

## 5 Internet and online content

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## 5.1 Scotland: recent developments

### Digital Skills

The Scottish Government published its digital strategy “*Realising Scotland’s full potential in a Digital World*” earlier this year. It sets out its plans for putting digital communications at the heart of economic growth and the delivery of public services.

The Scottish Government has a stated objective of making Scotland a ‘world class digital nation’ by 2021 and has announced some measures it intends to take including launching a new Digital Growth Fund to address the current undersupply of digital skills and launching a new

round of funding for community digital inclusion projects. It also plans to extend Scotland’s Digital Participation Charter to get more organisations involved in a national movement to promote digital skills.

## 5.2 Internet take-up

### Three-quarters of households in Scotland have access to the internet

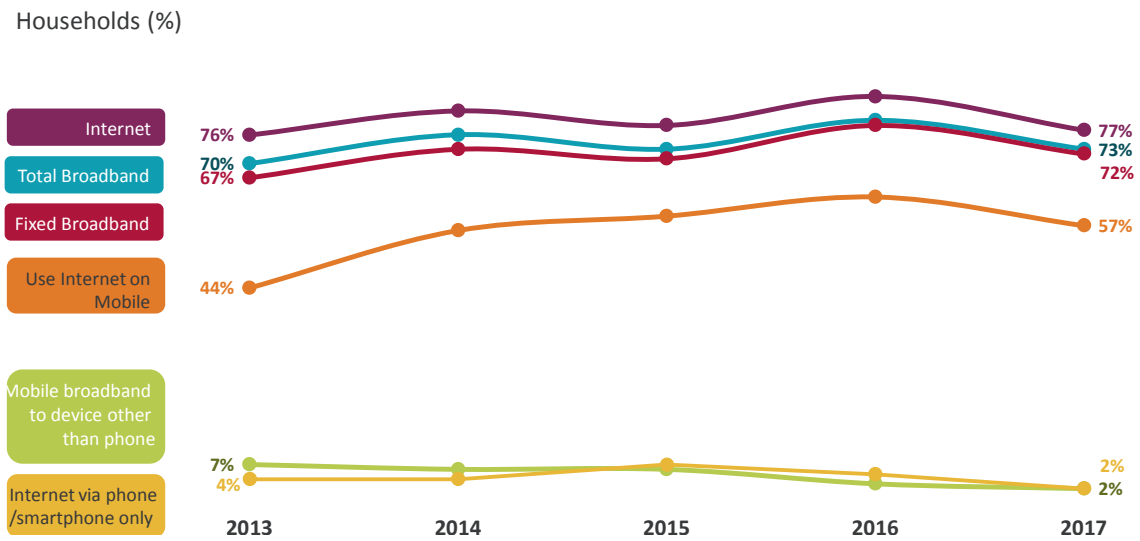
In 2017, more than three-quarters (77%) of households in Scotland have access to the internet<sup>1</sup>. Internet take-up levels in Scotland are statistically unchanged since 2016.

Around seven in ten households in Scotland (72%) have access to fixed broadband at home, and almost six in ten (57%) use the internet through a mobile phone, both figures unchanged since 2016. The

proportion of adults in Scotland who access the internet exclusively through a mobile phone or smartphone, and those with mobile broadband to a device other than phone, remain stable, both at 2%.

<sup>1</sup>This includes internet access via broadband or mobile phone. Incidences of narrowband are too low to report but would still count as ‘internet access’.

Figure 5.1: Internet take-up, Scotland: 2010-2017



**Source:** Significance testing: Arrows indicate any significant differences at the 99% confidence level between Scotland 2016 and 2017  
**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, 510 Scotland 2017)

**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 includes 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:** ‘Use 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.

