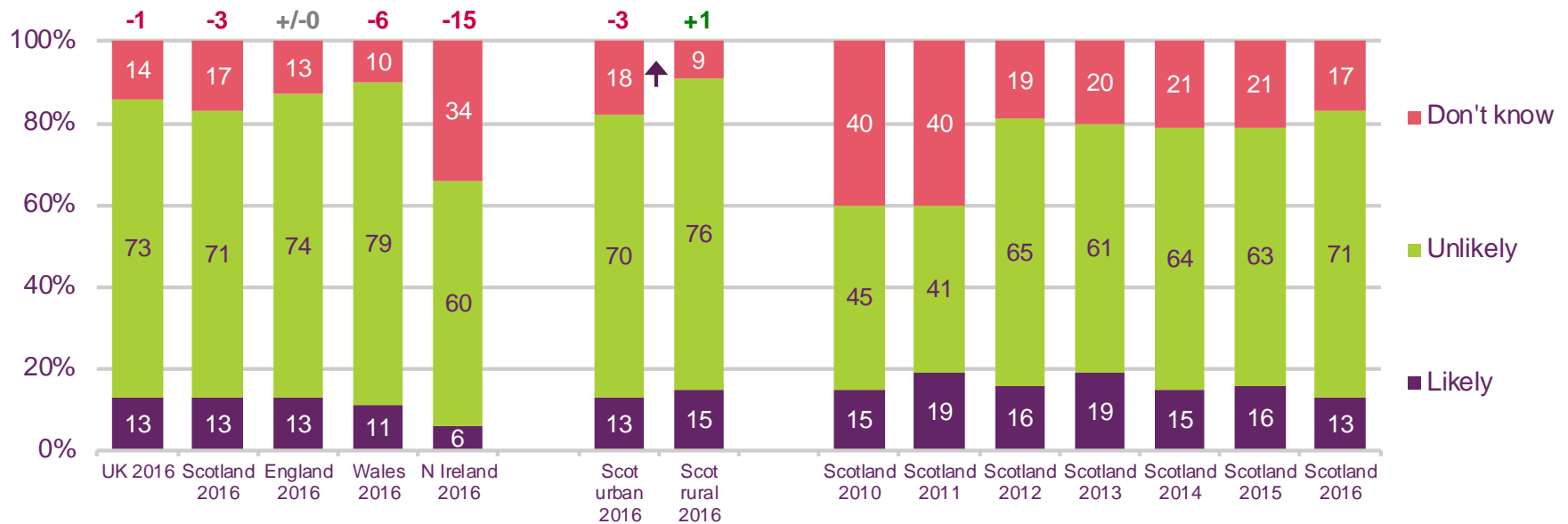
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QP9: How many DAB sets do you have in your household?

# Likelihood of purchasing a DAB radio within the next year

Percentage of respondents

Figure above bar shows % point change in likely to purchase from H1 2015



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1593 UK, 236 Scotland, 870 England, 212 Wales, 275 Northern Ireland, 131 Scotland urban, 105 Scotland rural, 661 Scotland 2010, 156 Scotland 2011, 243 Scotland 2012, 257 Scotland 2013, 211 Scotland 2014, 239 Scotland 2015, 236 Scotland 2016).

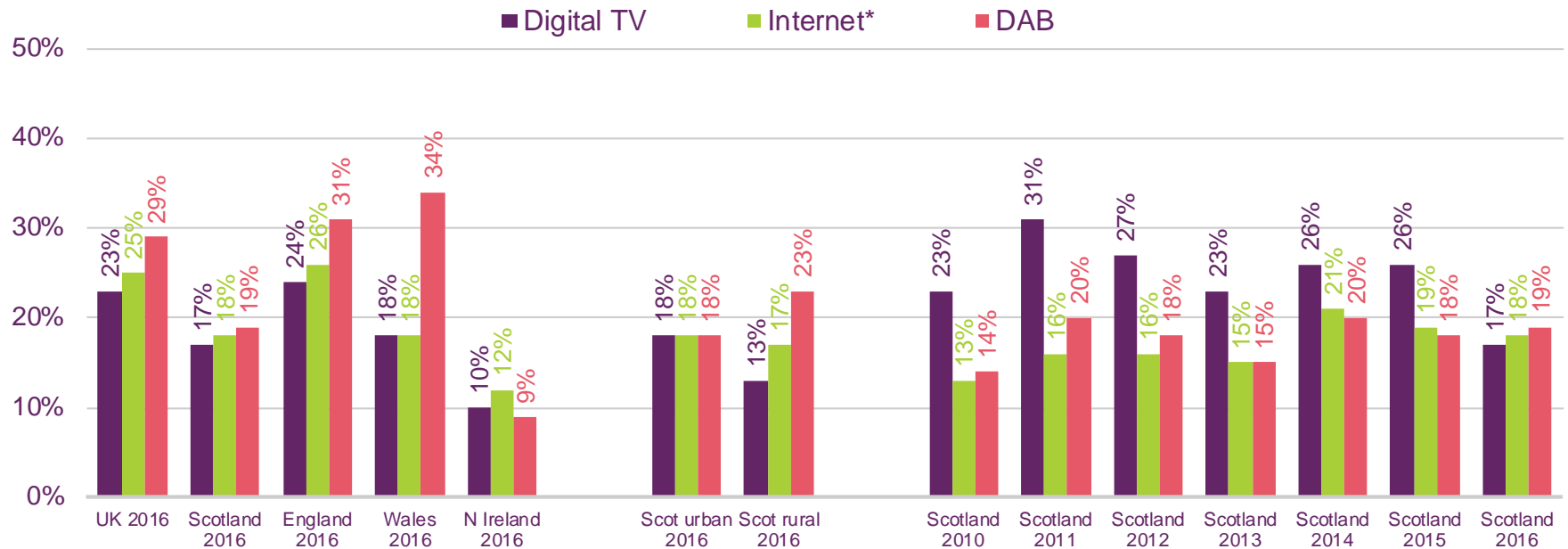
Significance testing: Arrow s indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QP12: How likely is it that your household will get a DAB radio in the next 12 months?

NB. Data in 2011 based on those who listen to radio, do not have a DAB set and have any radio sets in the household that someone listens to in most weeks.

## Listening to radio via internet, DTV and DAB

Proportion of respondents (%) who have listened to radio via DTV, or internet



Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

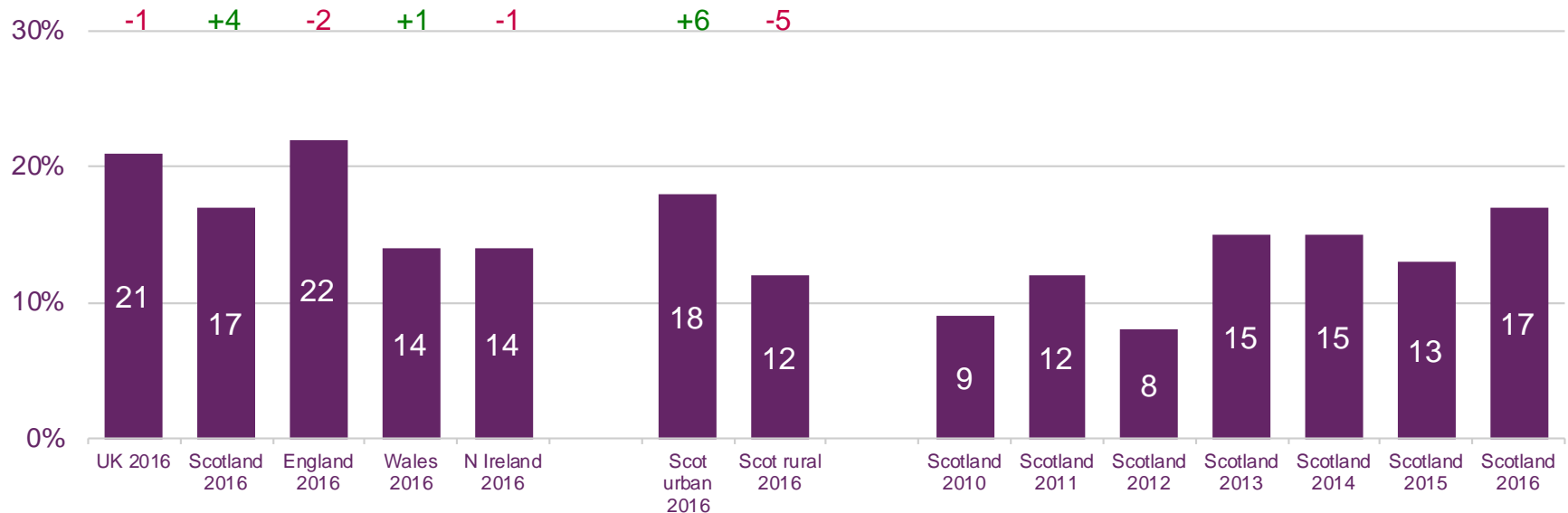
QP11: How often, if at all, do you listen to the radio via – Digital radio via: TV, Internet, DAB radio?/ QE5A: Which, if any, of these do you use the internet for?

\*Measure for Internet combines responses across radio listeners (at QP11) and internet users (at QE5A).

## Listening to radio on mobile phone

Proportion of respondents (%) who have used their mobile to listen to the radio

Figure above bar shows % point change in listening to radio from H1 2015



Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

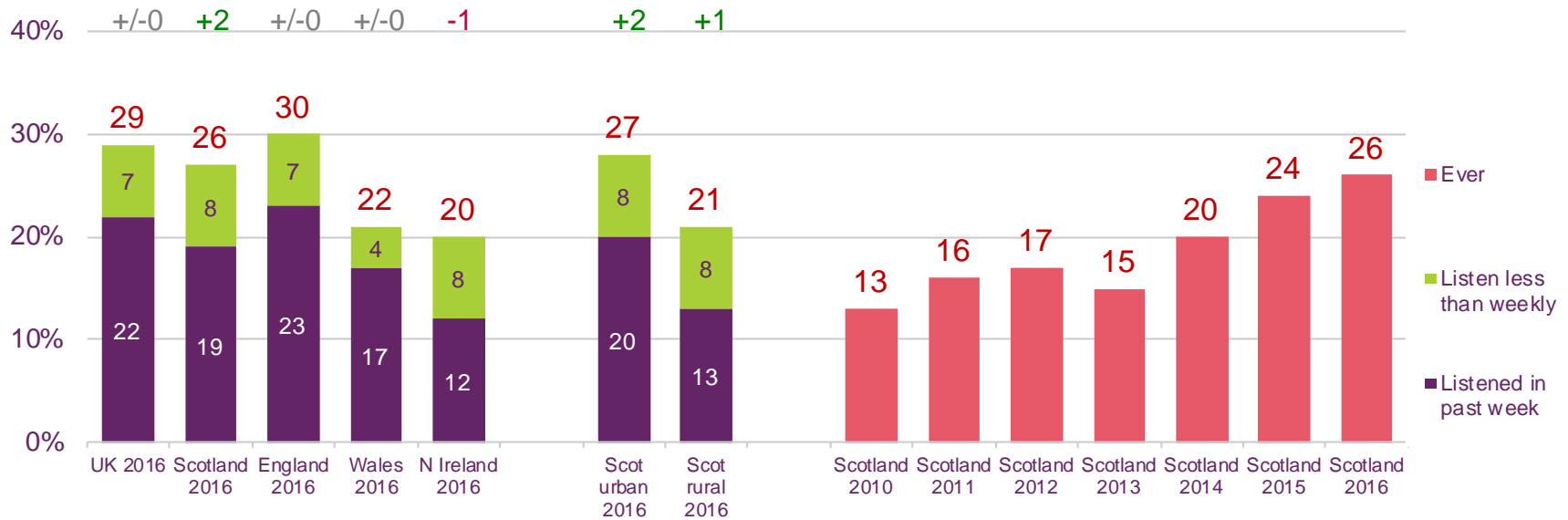
QD28A: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ QD28B: And, which of these activities have you used your mobile for in the last week?/ QP11C: How often, if at all, do you access the radio via mobile phone?



# Listening to audio content on mobile phone

Proportion of respondents (%) who have used their mobile to listen to audio content

Figure above bar shows % point change in listening to audio content from H1 2015

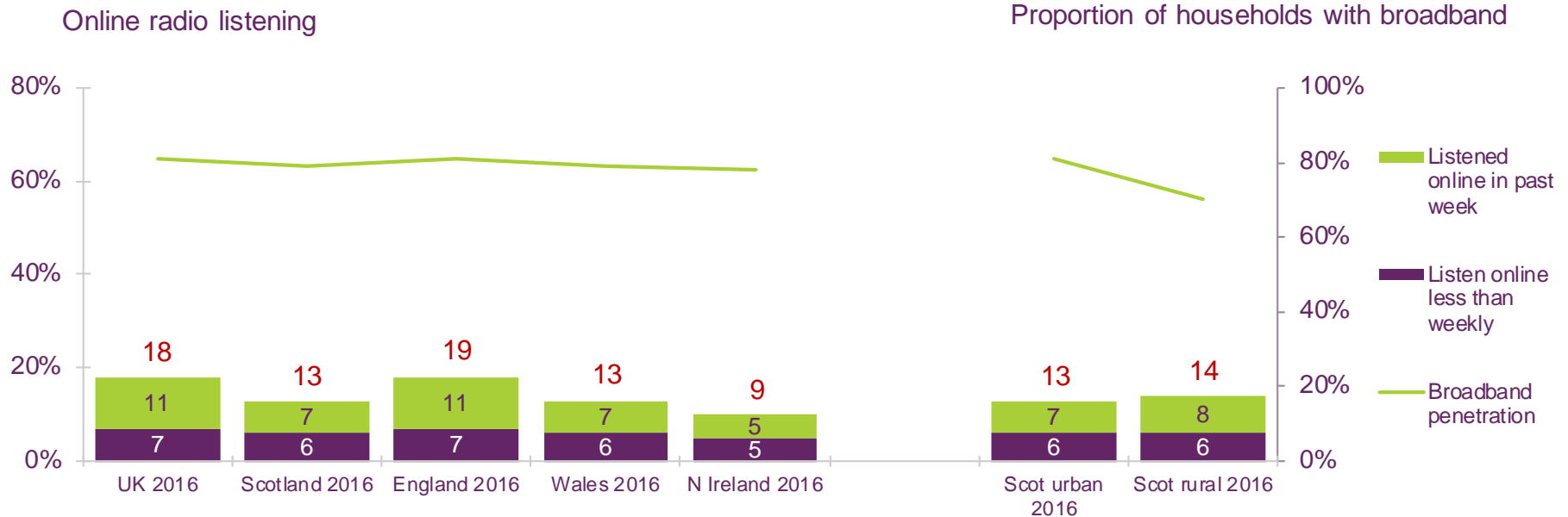


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QD28A: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ QD28B: And, which of these activities have you used your mobile for in the last week?

## Proportion of adults who listen to internet radio

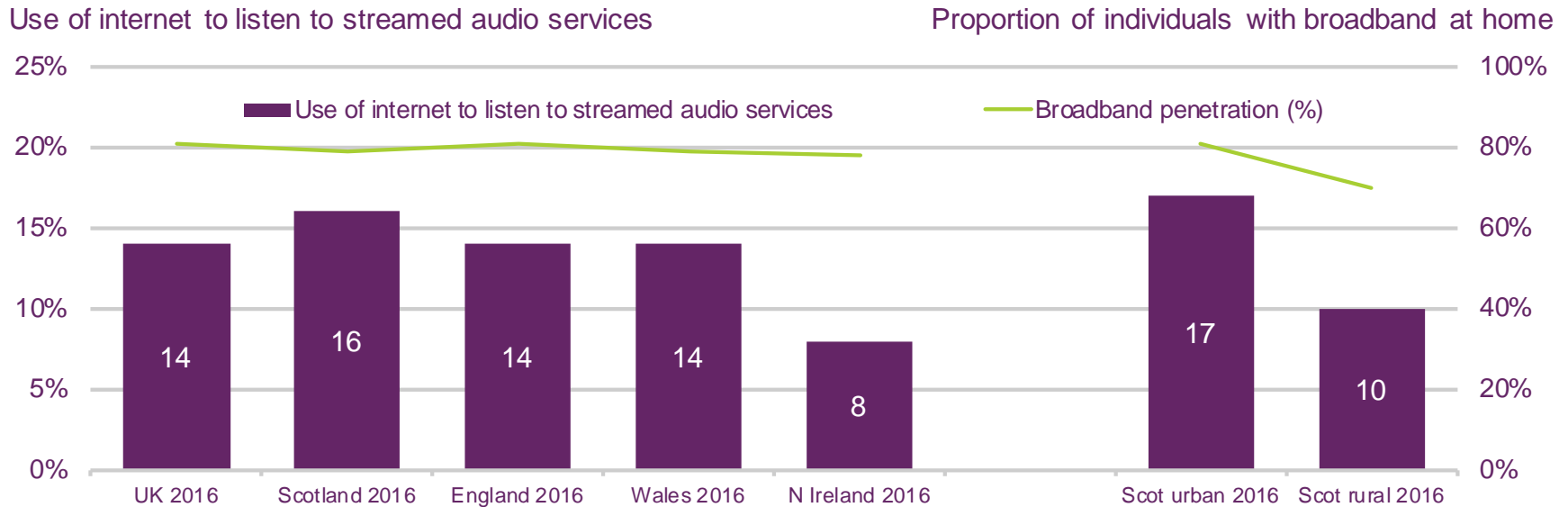


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?/ QE5B: And, which, if any, of these activities have you used the internet for in the last week?

## Use of internet for listening to streamed audio services



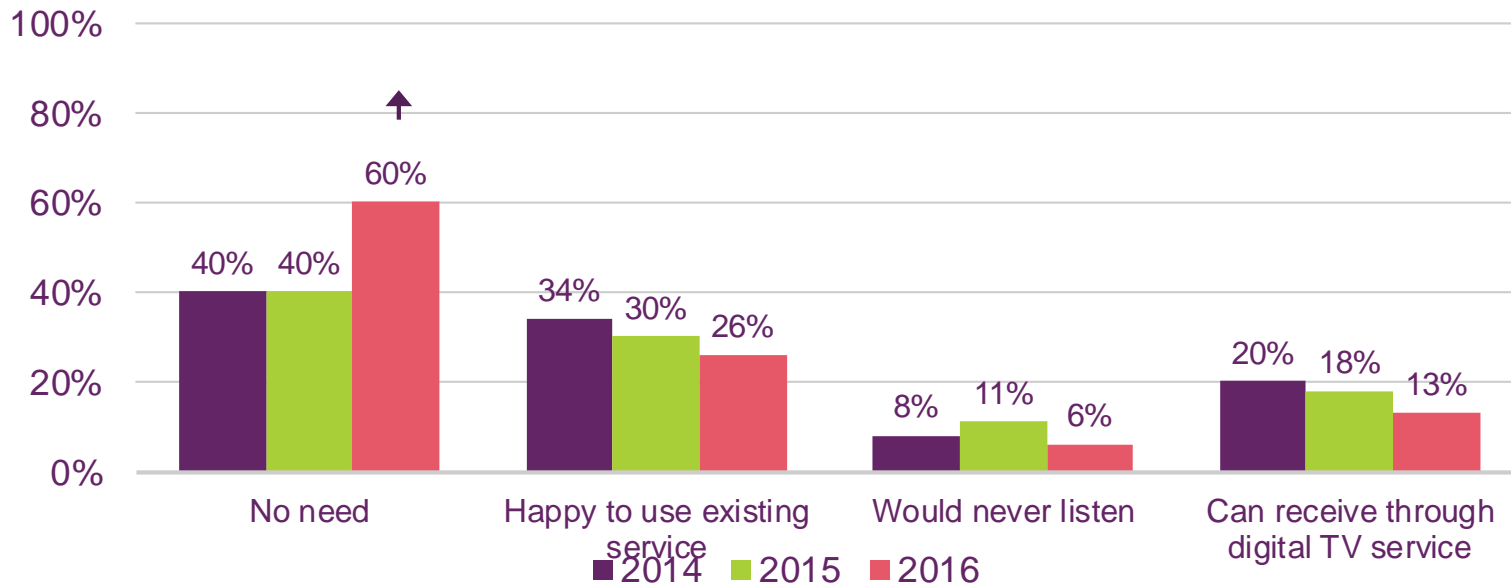
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?

## Reasons why unlikely to purchase DAB in next year

Percentage of respondents



Source: Ofcom Technology Tracker, Half 1 2016

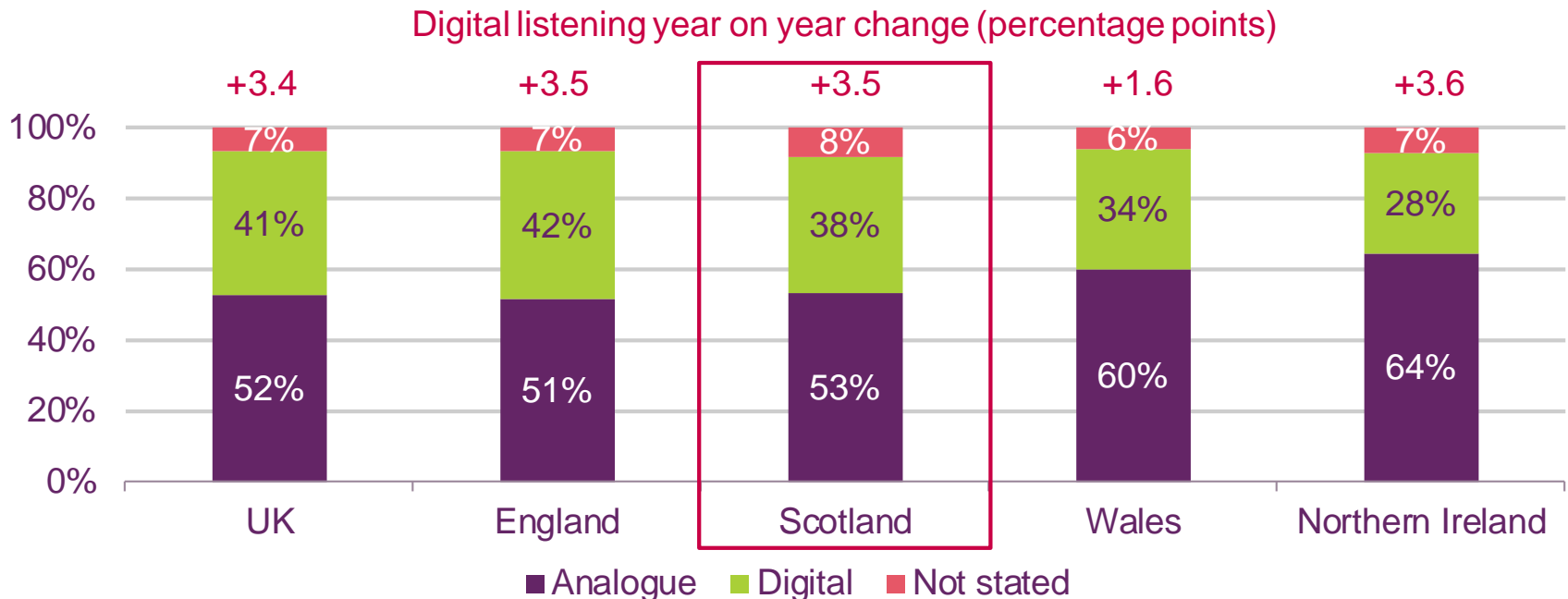
Base: All adults aged 16+ who listen to radio and are unlikely to get DAB radio in the next 12 months (Scotland 2014 = 137; Scotland 2015 = 148; Scotland 2016 = 174)

Responses shown for spontaneous mentions by 5% or more at a UK level

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland 2015 and 2016.

QJ14: Why are you unlikely to get digital radio in the next 12 months?

