



Internet Citizens 2013

Use of selected citizen-related online content and
services

Research Document

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Section 1

Executive summary

This report provides an overview of metrics relating to UK adults' online participation in citizen-orientated content and services; in other words, those elements of online activity which further societal or democratic participation.

A selected range of core topics are covered, including use of government websites, e-petitions, health, public service broadcasting, news, local websites, hyperlocal sites, citizen journalism, cultural activities and libraries. It is the first time that we have examined these activities together, and we have done so to gain a clearer picture of their relative performance online. Where possible, findings are provided for the devolved nations as well as for the UK as a whole.

The report is published as part of our Annual Plan commitment to providing information and high quality research to understand levels of participation in communications services across the UK and its nations. The main data source used is the comScore online measurement system¹, supplemented with a selected range of published survey research.

The report is designed to be an exploratory examination of the landscape. We welcome comments on our approach and the topics covered, and suggestions as to how it can be modified in any future publications.

Key research findings

Government

Nearly half (48%) of internet users aged 15+ use any kind of government website, including local authority sites². One in five (20%) use the GOV.UK website, the government 'portal' for a range of content and services. Users of these sites are more likely to be in the AB socio-economic group and in older age-groups.

After the GOV.UK website (7.7 million users), the most popular websites are HMRC (2.98 million users), the police (1.3 million), the Home Office (1.3 million) and the DWP (0.9 million). According to Ofcom survey research, three-quarters of internet users say they have ever found out information about public services online, and six in ten say they have ever completed government processes online. In the devolved nations, government websites are relatively more popular in Northern Ireland than in Scotland or Wales.

Non-government websites that aim to provide citizens with information about the workings of Parliament or public authorities show low levels of use. However, one in five online users, according to survey data, say they have ever signed a petition online.

Health

Four in ten (41%) internet users visit any type of health information website. The NHS website is the most used, with a unique audience of 7.1 million (18% reach). Visitors are

¹ We have used the comScore Media Metrix service (MMX) to measure internet use on PCs/laptops. While data including mobile and tablet use is available from comScore's MMX Multi-Platform service, trend data was not available for the analysis period and so we have not included it in this report.

² All data points in this Executive Summary are from the internet measurement system comScore and relate to activity in March 2013, unless otherwise stated.

more likely to be women, and to spend far longer on the site (49 minutes, vs. 11 minutes for men).

WebMD is the next most popular website for health, albeit with less than half the active reach of the NHS.

Across the nations, NHS sites and WebMD are the top two websites by active reach. The BBC News Health website has a greater active reach in England and Scotland than in Wales or Northern Ireland.

PSB, news, local, hyperlocal and citizen journalism

The BBC is the most popular public service broadcasting (PSB) website, by a considerable margin, with an active reach of over half of all internet users (55%).

The BBC is also the most-used website for news provision. According to survey research, 52% of online news users say they use it, while 19% say they use Facebook. Sixteen per cent use the Google search engine, and 14% use the Sky News website.

Over half of UK internet users visit blogging websites (58%). The most popular site is Blogger, with around one third (32%) visiting in March 2013. Almost one in five (18%) visited Wordpress.com and 14% visited Tumblr. Blogging sites are more popular in Northern Ireland than in other nations.

According to survey research, over four in ten UK adults (44%) say they browse online for local news and information monthly or more often, and around one in six say they use apps for specific local news or community websites. While TV is most likely to be nominated as the most important local source (49%), 14% of regular local online news users nominate that as their most important source of local news.

Research shows that the number of active hyperlocal websites has increased rapidly in the last few years – from 295 sites in 2010 to 499 sites in 2013, according to analysis of the Openly Local database³. Most of these sites appear to be located in urban areas.

Culture (heritage, archives, museums and galleries)

According to the *Taking Part* DCMS tracking study, two in five adults in England have participated digitally in some sort of cultural activity, with those aged 25-44 more likely to have done so. One third had visited a theatre or concert website, three in ten (29%) had visited heritage websites, and a quarter (26%) had visited a museum or gallery website.

Older people are more likely to engage with archive and heritage sites than other types of citizen activity; one third (32%) of visitors to the National Archives website are aged 55+.

Libraries

According to the DCMS tracking study, there has been growth in the use of library websites, from 11% of people in England in 2008/9 to 16% in 2011/12. While most use is for searching and viewing online information, over one third (36%) say they have completed a library transaction online.

The British Library is used by 1% of internet users, and is more likely to be used by older people and those in the AB socio-economic group.

³ This analysis was undertaken by Birmingham City University in June 2013.

Section 1

Introduction

Ofcom's principal duty, as set out in Section 3(1) of the Communications Act is:

- to further the interests of citizens in relation to communications matters; and
- to further the interests of consumers in relevant markets, where appropriate by promoting competition.

Our role in furthering the interests of citizens includes seeking to ensure that people have access to the services and content they need in order to participate fully in society. This report provides an overview of their online use of such services and content in selected areas.

Our duties to citizens have informed our thinking since Ofcom's inception, and they continue to underpin many of our activities, informing our annual planning process and the priorities that we set. As described in Ofcom's 2013/4 Annual Plan, one of our strategic priorities is the promotion of opportunities to participate. This report is a response to section 3.38 of the Plan:

*To provide information and high quality research to understand levels of participation in communications services across the UK and its nations, supporting the identification of opportunities for further participation*⁴.

In our 2008 discussion paper *Citizens, Communications and Convergence*⁵, we described the citizen interest as follows:

As citizens, we participate in society, which includes the marketplace, but also extends far beyond it. Citizens are free to exchange goods and services, but are also free to participate in a whole range of social, cultural and political activities that are not the subject of commercial contracts.

It is important to note that our activities as citizens and consumers often overlap and blur. For example, much of the online content described in this report can be delivered and consumed commercially, and as such could also be deemed relevant to consumer interests. Much of it is of personal interest or importance as well as being of use to society as a whole. For example, news content online straddles both commercial, consumer-focused services and those of public service or civic provision. Nonetheless, we have selected some core categories that, taken together, can be seen to represent a landscape of broadly citizen-orientated content and services that enable participation in society.

It is challenging to create a fully comprehensive and universally-accepted list of online citizen-related content and services, and we do not claim such comprehensiveness here. We have focused on the following core topics to provide a breadth of comparative analysis across a range of types of activity. We welcome comments on our selection, and we are open to modifications to this list in any further publication.

It should be noted that the report focuses on the more mainstream or major providers of this type of content. This is in large part because measuring smaller, grassroots citizen initiatives

⁴ <http://www.ofcom.org.uk/files/2013/03/annplan1314.pdf>

⁵ <http://stakeholders.ofcom.org.uk/consultations/citizens/summary>

is by definition more difficult, although where possible we have included additional research from surveys or bespoke analysis to gauge the breadth of such content now available, for example in relation to hyperlocal activity.

The core categories are:

- Government and politics
- Health information
- Media - public service broadcasting, news, citizen journalism and hyperlocal content
- Culture – heritage, archives, museums and galleries
- Libraries

Our introductory chapter also includes a comparative look at the category of social networking, as social networking can offer the potential to enhance societal cohesion and provide a space for citizen-orientated networks and information.

Our main data source is comScore, the online measurement system⁶. These data are predominantly from March 2013, and the methodology of this system is described below and in annex A. We also use published research, including:

- Ofcom data from *Communications Market Report 2013*, and the *Adults' media use and attitudes report 2013*
- Oxford Internet Survey (2013) *Cultures of the Internet: The Internet in Britain*⁷
- DCMS (2011/12) *Taking Part: England's Survey of Leisure, Culture and Sport*⁸
- NESTA (2013) *UK Demand for Hyperlocal Media Research Report*
- Reuters Institute (2013) *Digital News Report*
- Office for National Statistics (2013) *Internet Access - Households and Individuals*⁹

Where possible, data are shown by devolved nation as well as by socio-economic and age groups¹⁰. It is important to monitor how content and services with a citizen dimension are used at a nation level, particularly as devolved governments have their own strategies for encouraging online take-up and use.

The overall aim of the report is to show the use that is made of various types of citizen-oriented content and services, to help understand which areas might need further promotion or signposting to attract greater participation. We hope to track this use over time, to build a clear picture of how the consumption of online citizen content is developing.

The report is designed to be an exploratory examination of the landscape. We welcome comments on our approach and the topics covered, and suggestions as to how it can be modified in any future publications.

⁷ <http://microsites.oii.ox.ac.uk/oxis/>

⁸ <https://www.gov.uk/government/collections/taking-part>

⁹ http://www.ons.gov.uk/ons/dcp171778_322713.pdf

¹⁰ comScore provides geographic breaks which match the same regions as used by ISBA, the Incorporated Society of British Advertisers. For the purposes of this report we have used the following ISBA regions as proxies for each of the nations: Scotland – North East Scotland and Central Scotland; Wales – Wales and West; and Northern Ireland – Northern Ireland.

Overview of comScore measurement

The UK Online Measurement Company (UKOM) was formed in 2009 with a mandate from the advertising industry to establish measurement standards for digital media. In 2011, comScore was appointed the sole data supplier for UKOM under a three-year contract from January 2013.

comScore MMX™ measures PC/laptop internet use. Its methodology combines internet traffic, captured from a panel of internet users, with website interaction data from website publishers, in order to provide a projection of which websites people are visiting and how long they are spending browsing web pages. This is comScore's Unified Digital Measurement™ (UDM) methodology.

Throughout this report different web entities are followed by a letter in square brackets e.g. [C]. This letter designates where in a 'hierarchy' of web entities a particular entity sits. This hierarchy is comScore's dictionary. A property [P] is the legal parent of any web entities that sit within it, such as a media title [M], channel [C], or group [G]. How the entities of a property are defined in comScore's dictionary is determined by the properties themselves. As such, while there are similarities between different entities at a similar dictionary level, they are not always equivalent.

The comScore metrics used in this report are:

Unique audience: the total number of unique persons who have visited a website or used an application at least once in a given month. Persons visiting the same website more than once are therefore counted only once in this measure

Active reach (%): the unique audience of a website as a proportion of the total number of people who visited any website, or used any internet-connected application, at least once in a given month (the active audience).

Time spent per month: the average time spent browsing a website per unique visitor per month (excludes time spent watching online video and listening to streamed audio).

Section 2

Overview of internet use

This section provides a contextual overview of internet use. It begins with a reminder of the demographic differences that persist in internet use, particularly in relation to age groups. It highlights internet use by nation, and also which websites are most popular across the UK and by nation.

In order to establish a context for the relative position of citizen-related websites, we first provide an overview of the use of a range of websites by category (as defined by comScore), and then highlight those categories that potentially serve citizen functions. Finally, we collate the range of citizen websites that are highlighted in later sections of the report to provide a snapshot of the active reach of different types of citizen activity.

2.2 Internet use

Demographic divisions endure in internet use

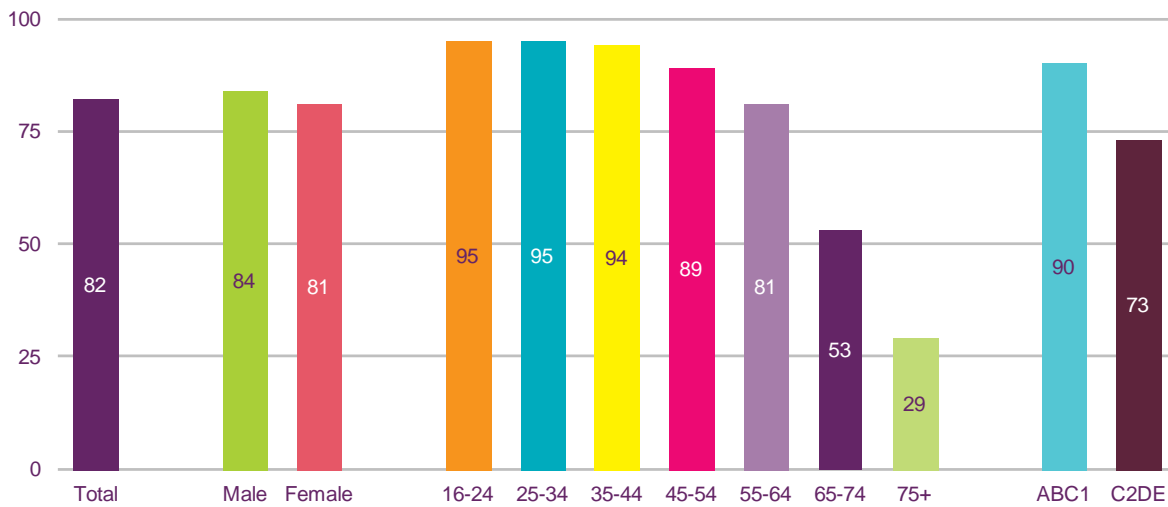
Figure 1 below shows that use of the internet reached eight in ten of the population (82%) in 2013.