## 5.3 Internet-enabled devices

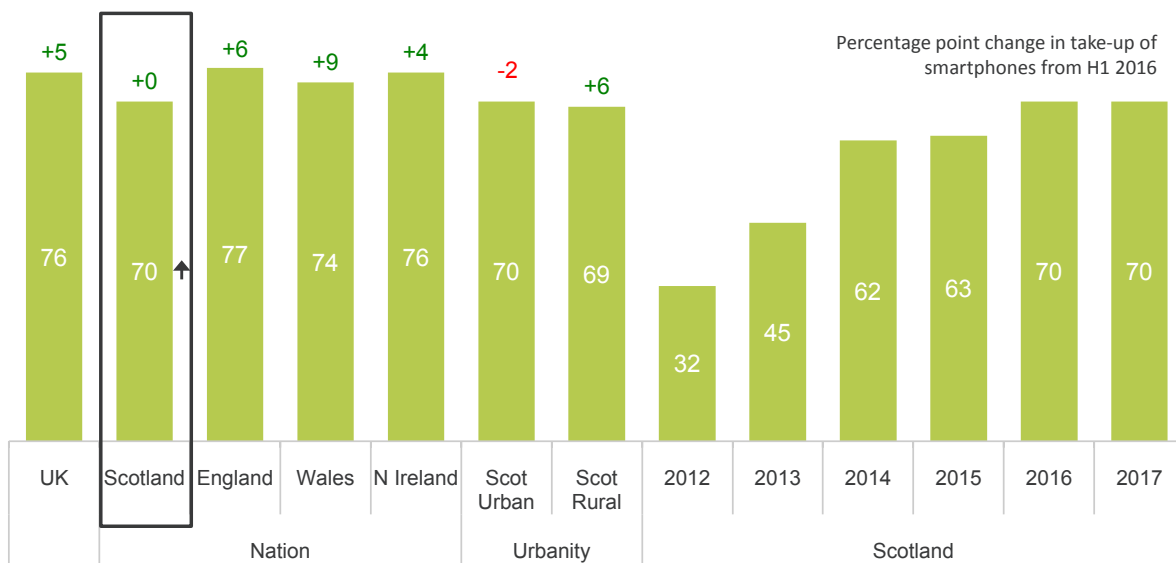
### Seven in ten adults in Scotland personally use a smartphone, below the UK average

In 2017, the proportion of adults in Scotland personally using a smartphone (70%) was unchanged since 2016.

This is lower than the UK overall figure (76%).

Smartphone ownership does not vary significantly by urban or rural location in Scotland.

Figure 5.2: Take-up of smartphones in Scotland: 2011-2017



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ (n = 3743 UK, 510 Scotland, 2245 England, 495 Wales, 493 Northern Ireland, 258 Scotland urban, 252 Scotland rural, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016, 510 Scotland 2017)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2017, between Scotland urban and rural in 2017 and at the 99% confidence level between Scotland 2016 and 2017. Circles around the +/- figures above the chart indicate any significant difference at the 99% confidence level between 2016 and 2017 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.