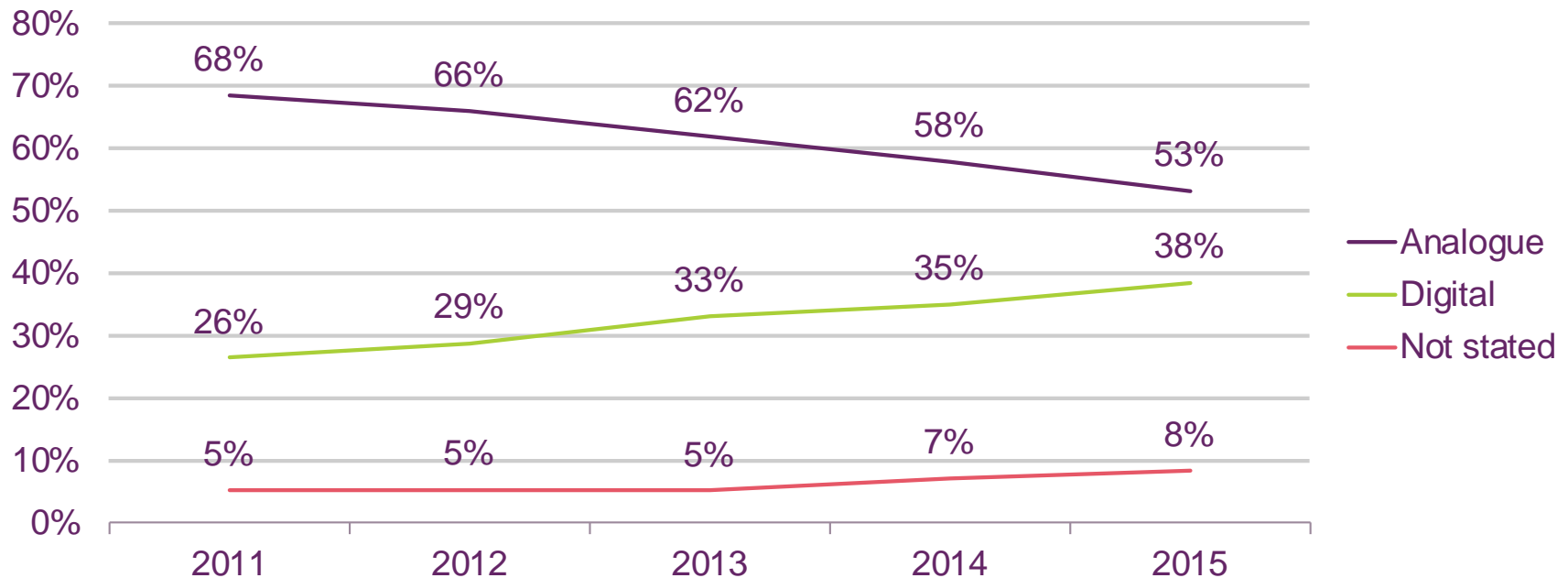
## Share of listening hours via digital and analogue platforms: 2015



Source: RAJAR, All adults (15+), year ended Q4 2015

## Share of listening hours via digital and analogue platforms, Scotland: 2011-2015

Share of total listening hours

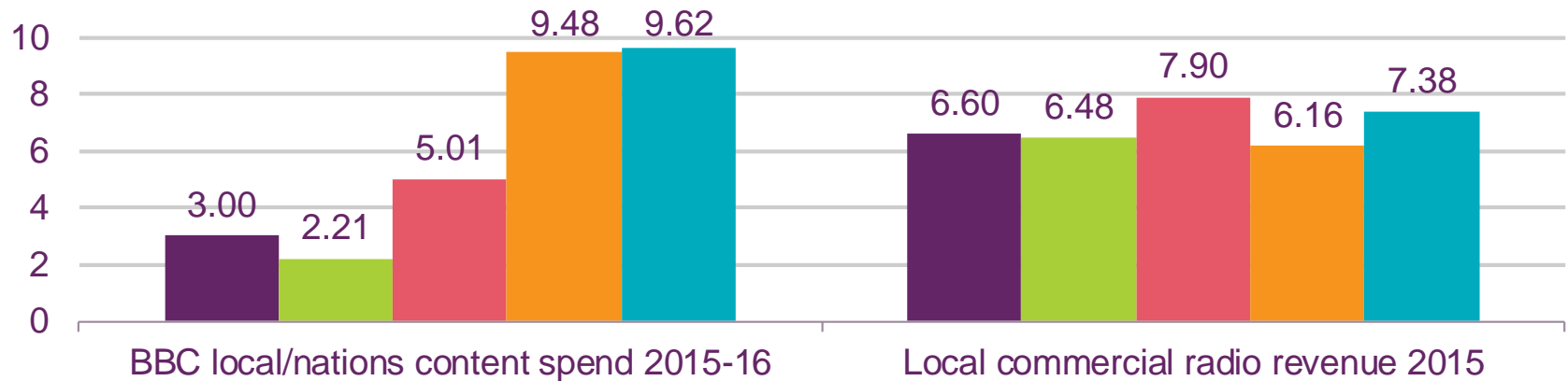


Source: RAJAR, all adults, calendar years 2011-2015



## Local/nations' radio spend and revenue per head of population

Revenue / spend per head (£)



Annual change (£):

+0.13 +0.08 +0.26 +0.78 +0.22      +0.15 +0.10 -0.12 +1.32 +0.25

■ UK nations average   ■ England   ■ Scotland   ■ Wales   ■ Northern Ireland

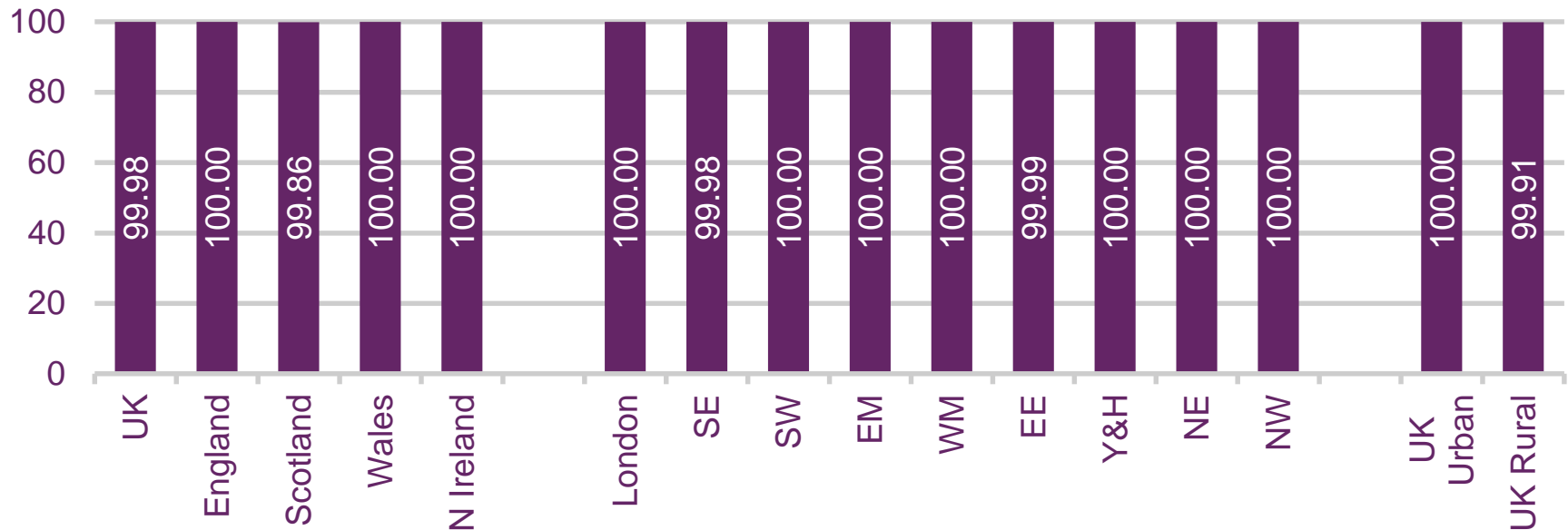
Source: Broadcasters

# 4. Telecoms and networks

# Availability of fixed broadband services

# Proportion of premises connected to an ADSL-enabled BT exchange

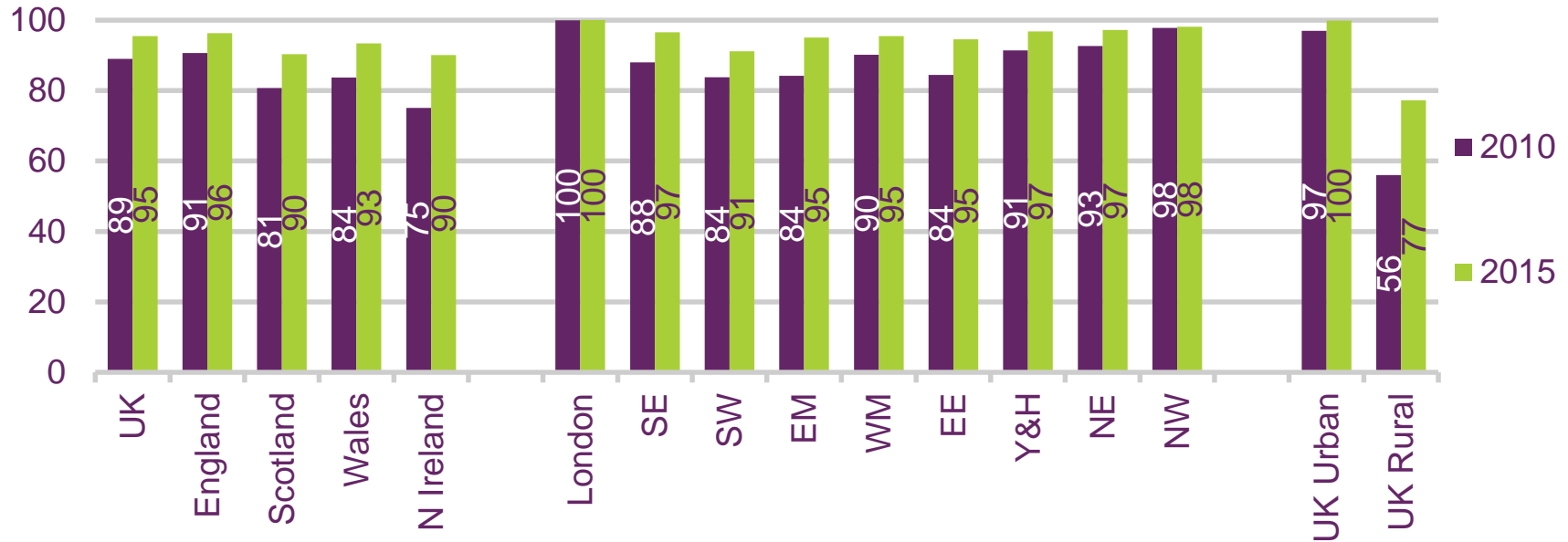
Proportion of premises (per cent)



Source: Ofcom / BT, December 2015 data

# Proportion of premises in connected to an unbundled local exchange

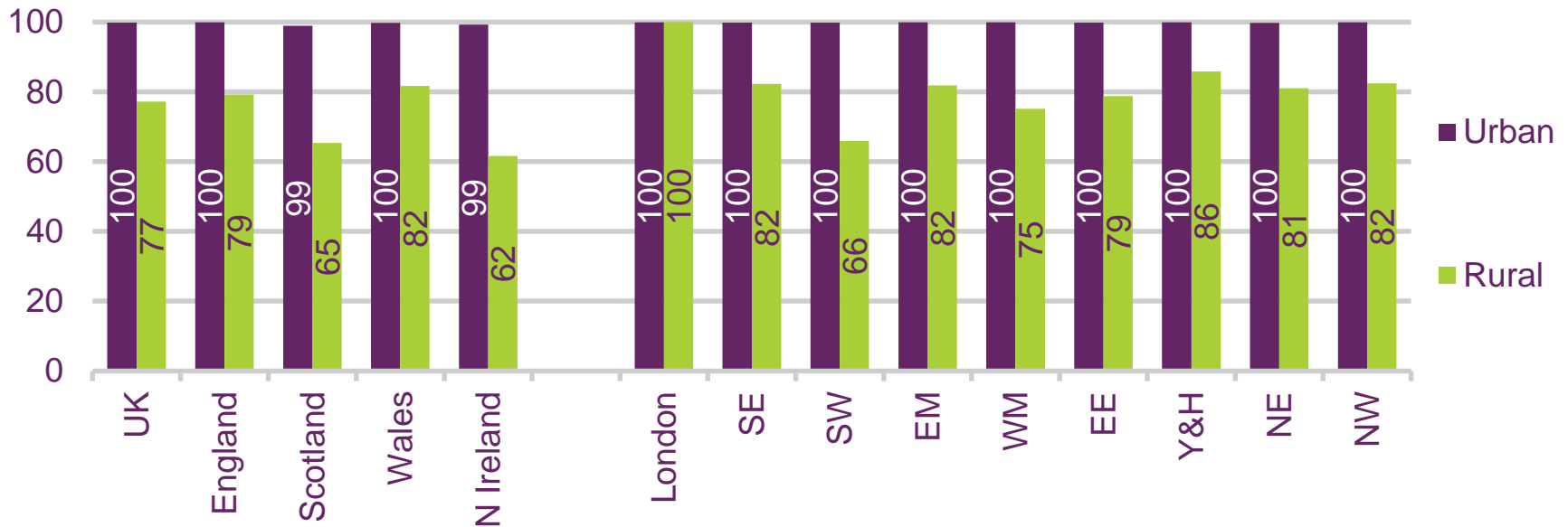
Proportion of premises (per cent)



Source: Ofcom / BT, data as at December of each year

# Proportion of premises in urban and rural areas connected to an unbundled exchange

Proportion of premises (per cent)

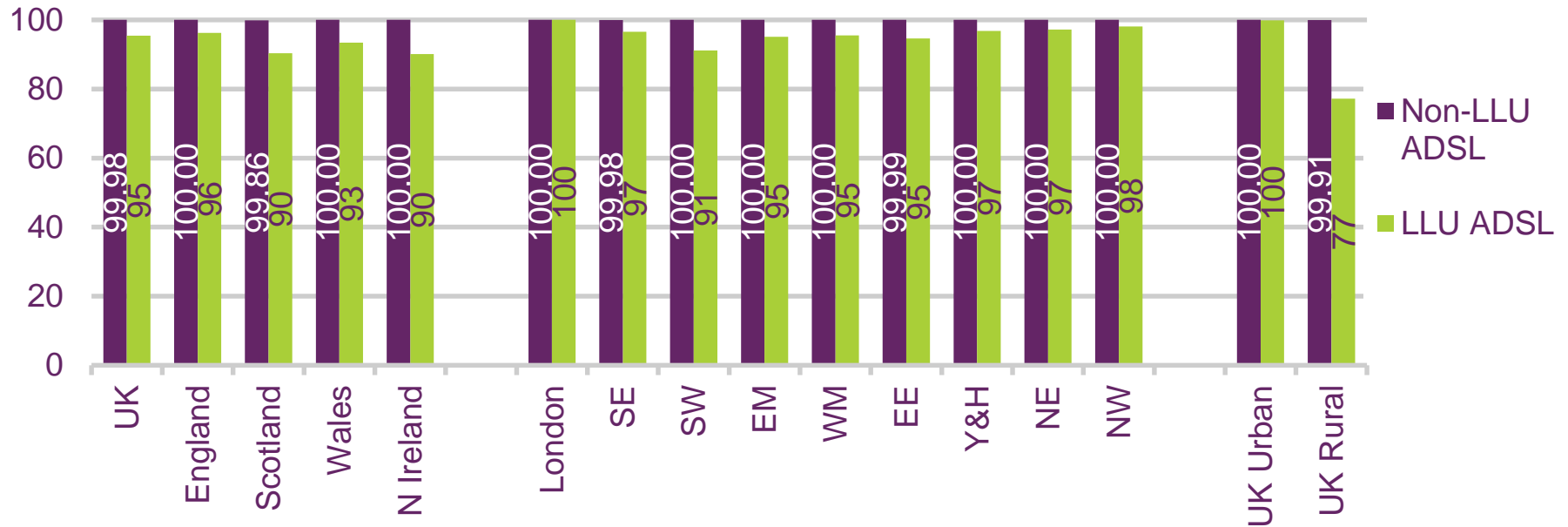


Source: Ofcom / BT, December 2015 data



# Proportion of premises connected to ADSL-enabled and LLU-enabled exchanges

Proportion of premises (per cent)



Source: Ofcom / BT, December 2015 data

## Proportion of premises able to receive broadband services with over 10Mbit/s speeds

Proportion of premises (per cent)



Source: Ofcom / operators, June 2016 data

Note: UK urban and rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications.

## Proportion of premises able to receive superfast broadband services

Proportion of premises (per cent)



Source: Ofcom / operators, June 2016 data

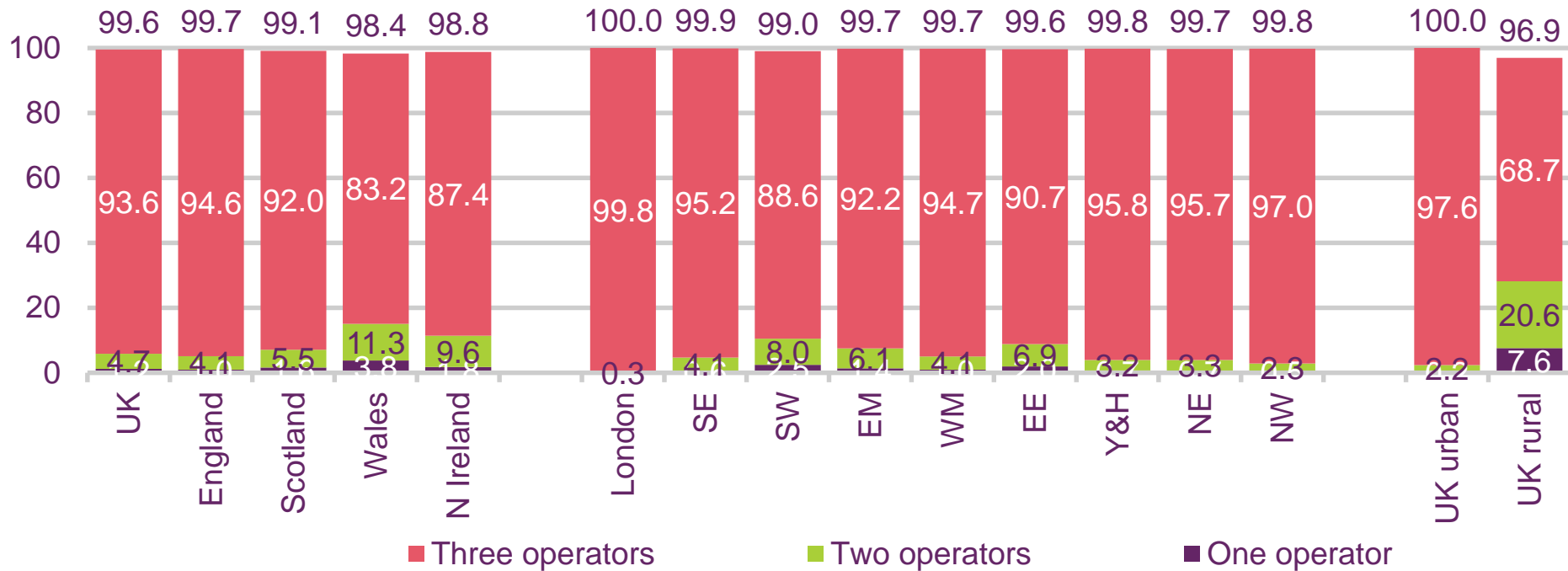
Note: UK urban and rural figures are not comparable to those published in the 2015 report due to a change in the urban/rural classifications.

# Mobile coverage

# Figure 4.2

## Outdoor 2G premises mobile coverage, by number of operators

Proportion of premises (per cent)

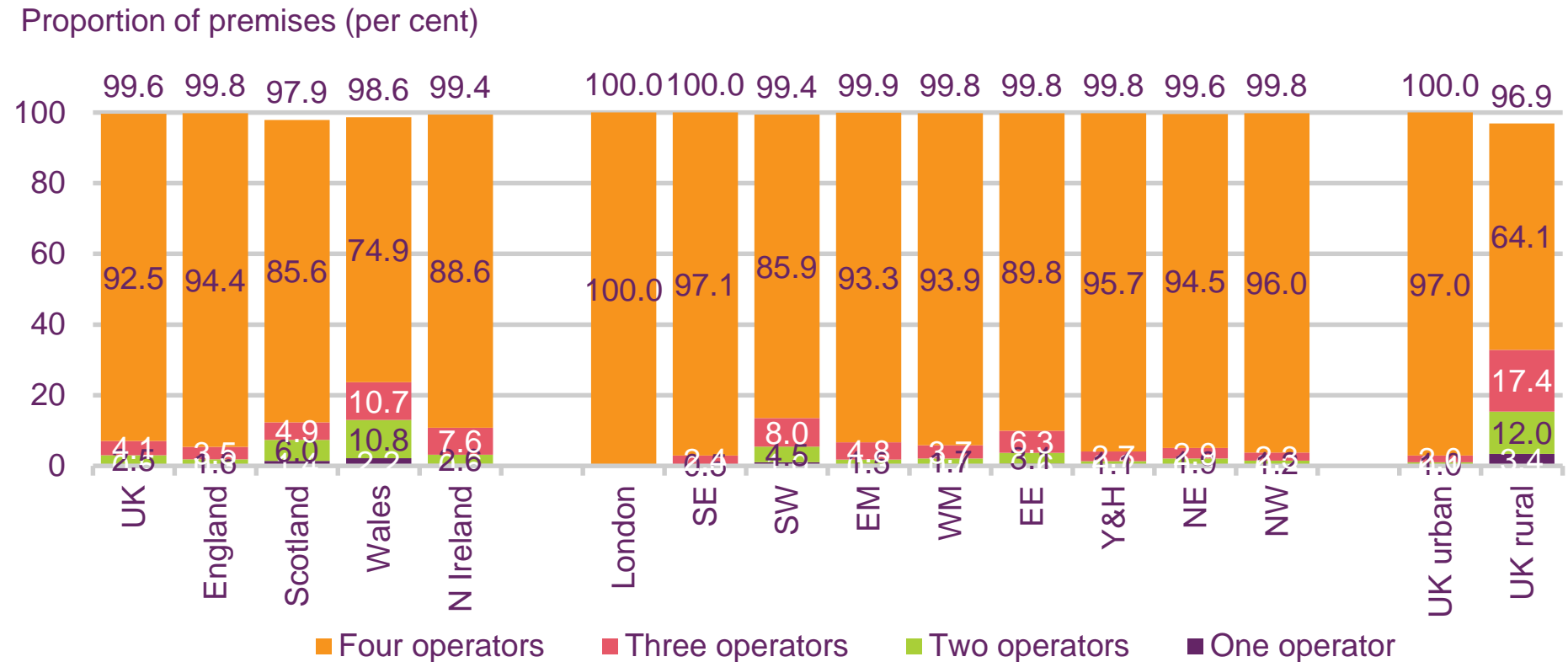


Source: Ofcom / operators, May 2016 data

Note: Coverage is based on 100m<sup>2</sup> pixels covering the UK

# Figure 4.3

## Outdoor 3G premises mobile coverage, by number of operators



Source: Ofcom / operators, May 2016 data

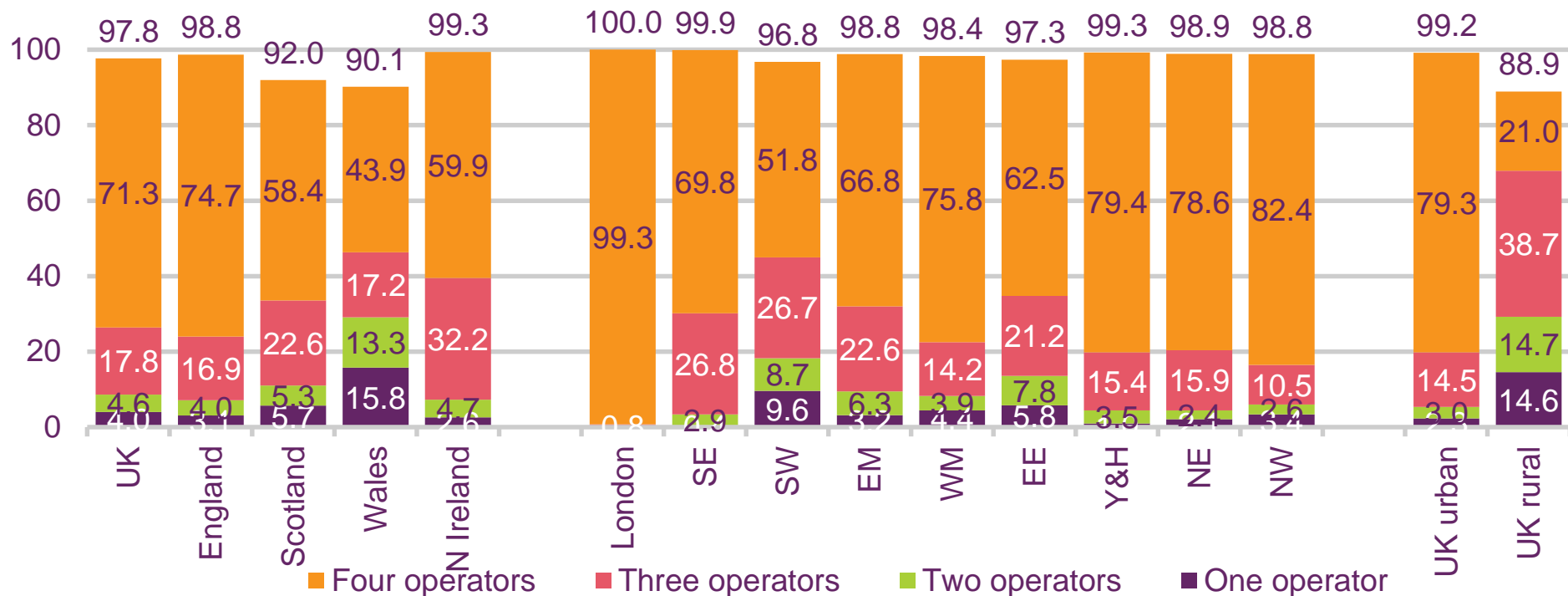
Note: Coverage is based on 100m<sup>2</sup> pixels covering the UK



