

4 Internet and web-based content

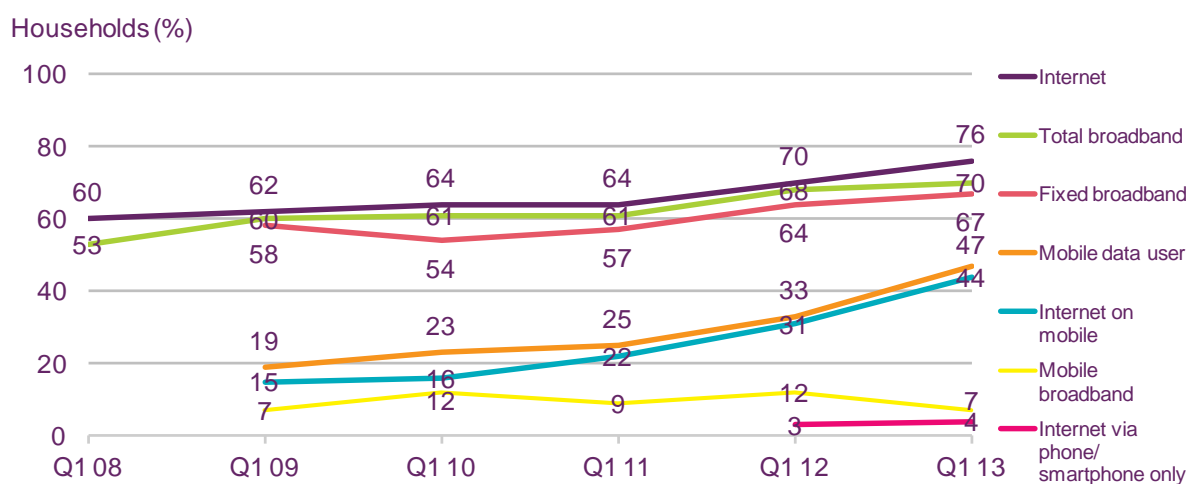
4.1 Internet take-up

Three in four households in Scotland have internet access

Three-quarters of households in Scotland (76%) had access to the internet at Q1 2013 (via broadband, mobile phone or narrowband), with this figure increasing six percentage points year on year, to be slightly lower than the UK average (80%).

The increased difference between total broadband access (70%) and internet access (76%) reflects the growing proportion of consumers in Scotland who access the internet on their mobile phone (44%). Internet access on a mobile phone was up by 13 percentage points, the largest rise among the devolved nations. Furthermore, 4% of consumers in Scotland accessed the internet *only* through a mobile phone, the same as the UK average.

Figure 4.1 Internet take-up, Scotland: 2008-2013



Source: Ofcom technology tracker

Base: All adults aged 16+ (n = 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013)

4.2 Internet-enabled devices

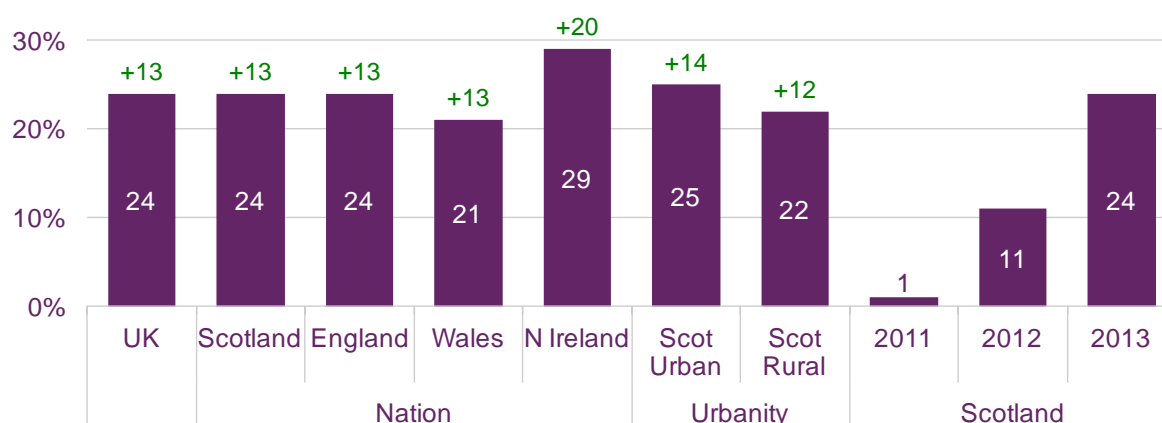
A quarter of households in Scotland have a tablet computer