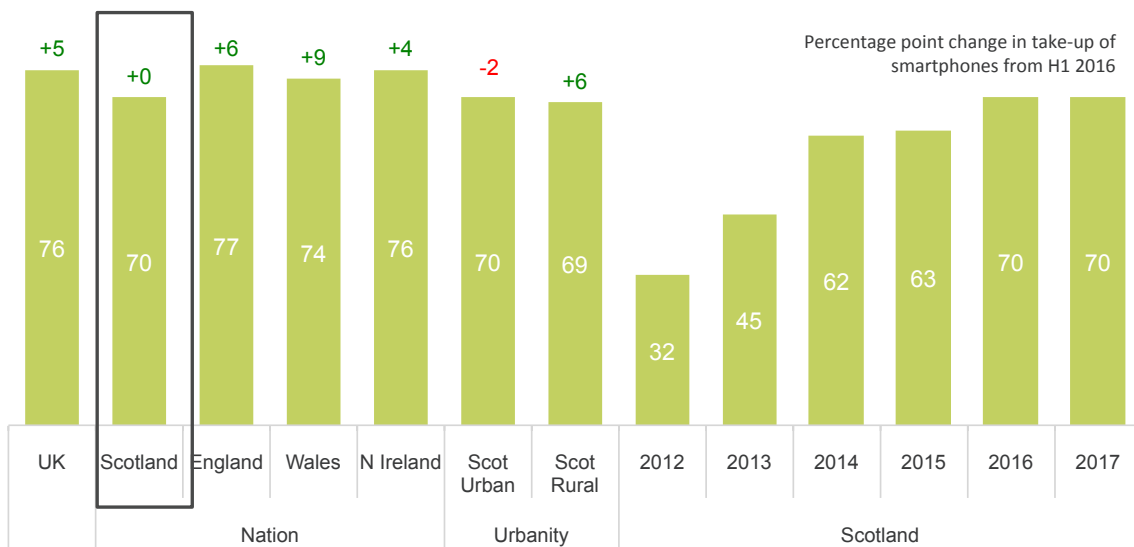


### Almost six in ten households in Scotland own a tablet

As in the UK overall, ownership of a tablet in households in Scotland (56%) remains unchanged since 2016, and is in line with the UK average.

Tablet ownership does not vary significantly by urban or rural location in Scotland.

Figure 5.3: Ownership of tablet computers in Scotland



Source: Ofcom Technology Tracker, Half 1 2017

Base: All adults aged 16+ (n = 3743 UK, 510 Scotland, 2245 England, 495 Wales, 493 Northern Ireland, 258 Scotland urban, 252 Scotland rural, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016, 510 Scotland 2017)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2017, between Scotland urban and rural in 2017 and at the 99% confidence level between Scotland 2016 and 2017. Circles around the +/- figures above the chart indicate any significant difference at the 99% confidence level between 2016 and 2017 for Scotland, urban and rural.

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

### Internet users in Scotland say a smartphone is their most important device for going online

Four in ten (41%) internet users<sup>1</sup> in Scotland say that the smartphone is their most important device for going online, at home or elsewhere. This matches attitudes for the UK overall. With the exception of internet users aged over 55, people in all demographic groups considered the smartphone their

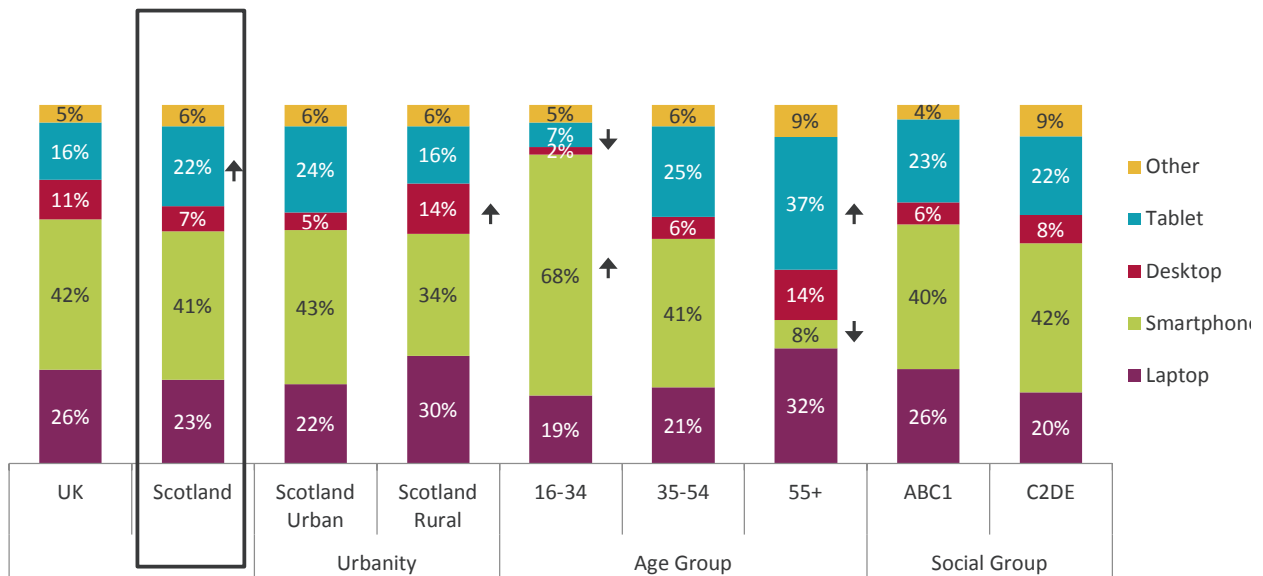
most important device for internet access; it was chosen by 68% of 16-34s compared to 8% of over-55s. There were no differences by socio-economic group in Scotland in 2017.