# Figure 4.4

## Outdoor 4G premises mobile coverage, by number of operators

Proportion of premises (per cent)



Source: Ofcom / operators, May 2016 data

Note: Coverage is based on 100m<sup>2</sup> pixels covering the UK

# Service-take-up

## Take-up of communications services, 2016

		UK	Scotland	England	Wales	N Ireland	Scotland urban	Scotland rural
<b>Individual</b>								
<b>Voice telephony</b>	Fixed Line	<b>86%</b>	86%	86%	85%	86%	87%	84%
	Mobile phone	<b>93%</b>	91%	94%	91%	92%	91%	91%
	Smartphone	<b>71%</b>	70%	71%	65%	72%	72% ↑	63%
<b>Internet</b>	Computer (any type)	<b>84%</b>	79% ↓	85%	85%	80%	80%	74%
	Tablet computer	<b>59%</b>	56%	59%	67%	60%	56%	54%
	Total Internet <sub>1</sub>	<b>86%</b>	84%	87%	84%	83%	86% ↑	78%
	Broadband (fixed and mobile) <sub>2</sub>	<b>81%</b>	79%	81%	79%	78%	81% ↑	70%
	Fixed Broadband	<b>79%</b>	78%	79%	77%	77%	80% ↑	69%
	Mobile Broadband (via dongle/SIM) <sub>3</sub>	<b>4%</b>	3%	5%	4%	3%	3%	3%
	Web access on mobile phone <sub>4</sub>	<b>66%</b>	63%	66%	61%	69%	64%	59%

Source: Ofcom Technology Tracker, Half 1 2016

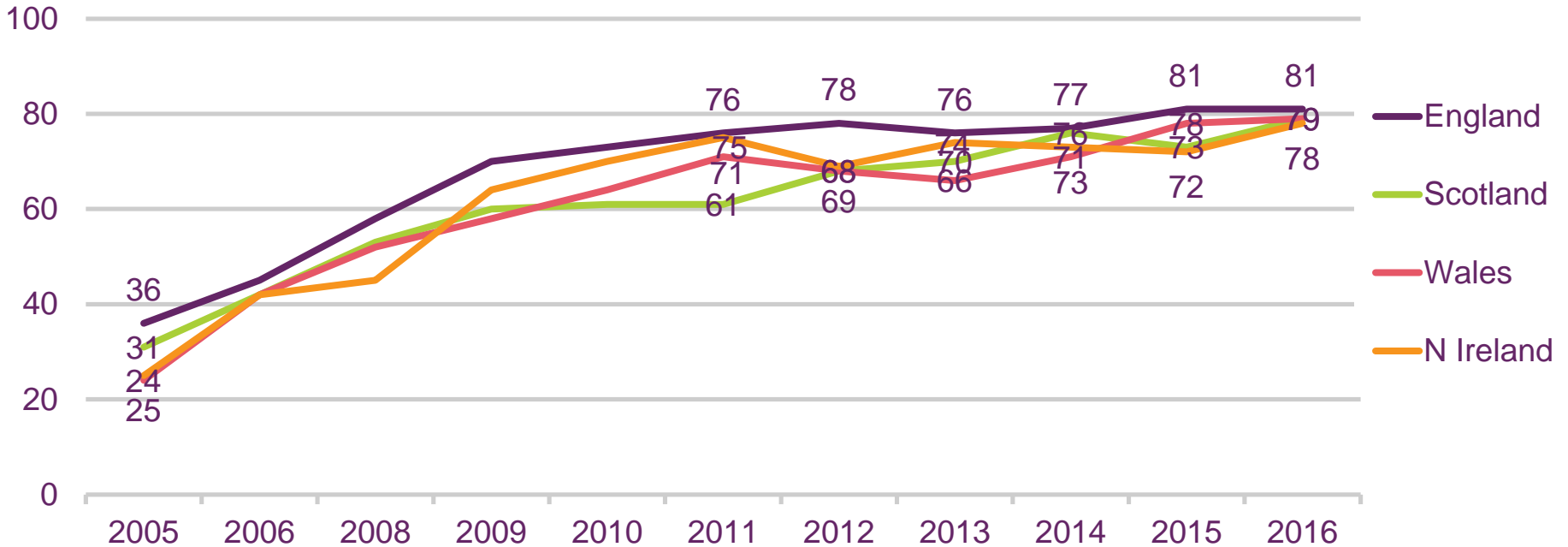
Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 and between Scotland urban and rural in 2016.

QC1: Is there a landline phone in your home that can be used to make and receive calls?/ QD2: Do you personally use a mobile phone?/ QD4: Do you personally use a smartphone?/ QE1: Does your household have a PC or laptop computer?/ QE2: Do you or does anyone in your household have access to the Internet/ Worldwide Web at home?/ QES: Which of these methods does your household use to connect to the Internet at home?/ QD23A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

# Broadband take-up

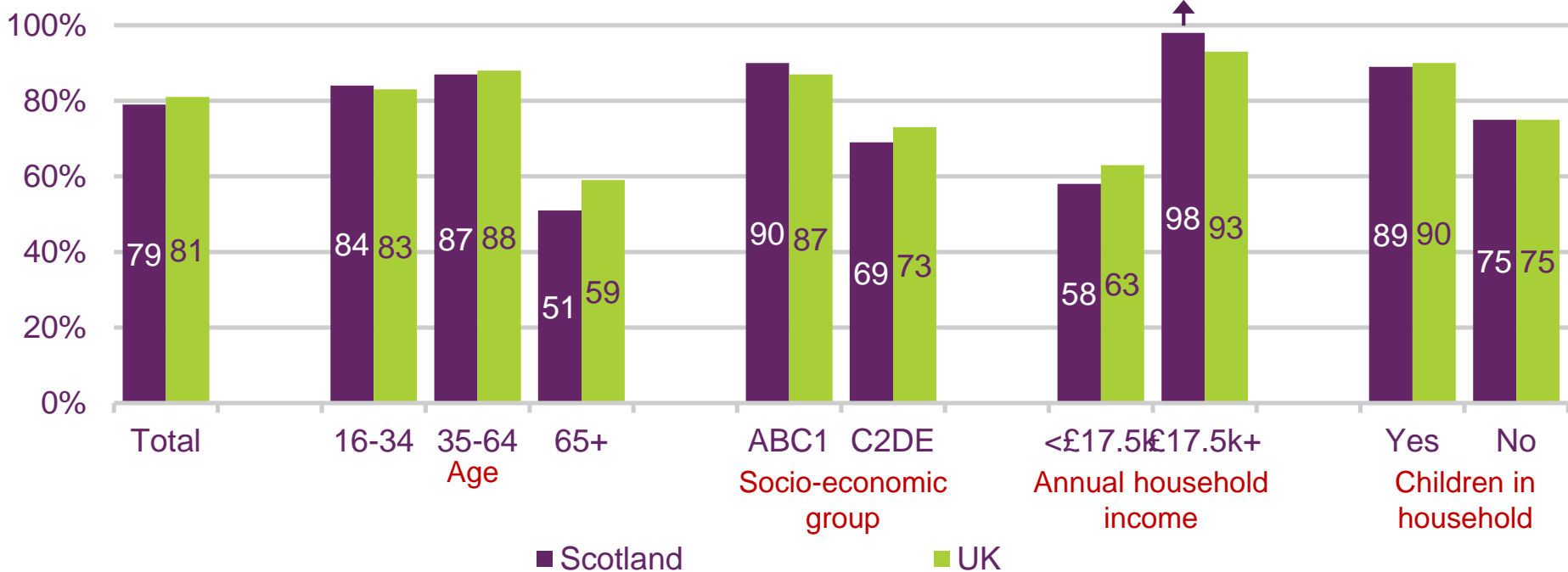
Take up (% of homes)



Source: Ofcom Technology Tracker, Half 1 2016  
 Base: All adults aged 16+ (2239 England, 502 Scotland, 489 Wales, 507 Northern Ireland)  
 QE9: Which of these methods does your household use to connect to the internet at home?

# Consumer broadband take-up in Scotland, by demographic

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

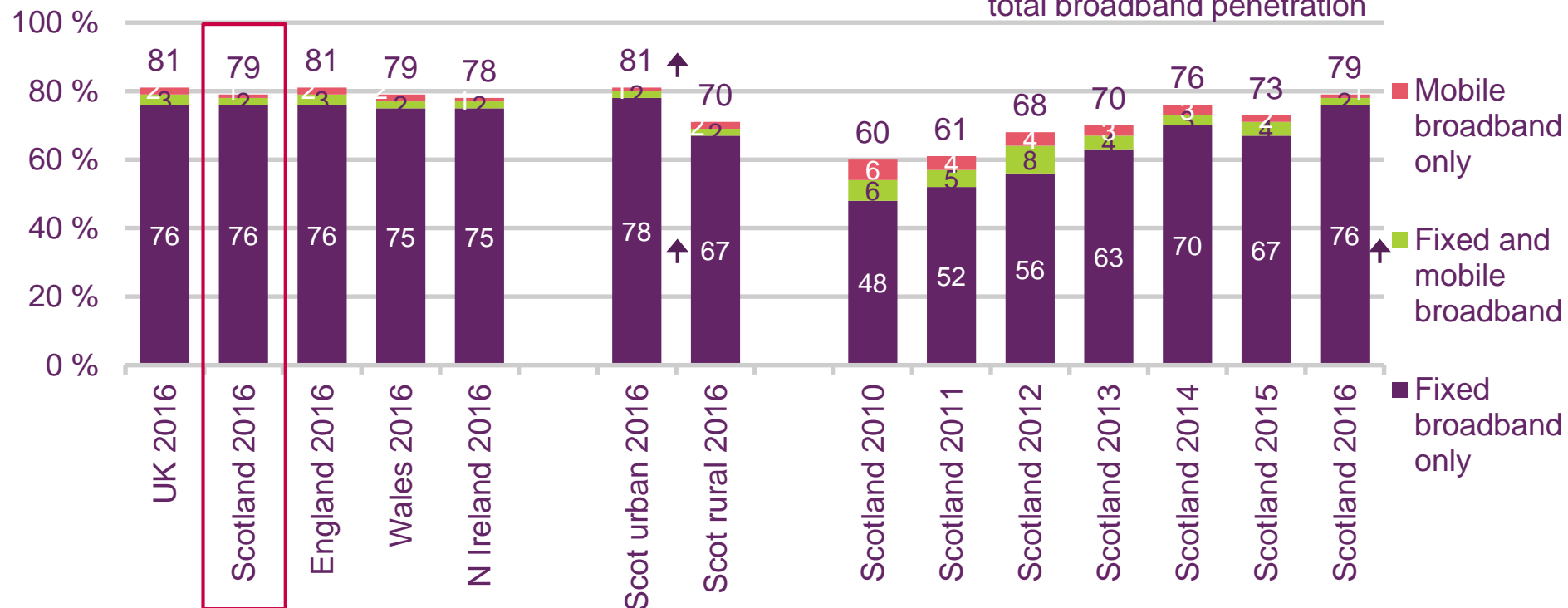
Base: All adults aged 16+ (n =502 Scotland, 152 16-34s, 225 35-64s, 125 65+, 239 ABC1, 263 C2DE, 168 <£17.5k income, 140 £17.5k+, 143 children in home, 359 no children in home)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 for each measure.

QE9: Which of these methods does your household use to connect to the internet at home?

# Consumer broadband, by connection type

Proportion of homes (%)



Source: Ofcom Technology Tracker, Half 1 2016

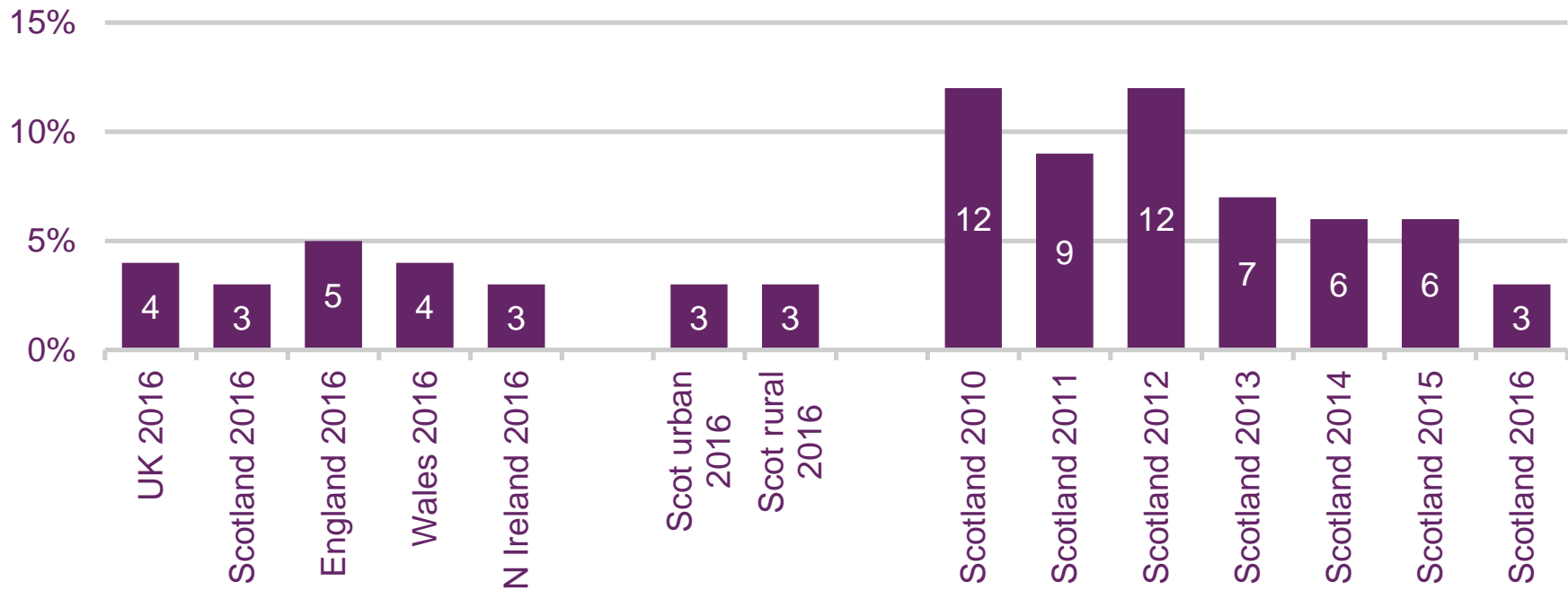
Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016.

QE9: Which of these methods does your household use to connect to the internet at home?



# Mobile broadband take-up



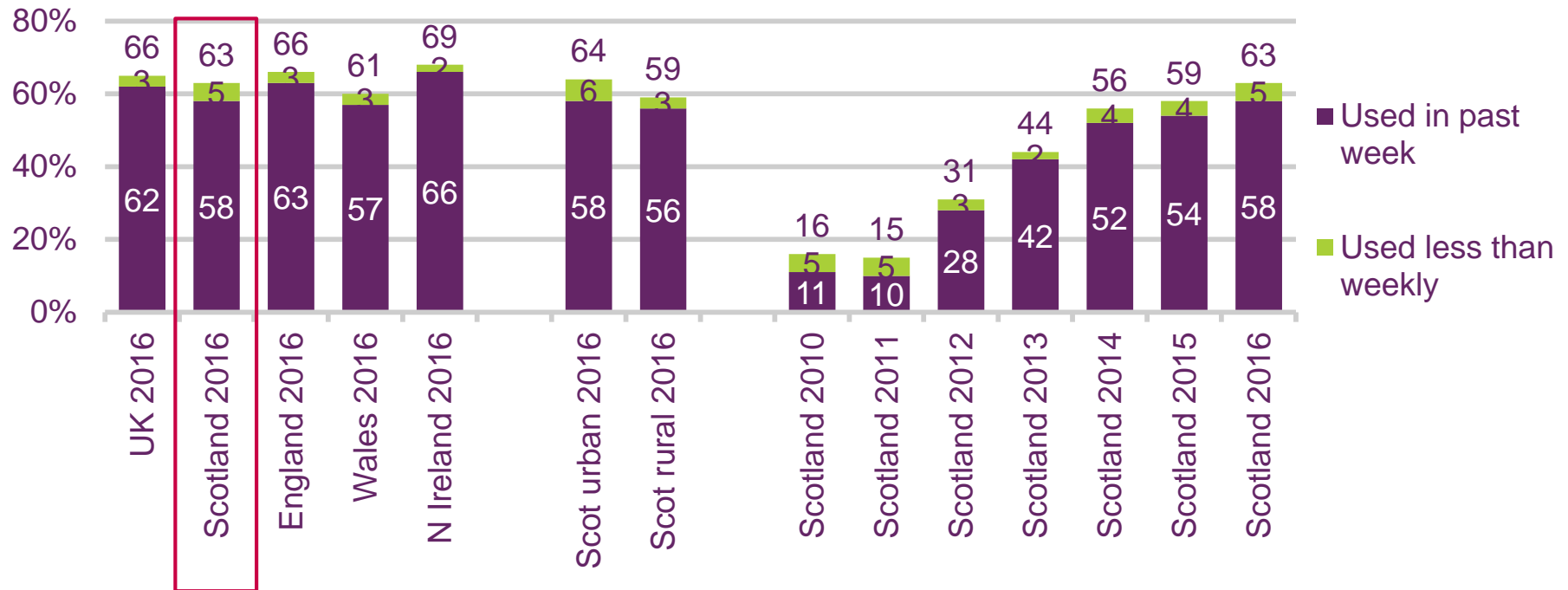
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QE9: Which of these methods does your household use to connect to the Internet at home?

# Proportion of adults who have used a mobile phone to access the internet

Proportion of respondents (%)



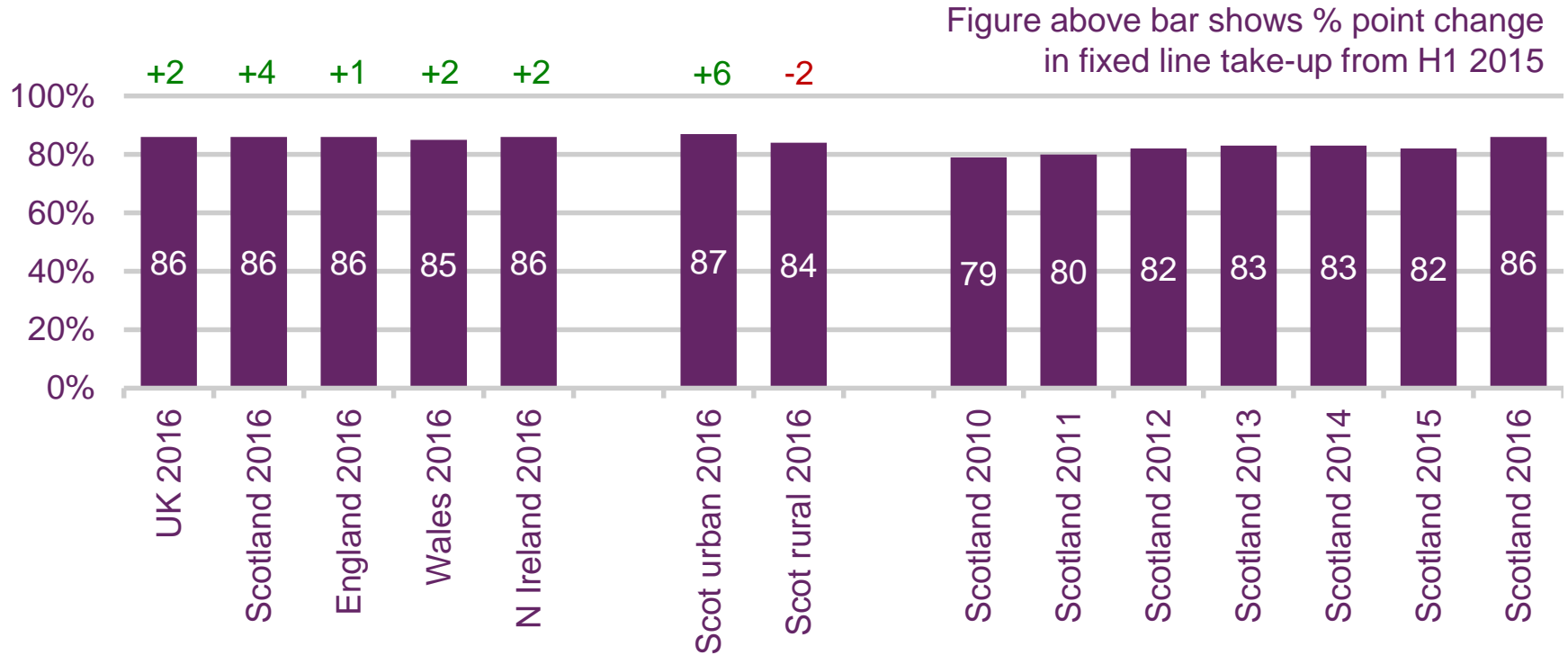
Source: Ofcom Technology Tracker, Half 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016.

QD28A: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ QD28B: And, which of these activities have you used your mobile for in the last week?

