

4 Internet and web-based content

4.1 Broadband take-up in Scotland

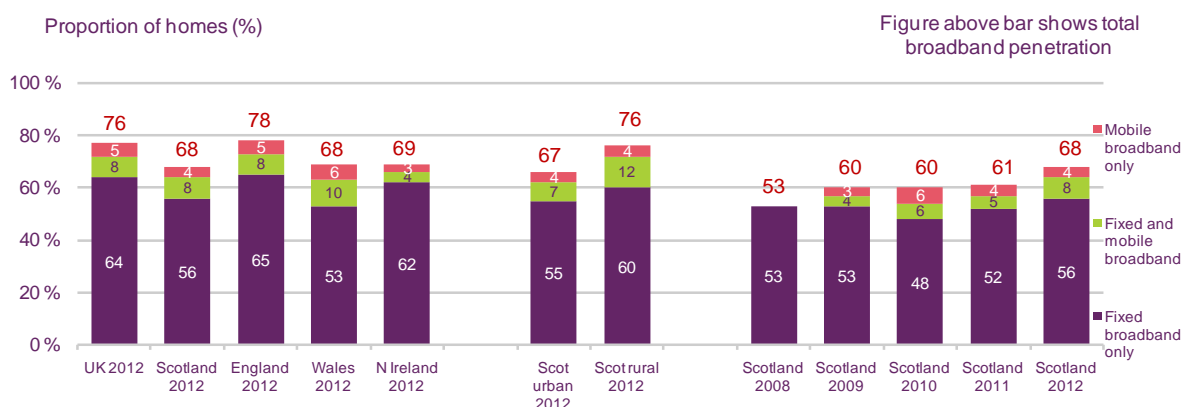
Significant increase in broadband take-up in Scotland

Last year we reported that broadband take-up in Scotland continued to lag behind other UK nations, and had remained unchanged at 61%, while all the other UK nations had seen year-on-year increases in take-up.

This year broadband take-up in Scotland has increased significantly; to 68%, and is now at a similar level to take-up in Wales (68%) and Northern Ireland (69%) (Figure 4.1). Broadband take-up in Scotland is still below the UK average of 76% - a figure which is heavily influenced by higher take-up in England (78%).

The increase in Scotland's broadband ownership has been driven by increased ownership of both fixed broadband (increasing from 57% to 64%) and mobile broadband (increasing from 9% to 12%). As in previous years, broadband take-up is higher in Scotland's rural areas than in urban areas.

Figure 4.1 Broadband take-up at home



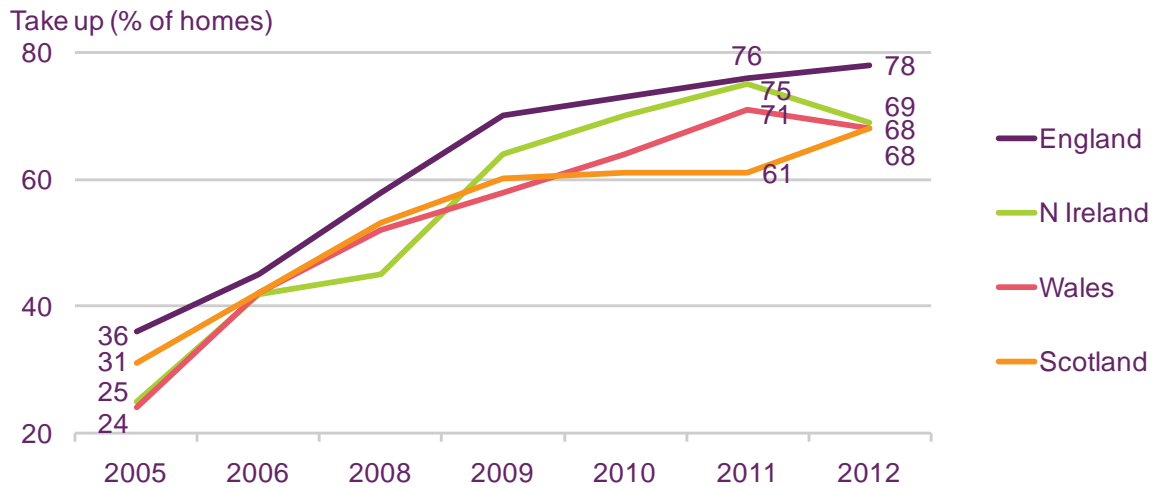
Source: Ofcom research, Q1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011, 500 Scotland 2012). Question: Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

Scotland returns to par with Wales and Northern Ireland

Figure 4.2 shows that broadband take-up in Scotland was level with the other nations until Q1 2010. In 2010 Scotland's take-up appeared to stall, while penetration in England, Wales and Northern Ireland continued to rise. This growing gap generated much debate among stakeholders in Scotland. Q1 2012 data show that the gap has now distinctly narrowed.

