

5 Internet and online content

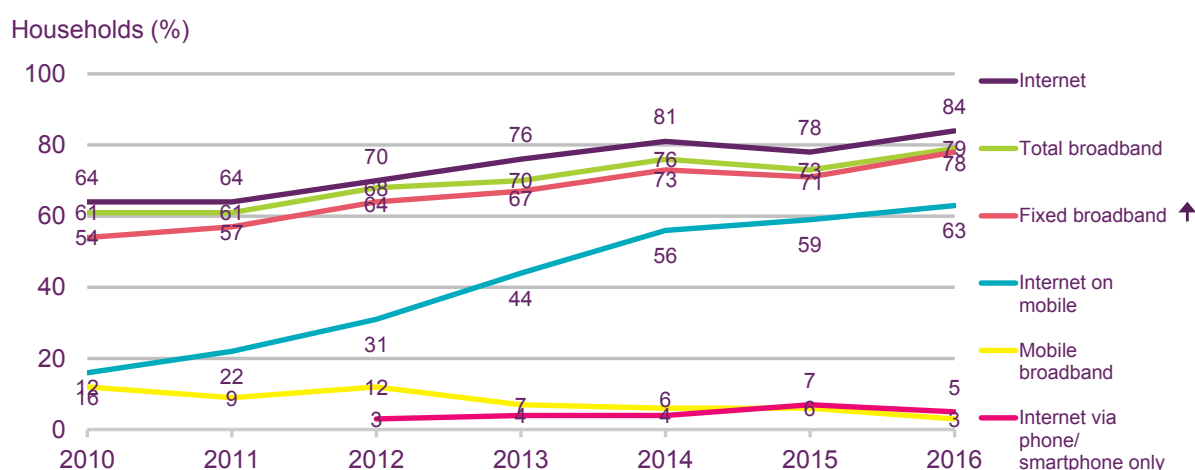
5.1 Internet take-up

Fixed broadband internet access in Scotland increased to 78% of households in 2016

More than three-quarters of households (78%) had access to fixed broadband at home - an increase of 7 percentage points (pp) since 2015. Just over six in ten adults (63%) had online access through a mobile phone.

In 2016, more than eight in ten households in Scotland (84%) had access to the internet.²⁷ This is consistent with 2015 figures.

Figure 5.1 Internet take-up, Scotland: 2010-2016



Source: Ofcom Technology Tracker. Data from Q1 2010-2014, then H1 2015-2016

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland 2015 and 2016.

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)

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 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.

²⁷ This includes internet access via broadband or mobile phone. Incidences of narrowband are too low to report but would still count as 'internet access'

5.2 Internet-enabled devices

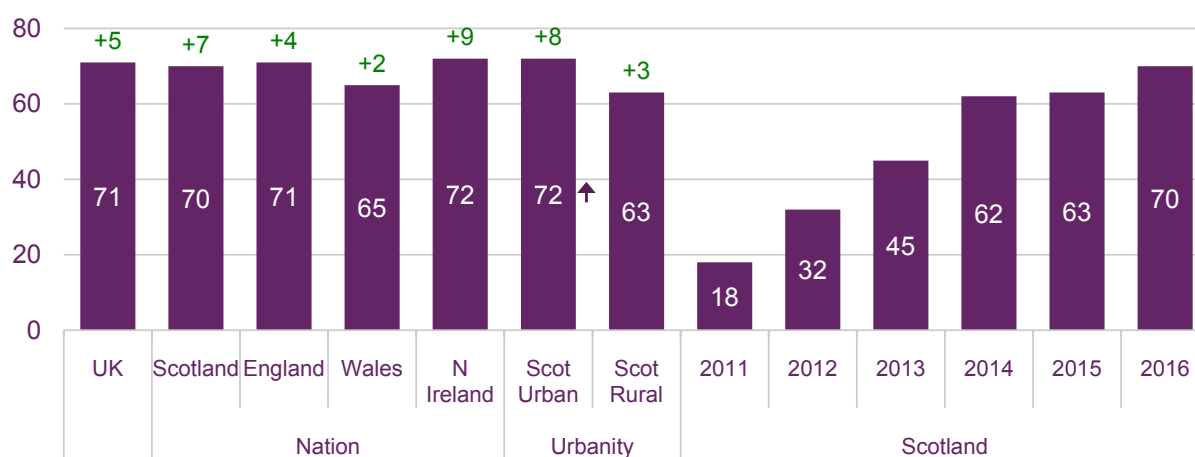
Take-up of smartphones in Scotland was steady at 70% of adults in 2016

Seventy per cent of adults in Scotland claimed to own a smartphone in 2016, in line with the overall UK average (71%). There has been no change in this figure for Scotland since 2015.