# Fixed line take-up

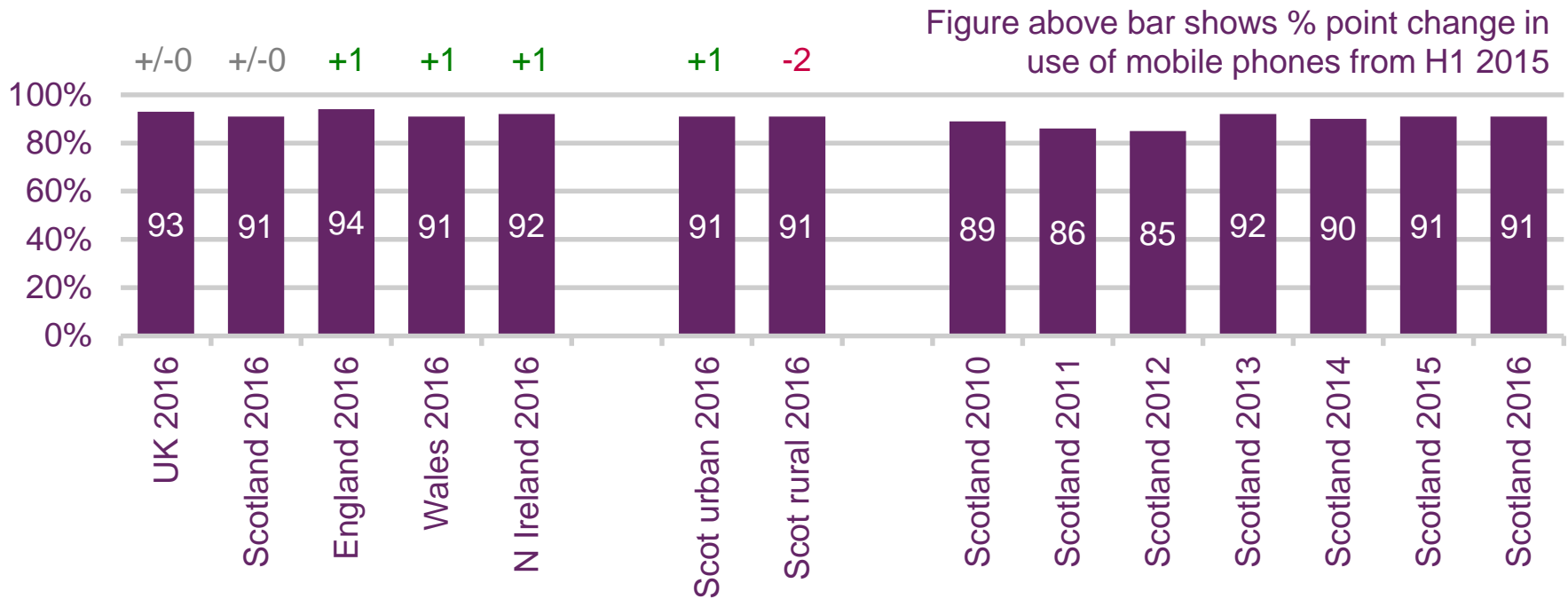


Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QC1: Is there a landline phone in your home that can be used to make and receive calls?

# Mobile take-up



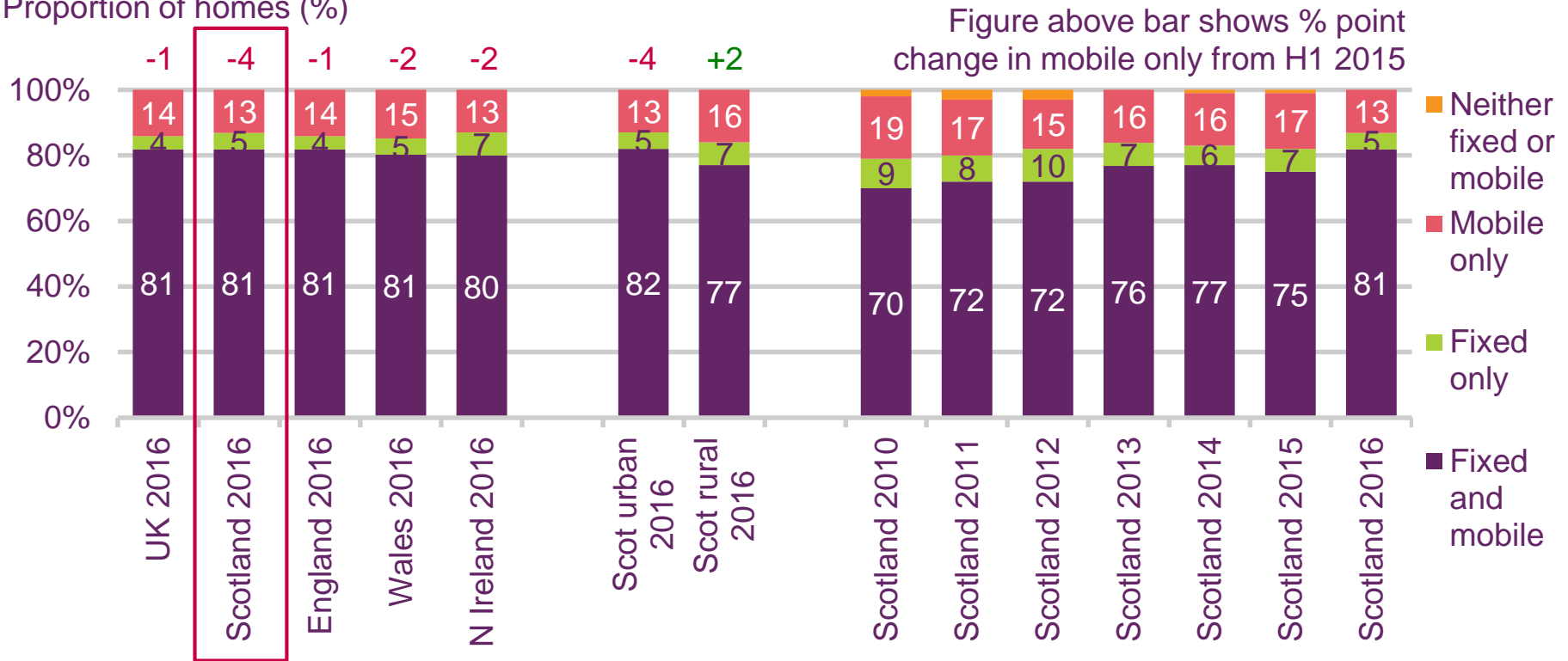
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QD2: Do you personally use a mobile phone?

# Cross-ownership of household telephony services

Proportion of homes (%)



Source: Ofcom Technology Tracker, Half 1 2016

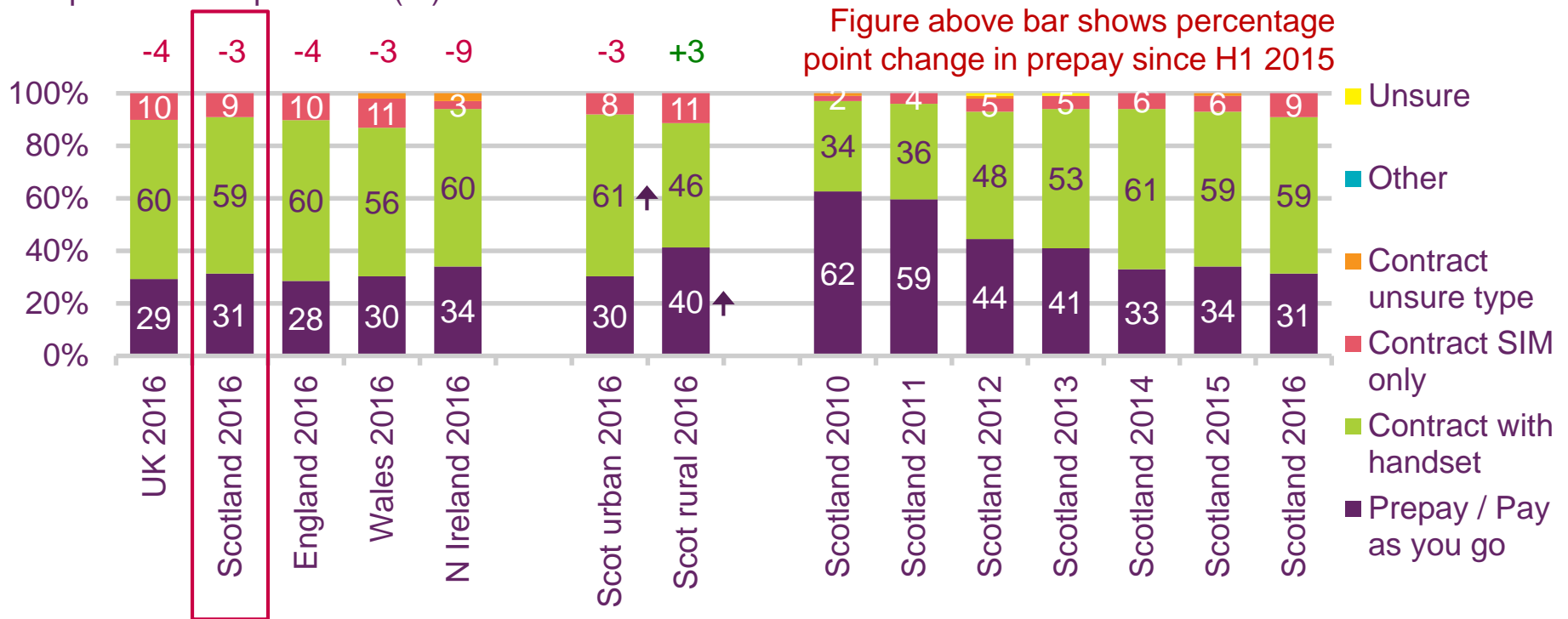
Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QC1: Is there a landline phone in your home that can be used to make and receive calls?/ QD1: How many mobile phones in total do you and members of your household use?

# Type of mobile subscription

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

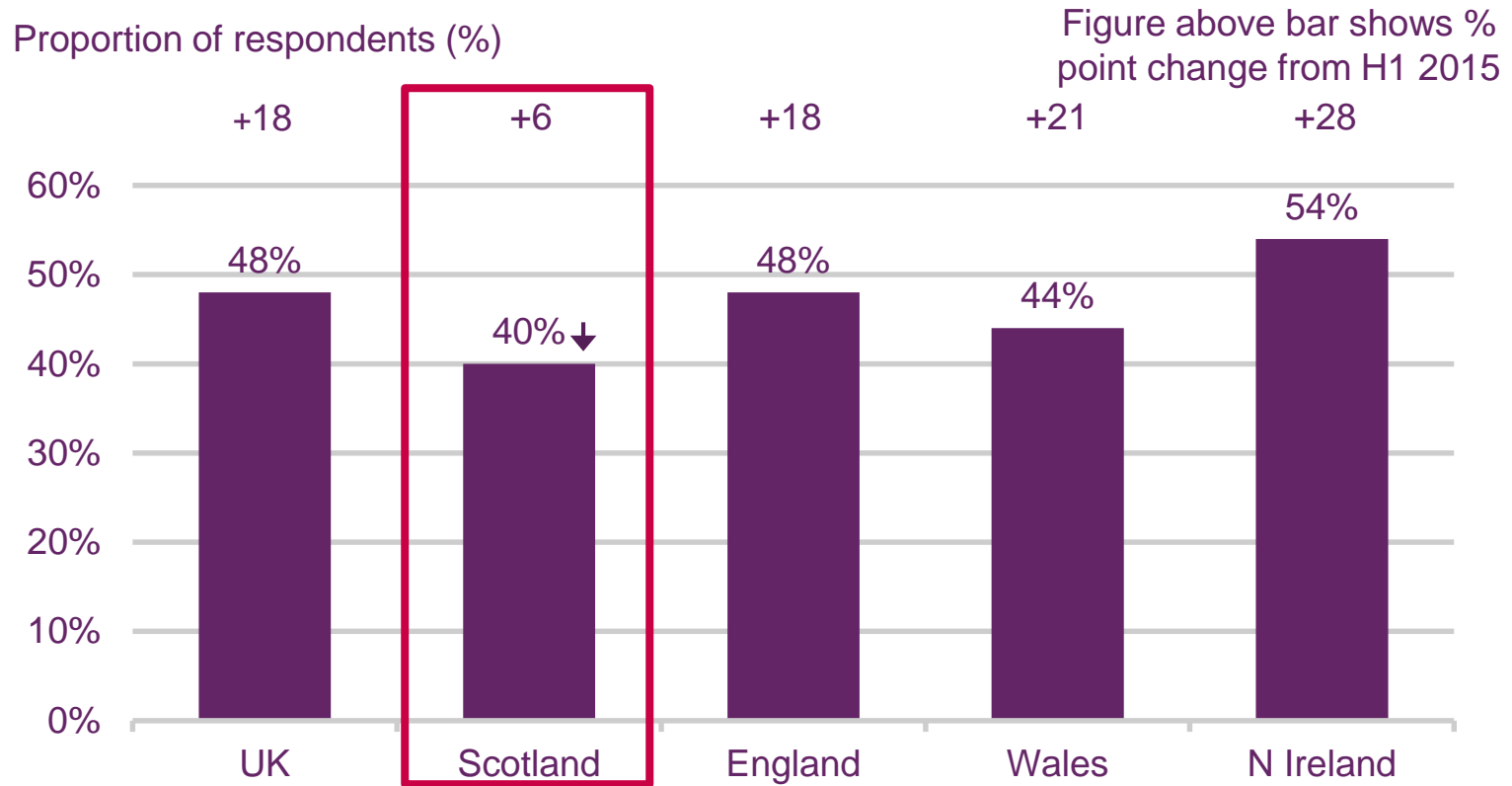
Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 451 Scotland, 2083 England, 445 Wales, 446 Northern Ireland, 226 Scotland urban, 225 Scotland rural, 1237 Scotland 2010, 425 Scotland 2011, 430 Scotland 2012, 464 Scotland 2013, 447 Scotland 2014, 450 Scotland 2015, 451 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QD11: Which of these best describes the mobile package you personally use most often?



# 4G take-up



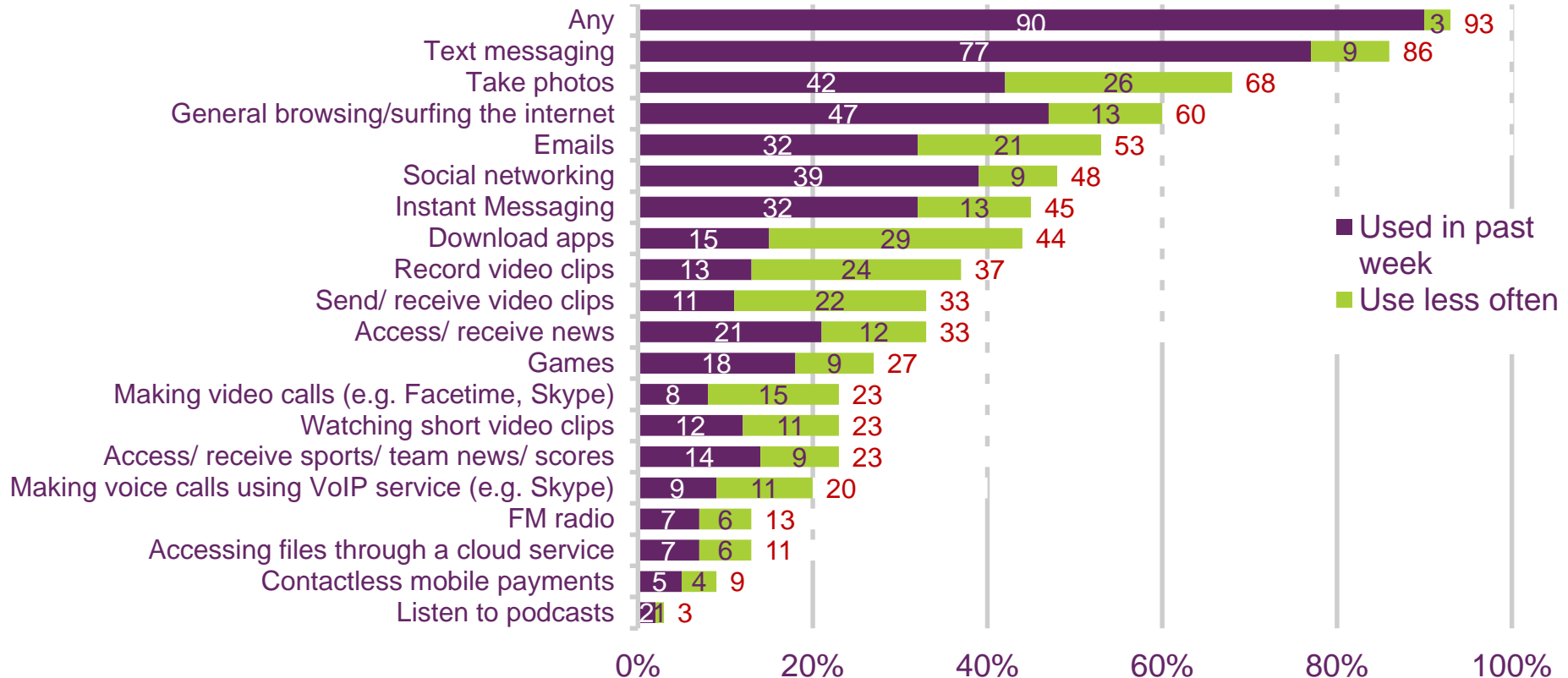
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016. A circle around the +/- figure above the chart indicates any significant difference between 2015 and 2016 for Scotland.

QD41. Do you have a 4G service? This is a service that enables faster mobile internet access

# Use of mobile applications

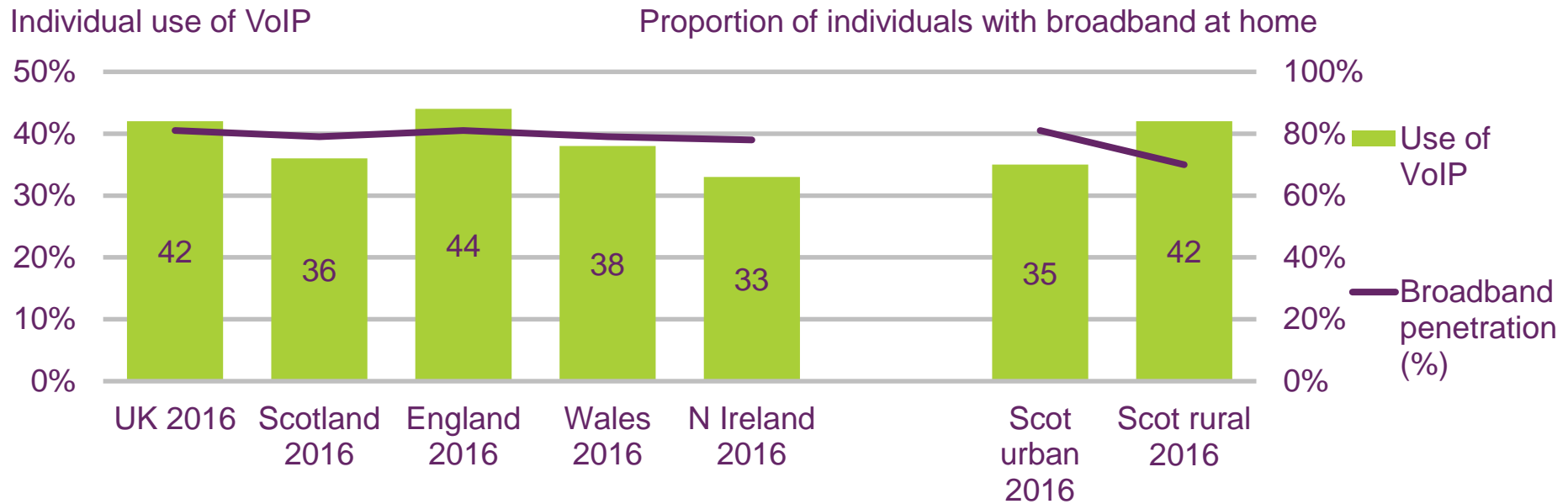


Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n= 451 Scotland 2016)

QD28A: Which, if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

# Individual use of Voice over IP



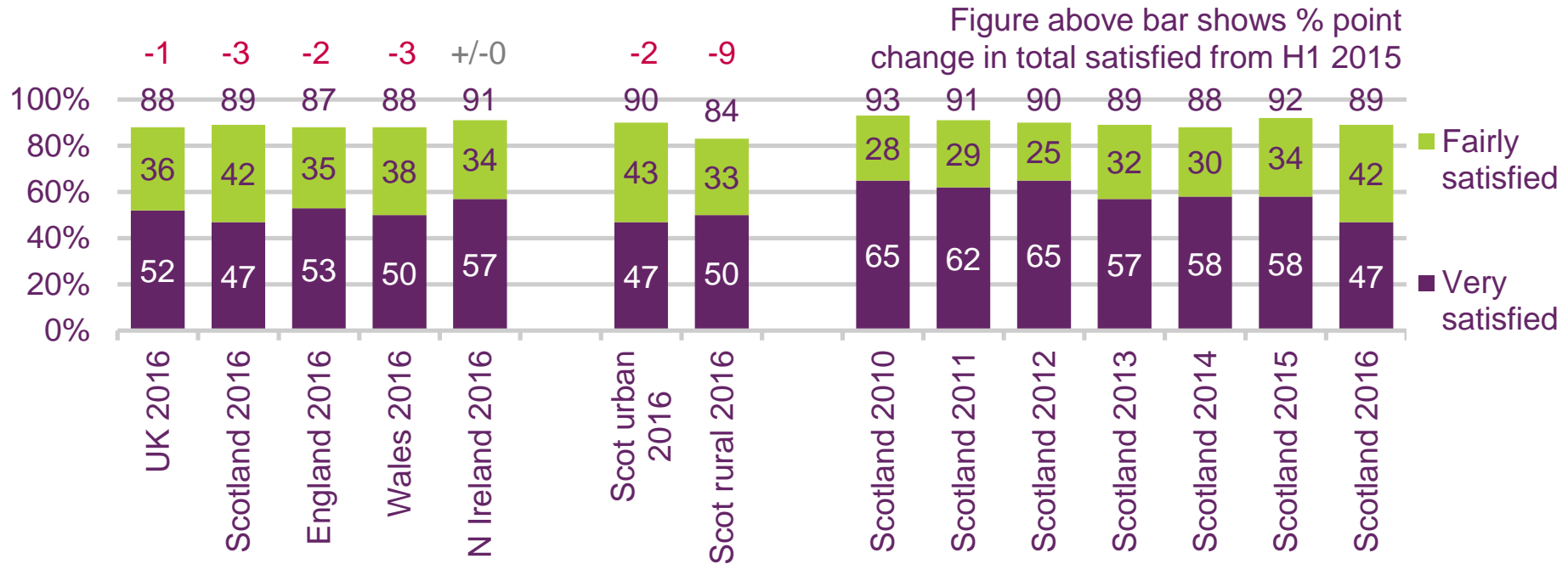
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE30: Have you or anyone in your household ever used one of these services to make voice calls using the internet? (Skype, Vonage, BT Communicator, BT Broadband voice/Home hub, Voipfone, Plusnet (Plustalk), Facebook, WhatsApp, Facetime, other) / QE5A: Which, if any, of these do you use the internet for? (Desktop, laptop, netbook, tablet, smartphone, standard landline, dedicated handset, TV, smartwatch, other)

