

5 Internet and web-based content

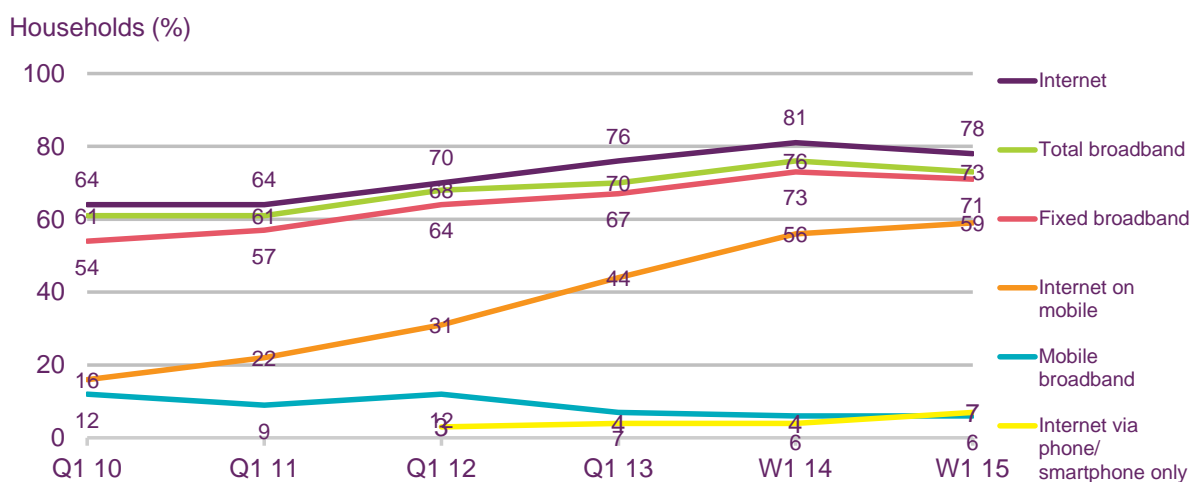
5.1 Internet take-up

As in 2014, eight in ten households in Scotland have internet access in 2015

In 2015, eight in ten households in Scotland (78%) have access to the internet (via fixed or mobile broadband, mobile phone or narrowband (dial-up)). These figures are consistent with 2014 and suggest that take-up of these services may have plateaued.

Three in four households in Scotland (73%) have access to fixed broadband at home, and six in ten (59%) adults in Scotland have online access through a mobile phone. As with the other means of accessing the internet, take-up of these services was the same level in 2015 as in 2014. Throughout this chapter, we note differences which are statistically significant. Depending on sample size and reported number, not all differences between reported figures reflect real changes in take-up or use of devices or services.

Figure 5.1 Internet take-up, Scotland 2010-2015



Source: Ofcom Technology Tracker. Data from Quarter 1 of each year 2010-2013, then Wave 1 2014-2015

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

Note 1: 'Internet' includes access to the Internet/Worldwide Web 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.

5.2 Internet-enabled devices

Six in ten adults in Scotland have a smartphone

Smartphone ownership in Scotland is unchanged since 2014, with about six in ten adults owning one (63%). This is the first time since 2011 where there has not been a year-on-year increase in smartphone ownership in Scotland.

The incidence of smartphone ownership among adults in Scotland does not differ from the UK average (66%) and ownership does not vary by urban or rural location in Scotland.

Figure 5.2 Take-up of smartphones in Scotland

Adults 16+ (%) / percentage point change in take-up of smartphones from W1 2014



Source: Ofcom Technology Tracker, Wave 1 2015 Base: All adults aged 16+ (n = 3756 UK, 492 Scotland, 2264 England, 496 Wales, 504 Northern Ireland, 246 Scotland urban, 246 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015) 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.