Those aged 75 or over are considerably less likely to use the internet, with three in ten (29%) claiming to go online. Despite this, internet use by this age group has increased significantly since 2008; by 11 percentage points. Those in the 65-74 age group are also significantly less likely to use the internet, with just over half (53%) of respondents claiming to access it. People aged between 16 and 34 have the highest rates of internet use (95%). There is no significant difference between the internet usage levels of men and women.

Turning to socio-economic groups, those in the DE socio-economic group¹¹ have the lowest level of internet use, although the use of the internet among this demographic group has risen considerably since Q1 2008 (from 49% to 69%). Those in the ABC1 demographic group are the most likely to use the internet, with 90% stating in Q1 2013 that they use it.

¹¹ DE: those defined as semi-skilled or unskilled manual workers, casual workers, those without a regular income or those on the lowest levels of subsistence, including those dependent upon the state long-term.

Figure 1: Use of the internet anywhere, by age and gender



Source: Ofcom’s Technology Tracker, Q1 2013

Base: All adults 16+ (3750)

QE2. Do you or does anyone in your household have access to the internet/ world wide web at home? And do you personally use the internet at home?/ IN6. Do you ever access the internet anywhere other than in your home?

Figure 2 shows use of the internet by nation. Internet use in Wales (77%) and Northern Ireland (78%) is slightly lower than for the UK as a whole. Eighty-three per cent of people in England use the internet, and 80% of those in Scotland.

Figure 2: Use of the internet anywhere, by nation: 2013

Nation	% of population using internet
UK	82
England	83
Scotland	80
Wales	77
Northern Ireland	78

Source: Ofcom’s Technology Tracker, Q1 2013.

Base: All adults 16+ (3750)

The active reach of the main online providers differs little by nation

To further compare the online habits of the nations of the UK, Figure 3 presents the ten media title¹² websites with the highest active reach in each nation, using comScore data. There is little difference in terms of which sites are in the top ten, although the order differs slightly by nation. Internet users in Northern Ireland, for example, are more likely to use Wikipedia and YouTube than those in the other nations. Northern Ireland also has the highest proportion of internet users using Facebook; 86% visited this site in March 2013, seven percentage points more than internet users in Scotland, which has the next highest proportion of visitors to Facebook.

¹² comScore defines a media title [M] as “an editorially and brand consistent collection of content ... this may represent a domain, a group of domains, online service or application”.

Figure 3: The UK and nations' top ten websites, by active reach (% of internet users)

#	UK	England	Scotland	Wales	N Ireland
1	Google [M] 92	Google [M] 92	Google [M] 91	Google [M] 93	Google [M] 96
2	FACEBOOK.COM [M] 76	FACEBOOK.COM [M] 76	FACEBOOK.COM [M] 79	FACEBOOK.COM [M] 77	FACEBOOK.COM [M] 86
3	YOUTUBE.COM* [M] 67	YOUTUBE.COM* [M] 67	YOUTUBE.COM* [M] 67	YOUTUBE.COM* [M] 66	YOUTUBE.COM* [M] 78
4	Yahoo! [M] 61	Yahoo! [M] 61	Yahoo! [M] 62	Yahoo! [M] 61	Windows Live [M] 64
5	Amazon [M] 56	Amazon [M] 56	Amazon [M] 57	eBay Sites [M] 55	Yahoo! [M] 63
6	Windows Live [M] 55	Windows Live [M] 55	Windows Live [M] 55	Amazon [M] 54	WIKIPEDIA.ORG* [M] 63
7	eBay Sites [M] 55	eBay Sites [M] 55	eBay Sites [M] 55	Windows Live [M] 53	Amazon [M] 59
8	WIKIPEDIA.ORG* [M] 53	WIKIPEDIA.ORG* [M] 53	WIKIPEDIA.ORG* [M] 52	WIKIPEDIA.ORG* [M] 51	eBay Sites [M] 56
9	MSN [M] 49	MSN [M] 50	MSN [M] 46	MSN [M] 48	BBC [M] 50
10	BBC [M] 46	BBC [M] 46	BBC [M] 45	BBC [M] 41	MSN [M] 47

Source: comScore MMX, March 2013, adults 15+, home and work panel

Note: * indicates that the entity has assigned traffic to certain pages in the domain to other entities

Core online citizen content is less frequently consumed than many other categories of content and services

Turning to the online consumption of citizen-related content, Figure 4 shows comScore's list of website categories, ordered by the percentage of UK internet users who used each category of website in March 2013. The categories highlighted in green are those directly associated with activities that have a particular citizen-related dimension.

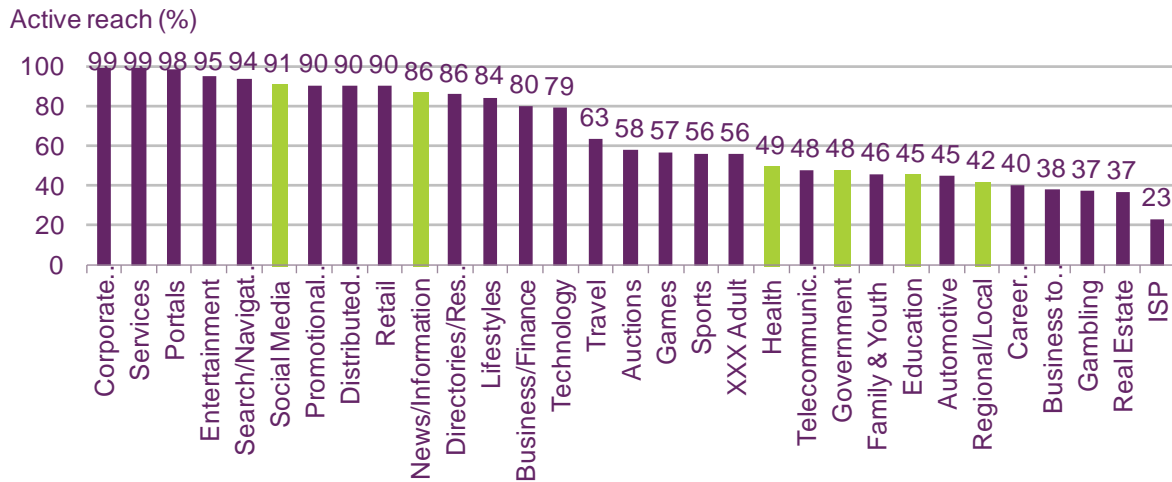
comScore's definitions of the highlighted categories are as follows:

- **Social media** – sites where the creation and consumption of content is user-generated, and sites that serve a social networking role.
- **News/ information** - sites that provide news and information regarding domestic and international issues. This category also contains sites with articles and periodicals on current events and weather.
- **Education** - sites that offer courses, curriculums, sites that end with *.edu*, and those that provide tutorials.
- **Health** - sites containing information regarding diet, health and fitness, and diseases, as well as exercise programmes and medical journals.
- **Government** - all sites that contain information on voting, elections, and sites ending with *.gov*.
- **Regional/ local** - sites that contain local content, city guides and restaurant guides.

The highest-ranking citizen activity is social media, which incorporates social networking and other forms of social media such as blogs, and which reached 91% of UK internet users in March 2013. News and information is the second most popular citizen-based activity, and 86% of UK internet users visited a site in this category at least once in the month. Other citizen-oriented categories such as education, health, and government sites have a much

lower reach, and were visited by between four in ten and five in ten internet users in March 2013.

Figure 4: Active reach of comScore website categories



Source: comScore MMX, March 2013, adults 15+, home and work panel

This pattern is repeated in Figure 5, which shows the majority of the websites covered in this report, ordered by the proportion of UK internet users who visited the sites in March 2013.

Citizen-oriented sites with the highest reach include the BBC, blogging sites, online news sites, PSBs, government and NHS sites. Cultural websites linked to archives, museums etc are used by relatively few users.

Figure 5: Active reach and unique audience of websites cited in this report

Website	Unique audience	Active reach (%)
BBC	21,488,000	55
BBC News	12,513,000	32
Blogger	12,383,000	32
Daily Mail	10,705,000	27
Guardian	10,434,000	27
GOV.UK	7,730,000	20
Telegraph	7,941,000	20
NHS.UK	7,100,000	18
Wordpress	6,906,000	18
Tumblr	5,547,000	14
ITV	5,620,000	14
Channel 4	5,028,000	13
WebMD	3,415,000	8.7
HMRC.gov.uk	2,980,000	7.6
Police.uk	1,316,000	3.4
Home Office	1,288,000	3.3
Channel 5	1,041,000	2.7
Dept for Transport	930,000	2.4
UTV	943,000	2.4
Education.gov.uk	888,000	2.3
STV	859,000	2.2
MOD.uk	746,000	1.9
NIDirect.gov.uk	658,000	1.7
National Archives	677,000	1.7
Scotland.gov.uk	245,000	0.6
British Museum	206,000	0.5
British Library	210,000	0.5
38degrees.org.uk	158,000	0.4
English Heritage	172,000	0.4
Wales.gov.uk	105,000	0.3
TheyWorkForYou	101,000	0.3
WhatDoTheyKnow	113,000	0.3
Tate	179,000	0.2
Science Museum	85,000	0.2

Source: comScore MMX, March 2013, adults 15+, home and work panel

Note: Figures for the BBC and Yahoo! refer to news-specific sites in their respective reporting categories

Key: Red – PSB; Purple – news; Dark green – blogging; Blue – government; Yellow – health; Light purple – culture; Light green – civic/political

Summary

While internet use is prevalent among most of the UK population, older people and those in DE households remain less likely to be online.

According to comScore data, there is little difference across the nations of the UK in terms of the main websites used by online users.

Social media and news/information are the most popular online categories that have a citizen dimension, with other types of citizen-oriented content having a lower active reach than many other website categories.

Section 3

Government and politics

Citizens can interact with government directly or indirectly in a range of ways. Government and local councils are providing more ways to encourage citizens to interact, as policies develop, and other types of organisation are also providing means for democratic involvement in the policy and scrutiny process.

This section provides information about take-up of online government services. Among other things, these services allow people to pay taxes, apply for benefits, search for jobs and learn more about how the government and its departments operate.

This section looks at which demographic groups are using online government services, the content and services that are available online, and how these are evolving over time. The section also includes findings from surveys that asked respondents about their online habits in this area, and information about non-government websites that seek to engage citizens in democratic processes.

3.2 Use of any type of government website

Nearly half of all internet users access any type of government website per month

Nearly half (48%) of active internet users access any type of government website per month, according to comScore data for March 2013. These sites are defined as any site with a “.gov” suffix, and incorporate many different local and devolved-nation government websites as well as major Westminster government departments. The average time spent per visitor per month was 23 minutes, and there were 18.7 million unique visitors.

Figure 6: Active reach and average time spent per visitor on comScore’s government website category, by nation

Nation	Active reach (%)	Average minutes spent per visitor
UK	48	23
England	48	24
Scotland	45	18
Wales	47	19
Northern Ireland	42	13

Source: comScore MMX, March 2013, adults 15+, home and work panel

3.3 Use of GOV.UK website

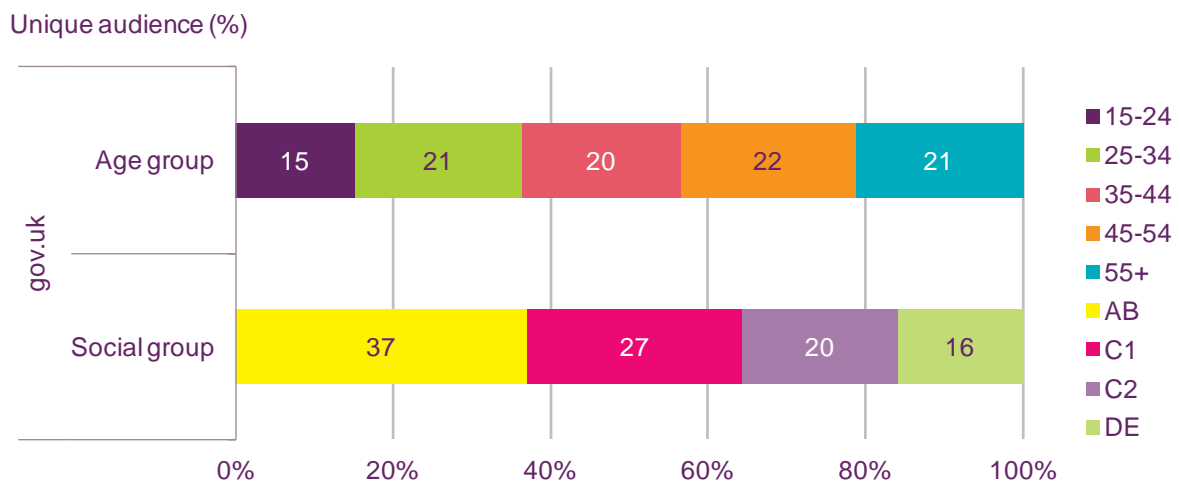
One in five internet users uses the GOV.UK portal each month

The UK government web portal GOV.UK provides services and advice on a range of topics, including transport and travel, businesses and the self-employed, benefits, education, taxes, and information for people with disabilities¹³.