# Satisfaction with telecoms services

# Overall satisfaction with fixed line services



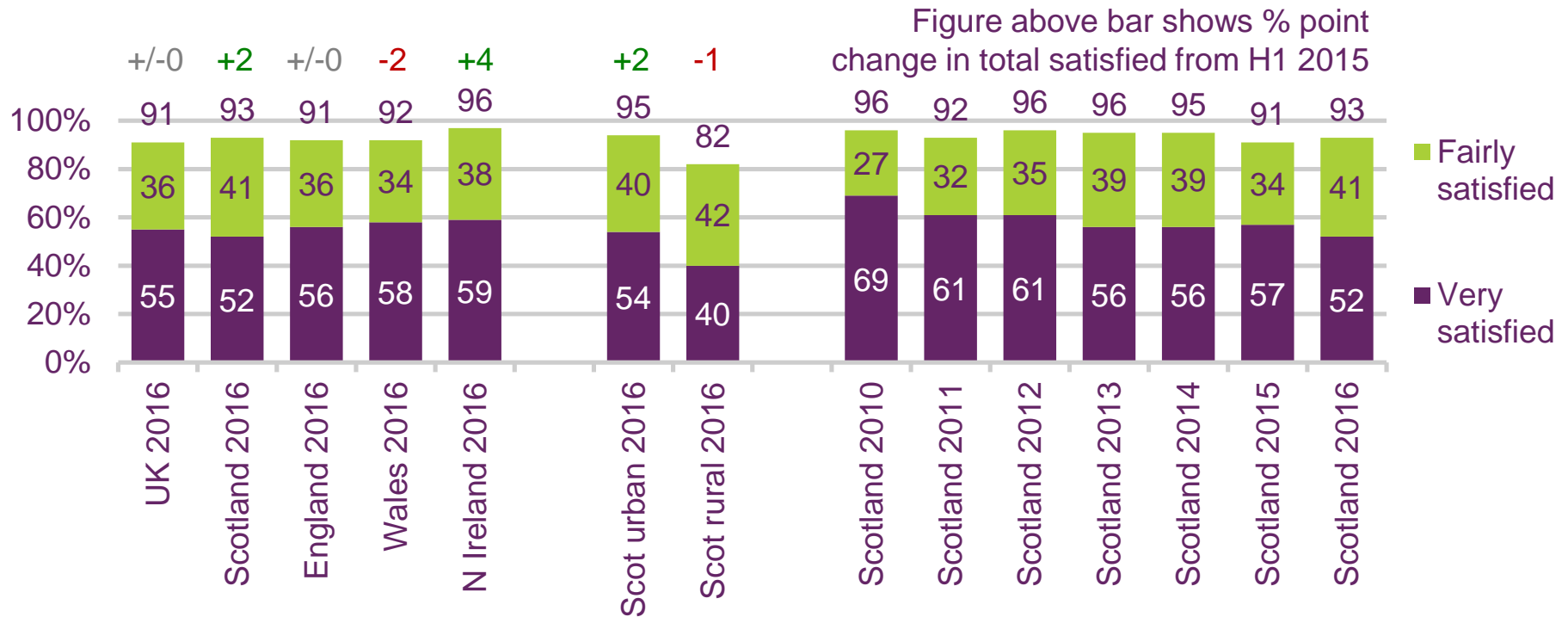
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a landline phone at home (n = 3151 UK, 415 Scotland, 1885 England, 411 Wales, 440 Northern Ireland, 211 Scotland urban, 204 Scotland rural, 1411 Scotland 2010, 400 Scotland 2011, 420 Scotland 2012, 425 Scotland 2013, 431 Scotland 2014, 403 Scotland 2015, 415 Scotland 2016)

QC13A: Thinking about your home phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed line service

# Overall satisfaction with mobile phone service



Source: Ofcom Technology Tracker, Half 1 2016

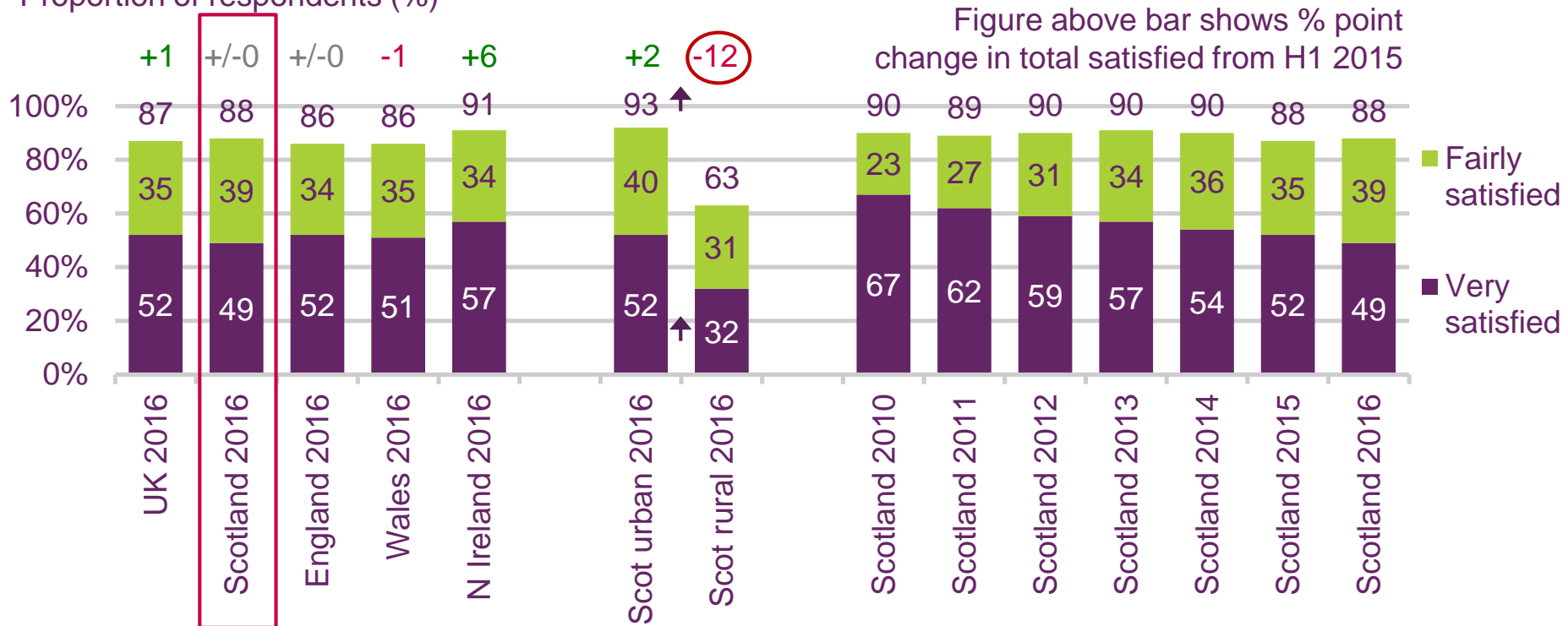
Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 451 Scotland, 2083 England, 445 Wales, 446 Northern Ireland, 226 Scotland urban, 225 Scotland rural, 1237 Scotland 2010, 425 Scotland 2011, 430 Scotland 2012, 464 Scotland 2013, 447 Scotland 2014, 450 Scotland 2015, 451 Scotland 2016)

QD21A: Thinking about your mobile phone service only, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall mobile service

# Satisfaction with reception of mobile service

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 451 Scotland, 2083 England, 445 Wales, 446 Northern Ireland, 226 Scotland urban, 225 Scotland rural, 1237 Scotland 2010, 425 Scotland 2011, 430 Scotland 2012, 464 Scotland 2013, 447 Scotland 2014, 450 Scotland 2015, 451 Scotland 2016)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their mobile reception

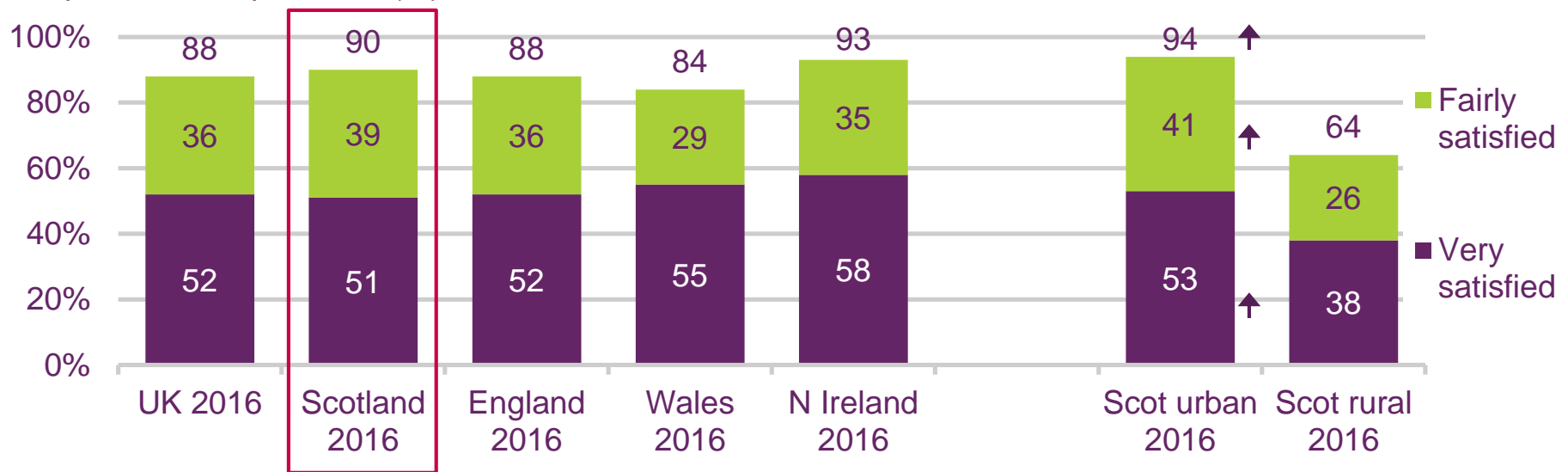
Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QD21J: Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?



# Satisfaction with ability to connect to the internet via 3G or 4G network

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

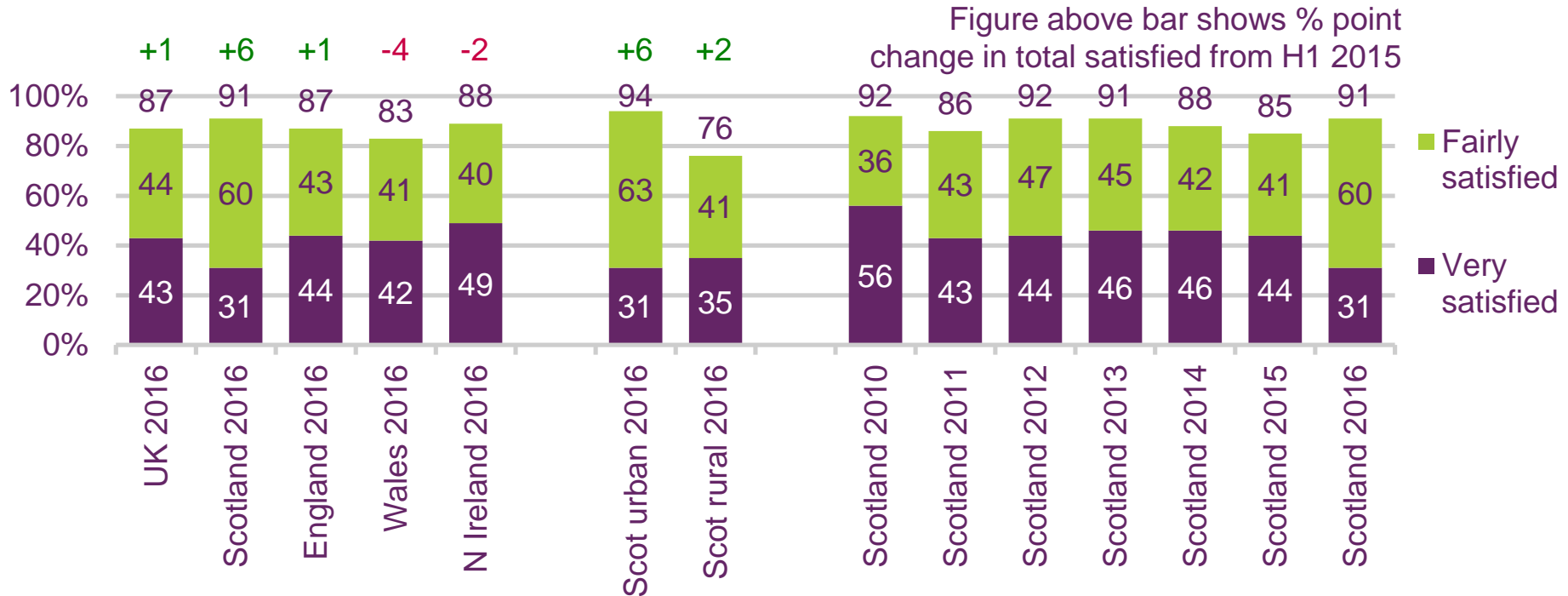
Base: Adults aged 16+ who personally use a smartphone (n = 2487 UK, 319 Scotland, 1532 England, 291 Wales, 345 Northern Ireland, 170 Scotland urban, 149 Scotland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 and between Scotland urban and rural in 2016.

QD21K: Thinking about your mobile phone service only, how satisfied are you with (main supplier) for ability to connect to the internet using the mobile network (3G or 4G)?

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with the ability to connect to the internet using the mobile network

# Overall satisfaction with fixed broadband service



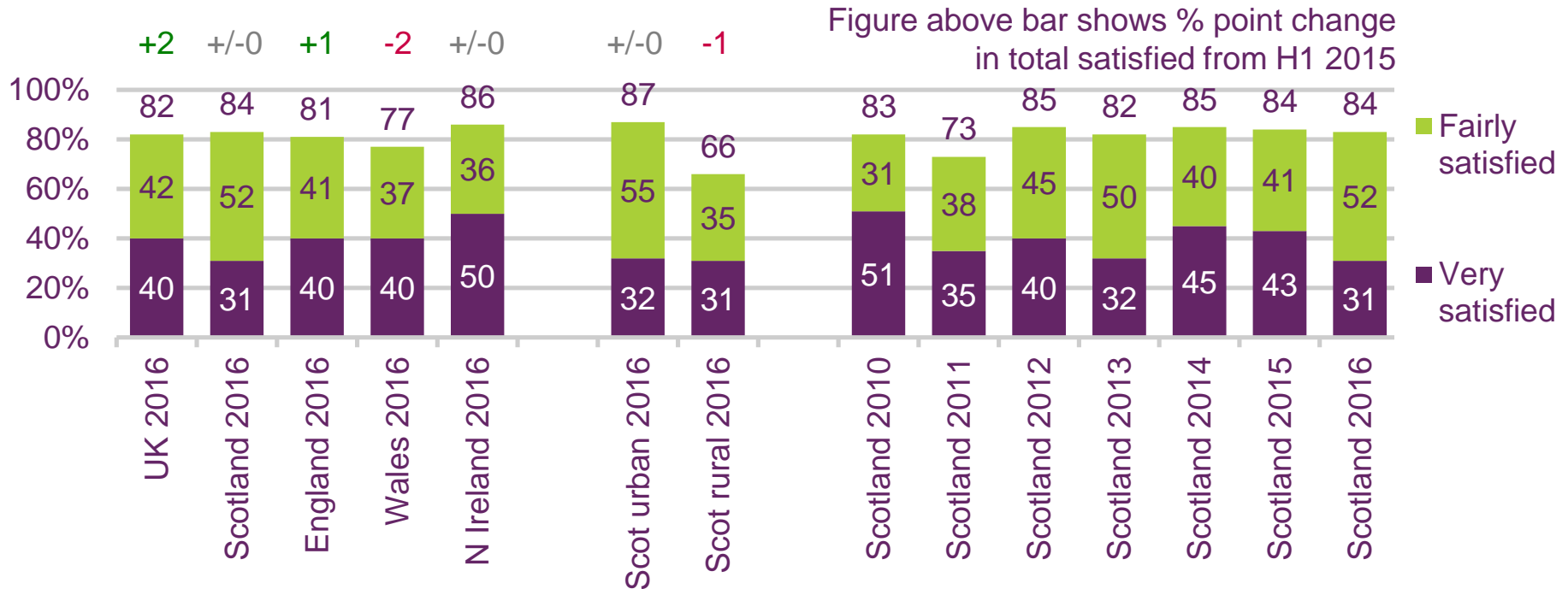
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2774 UK, 357 Scotland, 1701 England, 363 Wales, 353 Northern Ireland, 193 Scotland urban, 164 Scotland rural, 778 Scotland 2010, 294 Scotland 2011, 330 Scotland 2012, 341 Scotland 2013, 367 Scotland 2014, 345 Scotland 2015, 357 Scotland 2016)

QE8A: Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service provided by (main supplier)?

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their overall fixed broadband service

# Satisfaction with speed of fixed broadband connection



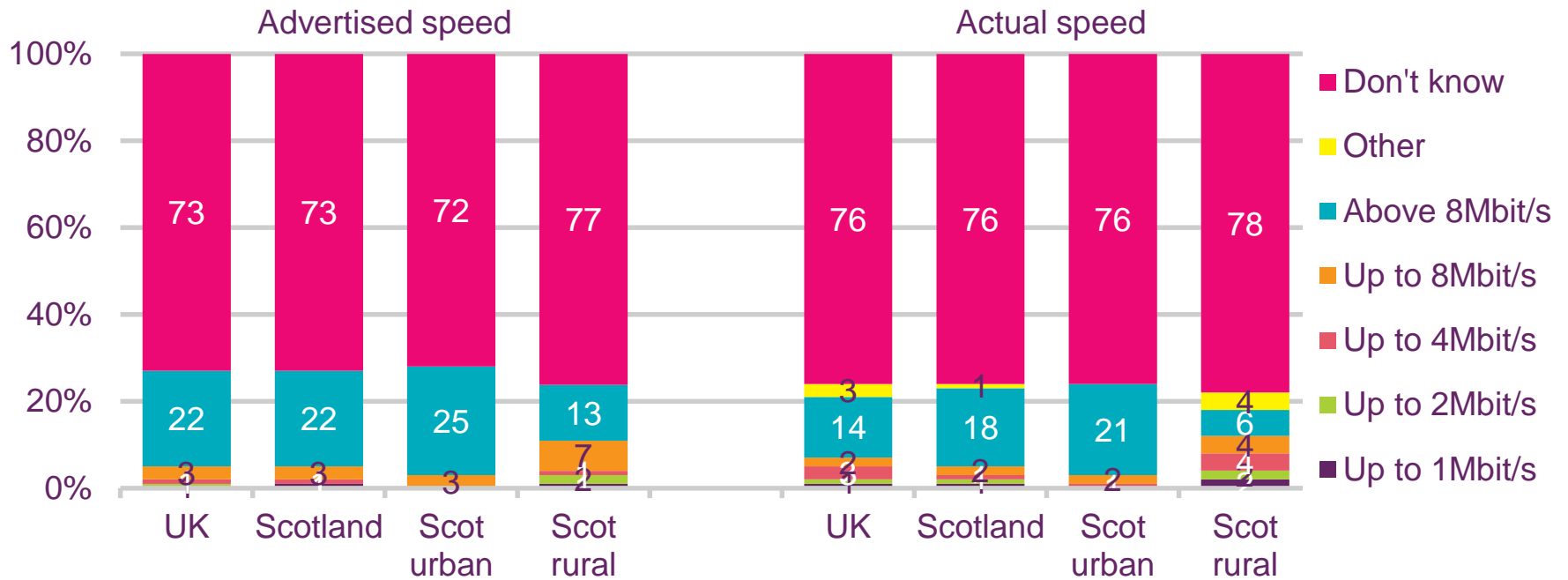
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2774 UK, 357 Scotland, 1701 England, 363 Wales, 353 Northern Ireland, 193 Scotland urban, 164 Scotland rural, 778 Scotland 2010, 294 Scotland 2011, 330 Scotland 2012, 341 Scotland 2013, 367 Scotland 2014, 345 Scotland 2015, 357 Scotland 2016)

QE8B: Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online

# Awareness of advertised and actual broadband speeds in Scotland



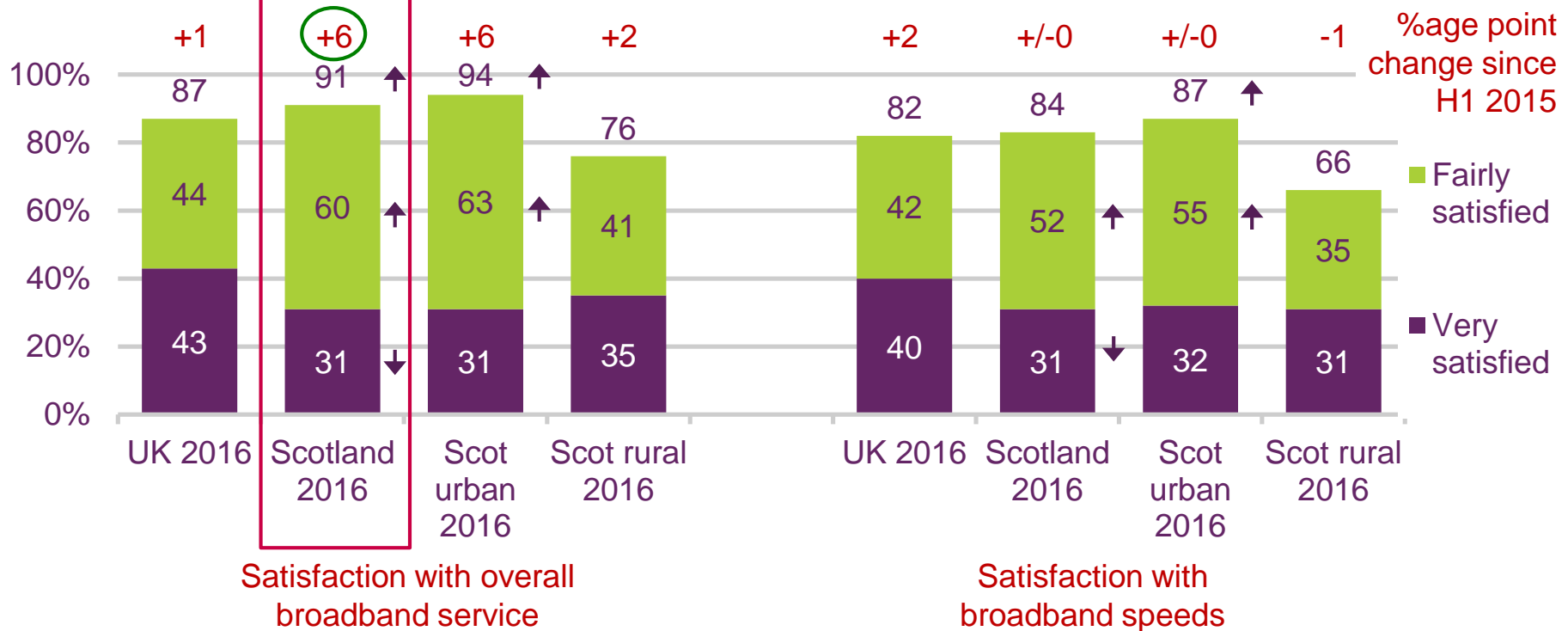
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with broadband connection at home (n = 2774 UK, 357 Scotland, 193 Scotland urban, 164 Scotland rural)

QENEW11: What was the advertised speed of your fixed broadband home internet connection when you took up your service?/ QE11A: What is the actual speed of your fixed broadband home internet connection?

# Satisfaction with overall service and speed of fixed broadband connection

Proportion of respondents (%)



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ with broadband connection at home (n = 2774 UK, 357 Scotland, 193 Scotland urban, 164 Scotland rural)

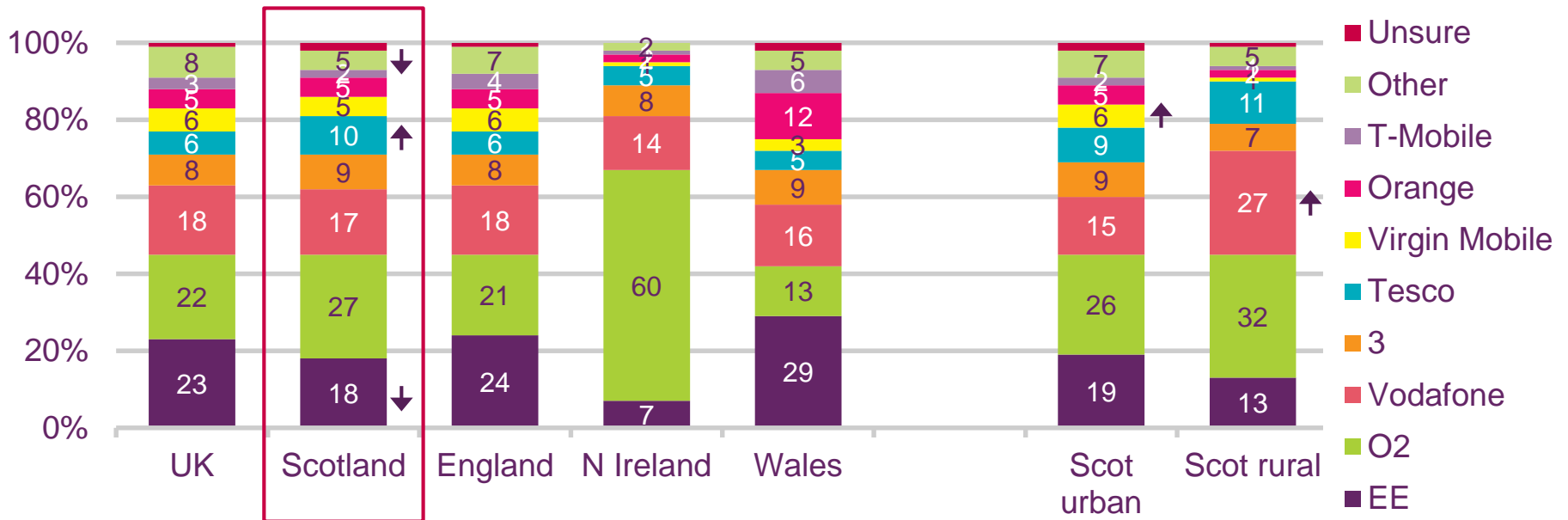
Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their speed of service while online

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 and between Scotland urban and rural in 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QE8A/B: Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the overall service/ for the speed of your service while online (not just the connection)?

