Ofcom wanted to understand the take up of broadband in Glasgow compared to other cities and to explore the low broadband take up in the Welsh Valleys. The scale of The British Population Survey provided the volume of data needed. This exercise was part of the 2012 Communications Market Review.

The following pages contain extracts from the Ofcom Communications Market Review 2012.

1.3 A study into fixed broadband take-up in the South Wales Valleys

Introduction

The South Wales Valleys comprise a number of industrialised valleys in South Wales. Since 2009, they have been identified as an area of low broadband take-up[4].

As a result, the Ofcom Advisory Committee for Wales suggested that Ofcom explore this in more detail. Therefore, Ofcom has undertaken analysis of the *British Population Survey* (BPS)[5] to assess take-up of fixed broadband in the South Wales Valleys.

For purposes of this analysis, the South Wales Valleys are considered to be the Welsh local authority regions of Blaenau Gwent, Rhondda Cynon Taff, Neath Port Talbot, Merthyr Tydfil, Torfaen and Caerphilly. This matches the definition used by the Welsh Local Government Association.

[4] http://www.bevanfoundation.org/wp-content/uploads/2011/10/Digital-Wales-Divided-Wales.pdf
[5] The British Population Survey http://www.thebps.co.uk/index.php

Methodology

The *British Population Survey* asks consumers about internet and fixed broadband take-up and comprises around 2,000 face-to-face, in-home interviews with adults (aged 15+) every week, allowing detailed regional and sub-demographic analysis. Note: The survey covers Great Britain, whereas Ofcom's technology tracker cited in the rest of the report is based on the UK.

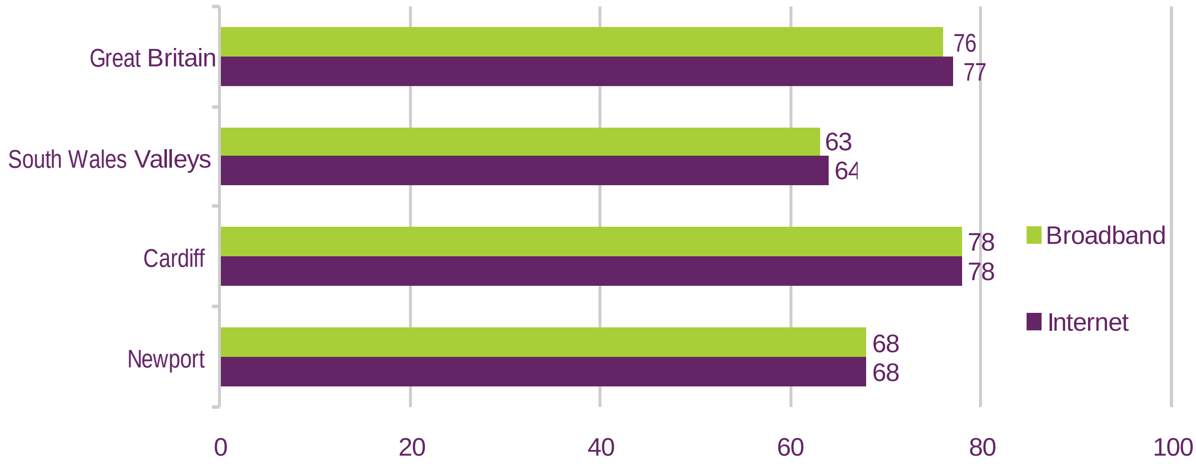
Using data from the *British Population Survey* (BPS), January to September 2011, analysis was undertaken on the Valleys, Cardiff and Newport (data not available for Swansea). The total GB sample was 62,669 and the sample size in the South Wales Valleys was 981. Sample sizes for Cardiff and Newport were smaller, at 224 and 187 respectively.

Findings

The analysis confirms that the South Wales Valleys have low broadband take-up compared to the GB average, Cardiff and Newport

Broadband take-up is relatively low in the South Wales Valleys. Figure 1.7 shows that 63% of adults in the South Wales Valleys have fixed broadband, compared to the GB average (as reported by the BPS for this period) of 76%.

Figure 1.7 Internet and fixed broadband take-up, by area



Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 981 South Wales Valleys)