The website had a unique audience in March 2013 of 7.73 million, or 19.8% of active internet users in the UK for that month. The average time spent per visitor in March 2013 was 3.9 minutes.

As Figure 7 shows, among visitors to the site, 22% were aged 45-54, while 15% were aged 15-24. Visitors were more likely to be in the AB socio-economic group (37%) than the DE group (16%).

Figure 7: Composition of unique visitors to GOV.UK website



Source: comScore MMX, March 2013, adults 15+, home and work panel

The government web portal is currently undergoing a major change. The websites of all government departments and many other public bodies are being moved onto the GOV.UK web domain. The website states that the migration will be completed by 2014, and also provides a counter to track how many websites have already moved. As of October 2013, all of the 24 ministerial departments, and 40 of over 300 agencies and other public bodies, had moved to GOV.UK.

It should be noted that many individual government transactions, for example, applying for a car tax disc, are still largely hosted separately outside of GOV.UK, but the initial transaction start page containing information about the service is on GOV.UK.

¹³ Much of this type of information and services for the nations is provided at a devolved level, as subsequent analysis notes.

3.4 Use of devolved nation government websites

The Northern Ireland government website is the most popular devolved government website

As well as using the GOV.UK website and various UK-wide government sites, people in the devolved nations also have specific government websites, as Figure 8 shows. The government website for Northern Ireland lists its most popular pages as: national minimum wage rates, MOT information, and calculating holiday entitlement¹⁴. This website attracted 658,000 unique visitors in March 2013 across the UK, with 145,000 of these being in Northern Ireland (12.1% active reach)¹⁵.

The Scottish government website attracted a unique audience of 245,000 visitors across the UK in March 2013. In addition to education, health, rural affairs, housing and transport, it provides information on the 2014 Commonwealth Games, the Scottish referendum, advice on severe weather and information on organ donation, among other issues. Its active reach in Scotland was 3.5%, or 142,000 unique users.

The Welsh Assembly website, which provides information in English and Welsh, covers housing, tourism, economic growth and agricultural policy, among other issues. The website had 105,000 unique visits in March 2013 across the UK, and 56,000 in Wales, corresponding to a 2.4% active reach.

Figure 8: Unique audience and active reach for devolved nations' government sites, 2013

Nation government website	Unique audience across UK	Unique audience in nation	Active reach in nation
Scotland.gov.uk	245,000	142,000	3.5%
Wales.gov.uk	105,000	56,000	2.4%
NIDirect.gov.uk	658,000	145,000	12.1%

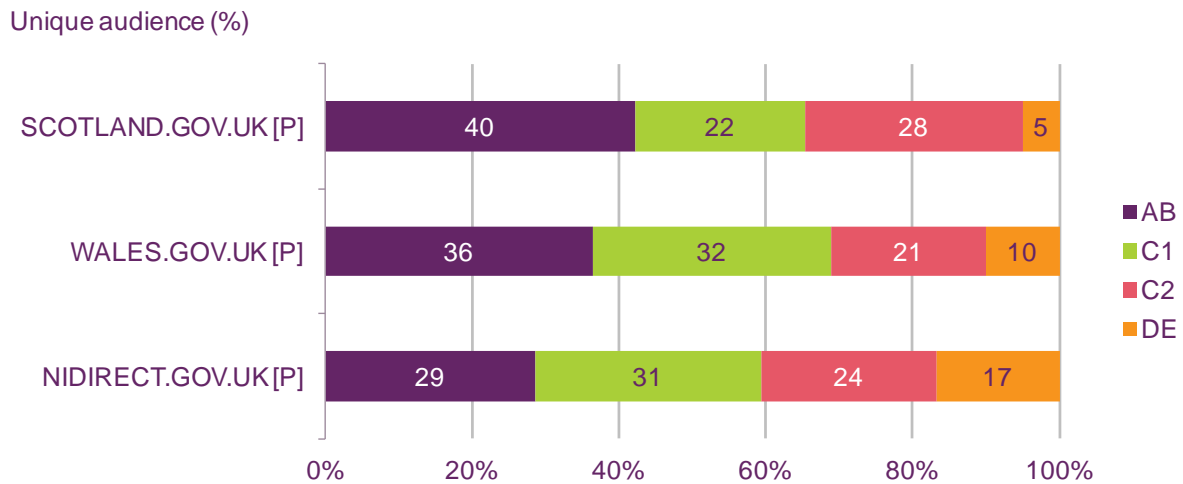
Source: comScore MMX, March 2013, adults 15+, home and work panel

Figure 9 below provides a breakdown by socio-economic group of the visitors to the nations' government websites. The Scottish government's website has the highest proportion of visitors in the AB demographic group (40%), and the lowest proportion of visitors in the DE group (5%). NIDirect's website, conversely, has a higher proportion of users in the DE socio-economic group compared to the other devolved nations.

¹⁴ www.NIDirect.gov.uk, accessed 05/09/13

¹⁵ comScore MMX, March 2013, adults 15+, home and work panel

Figure 9: Composition of unique audience of devolved nations' government sites



Source: comScore MMX, March 2013, adults 15+, home and work panel

3.5 Types of content visited and time spent on government sites

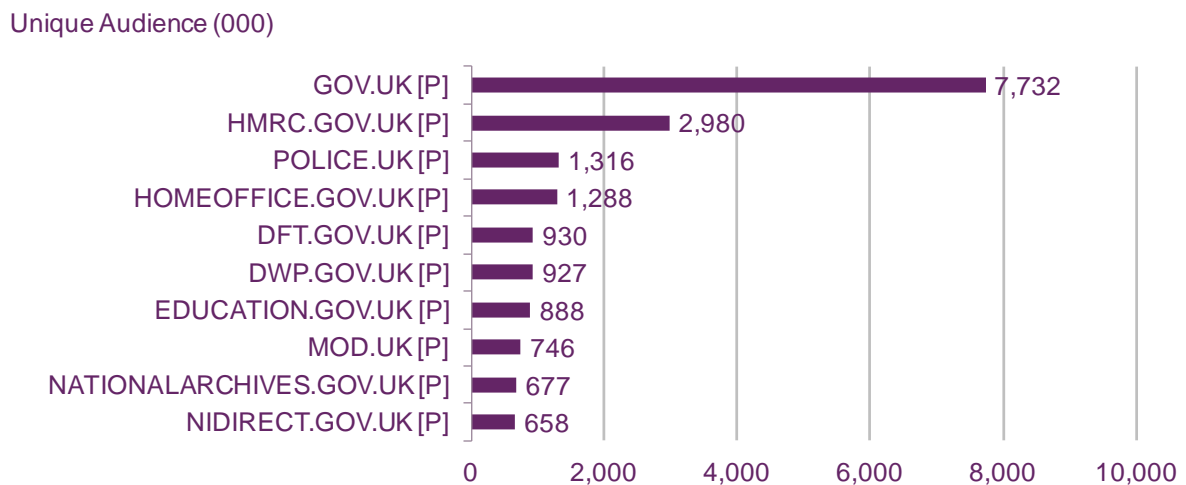
After GOV.UK, the HMRC website is the most-visited government site, and users spend the most time on it

As shown in Figure 10, the HM Revenue and Customs (HMRC) website has the largest unique audience of all government websites after that of GOV.UK, at 2.98 million. The HMRC website offers information on benefits and tax payment information for individuals, employers and businesses.

After this, the most-visited websites are: the police service; with a unique audience of 1,316,000, the Home Office, with a monthly unique audience of 1,288,000, and the Department for Transport, with 930,000 unique visitors in March 2013.

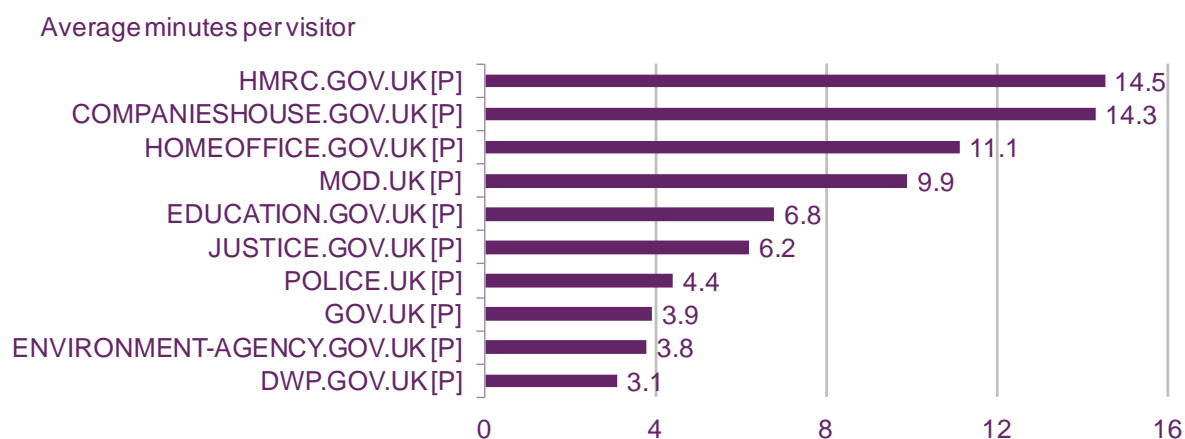
As Figure 11 illustrates, the average time spent per visitor to the HMRC site is 14.5 minutes. This is closely followed by Companies House (14.3 minutes) and the Home Office (11.1 minutes).

Figure 10: Unique audience of government websites



Source: comScore MMX, March 2013, adults 15+, home and work panel

Figure 11: Time spent on government websites



Source: comScore MMX, March 2013, adults 15+, home and work panel

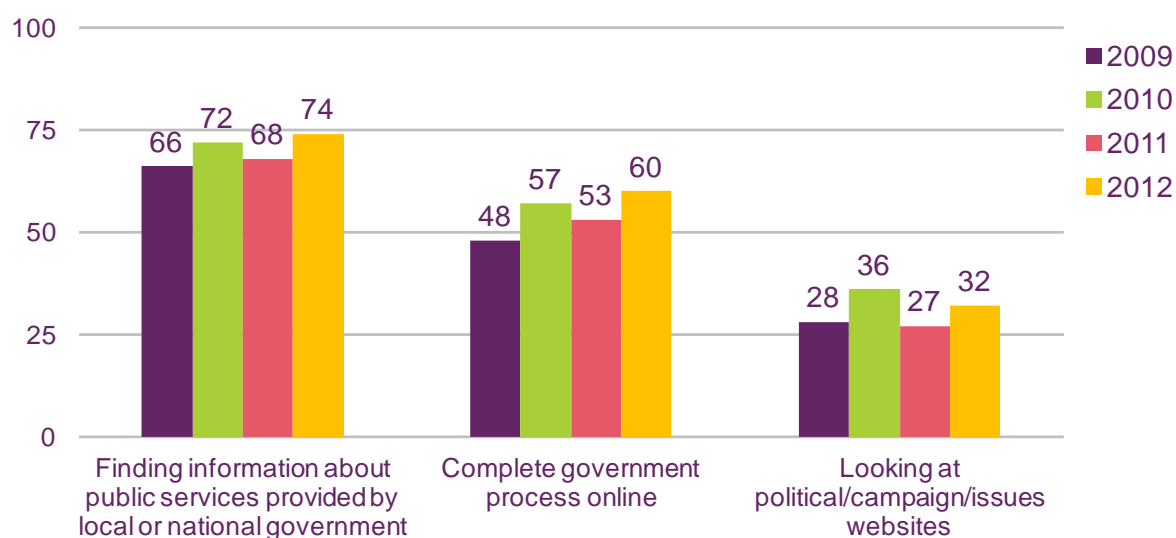
3.6 Self-reported use of government and council websites

As well as using online measurement industry metrics, it is useful to examine evidence from various surveys which ask respondents about their e-government activity, especially in order to track how this has changed over time.

Three-quarters of internet users say they have ever found out information about government services online

As Figure 12 shows, Ofcom's *Adults' Media Use and Attitudes Report* (2013) finds that three-quarters (74%) of internet users say they have ever found information online about local or national government public services, and six in ten that they have ever completed a government process online. Reported use of political/campaign/issues websites varies by year. It was highest in 2010, which is likely to be due to the general election in May 2010.