Internet users in Scotland are more likely than those in the UK overall to say that a tablet is their most important device for going online

(22% vs. 16%), despite comparable levels of tablet ownership in Scotland and in the UK overall.

In 2017, internet users in rural areas of Scotland are more likely than those in urban areas to say that a desktop is their most important device for going online (14% vs. 5%).

**Figure 5.4: Most important device for accessing the internet in Scotland**



**Source:** Ofcom Technology Tracker, Half 1 2017

**Base:** Internet users aged 16+ (n = 3221 UK, 4224 Scotland, 216 Scotland urban, 208 Scotland rural, 152 16-34, 148 35-54, 124 55+, 216 ABC1, 208 C2DE).

**Significance testing:** Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2017 and between Scotland urban and rural in 2017, by age compared to all internet users in Scotland in 2017 and between socio-economic groups in Scotland in 2017.

**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'.

<sup>1</sup> Internet users are defined as those who ever go online, either at home or elsewhere

## 5.4 Internet use

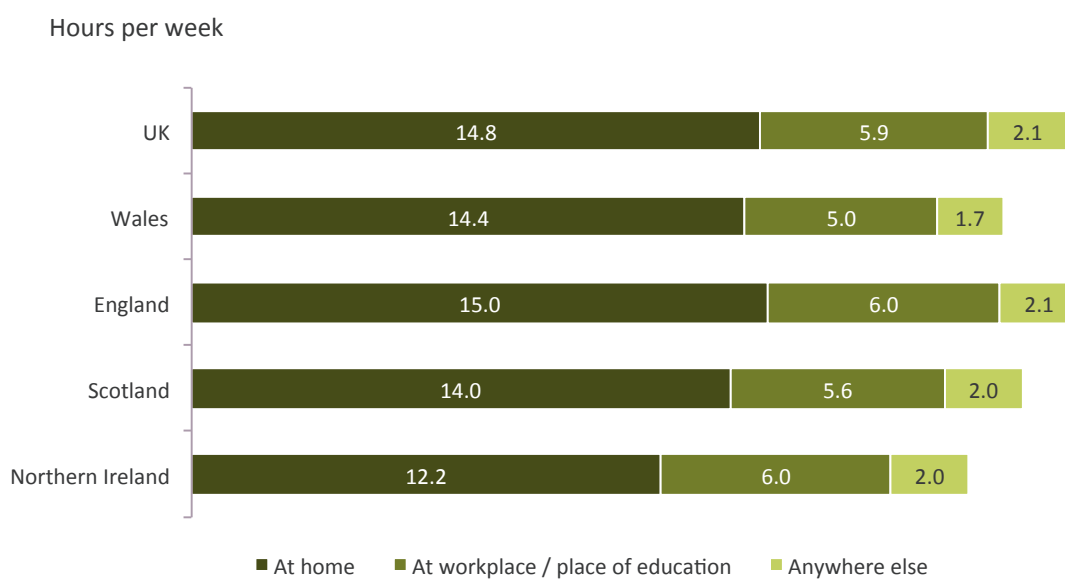
### Internet users in Scotland spent an average of 22 hours online per week in 2016

According to research conducted for Ofcom’s *Adults’ Media Use and Attitudes Report 2016*,<sup>1</sup> internet users in Scotland spent an average

of 21.7 hours online per week in 2016, the majority of which was at home (14 hours). Time spent online by internet users

in Scotland in any location (at home, in the workplace or place of education, or anywhere else), was in line with the UK as a whole.