Tablet computer ownership has more than doubled in Scotland in the past year, in line with the rest of the UK. In the first quarter of this year, 24% of households in Scotland claimed to own a tablet computer such as an iPad or Kindle Fire, a 13 percentage point annual increase, following a ten percentage point increase in the year to Q1 2012.

Those in Scotland most likely to have purchased a tablet are aged 35-54 (43% of whom had one in their household) and from higher-income households (40% of those with a household income of £17.5k+), with no significant difference across Scotland's urban or rural areas. For most households with a tablet, this is in addition to a desktop, laptop, or netbook computer, as just 2% of households in Scotland have *only* a tablet computer.

Figure 4.2 Household take-up of tablet computers in Scotland

Households (%) / percentage point change in take-up of tablet computers from Q1 2012



Source: Ofcom research, Q1 2013

Base: All adults aged 16+ (n = 3750 UK, 501 Scotland, 2250 England, 492 Wales, 507 Northern Ireland, 250 Scotland urban, 251 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013)

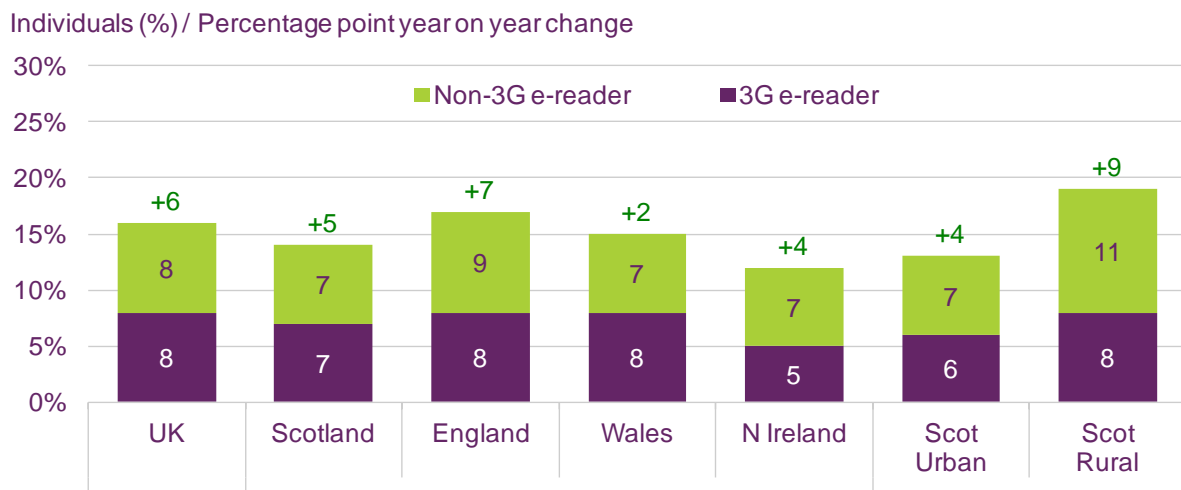
QE1. Does your household have a PC, laptop, netbook or tablet computer?

One in seven adults in Scotland use an e-reader

One in seven (14%) adults in Scotland personally use an e-reader to read e-books, magazines or other text downloaded from the internet, a five percentage point annual increase. Half of those who use an e-reader have a built-in 3G connection, which allows them to download books using a mobile network. The incidence of household ownership of an e-reader in Q1 2013 was 20%, a 12 percentage point annual increase and similar to the incidence for the UK as a whole (22%).

Those in Scotland most likely to use an e-reader are female (18%) and from ABC1 social groups (19%), with no significant difference across Scotland's urban or rural areas.

Figure 4.3 Personal use of e-readers: 2013



Source: Ofcom research, Q1 2013

Base: All adults aged 16+ (n = 3750 UK, 501 Scotland, 2250 England, 492 Wales, 507 Northern Ireland, 250 Scotland urban, 236 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 access to a mobile network?