Figure 12: Individual government-related activities ever undertaken: 2009-2012

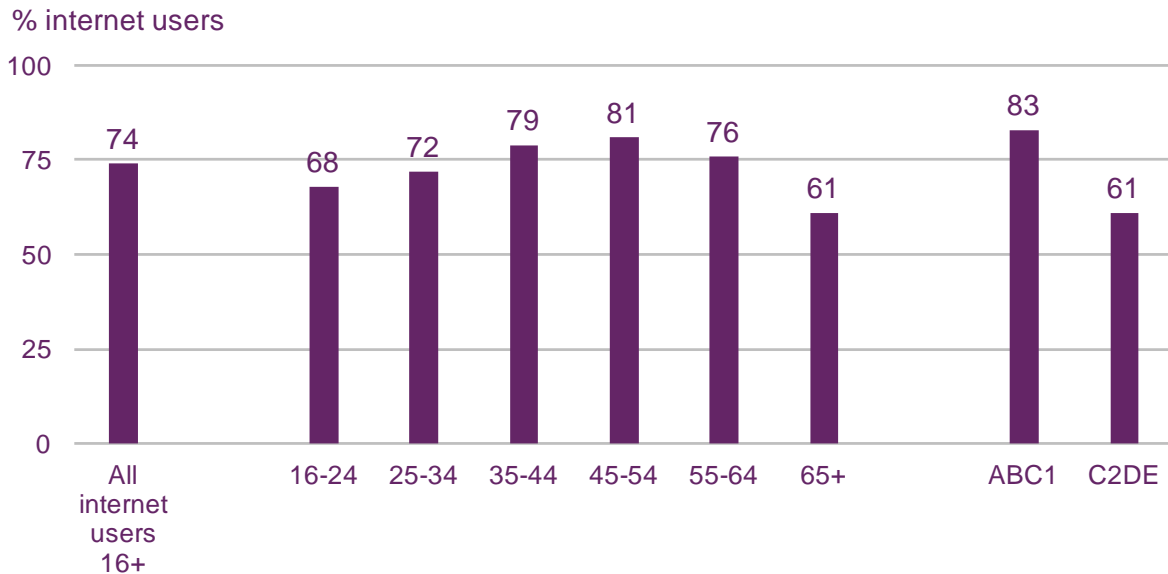


Source: *Adults' Media Use and Attitudes Report 2012*, Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2011. Additional data from *Adults' Media Use and Attitudes Report 2013*.

Base: All adults aged 16+ who use the internet at home or elsewhere (1,282 in 2009, 1,489 in 2010, 1,369 in 2011, 1381 in 2012). IN14/15: Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted) Single coded.

There are differences by age and socio-economic group. As Figure 13 shows, people aged 35-54 are more likely than 16-24s or those aged 55+ to find out information about public services, and those in ABC1 households are more likely to do so than those in C2DE households.

Figure 13: Finding information about government/council services, by demographic group



Source: Adults Media Use and Attitudes Report 2013.

Base: All adults aged 16+ who use the internet at home or elsewhere (1,282 in 2009, 1,489 in 2010, 1,369 in 2011, 1381 in 2012). IN14/15: Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted) Single coded

According to the National Audit Office's *Digital Britain 2* data¹⁶, published in March 2013, 37% of online users in England say they have used a government website to find information in the past 12 months, and 29% have used one to register or pay for services.

The Office for National Statistics data¹⁷ reports that in 2013, 31% of adults in Great Britain have obtained information from websites about public authorities or services such as local authorities, schools and universities, or government departments. Furthermore, 10% of GB adults have posted opinions on civic or political issues, and 7% say they have taken part in online consultations or voting on civic or political issues.

Self-reported use of government websites has increased considerably since 2005

According to the OxIS report: *Cultures of the Internet: The Internet in Britain: Oxford Internet Survey 2013*¹⁸, the use of online government services increased by 26 percentage points between 2005 and 2013¹⁹.

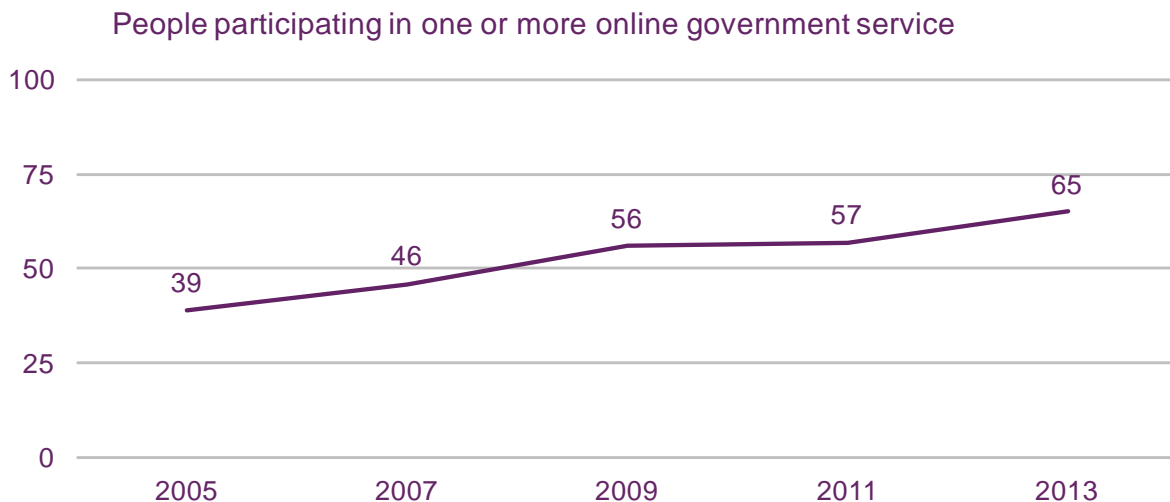
¹⁶ <http://www.nao.org.uk/wp-content/uploads/2013/03/10123-001-Digital-Britain-2-Book.pdf>

¹⁷ http://www.ons.gov.uk/ons/dcp171778_322713.pdf

¹⁸ <http://microsites.oii.ox.ac.uk/oxis/>

¹⁹ Please note that the Oxford Internet Survey data covers Great Britain and not the UK.

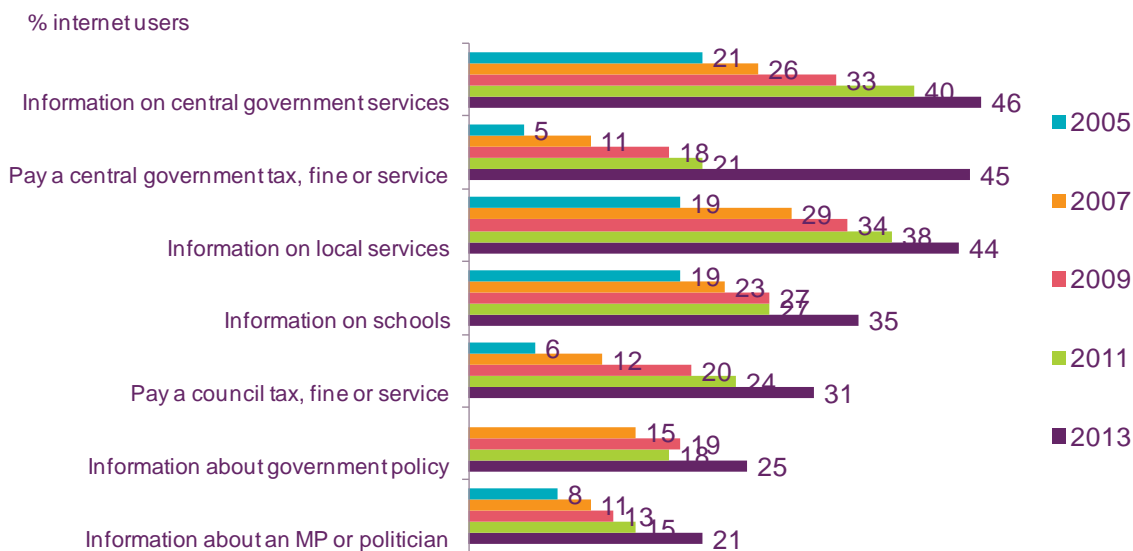
Figure 14: Use of online government services: 2005-2013



Source: OxIS Cultures of the Internet: The Internet in Britain. Oxford Internet Survey 2013 Report Base: Current Internet Users. OxIS 2005: 1,309; OxIS 2007: 1,578; OxIS 2009: 1,401; OxIS 2011: 1,498; OxIS 2013: 2083. QC34: 'Talking now about government information and services, have you done any of the following in the past year?'

Figure 15 shows the types of use made of online government services in the past year according to the OxIS survey data. The area with the biggest increase in self-reported use between 2011 and 2013 was paying a central government tax or fee, such as car tax or TV licence, which increased from 21% to 45% of internet users.

Figure 15: OxIS survey - self-reported use of types of online government services: 2005-2013



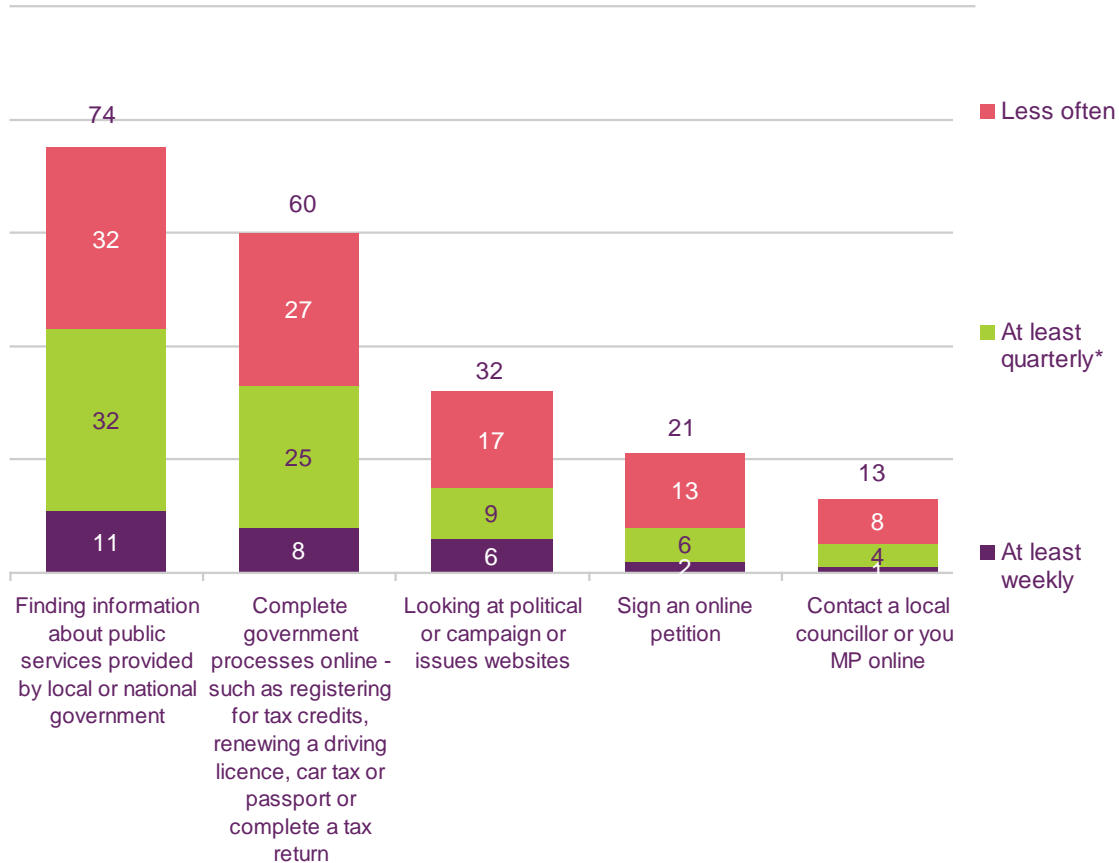
Source: OxIS Cultures of the Internet: The Internet in Britain. Oxford Internet Survey 2013 Report Base: Current Internet Users. OxIS 2005: 1,309; OxIS 2007: 1,578; OxIS 2009: 1,401; OxIS 2011: 1,498; OxIS 2013: 2083. QC34: 'Talking now about government information and services, have you done any of the following in the past year?'

Ofcom's 2013 Adults' Media Use and Attitudes report examined the frequency of use made of various public/civic activities. As Figure 16 highlights, while 74% of internet users say they

have ever found information online about public services, provided by local or national government, this reduces to 43% of users who say they do this quarterly or more often. One third (33%) say they complete government processes online quarterly or more often, compared to 60% who say they ever do this.

Overall, 13% of internet users say they have contacted their councillor or MP online, with 5% saying they do this at least quarterly.

Figure 16: Self-reported frequency of government-related activities ever undertaken



IN14/15 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded) * 'At least quarterly' represents those respondents who undertake this activity less frequently than weekly but at least every three months.