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



**Source:** Ofcom Media Literacy Tracker 2016

**Base:** All adults aged 16+ who go online at home or elsewhere (1553 UK, 999 England, 176 Scotland, 189 Wales, 189 Northern Ireland).

**IN5A-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)

<sup>1</sup> Available online at [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0020/102755/adults-media-use-attitudes-2017.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf)

### General surfing/browsing and sending/ receiving email remain the most popular activities among internet users in Scotland in 2017

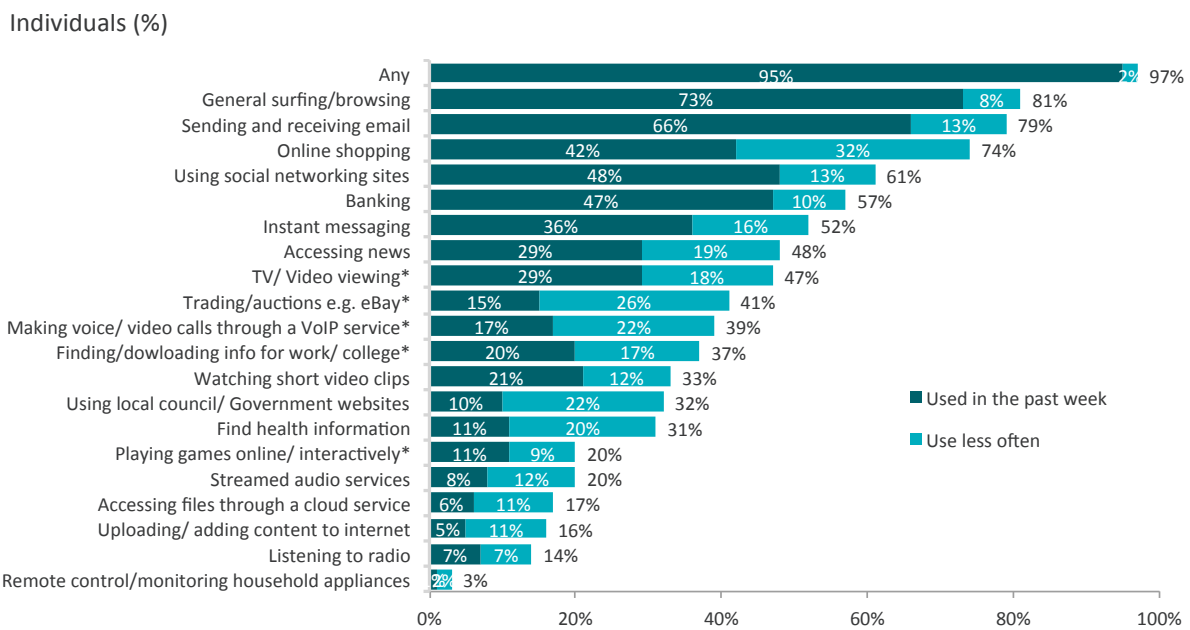
Around eight in ten internet users in Scotland cited general surfing/ browsing (81%) and sending/ receiving email (79%) as the most popular online activities in 2017.

These activities were also reported as having been done most in the past week.<sup>1</sup> Online shopping was the next most popular activity (74%), followed by social networking (61%) and banking (57%).

Around half of internet users in Scotland go online for instant messaging (52%), to access news (47%) and to view TV/ video (47%).

Where it was possible to make comparisons<sup>2</sup>, no internet activities were more likely or less likely than in 2016 to be carried out online.

Figure 5.6: Activities conducted online by internet users in Scotland



Source: Ofcom Technology Tracker, Half 1 2017

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 424 Scotland 2017)

Significance testing: Arrows indicate any significant difference at the 99% confidence level in the total incidence of use between Scotland 2016 and 2017. \*Codes marked with an asterisk have not been tested as they are not directly comparable.

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

<sup>1</sup> 'The past week' was that at the time of respondents' interviews

<sup>2</sup> Activities marked with an asterisk in Error! Reference source not found. are not directly comparable