Figure 4.2 Broadband take-up across the UK's nations



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

Source: Ofcom research, Quarter 1 2011

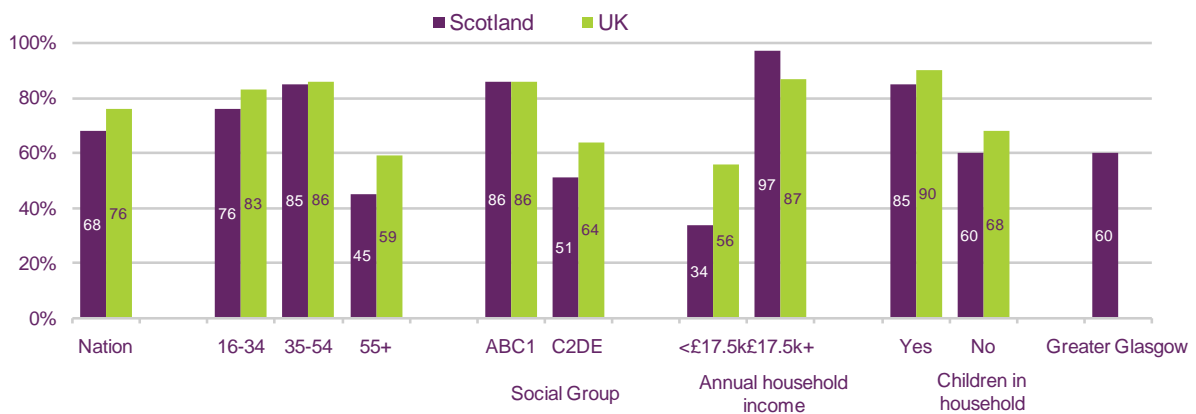
Base: All adults aged 15+ (n = 3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland)

Broadband take-up remains lower than average among over-55s and DE households

Despite the increased broadband take-up in Scotland this year, penetration is still lower than average among those aged over 55, C2DE social groups and low-income households (Figure 4.3).

In previous reports we have highlighted the particularly low broadband take-up in Greater Glasgow. Broadband take-up now stands at 60% in this area, which is an increase of ten percentage points from the same time last year when it stood at 50%. This year we have conducted in-depth analysis of the British Population Survey to better understand the reasons for this (see section 1.4).

Figure 4.3 Broadband take-up in Scotland compared to the UK (by demographic)



Source: Ofcom research, Q1 2012. Base: All adults aged 16+ (n =500 Scotland, 140 16-34s, 172 35-54s, 187 55+, 238 ABC1, 164 C2DE, 109 <£17.5k income, 154 £17.5k+, 154 children in home, 346 no children in home). Question. Which of these methods does your household use to connect to the internet at home?

This year has also seen a large increase (from 21% to 31%) in the proportion of adults in Scotland who use a mobile phone handset or smartphone to access the internet (Figure

5.8). This is discussed further in section 5.4 of the Telecoms and networks chapter of this report.

4.2 Internet-enabled devices

One in ten adults in Scotland have purchased a tablet computer in the past year

Figure 4.4 shows that tablet computer ownership has increased rapidly across the UK in the past year. In the first quarter of this year, 11% of adults in Scotland claimed to have a tablet PC, a 10 pp annual increase. Those most likely to have purchased a tablet PC are aged 35-54 and from AB social groups/ higher-income households.

Figure 4.4 Tablet computer take-up in Scotland



Source: Ofcom research, Q1 2012

Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural, 487 Scotland 2011, 500 Scotland 2012). Question. Does your household have a PC, laptop, netbook or tablet computer?

Eight per cent of adults in Scotland have an e-reader

As shown in Figure 4.5, just under one in ten (8%) adults in Scotland have an e-reader that they can use to read books, magazines and other text downloaded from the internet. Half of those with an e-reader have a built-in 3G connection, which allows them to download books using a mobile network. Those aged between 35 and 54 and in the AB social groups are most likely to own an e-reader.

Figure 4.5 Ownership of e-readers



Source: Ofcom research, Q1 2012 Base: All adults aged 16+ (n = 3772 UK, 500 Scotland, 2251 England, 513 Wales, 508 Northern Ireland, 264 Scotland urban, 236 Scotland rural) Question: 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?