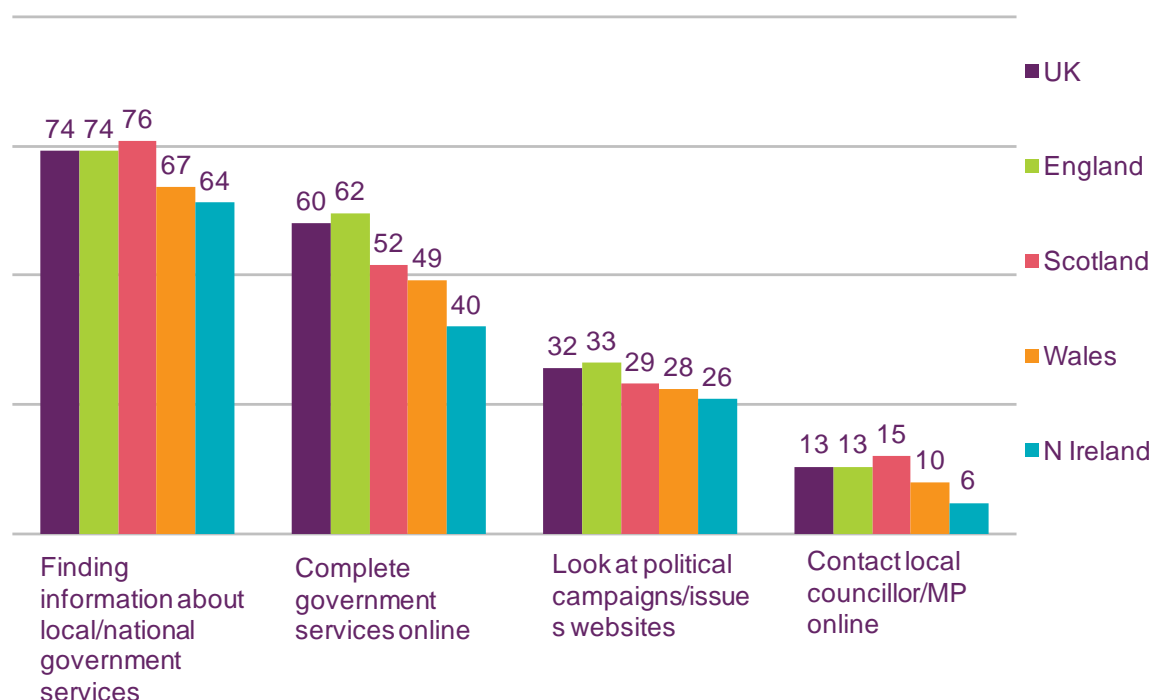
Base: All adults aged 16+ who use the internet at home or elsewhere (1381 in 2012)

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

Self-reported participation across the nations is generally lower for Northern Ireland

Figure 17 shows levels of self-reported participation across the UK nations. Finding information about public services provided by local or national government is the most common activity for all nations, although internet users in Northern Ireland are less likely to say they do this, or complete government services online, than those in Scotland and England. People in England are more likely than those in the other nations to say they have ever completed government processes online. Around one in three across all the nations say they have ever looked at political/campaign/issues websites, and while one in seven internet users in Scotland say they have contacted an elected official online, this is true for just 6% of those in Northern Ireland.

Figure 17: Individual government-related activities ever undertaken, by nation



Source: *Adults Media Use and Attitudes Report 2013*, Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012.

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

Question: IN14/15 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)

3.7 Government use of Twitter

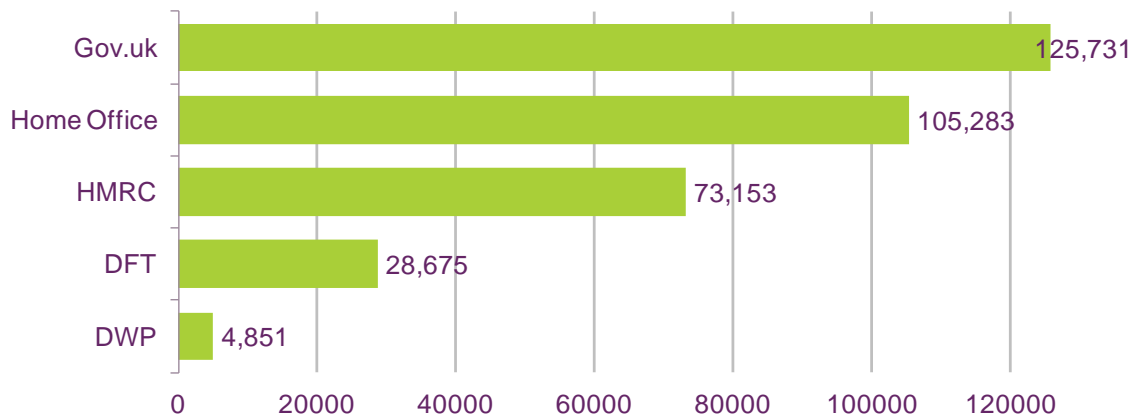
The UK government has over 125,000 Twitter followers

Social media has become an increasingly important aspect of online activity. Nearly two-thirds of internet users in the UK have profiles on social networking sites, and in March 2013, 76% of UK internet users visited Facebook²⁰. Other social networks, like the micro-blogging site Twitter, have increasingly high penetration rates among UK internet users. One in six (17%) internet users say they use Twitter by browsing and reading the site, and 11% are account holders and post on the site²¹.

Many public organisations now have an online presence on social networks in order to reach their stakeholders. For example, Figure 18 shows the UK government’s Twitter presence across those government departments with the highest unique audience as of March 2013 (see Figure 10).

²⁰ *Adults Media Use and Attitudes Report 2013* and comScore MMX, home and work, March 2013.

²¹ Ofcom Technology Tracker survey data, Q1 2013: <http://stakeholders.ofcom.org.uk/market-data-research/statistics/>

Figure 18: Followers of selected UK government departments' Twitter feeds

Source: Twitter.com, accessed 5/9/13

3.8 Petitions

Around one in five internet users say they have ever signed an online petition

Petitions allow citizens to make their views known and can enable them to have some say in the development of government policy. According to Ofcom's *Adults' media use and attitudes report 2013*, 21% of internet users say they have ever signed a petition online.

If the number of signatures on an online government petition reaches 100,000, the issue is forwarded to government backbenchers, who are asked to respond. According to the HM government e-petition page²², there are currently 6,027 open petitions across the UK, 15,091 closed (resolved) petitions and 18,376 rejected petitions on the website (correct at 10/05/2013).

The Scottish Parliament was the first parliament to introduce a system of e-petitions. An improved online system for petitions (integrated with the Parliament's main website) was developed and made available in 2012²³. By July 2013, 652 accounts had been created²⁴, with account holders being able to submit more than one petition²⁵.

The Welsh Assembly e-petition site²⁶ has received 450 petitions since its launch. The number of petitions received each year, according to the National Assembly for Wales, has increased from 11 in 2008 to 150 in 2012.

There is no dedicated e-petition website for the Northern Ireland Assembly.

Other than the government e-petition sites, other websites host petitions relating to topical issues. 38 Degrees²⁷ is a website that hosts online petitions and campaigns, which: "brings you together with other people to take action on the issues that matter to you and bring about real change in the UK"²⁸. According to comScore data, 38 Degrees had 158,000

²² <http://epetitions.direct.gov.uk>

²³ <http://scottish.parliament.uk/gettinginvolved/petitions/index.aspx>

²⁴ http://www.scottish.parliament.uk/S4_PublicPetitionsCommittee/Reports/puR-13-01w.pdf

²⁵ Source: communication with Scottish Parliament February 2013

²⁶ <http://www.assemblywales.org/gethome/e-petitions.htm>

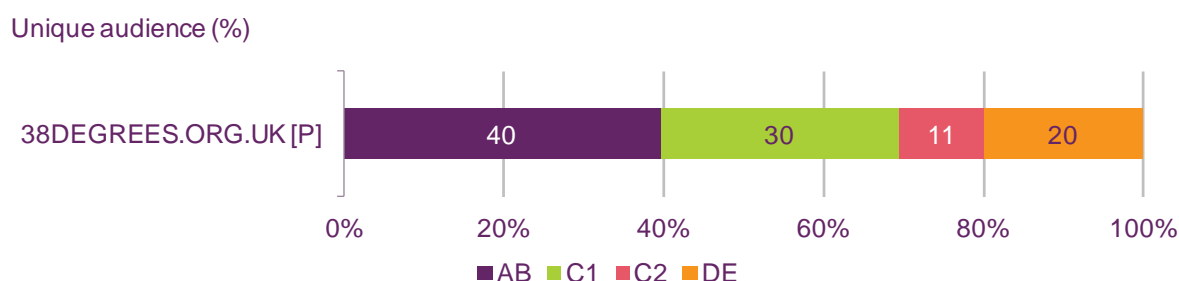
²⁷ www.38degrees.org.uk, accessed 5/9/13

²⁸ accessed 01/07/13

unique visitors in March 2013, equating to an active reach of 0.4% of the online population. Visitors spent an average of 4.7 minutes on the site.

Figure 19 below shows the profile of visitors by socio-economic group. Two in five (40%) visitors to the site are in the AB group, compared to 11% and 20% in the C2 and DE groups respectively.

Figure 19: Composition of the unique audience of 38degrees.org.uk



Source: comScore MMX, March 2013 (3 Month Average), adults 15+, home and work panel

Non-government websites

There are a range of intermediary websites encouraging citizen participation in government

There are also non-government websites aimed at people wishing to know more about what is happening in parliament. TheyWorkForYou²⁹ enables users to “find out what your MP, MSP or MLA is doing in your name, read debates, written answers, see what’s coming up in Parliament, and sign up for email alerts when there’s past or future activity on someone or something you’re interested in”. The site attracted 101,000 unique visitors in March 2013, and visitors spent an average of 1.7 minutes on the site³⁰.

Other sites include WhatDoTheyKnow³¹ which focuses on Freedom of Information requests to UK public authorities. The site claims to have sent 150,882 requests to 15,037 UK public authorities on behalf of users wanting to find out information (as at 04/03/13). In March 2013, the site received a unique audience of 113,000 (0.3% active reach), with the average time spent per visitor at 2 minutes³².

Such initiatives also work for local councils. Openly Local³³ is an information website that is not affiliated with any government or council initiative, but which gives users the opportunity to access data on their local council. This information includes council information, figures and records regarding councillors, committee meetings and financial transactions. According to the website’s Open Data Scoreboard, 105 of the 434 UK councils have enabled their data to be seen on the site³⁴.

²⁹ www.theyworkforyou.com

³⁰ comScore MMX, home and work, March 2013

³¹ www.whatdotheyknow.com

³² comScore MMX, home and work, March 2013

³³ www.openlylocal.com

³⁴ Accessed 01/07/13

Summary

Citizens can interact with government directly or indirectly in a range of ways. Government and local councils are providing more ways to encourage citizens to interact as policies develop, and other types of organisation are also providing means for democratic involvement in the policy and scrutiny process.

Less than half of internet users regularly engage with government or local council services online, according to comScore data, and one in five uses the GOV.UK website. Visitors to the GOV.UK website are more likely to be in the AB socio-economic group than the DE group.

At a more general level, according to survey research around three-quarters of online users say they have ever found out about government or local council information online, and six in ten say that they have ever completed government processes online.

In terms of online civic participation in the nations, people in Northern Ireland tend to spend less time on government websites (either UK, Northern Ireland-focused, or local government) than people in other parts of the UK, according to comScore data. However, they are far more likely than the other devolved nations to use their nation-specific government website.

Visitors to the devolved nations' government websites vary by socio-economic group. In Scotland, visitors are more likely to be in the AB socio-economic group. In Wales, visitors are broadly as likely to be in the AB as in the C1 socio-economic group. In Northern Ireland, nearly one in five visitors are from the DE group – the highest proportion of any nation.

People in England are more likely than those in other nations to say that they have completed government processes online.

Section 4

Health

There are various civic or citizen-oriented elements of online health provision. The NHS is a publicly-funded health service, and the provision of health information that is freely available and easily navigable, and not linked to ability to pay, is an important aspect of such a public service. It is particularly important to monitor the demographic profile of users of these sites, as online health information is proportionally more beneficial to those in greatest need – older people and those in lower socio-economic groups.