# Mobile network provider used most often

Proportion of mobile users (%)



Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who personally use a mobile phone (n = 3425 UK, 451 Scotland, 2083 England, 445 Wales, 446 Northern Ireland, 226 Scotland urban, 225 Scotland rural)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 and between Scotland urban and rural in 2016.

QD10: Which mobile network do you use most often?

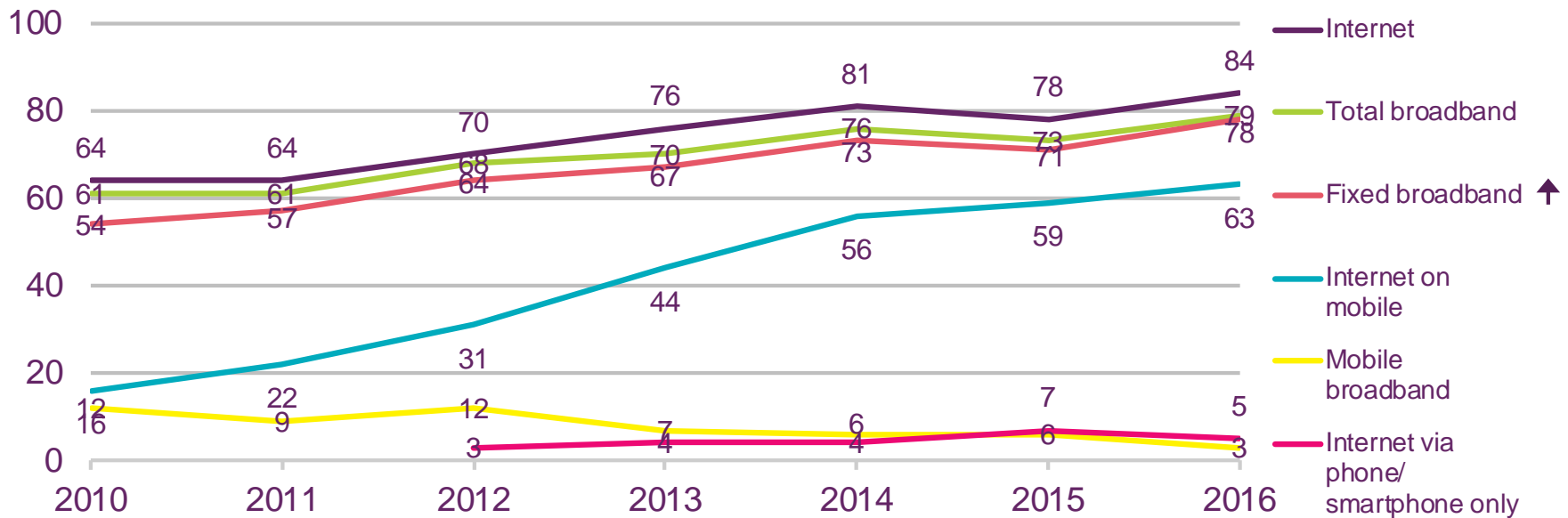


# 5. Internet and online content



# Internet take-up, Scotland: 2010 - 2016

Households (%)



Source: Ofcom Technology Tracker. Data from Q1 2010-2014, then H1 2015-2016

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland 2015 and 2016.

Base: All adults aged 16+ (n = 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Note 1: 'Internet' includes access to the internet at home (via any device, e.g. PC, mobile phone, tablet etc).

Note 2: 'Total broadband' includes the following methods to connect to the internet at home – fixed broadband (via phone line or cable service), mobile broadband (via a USB stick or dongle, or built in connectivity in a laptop/netbook/tablet with a SIM), tethering (via mobile phone internet connection on laptop/tablet), and mobile broadband wireless router (via 3G or 4G mobile network, which can be shared between devices).

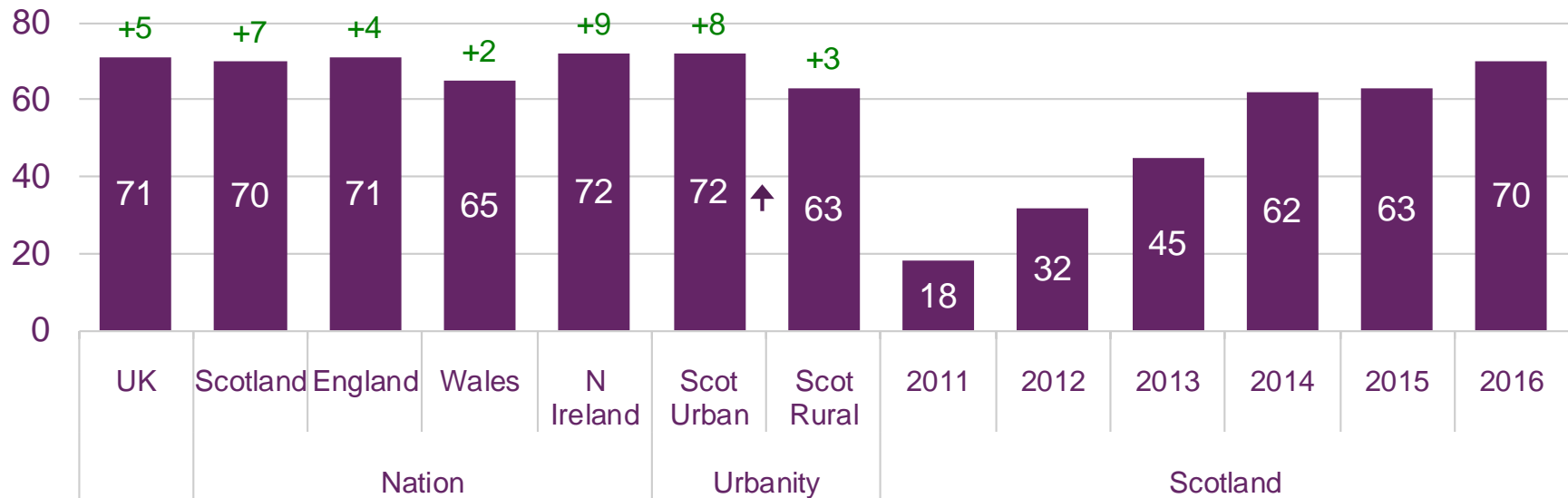
Note 3: 'Fixed broadband' includes ADSL, cable and fibre services – perhaps using a Wi-Fi router. This would include superfast broadband services.

Note 4: 'Mobile broadband' is connecting a device using a USB stick or dongle, or built-in connectivity in a laptop or netbook or tablet computer with a SIM card.

Note 5: 'Internet on mobile' is the proportion of adults who use a mobile phone for any of the following activities: Instant messaging, downloading apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

## Take-up of smartphones in Scotland: 2011 – 2016

Adults 16+ (%) / percentage point change in take-up of smartphones since H1 2015



Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QD24B: Do you personally use a Smartphone? A Smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

## Ownership of tablet computers in Scotland

Households (%) / percentage point change in take-up of tablet computers since H1 2015



Source: Ofcom Technology Tracker, Half 1 2016

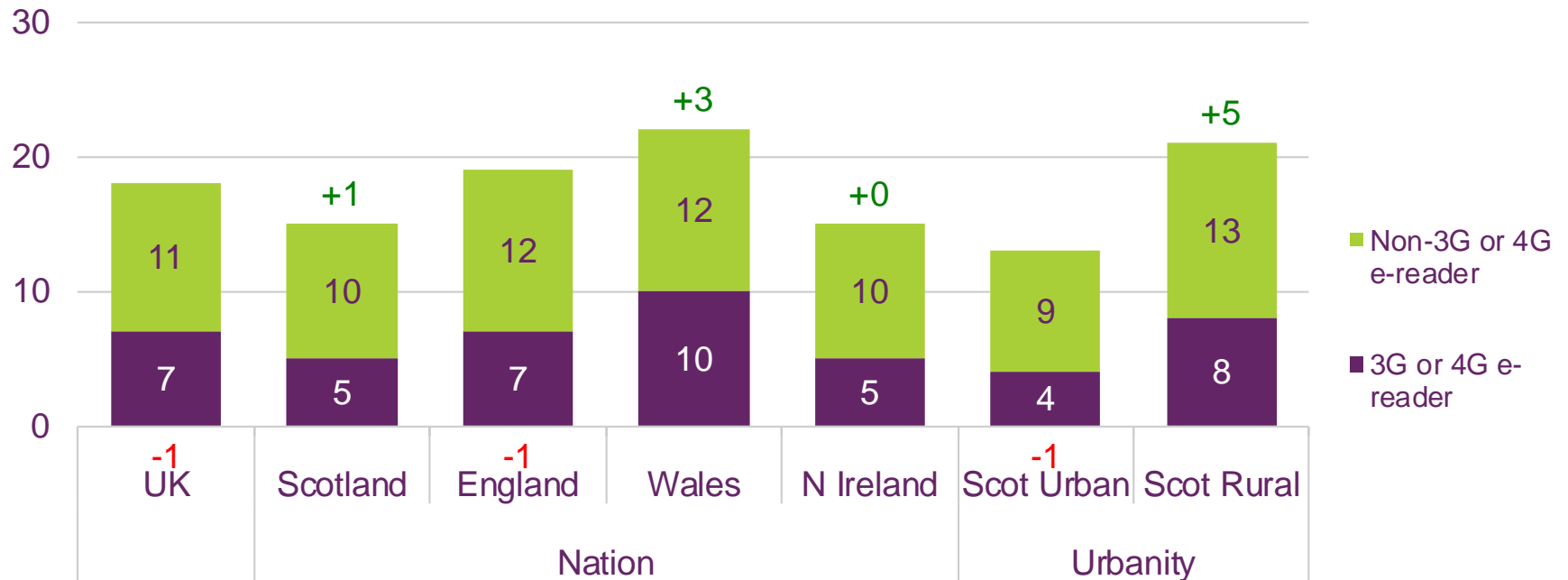
Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

QE1: Does your household have a PC, laptop, netbook or tablet computer?

## Personal use of e-readers: 2016

Individuals (%) / Percentage point year on year change



Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QB1: Which of the following do you, or does anyone in your household, have in your home at the moment?/ QB2: And do you personally use.../ QB6: Does your household's e-reader have built-in 3G or 4G access to a mobile network?

## Most important device for accessing the internet in Scotland

Individuals (%)



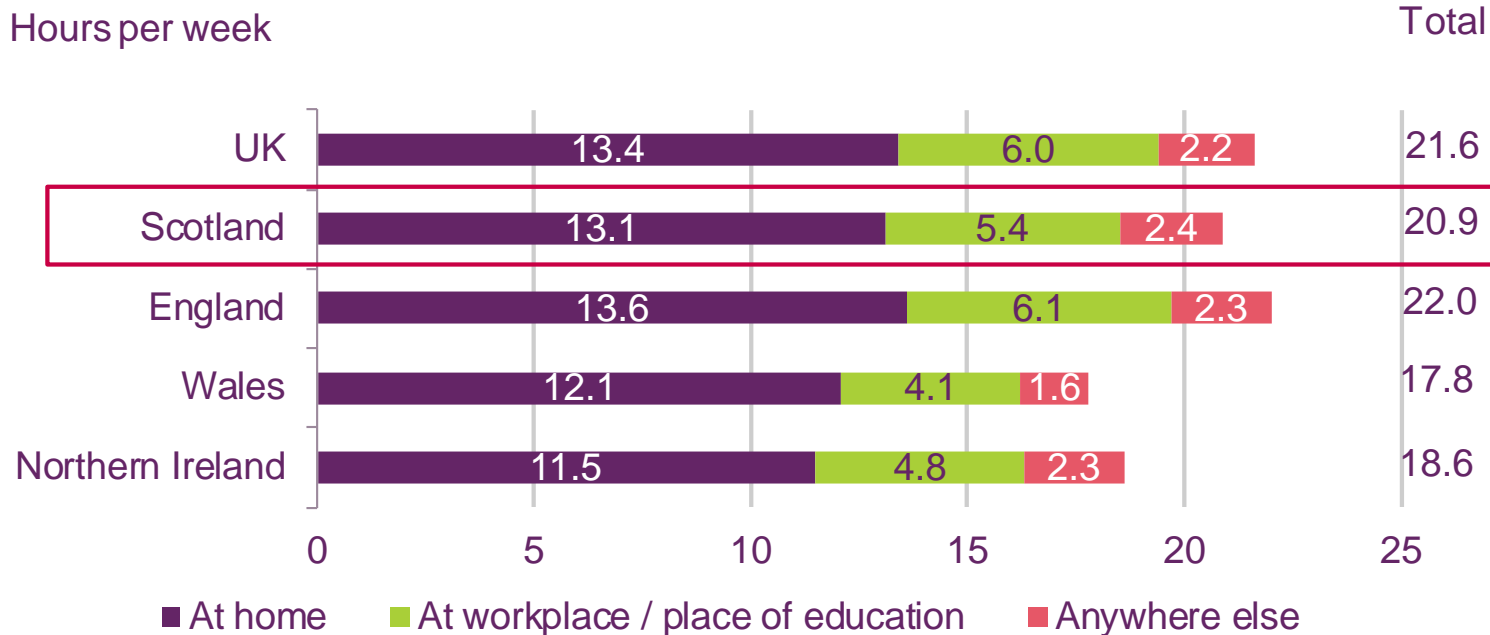
Source: Ofcom Technology Tracker, Half 1 2016

Base: Internet users aged 16+ (n = 3100 UK, 405 Scotland, 215 Scotland urban, 190 Scotland rural, 150 16-34, 134 35-54, 121 55+, 216 ABC1, 189 C2DE, 109 under £17.5K, 137 £17.5K+).

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016 and between Scotland urban and rural in 2016.

QE40: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "Netbook", "E-reader", "TV set", "Games console", "Other portable/handheld device", "Smartwatch", "Other device", "None" and "don't know".

## Claimed time spent on the internet in a typical week in 2015

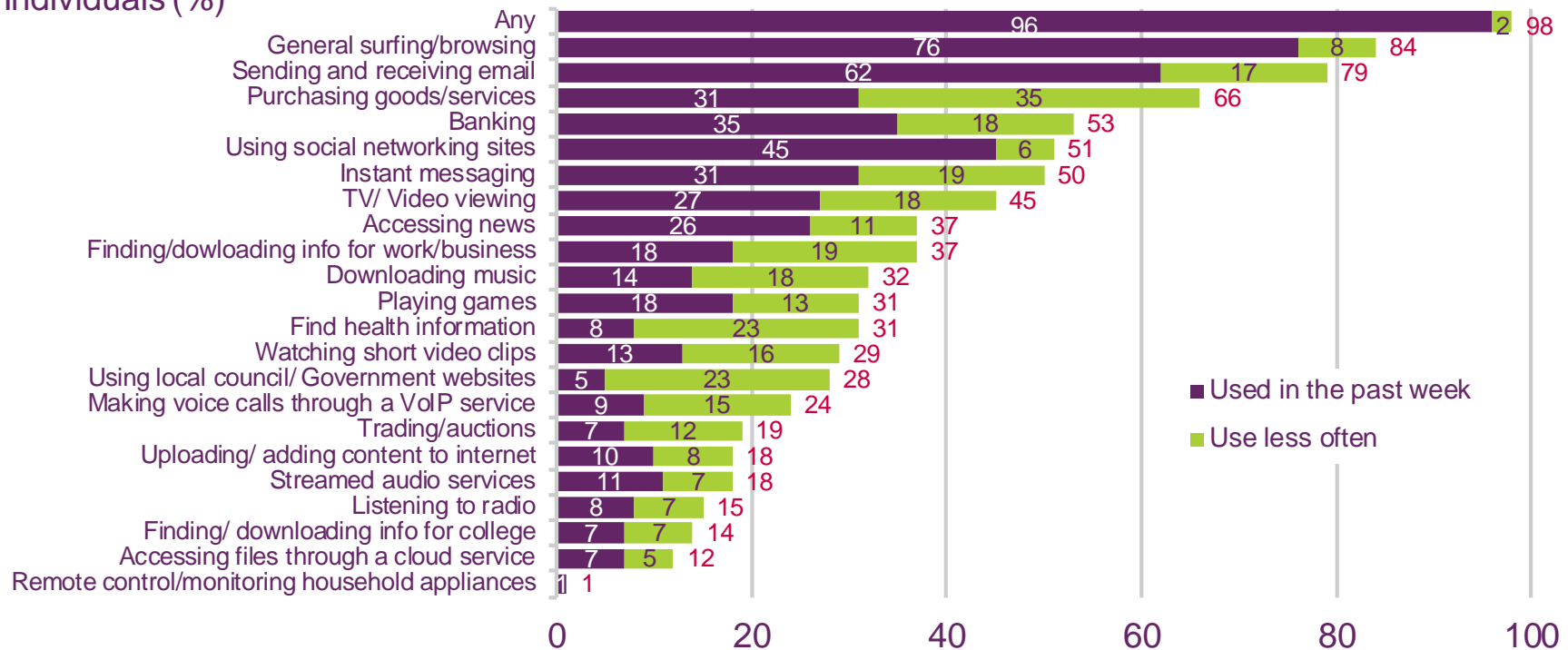


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2015  
 Base: All adults aged 16+ who use go online at home or elsewhere (1548 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Question: IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

## Activities conducted online by internet users in Scotland

Individuals (%)



Source: Ofcom Technology Tracker, H1 2016

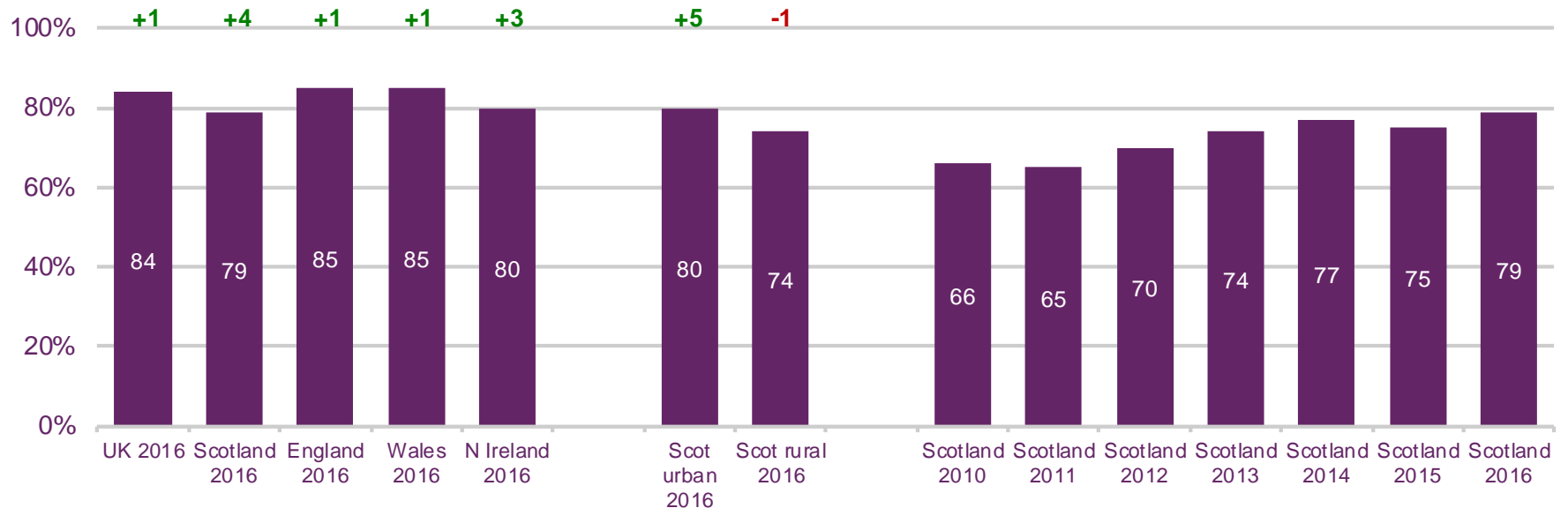
Base: Adults aged 16+ who use the internet at home or elsewhere (n= 405 Scotland 2016)

QE5A: Which, if any, of these do you use the internet for?



# Household computer ownership inc. PCs, laptops, tablets and netbooks

Figure above bar shows % point change in computer ownership from H1 2015



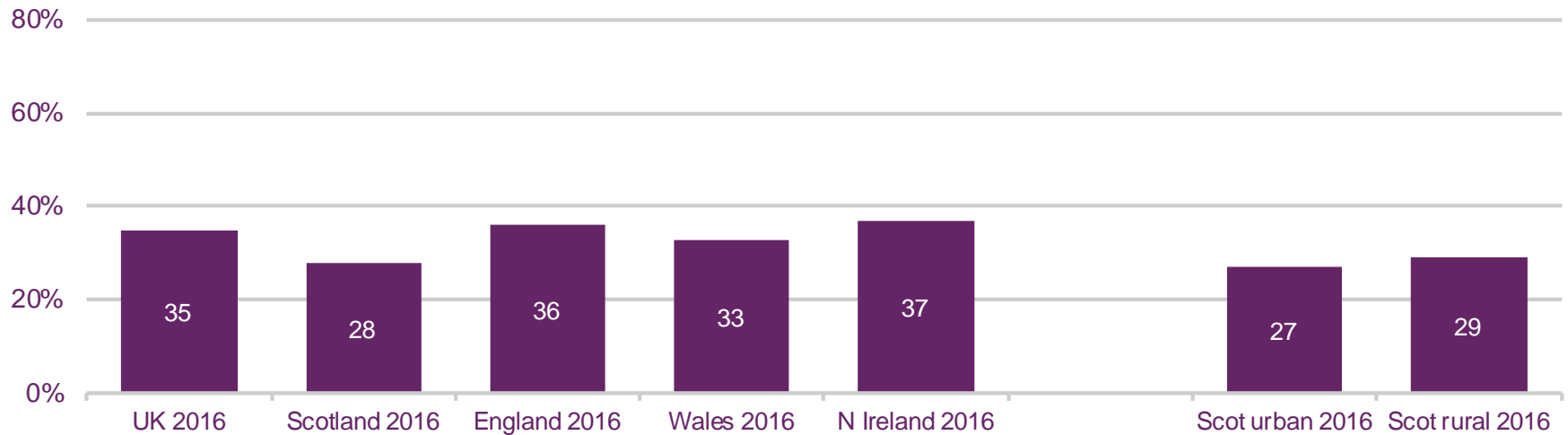
Source: Ofcom Technology Tracker, Half 1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

QE1: Does your household have a PC, laptop, netbook or tablet computer?