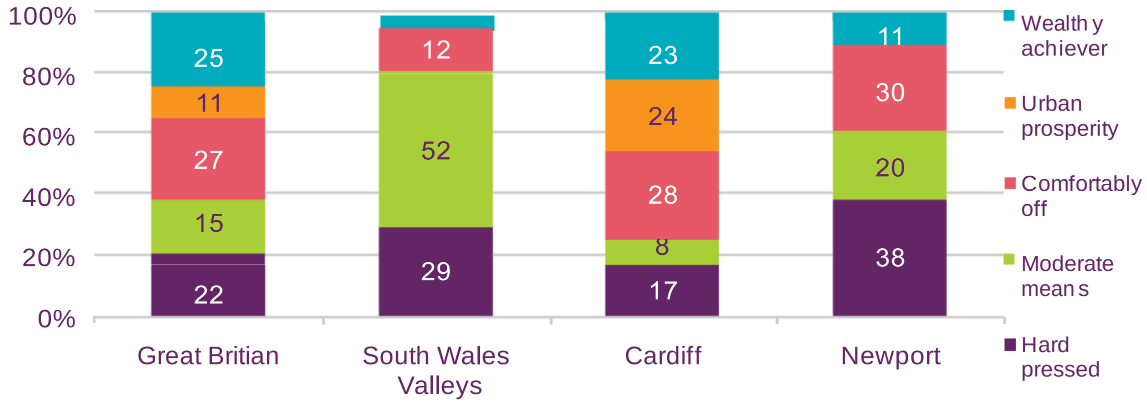
Demographic differences go some way to explaining the low fixed broadband take-up in the South Wales Valleys and Newport

We have applied CACI classifications[6] to the BPS data (Figure 1.8) to show that the population in these areas differs from the rest of Great Britain. One in two (52%) adults in the South Wales Valleys sample are classified as of 'moderate means' by CACI.

[6] http://www.caci.co.uk/639.aspx. CACI combines life-geographic and demographic information to categorise areas according to the attitudes and life-styles of the people living there.

This partly explains the lower level of broadband take-up, as we know from previous research[7] that those on low incomes are less likely to have broadband connections at home.

Figure 1.8 Demographic profile comparisons



Source: Ofcom analysis based on British Population Survey and CACI classifications, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 981 South Welsh Valleys)

<u>But demographic differences alone are not sufficient to explain South Wales Valleys fixed broadband take-up.</u>

Broadband take-up in the South Wales Valleys is lower than expected among those aged over 45, as shown in Figure 1.9.

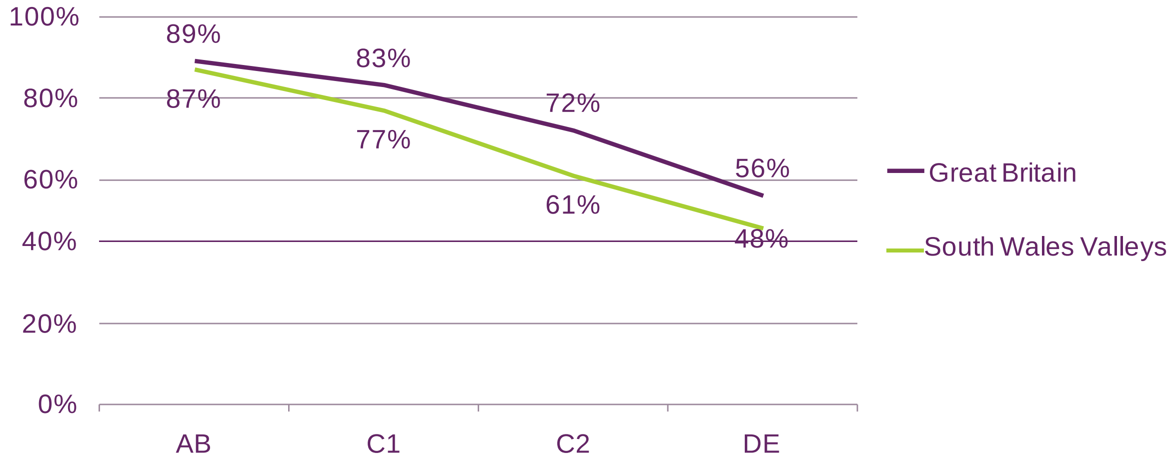
Figure 1.9 Fixed broadband take-up, by age group

Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 981 South Wales Valleys)

Figure 1.10 shows that broadband take-up is also lower than average among all socio-economic groups, excluding AB, in the South Wales Valleys. The difference is more noticeable among C2 social groups, where the average take-up of fixed broadband is 61% compared to the GB average of 72%.

[7] http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/scotland/4.2

Figure 1.10 Fixed broadband take-up, by socio-economic group



Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 981 South Wales Valleys)

This analysis confirms that the South Wales Valleys have lower take-up of fixed broadband than the national average. Demographic differences go some way to explain lower take-up. But there is also a concern that people aged over 45 and in socio-economic groups C2DE are less likely to have fixed broadband at home than their counterparts elsewhere. Other factors such as societal or attitudinal differences may be contributing to these differences in take-up.

1.4 Analysis of fixed broadband take-up in Glasgow

Introduction

In last year's report we found that broadband take-up in Scotland was lower than in any other UK nation. This year, we have found that Scotland has closed the gap (see section 4.1), and now has broadband take-up at a similar level to that found in Wales and Northern Ireland (based on quarter 1 2012 data).