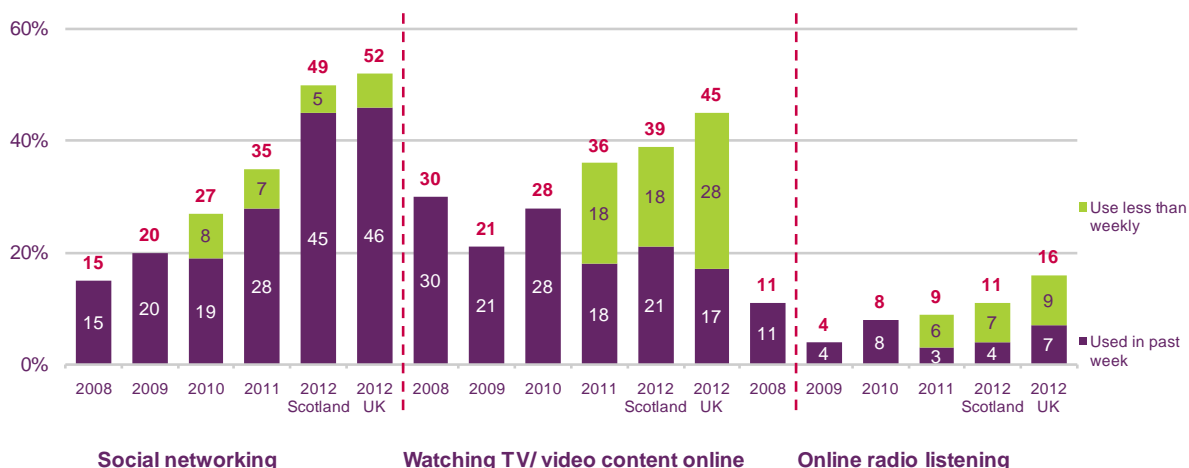
4.3 Internet use

Half of all adults in Scotland use social networking sites

The increase in broadband take-up and use of mobile phones to access the internet in Scotland in the past year has been accompanied by a sharp and significant increase in use of social networking sites, from 35% in Q1 2011 to half (49%) of all adults in Q1 2012 (Figure 4.6). The majority of those who used social networking sites had done so in the past week.

Four in ten (39%) adults in Scotland watch TV or video content online and one in ten (11%) listen to online radio. In both cases the proportion who use the internet for these activities has increased by a small, but not statistically significant, amount since the beginning of 2011.

Figure 4.6 Use of internet applications

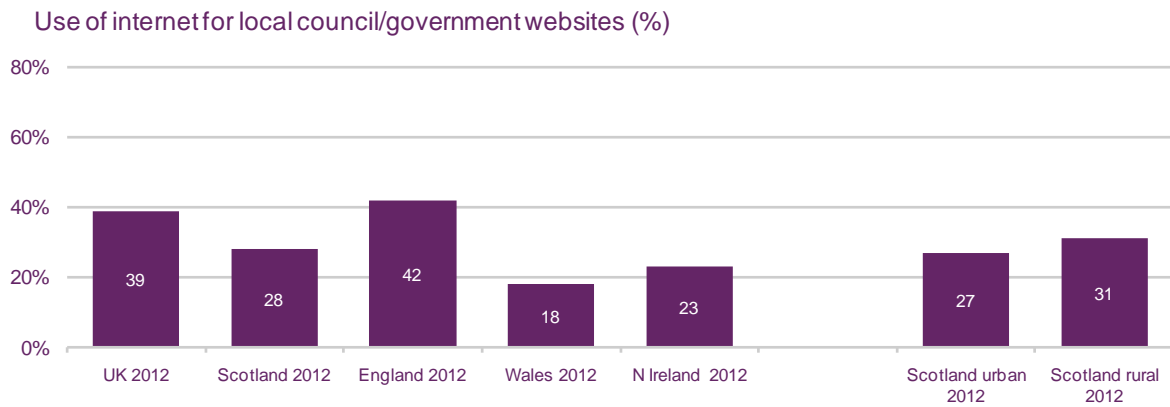


Source: Ofcom research, Q1 2012

Base: All adults aged 16+ in Scotland n = 500 Question. NB includes use via any device i.e. PC/laptop or mobile phone. Prior to 2011 the chart shows those who had ever used these applications.

Just over a quarter (28%) of adults in Scotland claim to use the internet to access local council or government websites (Figure 4.7). This is lower than in England (42%), where broadband take-up is higher, but higher than in Wales (18%) and Northern Ireland (23%) where broadband take-up is at a comparable level.

Figure 4.7 Use of internet to access local council/ government websites



Source: Ofcom research, Q1 2012 Base: Adults aged 16+ with access to the internet at home (n = 2823 UK, 361 Scotland, 1734 England, 363 Wales, 365 Northern Ireland, 178 Scotland urban, 183 Scotland rural). Question: Which, if any, of these do you or members of your household use the internet for whilst at home?