## Use of the internet to access local council/government websites

Use of internet for local council/government websites (%)



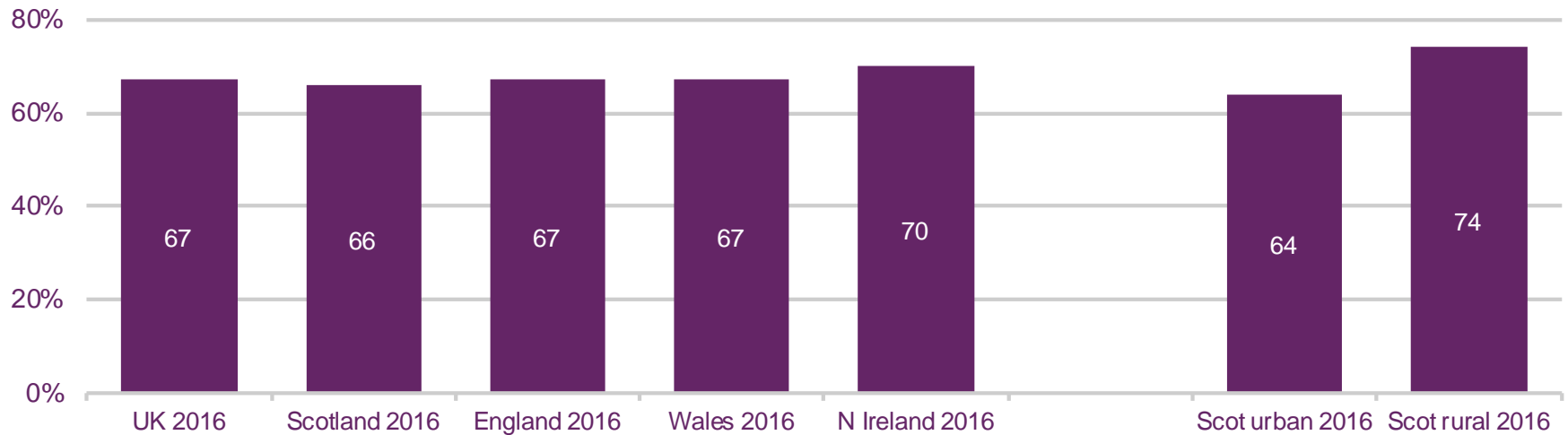
Source: Ofcom Technology Tracker, Half 1 2016

Base: Adults aged 16+ who use the internet at home or elsewhere (n = 3100 UK, 405 Scotland, 1899 England, 401 Wales, 395 Northern Ireland, 215 Scotland urban, 190 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?

## Use of the internet to purchase goods, services, tickets

Use of internet for purchasing goods, services and tickets (%)



Source: Ofcom Technology Tracker, Half 1 2016

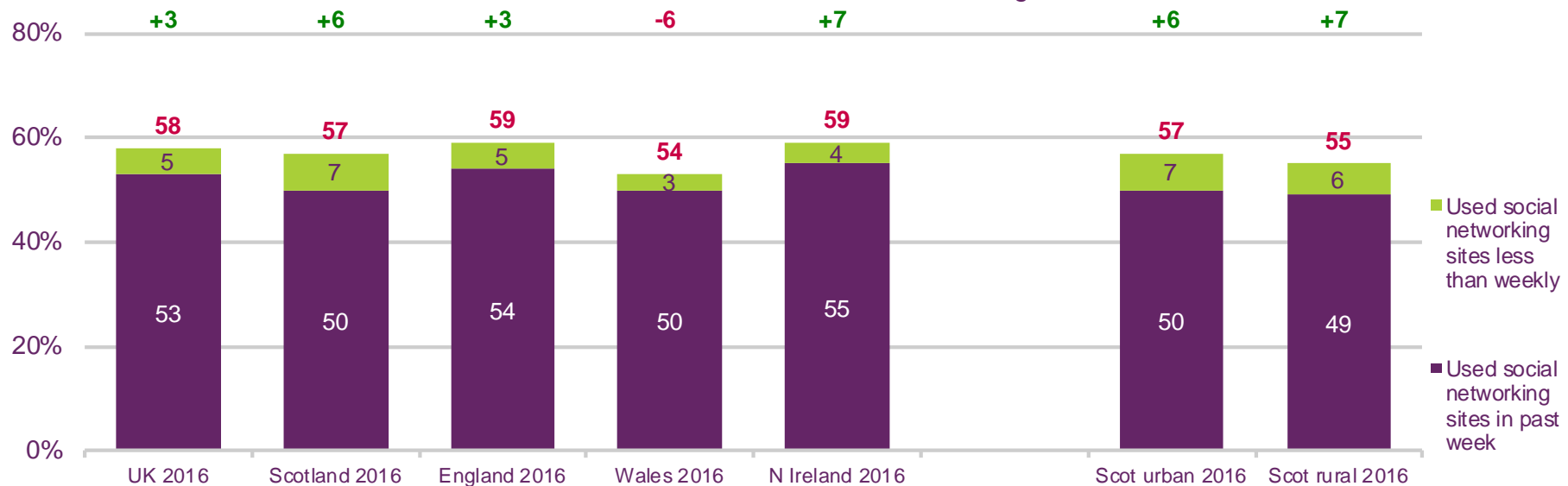
Base: Adults aged 16+ who use the internet at home or elsewhere (n = 3100 UK, 405 Scotland, 1899 England, 401 Wales, 395 Northern Ireland, 215 Scotland urban, 190 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?

# Use of social networking sites

Use of social networking sites (%)

Figure above bar shows year on year change



Source: Ofcom Technology Tracker, Half 1 2016

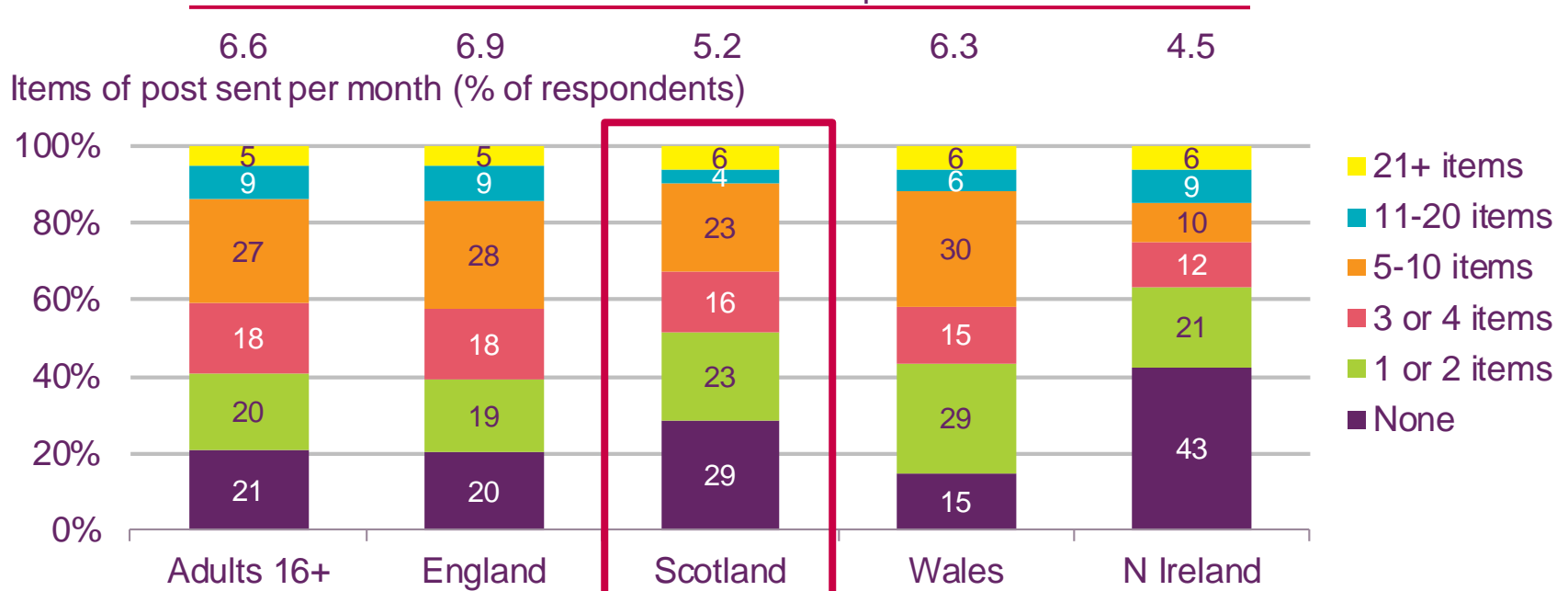
Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural)

QE5A: Which, if any, of these do you use the internet for?/ QE5B: And, which, if any, of these activities have you used the internet for in the last week?/ QD28A: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ QD28B: And, which of these activities have you used your mobile for in the last week?

# 6. Post

## Approximate number of items of post sent each month (residential)

Mean number of items sent per month



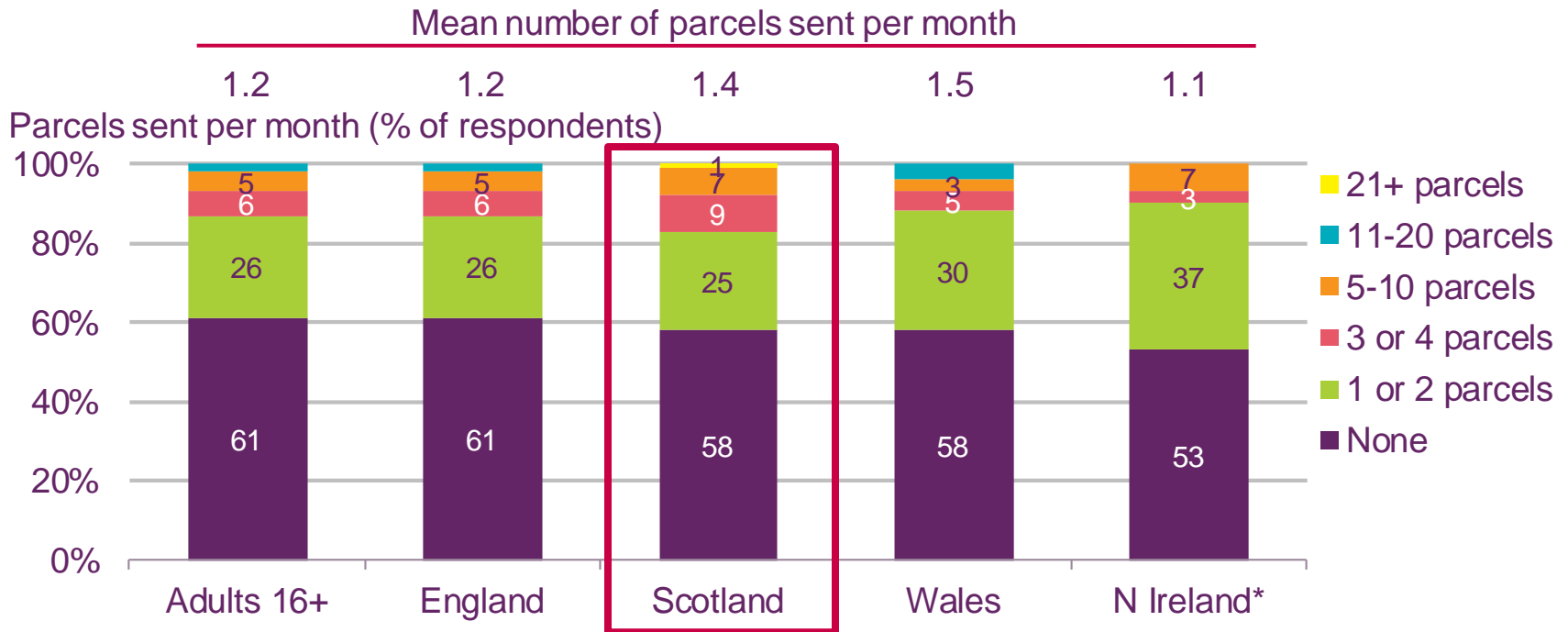
Source: Ofcom Residential Postal Tracker 2015

Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland)

QC1. Approximately how many items of post – including letters, cards and parcels – have you personally sent in the last month?



## Parcels sent in the past month



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents who have personally sent any items of post in the past month (n = 1491 adults 16+, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

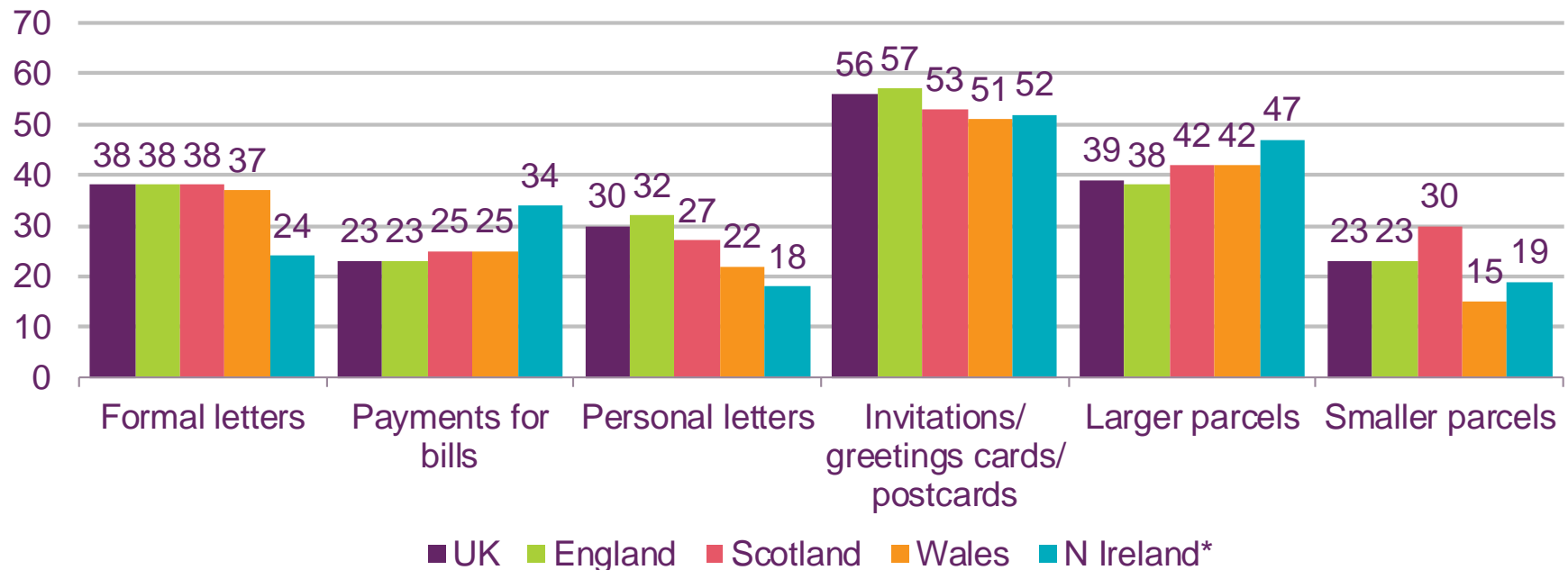
QC2. And how many of these items sent in the last month were parcels rather than letters or cards?

\*Caution: Low base



## Types of post sent in the past month

Proportion of consumers (%)

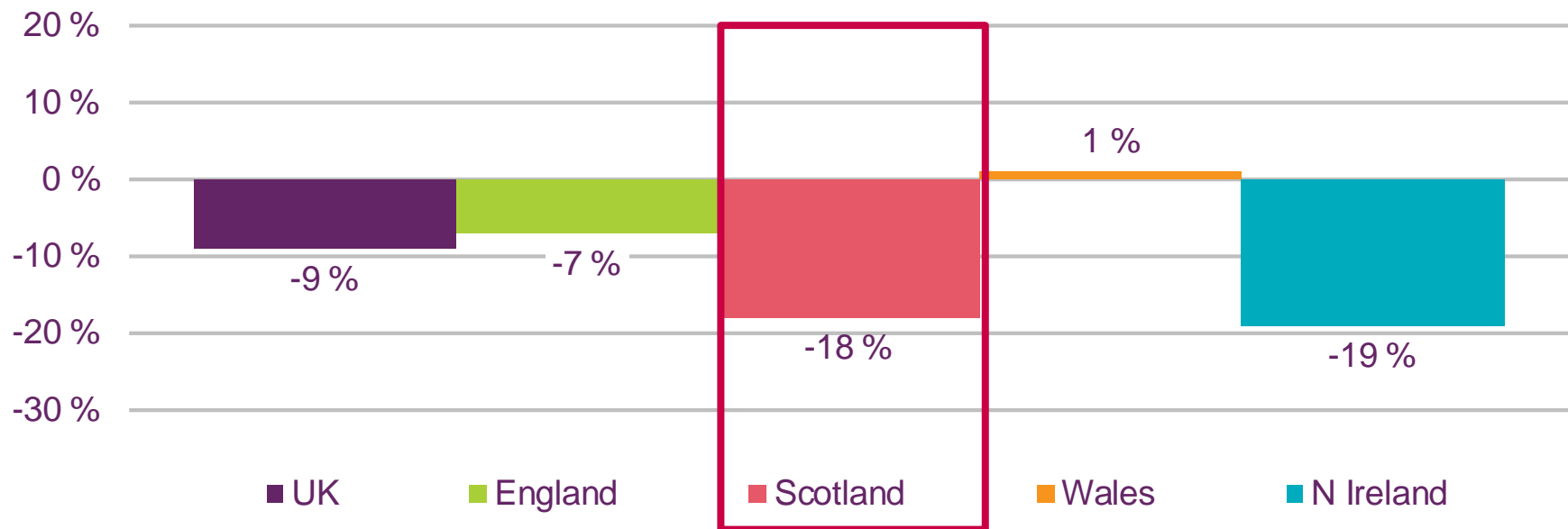


Source: Ofcom Residential Postal Tracker 2015

Base: All who have personally sent any items of post in the last week (n = 1491 UK, 1131 England, 152 Scotland, 127 Wales, 81 Northern Ireland)

QC5. Which of these types of mail would you say you have personally sent in the last month by post? (MULTICODE) \*Caution: Low base

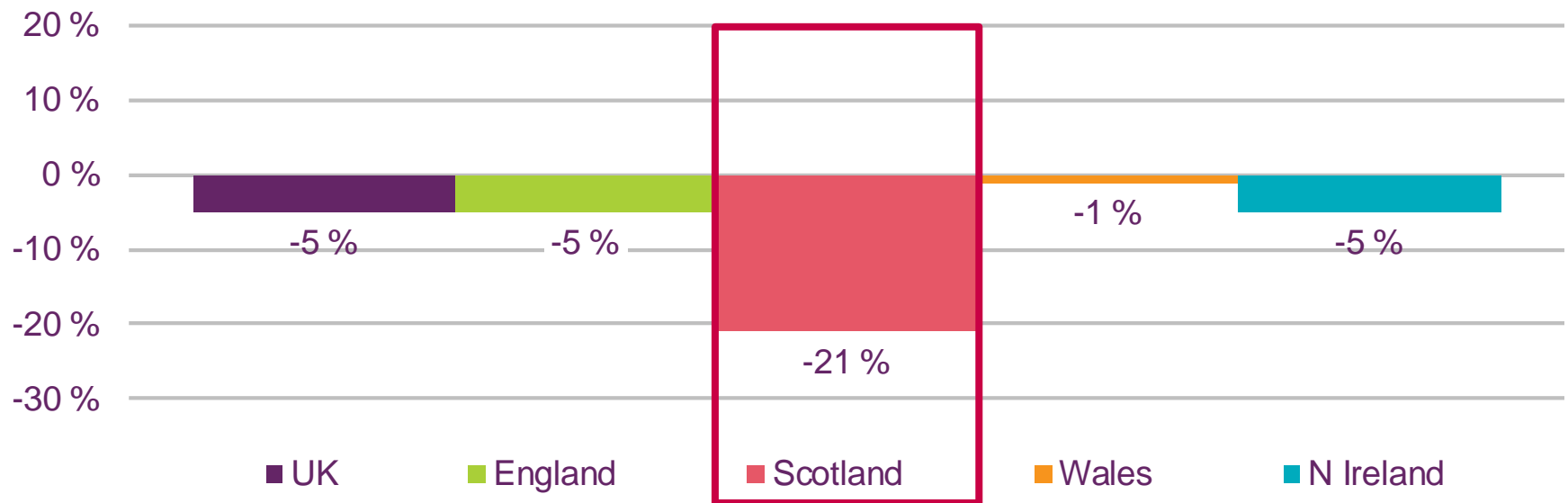
## Net claimed change in amount of post sent in the past two years



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland) QC10. Compared with two years ago, would you say that the number of items you send through the post has... increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly? Note: Chart shows net percentage (% who claim their use has increased - % who claim their use has decreased)

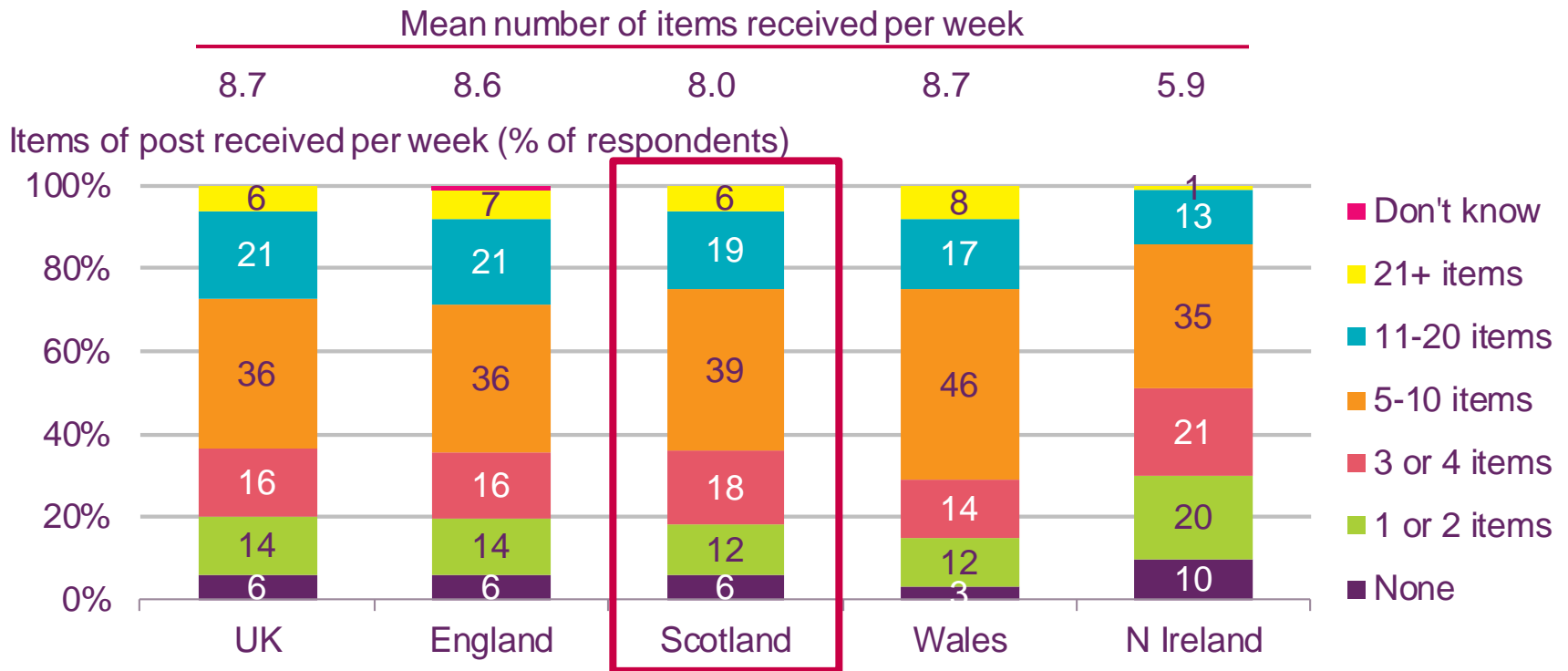
## Predicted change in amount of post sent in the next two years



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland) QC25. Looking to the future... Compared with now, would you say that the number of letters and cards you will be sending in the post two years from now will have... increased greatly, increased slightly, stayed the same, decreased slightly, decreased greatly? Note: Chart shows net percentage (% who claim their use will increase - % who claim their use will decrease)

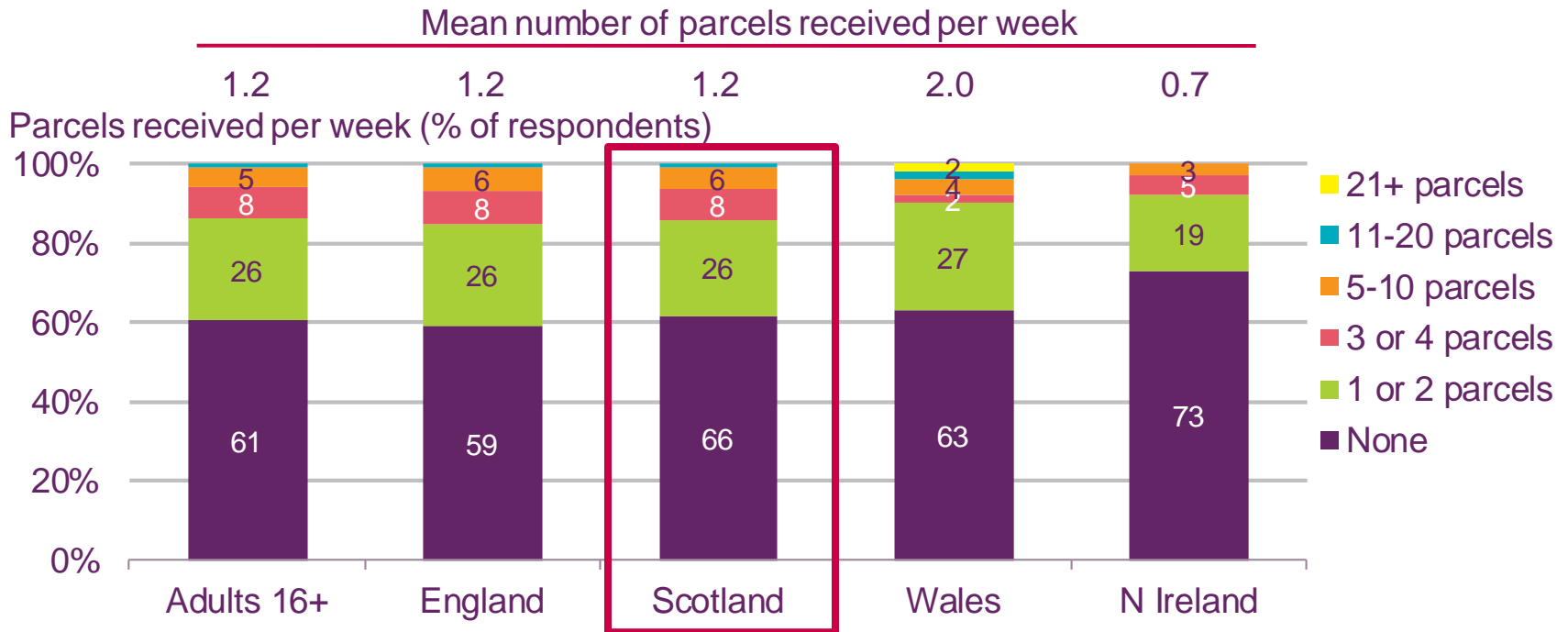
## Approximate number of items of post received in the past week



Source: Ofcom Residential Postal Tracker 2015

Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland) QD1. Approximately how many items of post – including letters, cards and parcels – have you personally received in the last week?