Smartphone ownership among adults in Scotland differed by location, with those in urban areas more likely than those in rural areas to own a smartphone (72% vs. 63%).

Figure 5.2 Take-up of smartphones in Scotland: 2011-2016

Adults 16+ (%) / percentage point change in take-up of smartphones since H1 2015



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

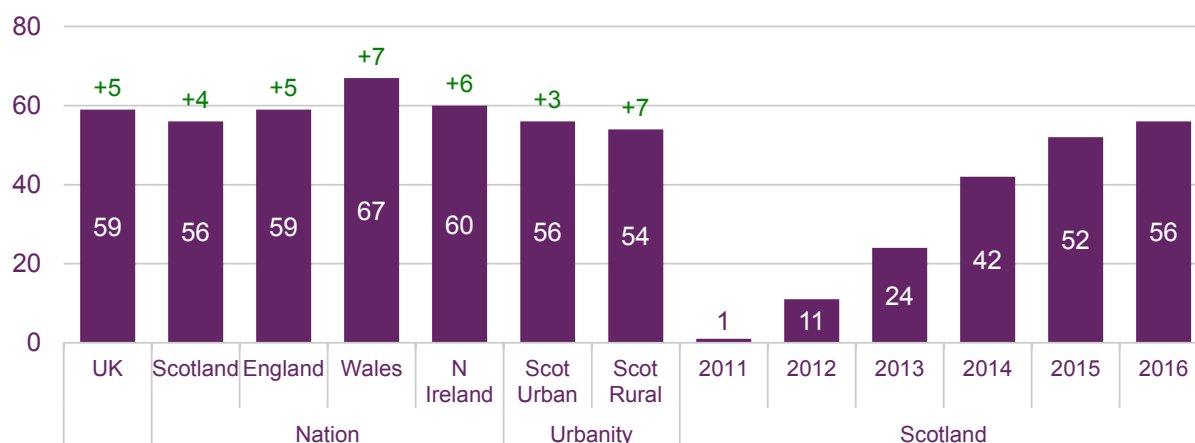
QD24B: Do you personally use a smartphone? A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.

Almost six in ten households in Scotland own a tablet

Close to six in ten households in Scotland own a tablet computer (56%). This figure is unchanged since 2015, following a 10pp increase between 2014 and 2015 (from 42% to 52%). Ownership levels in Scotland in 2016 did not vary compared to the UK overall (59%) and there was no variation by urban or rural location.

Figure 5.3 Ownership of tablet computers in Scotland

Households (%) / percentage point change in take-up of tablet computers since H1 2015



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ (n = 3737 UK, 502 Scotland, 2239 England, 489 Wales, 507 Northern Ireland, 251 Scotland urban, 251 Scotland rural, 487 Scotland 2011, 500 Scotland 2012, 501 Scotland 2013, 501 Scotland 2014, 492 Scotland 2015, 502 Scotland 2016)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and UK in 2016, between Scotland urban and rural in 2016 and between Scotland 2015 and 2016. Circles around the +/- figures above the chart indicate any significant difference between 2015 and 2016 for Scotland, urban and rural.