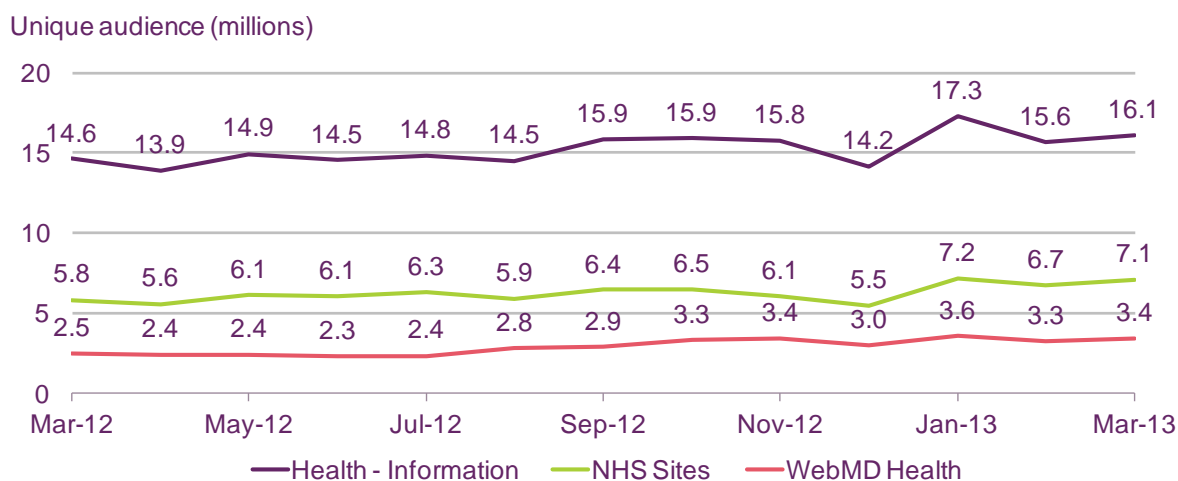
There are many types of online health resources, which are grouped by the comScore online measurement system into two main categories: online pharmacy websites and health information. The former are based around visitors browsing and purchasing health-related goods online, and attracted 919,000 visitors in March 2013, with an average time spent per visitor of 5.2 minutes³⁵. For the purposes of this report, this section focuses on how users interact with the second category – health information sites.

4.2 Use of health information websites

Health information websites are used by around half the internet population

As Figure 20 shows, 16.1 million internet users visited health information websites in March 2013, spending an average of 22.4 minutes each, and representing 41% of the active internet population. After the NHS site, webMD³⁶ is the next most widely-used health information site in the UK.

Figure 20: Unique audience of popular health websites: March 2012 to March 2013



Source: comScore MMX, March 2012 to March 2013, adults 15+, home and work panel

³⁵ comScore MMX, home and work, March 2013

³⁶ www.webmd.com

4.3 NHS.UK

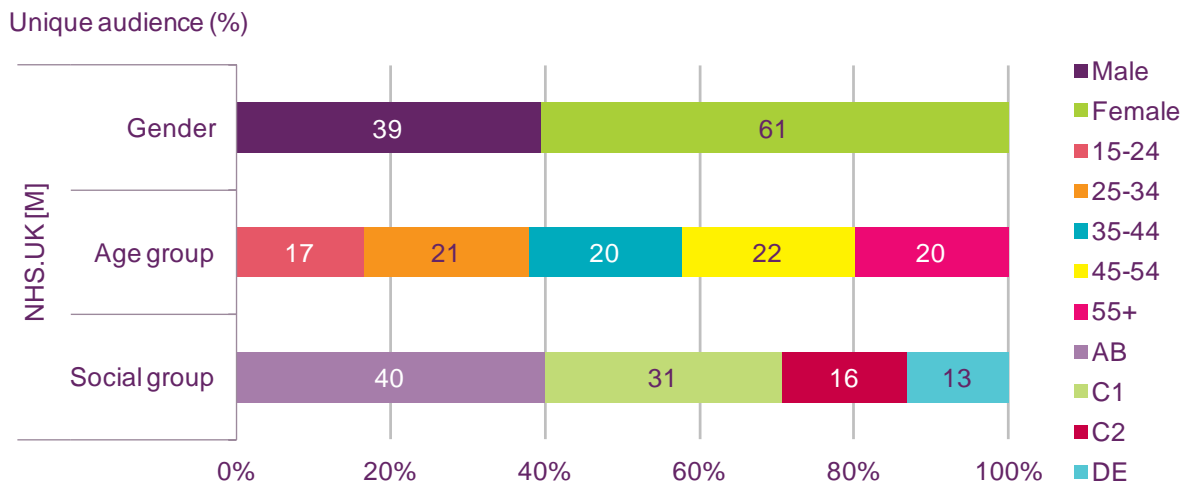
Visitors to the NHS.uk website are more likely to be women

The overall NHS sites ‘category’ comprises NHS.uk, the Scottish NHS24.com and Northern Ireland’s HSCNI.net (Health and Social Care in Northern Ireland).

NHS.uk received a unique audience of 7.1 million in March 2013 (equivalent to 18% of UK active internet users). The website has a variety of functions, including a health A-Z where users can browse health conditions; a feature where they can find nearby GPs, hospitals and dentists, a variety of online communities and the option to book hospital appointments once the user has been referred by their GP.

The NHS.uk website’s visitor demographics are shown in Figure 21. Visitors are significantly more likely to be female than male (61% vs. 39%), and women are also likely to spend considerably longer on the site – an average of 48.3 minutes compared to 10.9 minutes for men³⁷. People in the AB socio-economic group are more likely to visit the site (40%) than those in DE households (13%). Younger people aged 15-24 are less likely to visit the site than all other age groups.

Figure 21: Unique visitors to NHS.uk, by audience profile



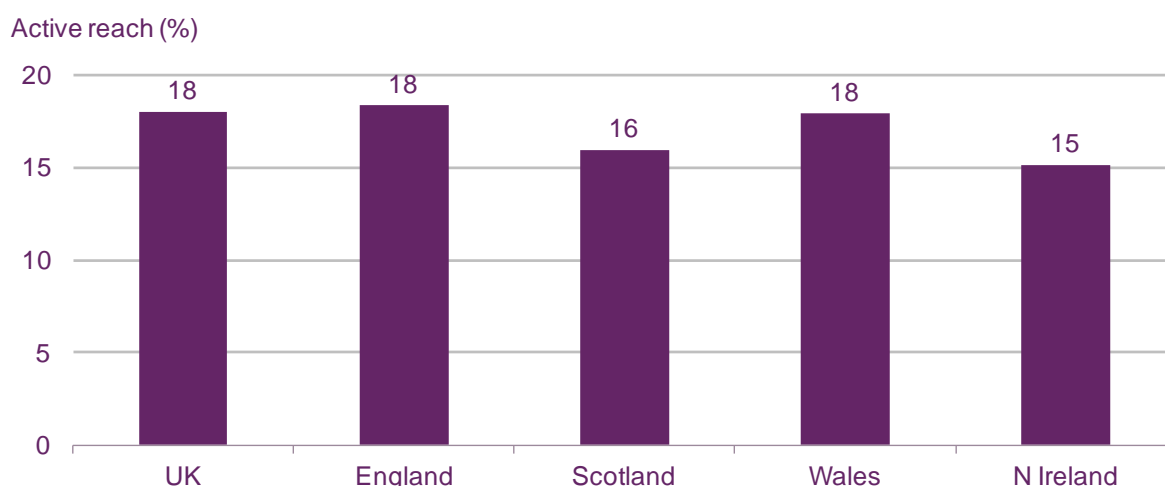
Source: comScore MMX, March 2013, adults 15+, home and work panel

Figure 22 below shows the active reach of the NHS.uk website in March 2013. Internet users in Wales and England were more likely to use the site, with an 18% reach.

In addition, the NHS24 website in Scotland has an active reach of 0.7%, corresponding to 28,000 unique users, with an average time spent per visitor of 3.8 minutes. The HSCNI.net website has an active reach of 2.3% in Northern Ireland, corresponding to 28,000 unique users, with an average time spent per visitor of 5.0 minutes³⁸.

³⁷ comScore MMX, home and work, March 2013

³⁸ The website for Wales – www.wales.nhs.uk – is not available as a separate measurement on comScore.

Figure 22: Active reach of NHS.uk, by nation

Source: comScore MMX, March 2013, adults 15+, home and work panel

4.4 NHS use of interactive and social media

The NHS is developing online symptom checkers

According to the *NHS Annual Report 2011-2012*³⁹, there are over 40 online health and symptom checkers on the NHS website. The report claims that use of these online features almost doubled during 2011-2012, from 5.6 million to 10.7 million, and the NHS Android mobile phone app has had more than 1.5 million downloads since its launch. Research published in 2010 by Imperial College London reported that 37% of NHS Choices users who used the Choices service for a GP consultation said that they had decreased their use of GP services as a result of the Choices service⁴⁰.

The NHS uses various forms of social media

There are also many ways in which citizens can interact with the NHS through social media sites, and the sites have a considerable audience on Facebook and Twitter.

On Facebook, NHS Choices has 31,097 'likes'⁴¹, and on Twitter, it has 76,327 followers (as of 17/06/13). The NHS has also branched out into YouTube; its Choices channel has 9,363 subscribers⁴², and has had 15,367,805 video views in total (as of 09/09/13). NHS Direct in England also provides the opportunity to watch NHS Commissioning Board Authority (CBA) board meetings⁴³, 48 hours after the meeting has been held. These attract between 100-300 views on average, per video.

³⁹ <http://www.nhsdirect.nhs.uk/en/About/CorporateInformation/OperatingStatistics/AnnualReport2011-2012>

⁴⁰ <http://www.nhs.uk/aboutNHSChoices/professionals/developments/Documents/annual-report/primary-care-consultation-report.pdf>

⁴¹ The 'like' button is a feature of Facebook allowing users to indicate that they enjoy or support certain content on the network, such as photos and videos posted by friends. Users may also 'like' people and organisations such as NHS who are Facebook page owners, as a 'like' button appears on Pages.

⁴² <http://www.youtube.com/user/NHSChoices>

⁴³ <http://www.youtube.com/user/NHSCommissBoardAuth>

4.5 Other online health services

There are differences by nation in the main health sites used

Figure 23 below shows the top five health information websites by active reach, according to comScore's 'health information' category. Comparing the nations of the UK, the first two websites are the same for all nations, but the BBC's health information website is not used to the same extent in Wales and Northern Ireland as it is in England and Scotland.

Figure 23: The UK and nations' top five health information websites, by active reach

Active reach (%)

#	UK	England	Scotland	Wales	N Ireland
1	NHS Sites [P] 18.1	NHS Sites [P] 18.4	NHS Sites [P] 16.4	NHS Sites [P] 17.9	NHS Sites [P] 16.3
2	WebMD Health [P] 8.7	WebMD Health [P] 8.8	WebMD Health [P] 7.5	WebMD Health [P] 8.8	WebMD Health [P] 9.9
3	LIVESTRONG - eHow Health [S] 6.9	LIVESTRONG - eHow Health [S] 7	LIVESTRONG - eHow Health [S] 6.4	LIVESTRONG - eHow Health [S] 6.7	LIVESTRONG - eHow Health [S] 7.2
4	BBC News - Health [S] 5.7	BBC News - Health [S] 5.9	BBC News - Health [S] 5.4	Everyday Health [P] 5.6	About.com Health [M] 5
5	About.com Health [M] 5.2	About.com Health [M] 5.2	About.com Health [M] 5.4	About.com Health [M] 4.6	Everyday Health [P] 4.9

Source: comScore MMX, March 2013, adults 15+, home and work panel

Other services also aim to provide online health-related assistance and support to UK citizens. These include services such as Health Unlocked⁴⁴, which hosts online communities dedicated to discussion, and providing advice and support for those suffering from, or knowing someone who suffers from, particular illnesses. Other services include the Family Planning Association⁴⁵, whose website provides advice and information regarding sexual health and relationships. This website contains information on community projects run by the charity, including its Speakeasy project which advises parents how to talk to their children about sex and relationships.

Summary

Around 18% of the UK internet population access NHS.uk on a monthly basis. Visitors to the site are more likely to be women, and from AB households, although there is little difference in age group, with the exception that younger people are less likely to visit the site.

The NHS website is the most popular health information site, with webMD the next popular site, albeit with less than half the active reach of the NHS.

By nation, the BBC's health information website is not used to the same extent in Wales and Northern Ireland as it is in England and Scotland.

⁴⁴ www.healthunlocked.com

⁴⁵ www.fpa.org.uk

Section 5

Public service broadcasting, news, citizen journalism and hyperlocal media

This section provides a brief overview of media-related citizen content and services online, covering use of public service broadcasting websites, news and journalism sites, citizen journalism and hyperlocal sites.

These areas are a major focus of other studies and analysis⁴⁶. Rather than replicate much of this detail, this section provides a distillation of key metrics in these areas, to illustrate the relative use of news-related online content within the wider context of other types of online citizen experience.

5.2 Public service broadcasting (PSB)

The BBC is the most popular PSB website by a considerable margin

The designated public service broadcasters are television services from the BBC⁴⁷, ITV1⁴⁸, ITV Breakfast, Channel 4, Channel 5 and S4C⁴⁹. They are mandated to deliver public service purposes as set out in the 2003 Communications Act. These purposes can be summarised as follows:

- to deal with a wide range of subjects;
- to cater for the widest possible range of audiences – across different times of day and through different types of programme; and
- to maintain high standards of programme-making⁵⁰.