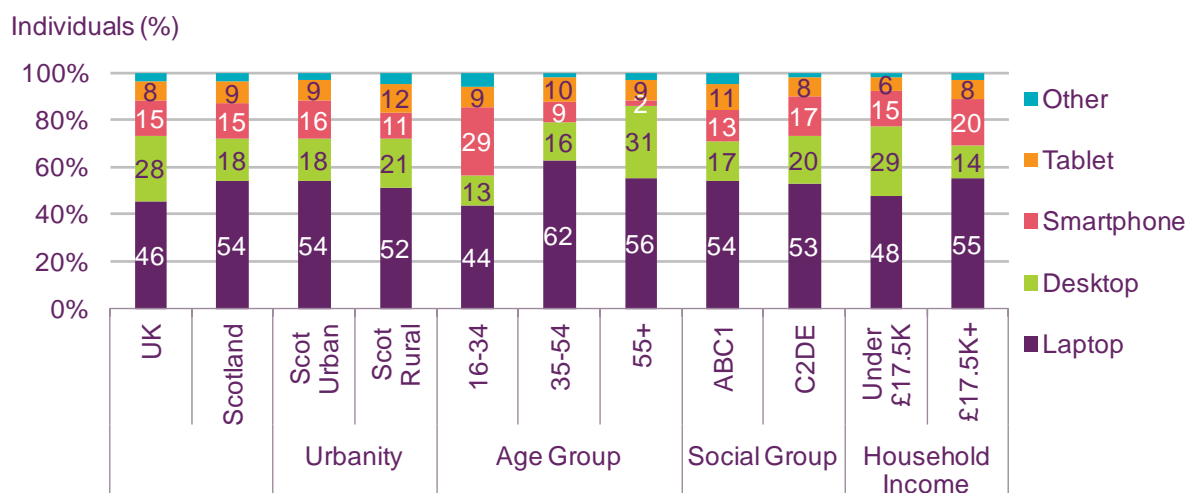
More than half of internet users in Scotland claim their laptop is the most important device for getting online

The laptop (54%) was the most important device among internet users in Scotland for accessing the internet. This was especially the case for internet users aged 35-54 (62%) who were significantly more likely to choose the laptop as their most important device than were those aged 16-34 (44%). Instead, 16-34 year olds were significantly more likely to say their smartphone (29%) was their most important device for going online.

The desktop computer was significantly more likely to be the most important device for internet access among those aged 55+ (31%) and those in low-income households (29%). There were no significant differences by socio-economic group among those who chose their tablet computer, and no significant differences between rural and urban areas.

Device preferences are likely to reflect take-up of devices; we consider device importance by ownership in Chapter 4 of the *UK Communications Market Report*.

Figure 4.4 Most important device for accessing the internet in Scotland



Source: Ofcom research, Q1 2013

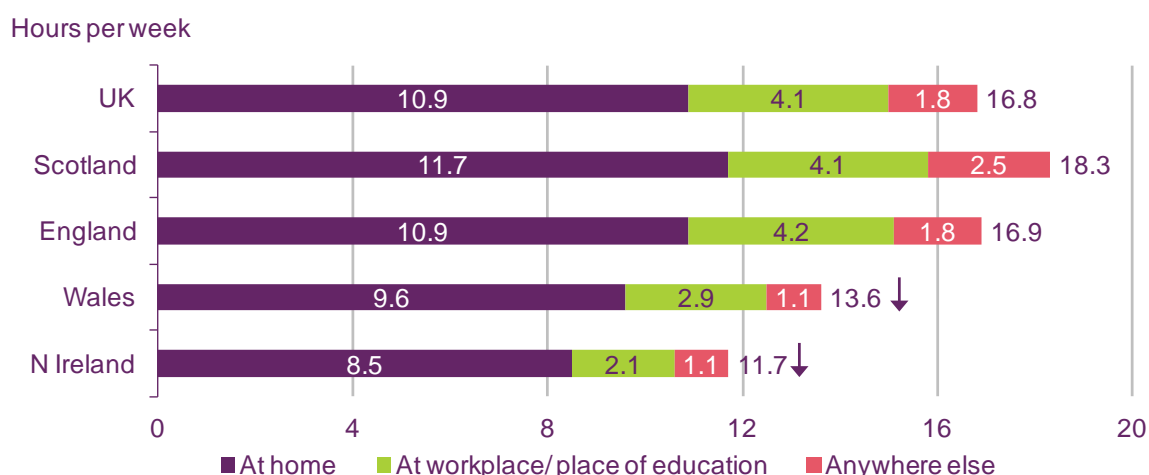
Base: All adults aged 16+ (n = 3750 UK, 501 Scotland, 2250 England, 492 Wales, 507 Northern Ireland, 250 Scotland urban, 251 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "netbook", "games console", "other device", "none" and "don't know".