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

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

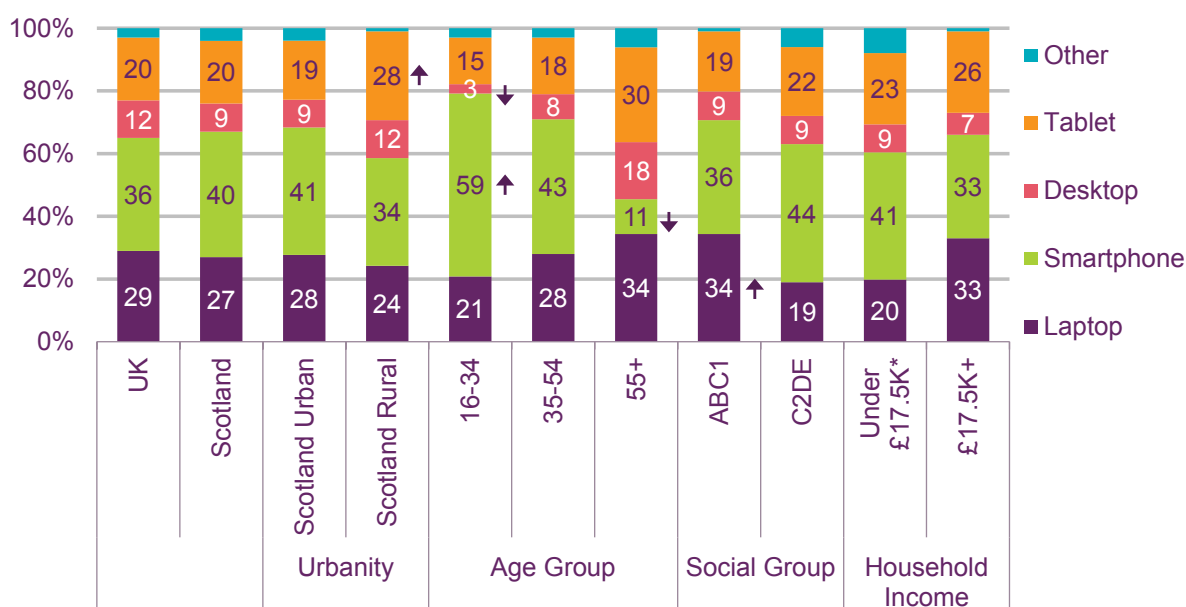
Internet users²⁸ in Scotland were most likely to consider smartphones their most important device for accessing the internet in 2016, with 40% choosing this device. In contrast, 27% of internet users thought a laptop was their most important device for internet access, while 20% selected tablets. There are no differences in these figures compared to the UK overall.

Compared to all internet users in Scotland, those aged 16-34 were more likely to say smartphones were their most important device (59% vs. 40%) and less likely to say that about desktop computers (3% vs. 9%). In contrast, internet users aged 55 and over were less likely to choose a smartphone as their most important device than all internet users in Scotland (11% vs. 40% respectively).

In 2016, internet users in rural areas of Scotland were more likely than those in urban areas to say that tablets were their most important device for going online (28% vs 19%). There was one difference by household socio-economic group: internet users in ABC1 households in Scotland were more likely than those in C2DE households to say that laptops were the most important device used to go online (34% vs. 19%). This is because ABC1 households are more likely than C2DE households to own a laptop (70% vs. 50%).

²⁸ Internet users are defined as those who ever go online, either at home or elsewhere.

Figure 5.4 Most important device for accessing the internet in Scotland



Source: Ofcom Technology Tracker, H1 2016

Base: Internet users aged 16+ (n = 3100 UK, 405 Scotland, 215 Scotland urban, 190 Scotland rural, 150 16-34, 134 35-54, 121 55+, 216 ABC1, 189 C2DE, 109 under £17.5K, 137 £17.5K+).

Significance testing: Arrows indicate any significant differences at the 95% confidence level between Scotland and the UK in 2016, between Scotland urban and rural in 2016, by age compared to all internet users in Scotland in 2016, between socio-economic groups in Scotland in 2016 and between household income groups in Scotland in 2016.

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'.