Half of households in Scotland now have a tablet computer

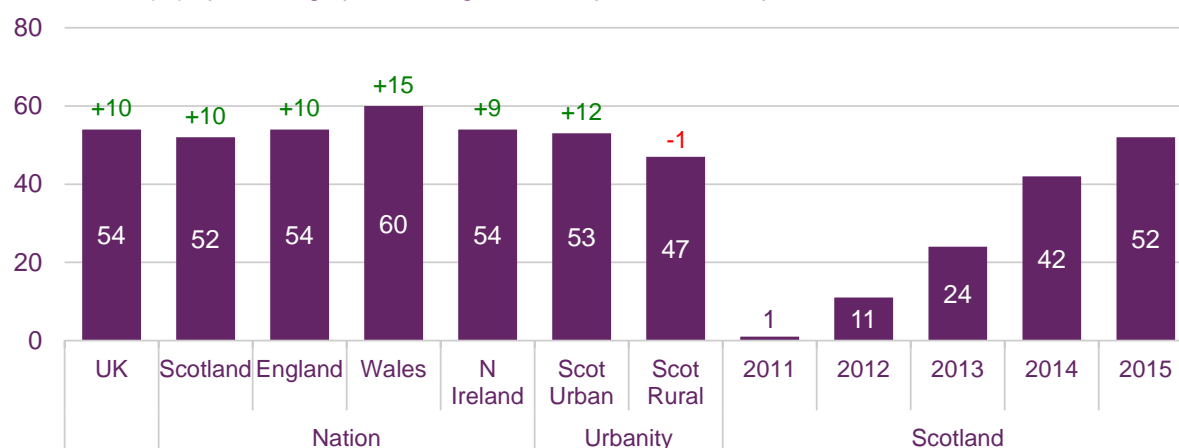
Tablet ownership has continued to increase among adults in Scotland and in the UK overall.

Half of adults in Scotland say they have a tablet computer in the household (52%), a 10 percentage point (pp) increase since 2014 (42%). Tablet ownership in the UK has also increased by 10 pp in this period and ownership levels do not vary significantly compared to the UK overall (52% vs. 54% in Scotland).

While adults in urban areas of Scotland are no more likely own a tablet compared to those in rural areas (53% vs. 47%) those in urban areas have seen a 12 pp increase in ownership since last year (from 41%).

Figure 5.3 Ownership of tablet computers

Households (%) / percentage point change in take-up of tablet computers from W1 2014



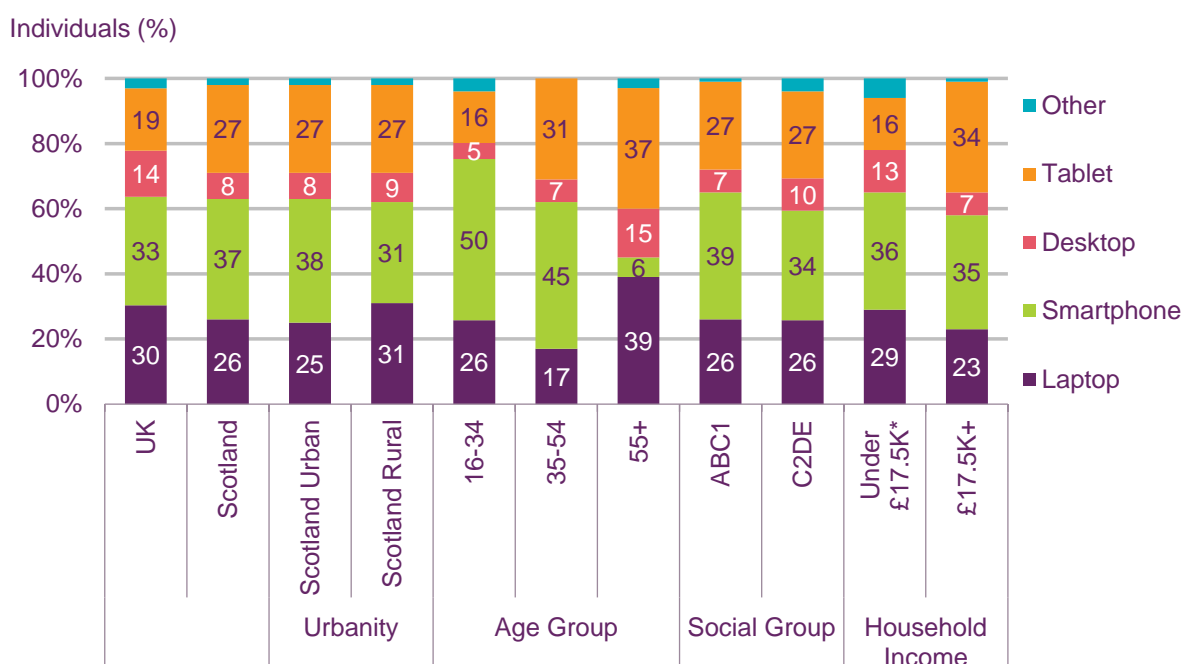
Source: Ofcom Technology Tracker, Wave 1 2015 Base: All adults aged 16+ (n = 3756 UK, 492 Scotland, 2264 England, 496 Wales, 504 Northern Ireland, 246 Scotland urban, 246 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015) QE1. Does your household have a PC, laptop, netbook or tablet computer?