Online, obligations vary between the broadcasters. The BBC's online content, regulated by the BBC Trust, must comply with the same standards as other BBC content. On-demand services from ITV PLC, Channel 4 Corporation and Channel 5 are not PSBs, and so are not subject to the same regulatory framework. They must instead comply with the rules set out by the Authority for Television On Demand (ATVOD). Channel 4 also has a digital remit in the Digital Economy Act 2010 which sets out some commitments across the range of its digital content⁵¹. In the light of the varying legislative and regulatory requirements, the focus and range of content across the broadcaster websites varies considerably.

⁴⁶ See Kantar, 2012: *Measuring News Consumption and Attitudes*; Ofcom, 2013: *News Report 2013*; Reuters Institute, 2013: *Digital News Report*; Nesta, 2013: *UK Demand for Hyperlocal Media Research Report*

⁴⁷ The BBC PSB channels are BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC HD, BBC News, BBC Parliament and BBC One HD

⁴⁸ The Channel 3 regional licensees are usually referred to by the most commonly-used collective terms: ITV1, or simply ITV. However, these terms are not used within the devolved nations. Instead Channel 3 is referred to as STV in north and central Scotland, UTV in Northern Ireland and ITV1 Wales in Wales.

⁴⁹ The Welsh Authority has the statutory responsibility to provide S4C Digidol (digital) services for viewers in Wales.

⁵⁰ See Ofcom, 2012: *PSB Annual Report* for more detail

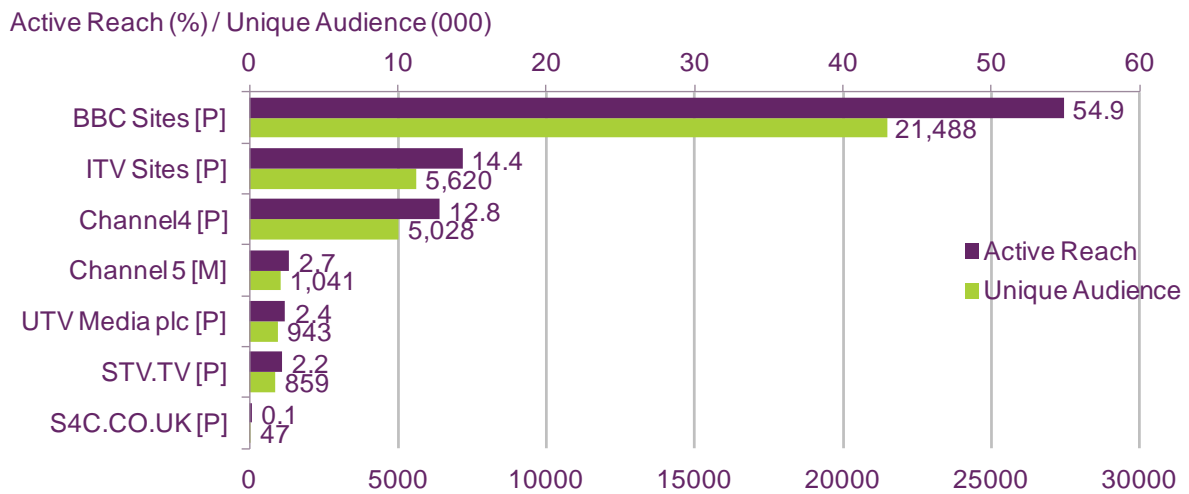
⁵¹ For further detail see <http://www.legislation.gov.uk/ukpga/2010/24/section/22>

Figure 24 shows the unique audience and the active reach of each of the seven main public service broadcasters' websites in the UK in March 2013. Given the differences in remit and content, it is unsurprising that there is such a range in levels of use between the BBC and other public service broadcasters' websites.

The BBC had a considerably larger unique audience than the other PSBs, followed by ITV and then Channel 4, although the gap between the latter is slight. In March 2013 2.7% of UK internet users used the Channel 5 website, equating to just over 1 million visitors.

UTV, which operates on Channel 3 in Northern Ireland, had 943,000 visitors to its website in March 2013, equating to 2.4% of UK internet users. STV operates on Channel 3 in Scotland, and attracted a unique audience of 859,000 visitors to its website. S4C has a specific target audience of Welsh-speaking people, and its website was visited by 47,000 unique users during March 2013, or 0.1% of UK internet users.

Figure 24: Unique audience and active reach of public service broadcaster websites



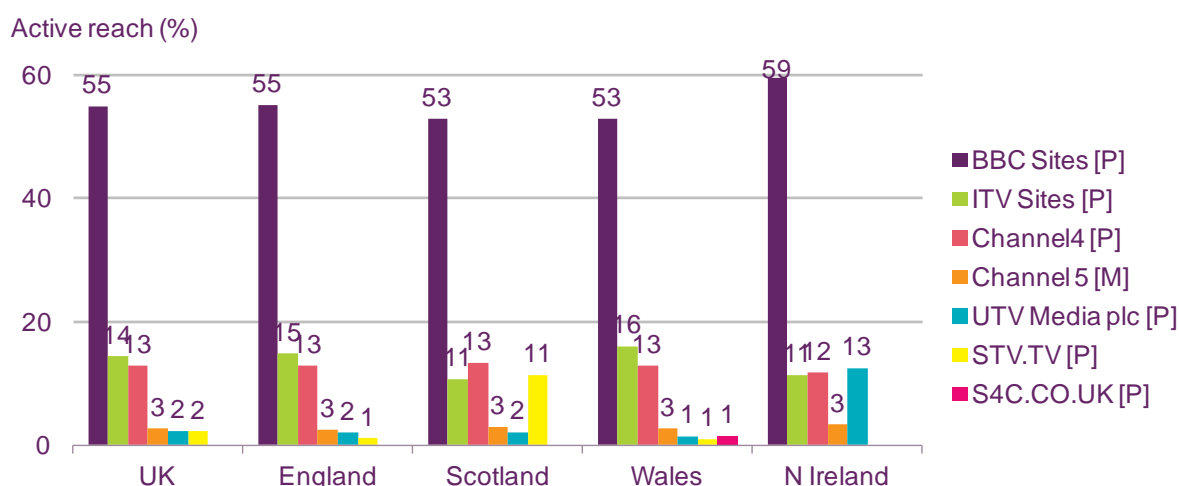
Source: comScore MMX, March 2013, adults 15+, home and work panel

The BBC is the most popular PSB website in the nations, with Channel 3 websites also relatively popular in Scotland and Northern Ireland

Figure 25 shows the percentage of internet users in each UK nation who visited one of the PSBs' websites during the same period. A similar proportion in each UK nation visited the BBC website in March 2013, with internet users in Northern Ireland being most likely to visit, at 59%. UTV and STV⁵² websites attracted over one in ten internet users in Northern Ireland and Scotland respectively, while ITV visits in these nations are lower than for England and Wales.

⁵² While it is possible to tune the STV channels manually in other parts of the UK, they do not appear on any EPG.

Figure 25: Active reach of public service broadcaster websites, by nation



Source: comScore MMX, March 2013, adults 15+, home and work panel
 Note: Active reach is reported only for data points which met minimum reporting standards (MRS). Where a nation is culmination of ISPA regions, active reach is calculated from those regions that met MRS

5.3 News information online

News provision is a form of online content that has clear citizen benefits, in terms of the potential to inform citizens and ensure an effective democratic process.

As the Kantar qualitative research commissioned by Ofcom in 2012⁵³ set out, ‘news’ has a variety of definitions, including: raw *information*, in the form of facts and figures, keeping up to date what’s *happening* at the moment, a range of *topics*, content that is simply *new*, and issues of *relevance* (spanning personal, community, regional, national, and even global levels).

One third of UK adults now say they use the internet for news

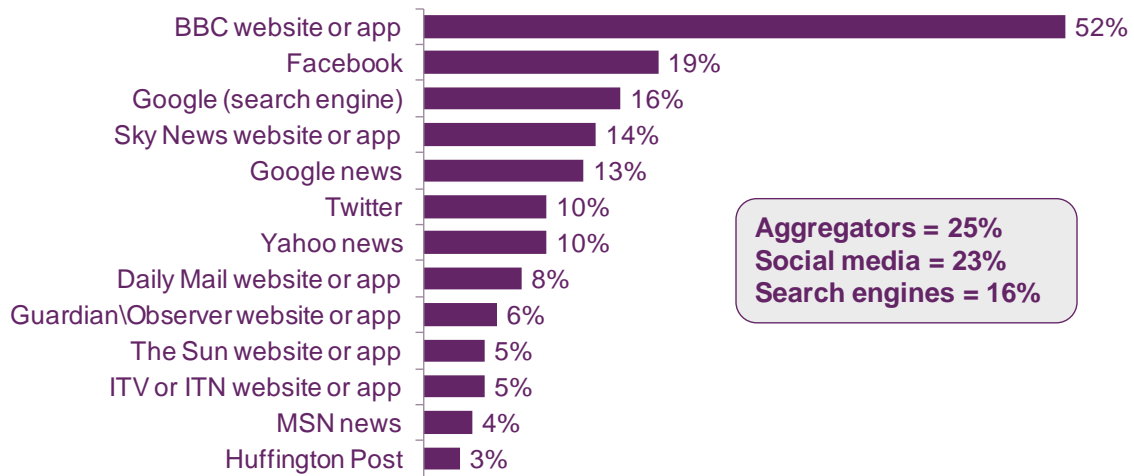
Various recent studies provide useful data documenting how people use news. For example, in 2013, one third (32%) of the UK population said that they used the internet for news “nowadays”, according to Kantar research commissioned by Ofcom⁵⁴. As Figure 26 shows, when asked which sites they used, just over half of this group nominated the BBC, and one in five nominated Facebook, with one in six using the Google search engine.

⁵³ Kantar, 2012: *Measuring News Consumption and Attitudes* <http://stakeholders.ofcom.org.uk/binaries/consultations/measuring-plurality/statement/Annex5.pdf>

⁵⁴ See Ofcom: *News Report 2013* <http://stakeholders.ofcom.org.uk/market-data-research/market-research/>. See also Reuters Institute: *Digital News Report 2013* for detailed understanding of how online users access news <http://www.digitalnewsreport.org/>.

Figure 26: Websites used for news: 2013

Proportion of those that use the internet for news (32% of UK adults)



Source: Kantar, 2013

Q5e) Thinking specifically about the internet which of the following do you use for news nowadays

Base: All who use internet for news (857) Note: only sources with an incidence of over 2% are shown

It is worth noting that internet users are increasingly using social networks to navigate and discover content online, including news information. According to the Reuters Institute *Digital News Report 2013*, one in five (20%) online news users now use social media as a source of news, and this rises to 40% of those aged 18-24⁵⁵.

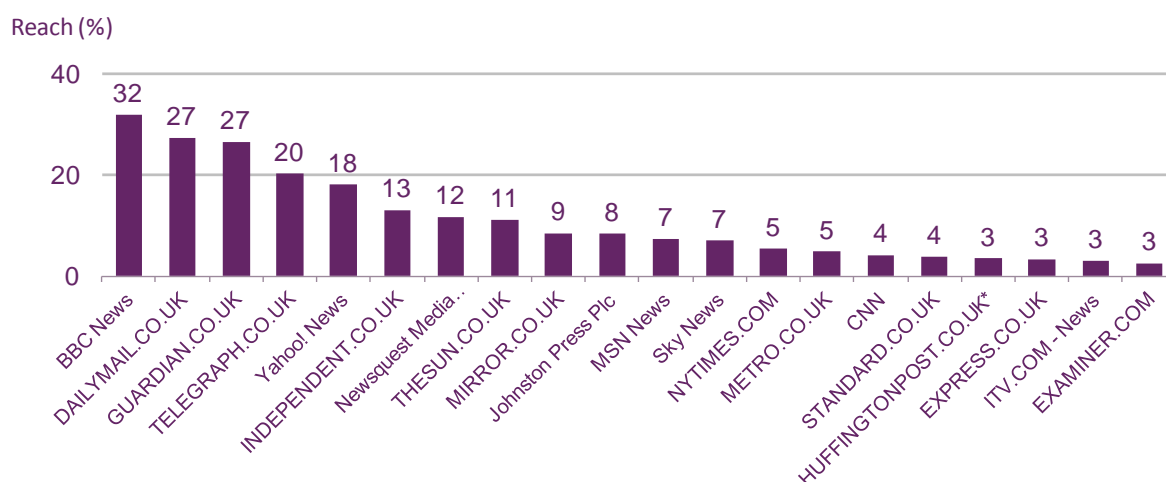
The BBC, Mail Online and the Guardian are the most-visited news sites, according to comScore

Figure 27 shows the active reach of the top websites in comScore's 'General News' category⁵⁶. BBC News has the widest monthly reach, at nearly one-third of online users, followed by Daily Mail and The Guardian, each with 27% reach.