Last year we also highlighted that broadband take-up was particularly low in the Greater Glasgow area (at 50%[5]). In order to be able to explore this in more detail Ofcom has undertaken analysis of broadband take-up in the city of Glasgow using the British Population Survey[6] (BPS) January to September 2011 fieldwork.

Methodology

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

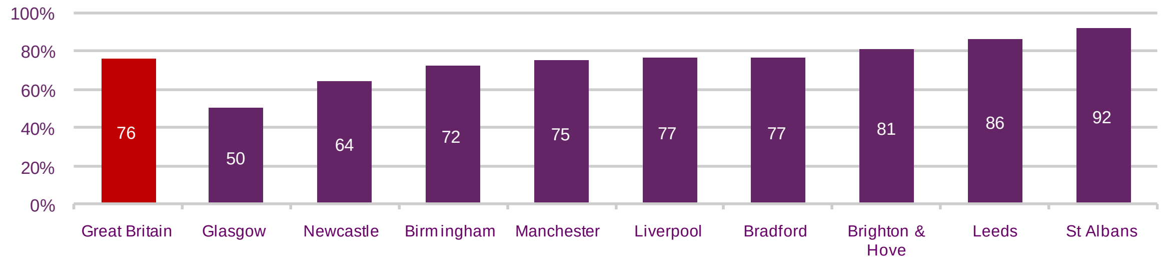
Using data from the British Population Survey (BPS), January to September 2011, analysis was undertaken on cities where the sample size was over 350 individuals. The total GB sample was 62,669 and the sample size in Glasgow was 594.

The analysis confirms Glasgow's low fixed broadband take-up

As the *Communications Market Report* highlighted in 2011 and 2010, broadband take-up is relatively low in Glasgow. Figure 1.7 shows that 50% of adults in the city of Glasgow have fixed broadband, compared to the GB average (as reported by the BPS for this period) of 76%. Fixed broadband take-up in Glasgow was, by some distance, the lowest of all of the cities we analysed.

[5] According to Ofcom's technology tracker Q1 2012, broadband take-up in Greater Glasgow has increased to 60% this year.
[6] British Population Survey http://www.thebps.co.uk/index.php

Figure 1.7 Fixed broadband take-up, by city



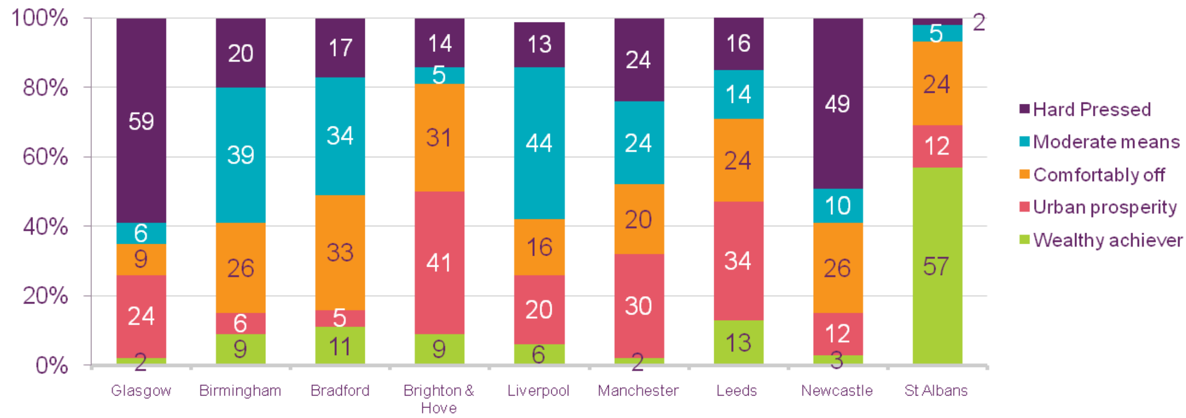
Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 594 Glasgow)

Demographic differences go some way to explaining Glasgow's low fixed broadband take-up

We have applied CACI classifications[7] to the BPS data (Figure 1.8) to show that Glasgow's population is not typical of other cities in the UK. Six in ten (59%) adults in the Glasgow sample are classified as 'hard-pressed' by CACI.

This partly explains the lower level of broadband take-up, as we know from previous research[8] that those on low incomes are less likely to have broadband connections at home.