Smartphones are the most important device for accessing the internet in Scotland

When asked to name their most important device for accessing the internet, no single device is cited by a majority of internet users in Scotland. About four in ten (37%) internet users in Scotland cite smartphones as the most important device with one in four nominating a tablet (27%) or laptop (26%). Compared to the UK overall, users in Scotland are more likely to cite a tablet as their most important device (27% vs. 19%) and are less likely to nominate a desktop computer (8% vs. 14%).

There are no significant differences in 2015 among internet users in Scotland in urban or rural locations or by household socio-economic group. Half of internet users aged 16-34 (50%) and more than four in ten (45%) aged 35-54 say a smartphone is the most important device for going online. In contrast only 6% of internet users aged 55 and over are likely to say this. Younger internet users (aged 16-34) are less likely than older users to say a tablet computer is the most important device for going online (16%).

Figure 5.4 Most important device for accessing the internet in Scotland



Source: Ofcom Technology Tracker, Wave 1 2015 Base: Internet users aged 16+ (n = 3095 UK, 388 Scotland, 197 Scotland urban, 191 Scotland rural, 150 16-34, 134 35-54, 104 55+, 224 ABC1, 164 C2DE, 97 under £17.5K*, 157 £17.5K+).

QE40: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "Other device", "None" and "don't know". *Caution: Low base