4.3 Internet use

Internet users in Scotland spent the most time online of the devolved nations

According to research conducted for Ofcom's *Adult Media Literacy Report*, internet users in Scotland claim to spend more than 18 hours on the internet per week. This was not significantly different to the UK average of 16.8 hours. Following a similar pattern as the rest of the UK, internet users in Scotland claim to spend the majority of their time online at home, followed by their workplace or place of education, and the least time online in any other location.

Figure 4.5 Claimed time spent online in a typical week



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

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)

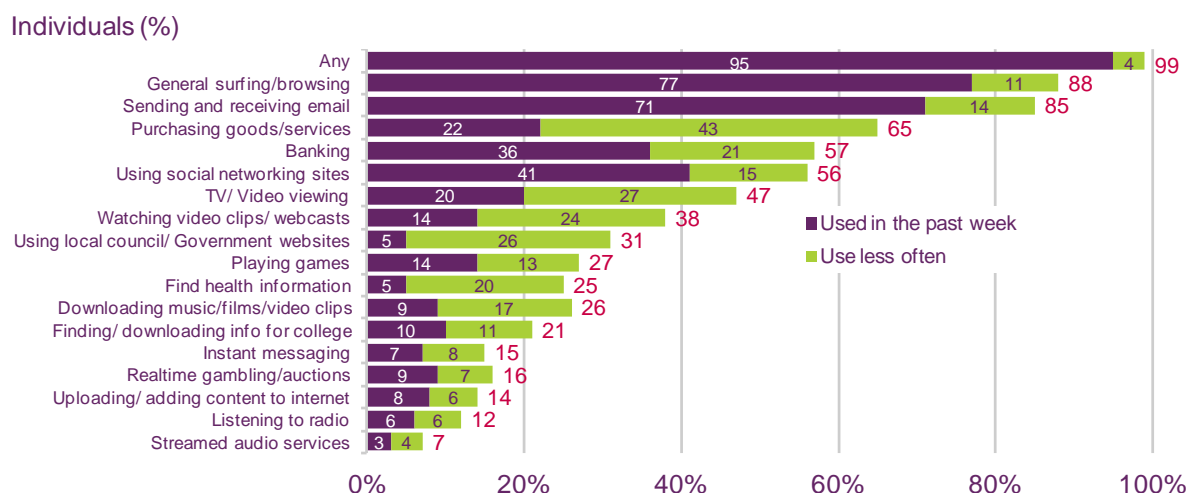
Base: All adults aged 16+ who use the internet at home or elsewhere (1381 UK, 857 England, 183 Scotland, 177 Wales, and 164 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Two-thirds of broadband users in Scotland purchase goods and services online

Almost nine in ten internet users (88%) in Scotland use the internet for general browsing, and of the more specific activities asked about, sending and receiving email (85%) is the most popular use, with 71% of internet users having done this in the past week.

Purchasing goods and services online is the second most popular specific use of the internet (65%), but only one in five internet users had done this in the past week (22%). Visiting social networking sites (41%) and internet banking (36%) were other popular uses of the internet, which had been done in the past week.

Figure 4.6 Activities conducted online by internet users in Scotland



QE5. Which, if any, of these do you use the internet for?

Source: Ofcom research, Q1 2013

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 394 Scotland 2013)

Note: Question change between 2012 and 2013 makes trend data incomparable.