Figure 1.8 City demographic profile comparisons



Source: Ofcom analysis based on British Population Survey and CACI classifications, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 594 Glasgow)

But demographic differences alone are not sufficient to explain Glasgow's low fixed broadband take-up

Broadband take-up in Glasgow is lower than average among all age groups (Figure 1.9), so regardless of the age profile of the population of Glasgow, we would expect to see lower

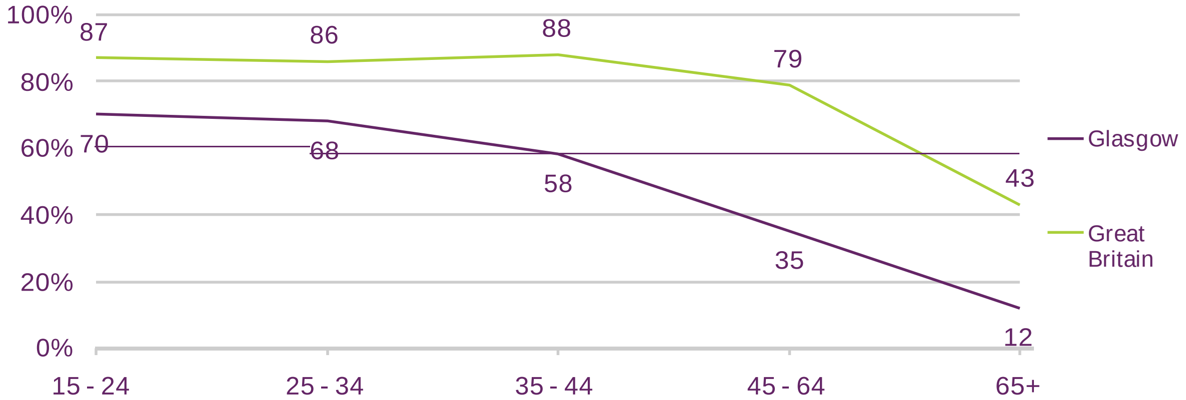
---

[7] http://www.caci.co.uk/639.aspx. CACI combines life-geographic and demographic information to categorise areas according to the attitudes and life-styles of the people living there.

[8] http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr11/scotland/4.2

broadband take-up. Among the 45-64 year old population, broadband take-up in Glasgow appears to be particularly low relative to the GB figure (35% compared to 79% GB average).

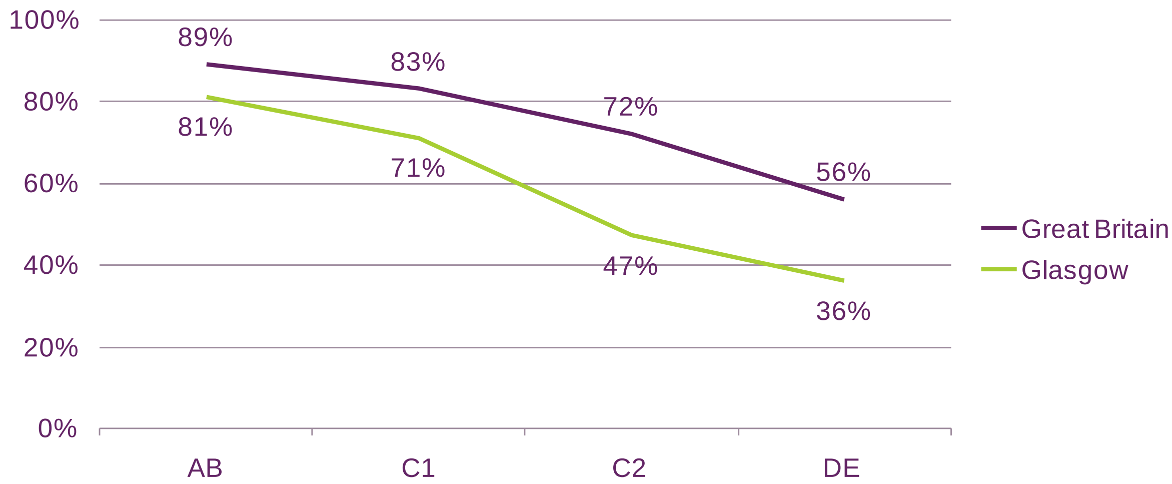
Figure 1.9 Fixed broadband take-up, by age group



Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 594 Glasgow)

Figure 1.10 shows that broadband take-up is also lower than average among all socio-economic groups in Glasgow. The difference is most marked among the C2 social group, where the average take-up of fixed broadband is 47% compared to the GB average of 72%.

Figure 1.10 Fixed broadband take-up, by socio-economic group



Source: British Population Survey, January-September 2011. Base: GB adults aged 15+, (n = 62,669 GB, 594 Glasgow)

This analysis confirms the lower take-up of fixed broadband in Glasgow compared to the GB average. Demographic differences go some way to explain lower take-up, but there is also direct evidence that Glaswegians are less likely to have broadband than the GB average, regardless of age and socio-economic group, with particularly low levels of take-up among 35-64 years olds and the C2 socio-economic group[9].

---

[9] For other research on offline consumers in Glasgow, see the Communications Consumer Panel a report (2012)
http://www.communicationsconsumerpanel.org.uk/Bridging%20the%20gap%20and%20cover.pdf