## Parcels received in the past week

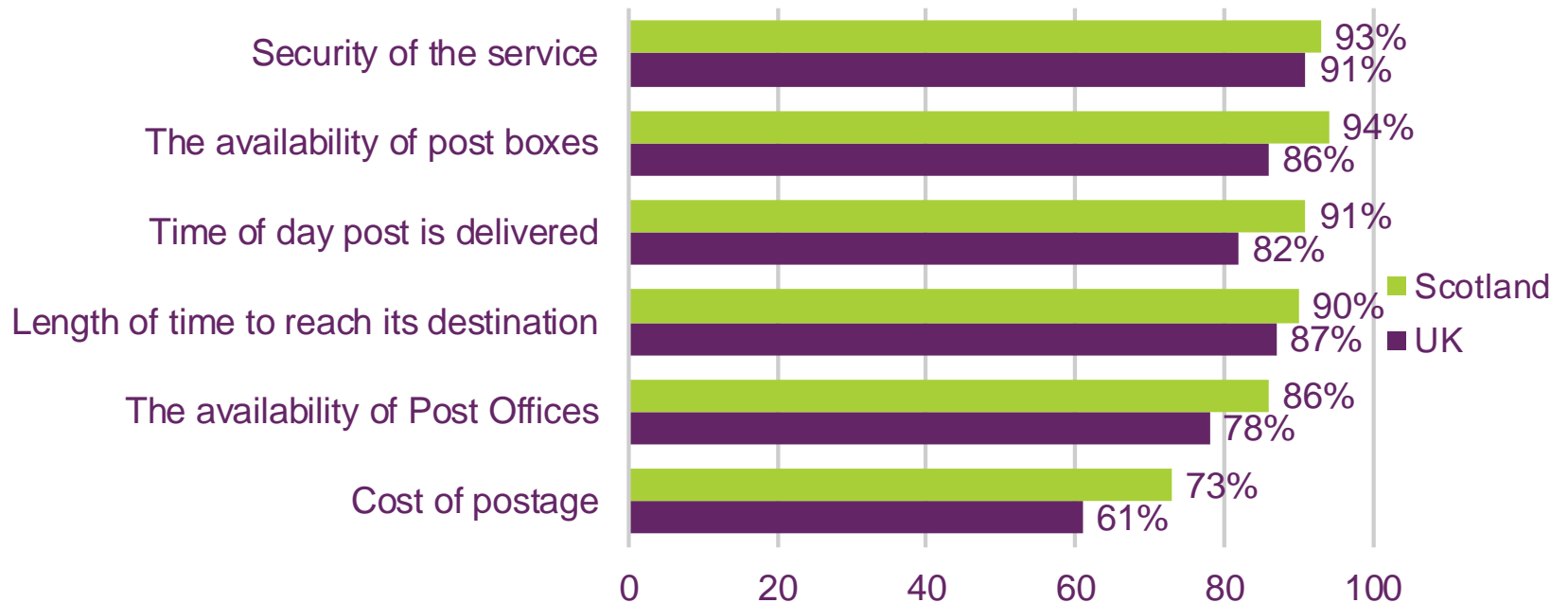


Source: Ofcom Residential Postal Tracker 2015

Base: All respondents who have personally received any items of post in the last week (n = 1824 adults 16+, 1258 England, 203 Scotland, 147 Wales, 116 Northern Ireland)

QD2. And how many of these items received in the last week were parcels?

## Satisfaction with specific aspects of Royal Mail's service



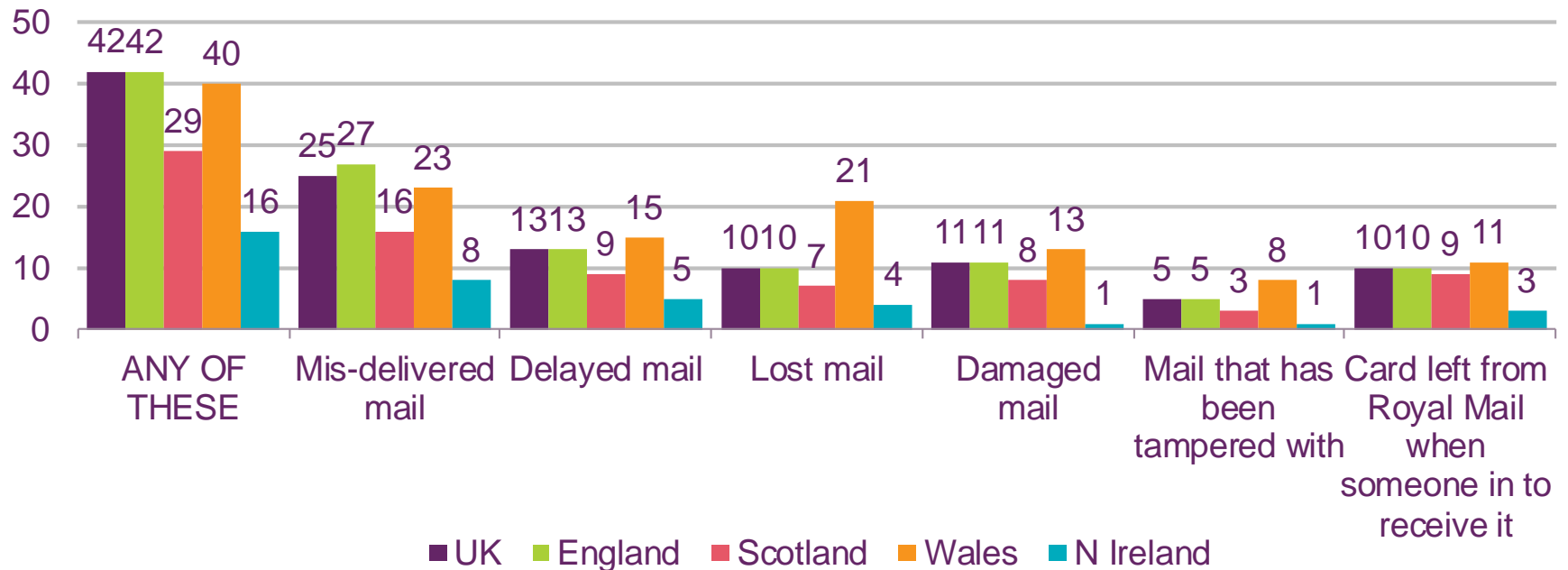
Source: Ofcom Residential Postal Tracker 2015

Base: All respondents in Scotland (n = 1946 UK, 214 Scotland)

QE3A-F. Satisfaction with specific aspects of Royal Mail's services – Ranked by proportion satisfied among adults in Scotland

## Problems experienced with Royal Mail in the past 12 months

Proportion of consumers (%)



Source: Ofcom Residential Postal Tracker 2015 Base: All respondents (n = 1946 adults 16+, 1451 England, 214 Scotland, 151 Wales, 130 Northern Ireland) QG1A-E. Problems experienced with Royal Mail service in the last 12 months – Ranked by proportion among all UK adults



## Average volume of letters sent each month

Proportion of respondents (%)



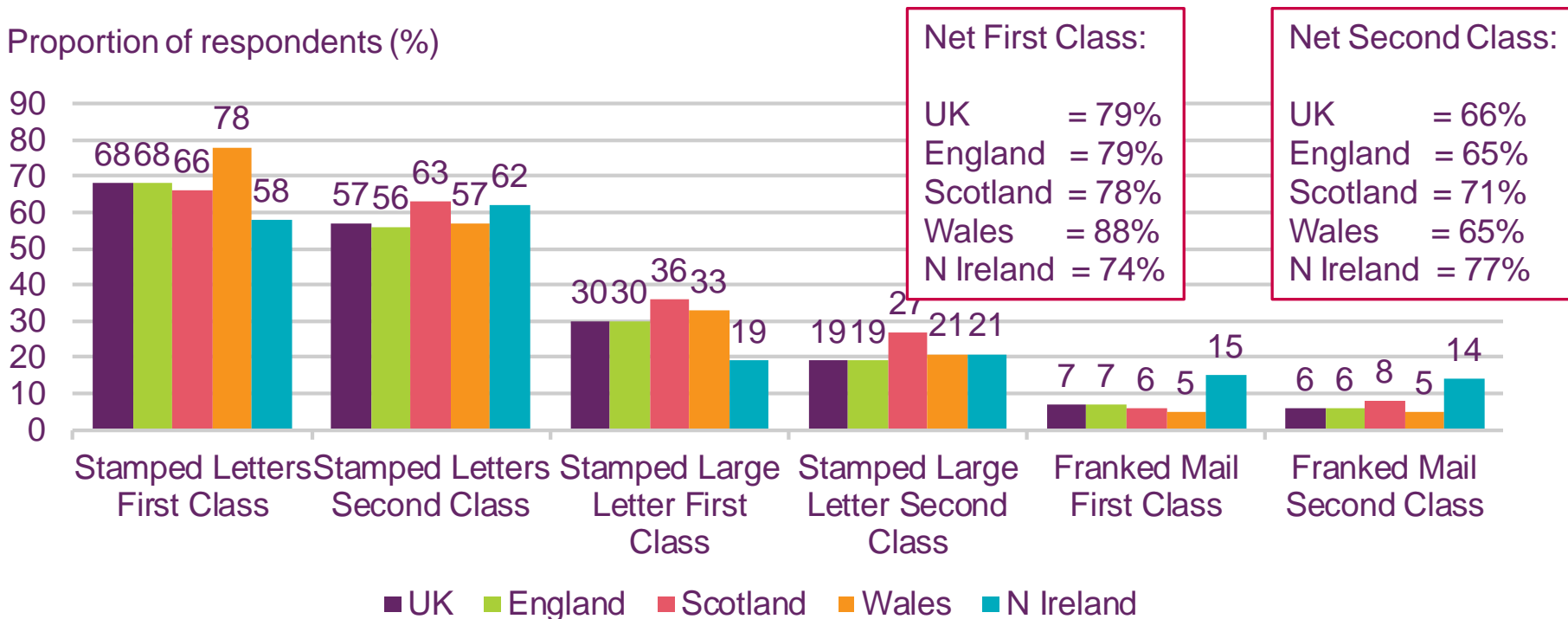
Source: Ofcom Business Postal Tracker 2015

Base : All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)

QV2a. On average, how many letter items does your organisation send per month? Please think ONLY about all the letters and large letters you may send as an organisation.

## Royal Mail services used to send standard post each month

Proportion of respondents (%)



Source: Ofcom Business Postal Tracker 2015

Base : All respondents using RM standard delivery services (n = 1121 UK, 686 England, 146 Scotland, 155 Wales, 134 N Ireland) QV6d. Which, if any, of the following Royal Mail services does your organisation use to send your standard mail?

## Switched some mail to other communication methods over last twelve months

Proportion of respondents (%)



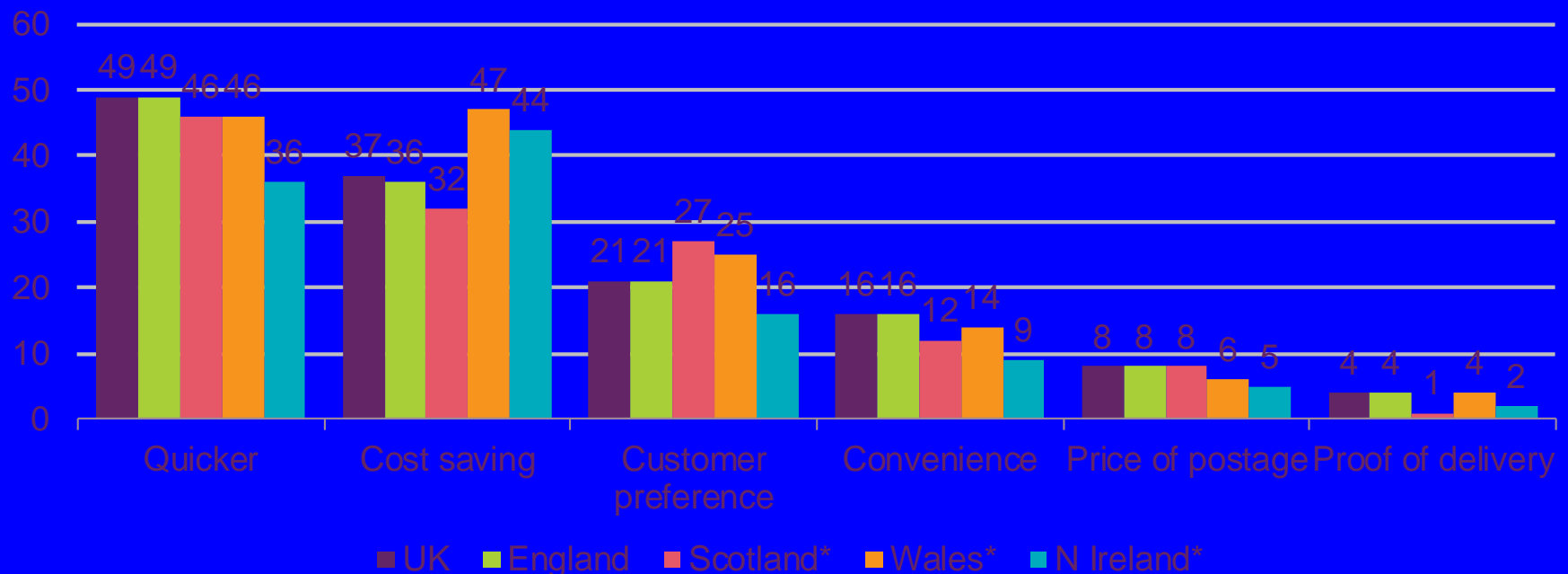
Source: Ofcom Business Postal Tracker 2015

Base: All respondents (n = 1200 UK, 734 England, 156 Scotland, 167 Wales, 143 N Ireland)

QF4. Over the last 12 months, has your organisation moved some mail to other communication methods?

## Main reasons for switching some mail to other communications methods over past 12 months

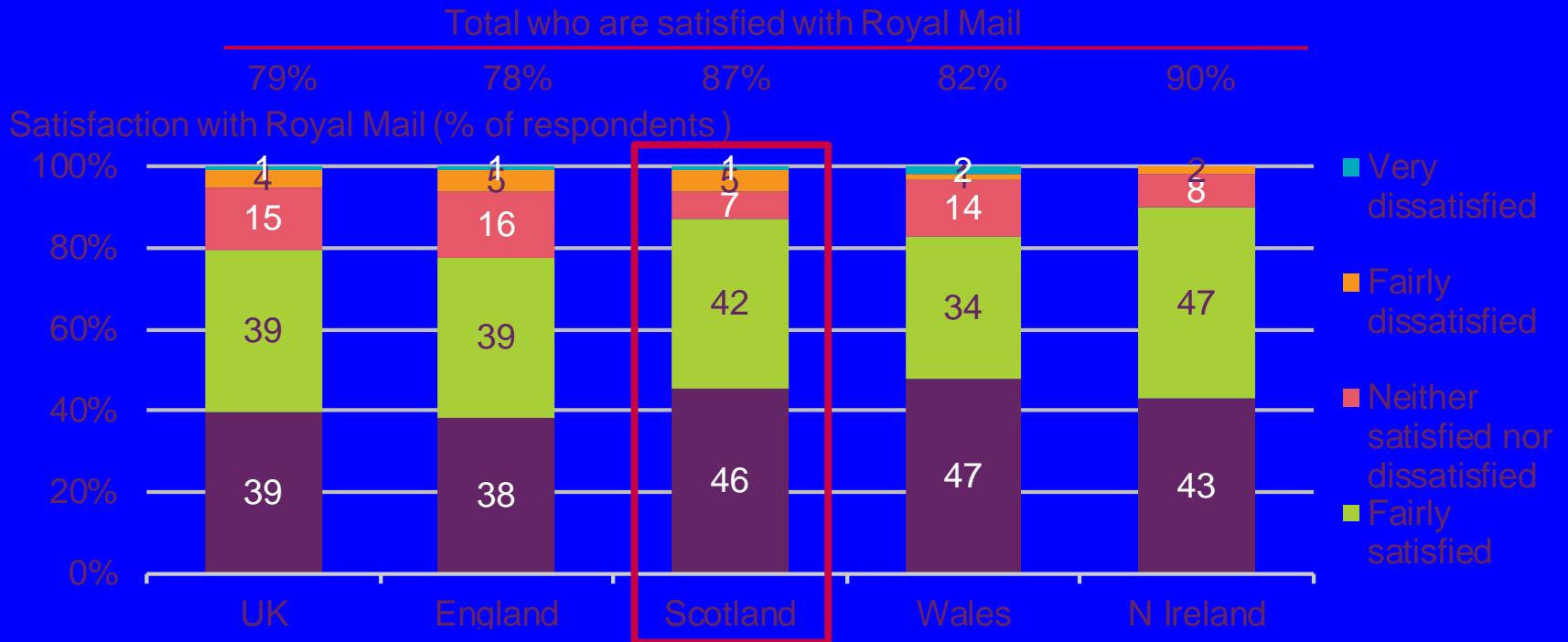
Proportion of respondents (%)



Source: Ofcom Business Postal Tracker 2015 Base: All who have moved to other communication methods (n = 720 UK, 452 England, 80 Scotland, 94 Wales, 94 N Ireland) QF6: Why have you moved some mail to other communication methods? OPEN ENDED Top 6 reasons shown

\*Caution: Low base

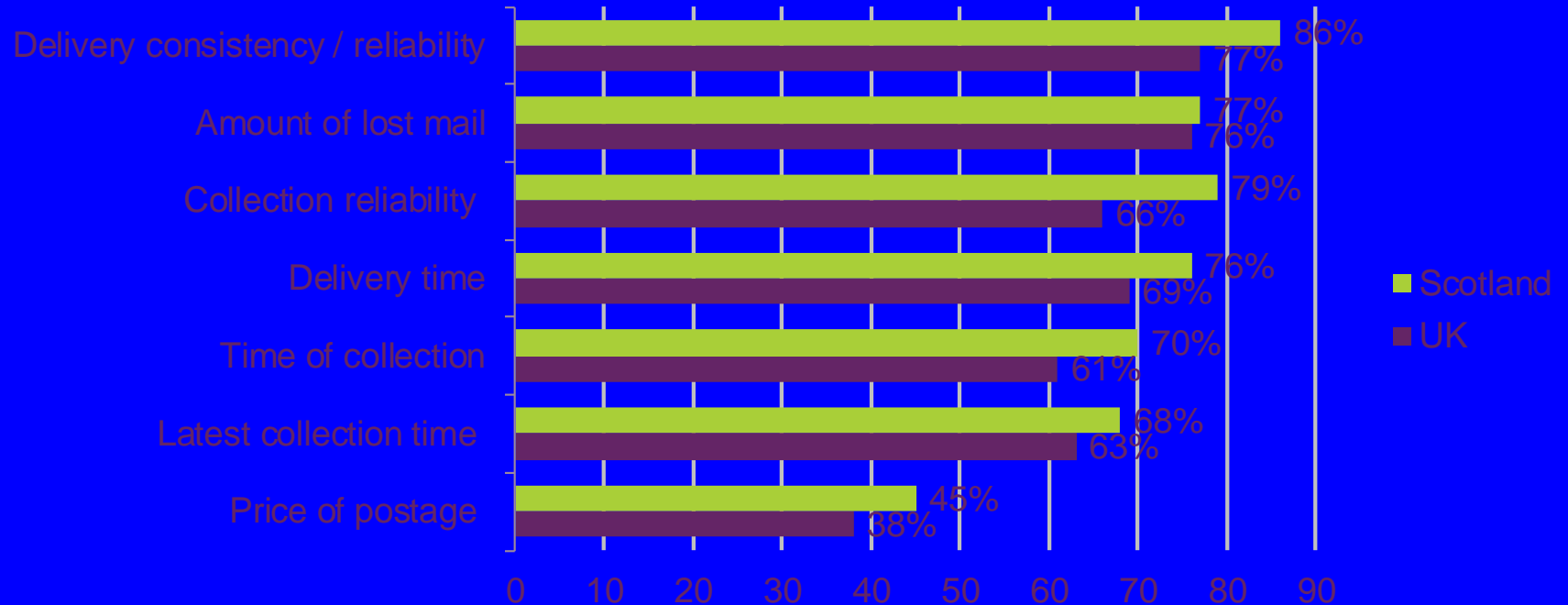
## Overall satisfaction with the quality of service from Royal Mail



Source: Ofcom Business Postal Tracker 2015 Base: All respondents who use Royal Mail (n = 1185 UK, 727 England, 155 Scotland, 164 Wales, 139 Northern Ireland) QRM2. Thinking generally about the service your organisation receives as a whole, on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the overall quality of the services you receive from Royal Mail as a recipient and sender?

## Satisfaction with specific aspects of Royal Mail's service

Satisfaction with Royal Mail (% of respondents)



Source: Ofcom Business Postal Tracker 2015

Base: All respondents who use Royal Mail (n = 1185 UK, 155 Scotland) QRM3: How would you rate the performance of Royal Mail, as a recipient and sender, in the following areas on a 5 point scale where 1 is very dissatisfied and 5 is very satisfied?