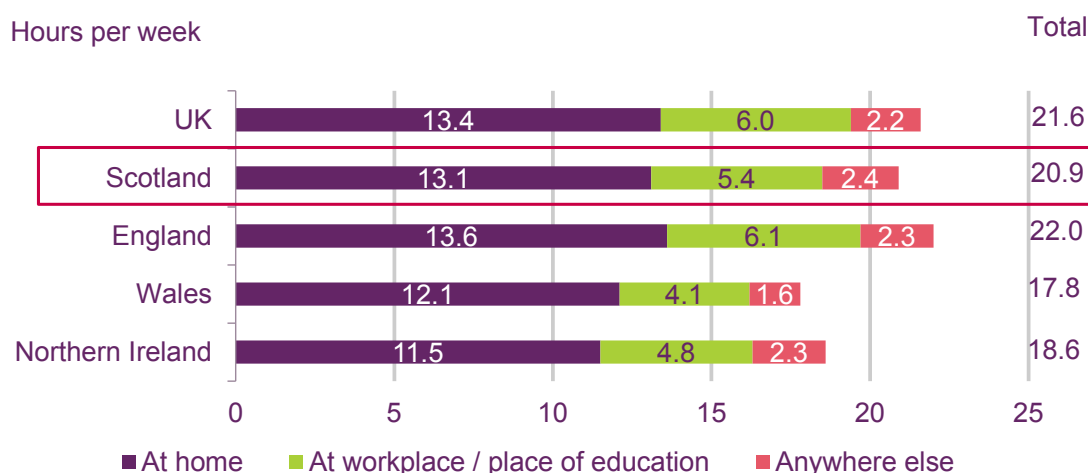
5.3 Internet use

Internet users in Scotland spent 20.9 hours a week on the internet in 2015

According to research conducted for Ofcom's *Adult Media Literacy Report*,²⁹ internet users in Scotland claimed to spend 20.9 hours on the internet per week in 2015. This was not statistically different to 2014. Consistent with observations across the UK and its nations, adults in Scotland spent the majority of their time online at home, followed by their workplace or place of education.

²⁹ Available online at http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/media-lit-10years/2015_Adults_media_use_and_attitudes_report.pdf

Figure 5.5 Claimed time spent on the internet in a typical week in 2015



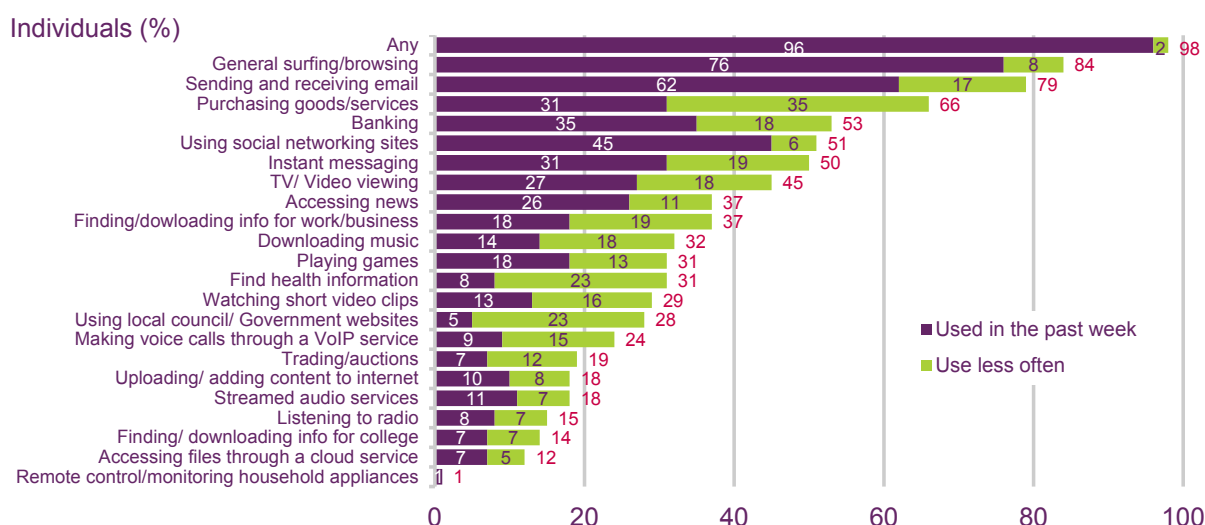
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2015
 Base: All adults aged 16+ who use go online at home or elsewhere (1548 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

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

General surfing or browsing and sending and receiving email were the most popular activities among internet users in Scotland in 2016

In 2016, three activities were undertaken by a majority of internet users in Scotland. These were: general surfing or browsing (84%), sending and receiving email (79%), and purchasing goods or services (66%). The first two of these activities had been undertaken in the previous week by more than six in ten internet users. A further two activities were undertaken by over half of internet users in Scotland; online banking (53%) and using social networking sites (51%).

Figure 5.6 Activities conducted online by internet users in Scotland



Source: Ofcom Technology Tracker, H1 2016

Base: Adults aged 16+ who use the internet at home or elsewhere (n= 405 Scotland 2016)

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