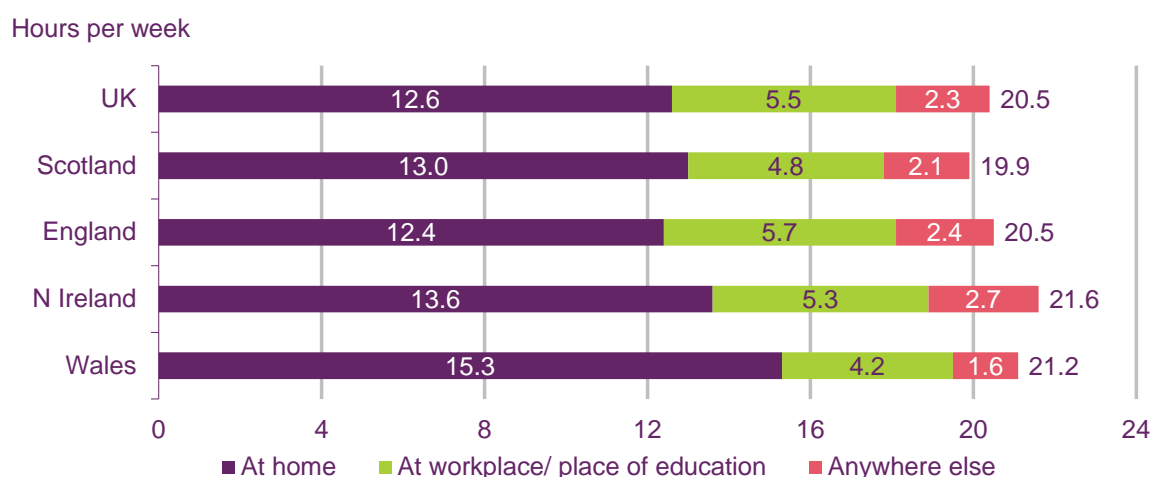
5.3 Internet use

People in Scotland say they spent more time online in 2014 than they did in 2013

According to research conducted for Ofcom's *Adult Media Literacy Report*⁴³, internet users in Scotland claim to spend 19.9 hours on the internet per week (16.5 hours in 2013). Internet users in Scotland claimed to spend a significantly lower amount of time using the internet inside of the home than in Wales (13.0 vs. 15.3 hours).

⁴³ Available from online at <http://stakeholders.ofcom.org.uk/market-data-research/other/research-publications/adults/media-lit-10years/>

Figure 5.5 Claimed time spent on the internet in a typical week



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland).

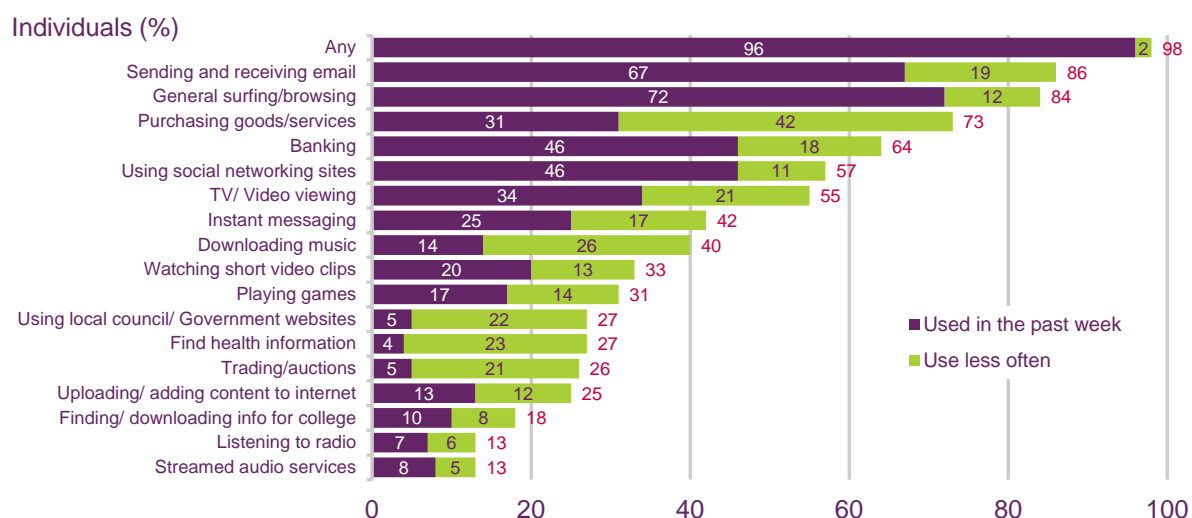
Question: IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)

More than half of internet users in Scotland now watch TV or video content online

There are six activities undertaken by a majority of internet users in Scotland. These are sending and receiving email (86%), general surfing or browsing (84%), purchasing goods or services (73%), banking (64%), using social networking sites (57%), and TV/ video viewing (55%). The first two of these activities had been undertaken in the previous week by a majority of internet users in Scotland.

Among the six activities undertaken by a majority of internet users in Scotland, compared to 2014 internet users in Scotland are now more likely to say they purchase goods or services (73% compared to 65% in 2014) or undertake TV/ video viewing (55% vs. 45%).

Figure 5.6 Activities conducted online by internet users in Scotland



Base: Adults aged 16+ who use the internet at home or elsewhere (n= 388 Scotland 2015)

QE5. Which, if any, of these do you use the internet for? Source: Ofcom Technology Tracker, Wave 1 2015