⁵⁵ Reuters Institute *Digital News Report 2013* <http://www.digitalnewsreport.org/>

⁵⁶ This category therefore does not include websites like Facebook and the Google search engine that users nominated in the survey findings in Figure 26.

Figure 27: Active reach of top news websites



Source: comScore, March 2013, 15+. Active reach is defined as the proportion of the total online audience aged 15+ who have visited the relevant site at least once in the reporting month.

Note: Figures for the BBC and Yahoo! refer to news-specific sites in their respective reporting categories. Newsquest and Johnston Media are aggregate audiences of reporting local titles.

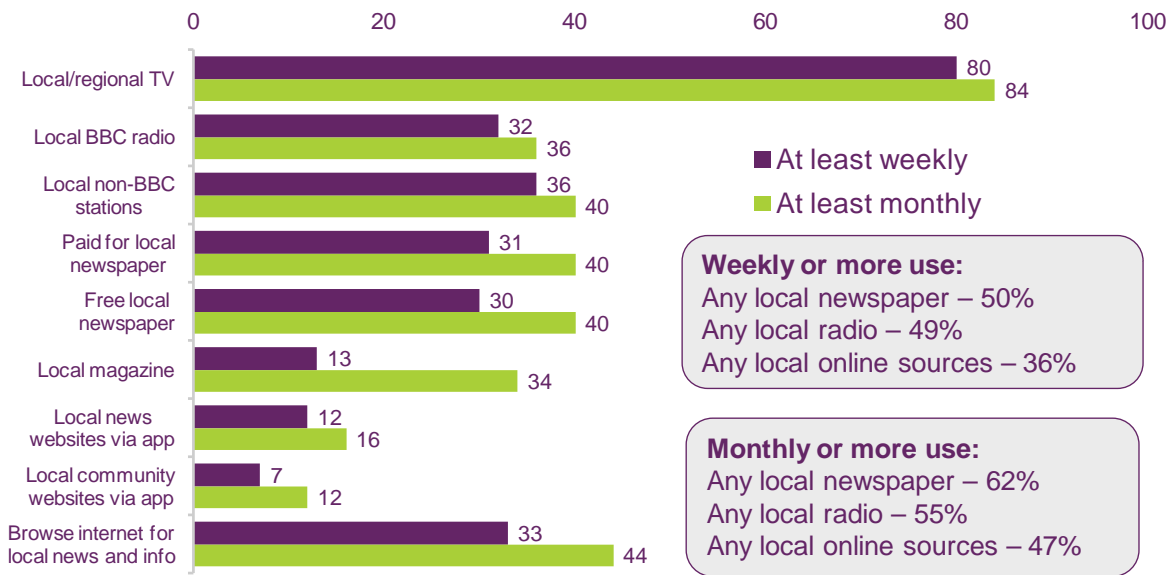
One third say they browse for local news online on a weekly basis

According to Ofcom’s survey of local media consumption⁵⁷, one third of UK adults say they browse online at least weekly for local⁵⁸ news and information, and around one in ten say they use apps for specific local news or community websites. But television remains the most popular medium – some four in five UK adults aged 15+ say they watch local or regional TV on a weekly, or more frequent, basis.

⁵⁷ These findings were reported in Ofcom’s *Communications Market Report 2013* <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr13>.

⁵⁸ The definition given to respondents of “local” was “the area in which you live”, and “regional” was “your local area and surrounding areas in the wider region”.

Figure 28: Local media consumption: 2013



Source: Ofcom local media omnibus 2013, reported in Communications Market Report 2013
 Q1: On average, how often do you spend doing each of the following?
 Base: all UK adults aged 15+, n=2016

One in seven regular news users say online browsing for local news and information is their most important local source

Local media users were asked how important the various sources of local news and information were to them. Perceived levels of importance are similar among people who use each source monthly, as among those who use them more frequently. Over half of regular local TV viewers rate this medium as being highly important to them, as do just under half (47%) of any online users. Local magazines are least likely to be highly rated as personally important (25%).

While TV is most likely to be nominated as the most important type of local news media, 14% of regular local online news users also nominate it as their most important source of local news.

Figure 29: Personal importance of local media: 2013 (% rating 7-10 out of 10)



Source: Ofcom local media omnibus 2013, reported in Communications Market Report 2013

Q2: How important are the following types of local media to you?

Q3a: And of all the local media sources you use [at least once a month] which one would you say is the most important to you personally?

Base: All UK adults 15+ who use all local media once a month or more

5.4 Hyperlocal media

Hyperlocal media is a growing sector in the UK. The definition ‘hyperlocal’ may include a range of locally-focused websites and apps and other online content services. There is no universally accepted definition of what constitutes ‘hyperlocal media’ or a ‘hyperlocal website’ and the term has been debated by academics and practitioners⁵⁹.

‘Hyperlocal media’ has been broadly defined by Nesta⁶⁰ as “online news or content services pertaining to a town, village, a single postcode or other small, geographically-defined community”. This could potentially cover a wide set of services, including both amateur and professionally-generated content⁶¹. This definition could also potentially relate to topics discussed in other sections of this report, such as health in the locality, local government services or tourist information, as well as ‘hard’ news and items about community events.

Alternatively, some definitions of ‘hyperlocal’ are narrower and have a specific focus on news. For example, Baines states: “‘Hyper-local’ has gained currency as a term referring to a news website, sometimes accompanied by a printed paper, serving city suburbs, a small town, village or postcode (US zip code)”⁶².

Despite these differences in definitions, services described as ‘hyperlocal’ are rooted in place and are more localised in terms of geographical and story focus, meaning that many of

⁵⁹ For a discussion of some of the definitions in this area see Harte (2013) ‘One Every Two Minutes: assessing the scale of hyperlocal publishing in the UK’, *JOMEC Journal*, available from www.cardiff.ac.uk/jomec/jomecjournal/3-june2013/Harte_Hyperlocal.pdf [accessed 19/09/13]

⁶⁰ National endowment for science, technology and the arts www.nesta.org.uk

⁶¹ *UK Demand for Hyperlocal Media Research Report*, 2013: <http://www.nesta.org.uk/library/documents/UK-demand-for-hyperlocal-media-report.pdf>

⁶² Baines (2010) ‘Hyperlocal: Glocalised rural news’, *International Journal of Sociology and Social Policy*, 30 9/10, pp. 581-592

the stories covered may differ from mainstream news outlets in terms of content and perspective⁶³. In addition to dedicated hyperlocal websites (and smartphone/tablet apps), citizens can also access hyperlocal content (i.e. content relevant to and/or about small defined geographic areas) via national and international social media such as Facebook and Twitter, as well as subject-led websites such as Mumsnet and Squaremeal⁶⁴.

Given their relatively small geographic focus, and as absolute visitor numbers to individual hyperlocal websites may be relatively small, traditional panel-based approaches to audience measurement may need to be supplemented with other approaches to fully understand the reach and impact of the sector⁶⁵.

Functional information and breaking news are the main reasons for using hyperlocal media

According to Nesta's 2013 *UK Demand for Hyperlocal Media Research Report*, most people who use hyperlocal media do so in order to access 'functional information' such as local weather (50% of hyperlocal media users) and breaking news (41% of hyperlocal media users)⁶⁶. Other information accessed by users, to a lesser extent, includes information about local services (7%) and local business news (8%)⁶⁷. Figure 30 below ranks users' use of various topic areas when using hyperlocal media.

⁶³ A content analysis of citizen-led hyperlocal websites by Cardiff and Birmingham City Universities found that these tended to have a strong focus on local politics, and a stronger emphasis on quoting from members of the general public and representatives of community organisations than traditional local media outlets – see <http://www.communityjournalism.co.uk/research/the-value-of-hyperlocal-news-content/> [accessed 19/09/13]

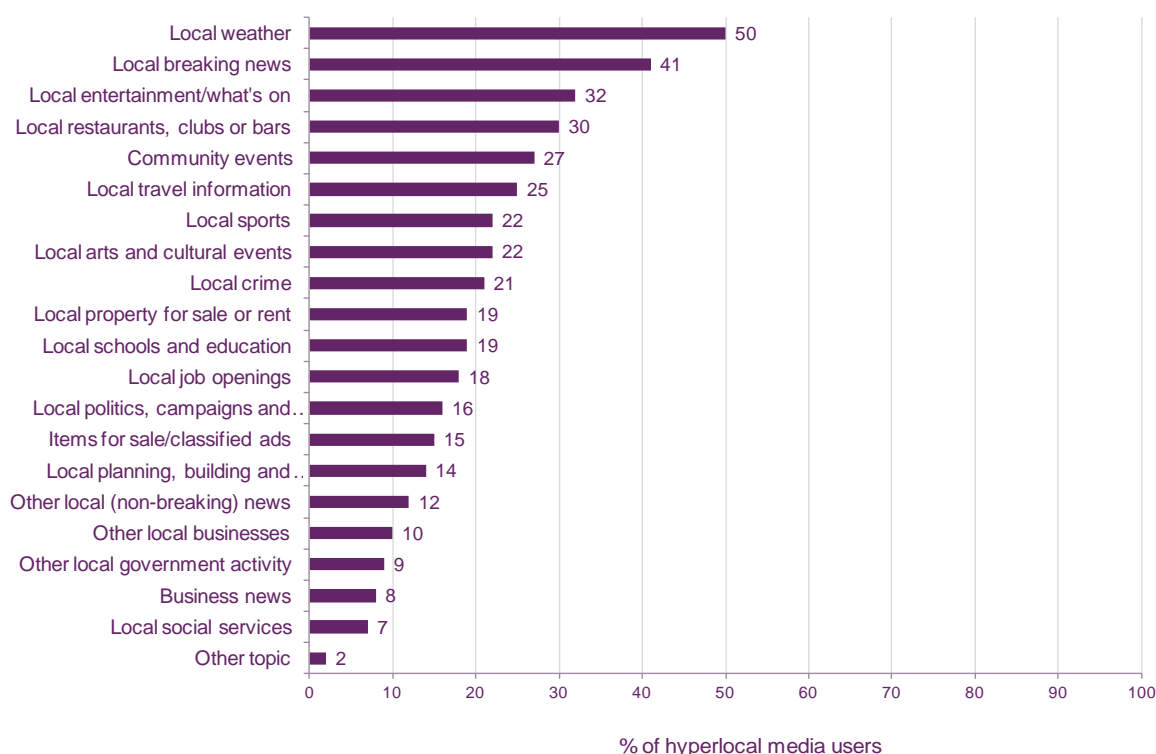
⁶⁴ See, for example, Nesta (2013) *Understanding the use of hyperlocal content through consumer search*, [online] available from: http://www.nesta.org.uk/areas_of_work/creative_economy/destination_local/assets/documents/understanding_the_use_of_hyperlocal_content_through_consumer_search [accessed 19/09/13]

⁶⁵ As well as technical issues around audience measurement methodologies and small audiences, the nature of the hyperlocal sector means that its impact may also be felt offline. For more details, see Pearson, Kingsbury and Fox (2013) *Destination Local: Our Lessons to Date*, Nesta [Online] available from http://www.nesta.org.uk/areas_of_work/creative_economy/destination_local/assets/documents/destination_local_our_lessons [accessed 19/09/13]

⁶⁶ *UK Demand for Hyperlocal Media Research Report*, 2013: <http://www.nesta.org.uk/library/documents/UK-demand-for-hyperlocal-media-report.pdf>

⁶⁷ *Ibid*

Figure 30: Nesta research: Hyperlocal media use ranked by topic areas, 2013



Source: Nesta research (2013)

Q12: Which of the following topic areas do you get information about? Here we are referring to when you get news or information online, on your computer or laptop, mobile phone or on your tablet about the immediate area you are in, such as a town, village, or local neighbourhood. This could either be where you live, work, used to live but no longer live or are visiting?

Base: Hyperlocal media users (939)

Hyperlocal media is an emerging sector, so trade associations or official membership bodies have yet to be established⁶⁸. Gauging the size of the sector can therefore be difficult.⁶⁹ However, Openly Local has established a database of hyperlocal websites, developed through websites' self-declaration and research by Openly Local.⁷⁰

In 2013, 499 active hyperlocal sites were recorded by Openly Local

Analysis of the Openly Local database⁷¹ shows that the number of hyperlocal websites in the UK has increased rapidly in the last few years. Indeed, in 2013, 499 of the hyperlocal sites recorded in Openly Local's database were regarded as being 'active'⁷², compared to 432 in 2012. In 2010 just 295 sites were listed on the database. To compare these figures to other

⁶⁸ Communications Market Report 2012: <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr12/>

⁶⁹ This difficulty in counting the number of services is not unique to the UK – see <http://streetfightmag.com/2012/11/14/in-market-sizing-who-gets-counted-as-hyperlocal/> for a discussion of attempts to count the number of US hyperlocal services [accessed 19/09/13]

⁷⁰ See http://openlylocal.com/hyperlocal_sites.

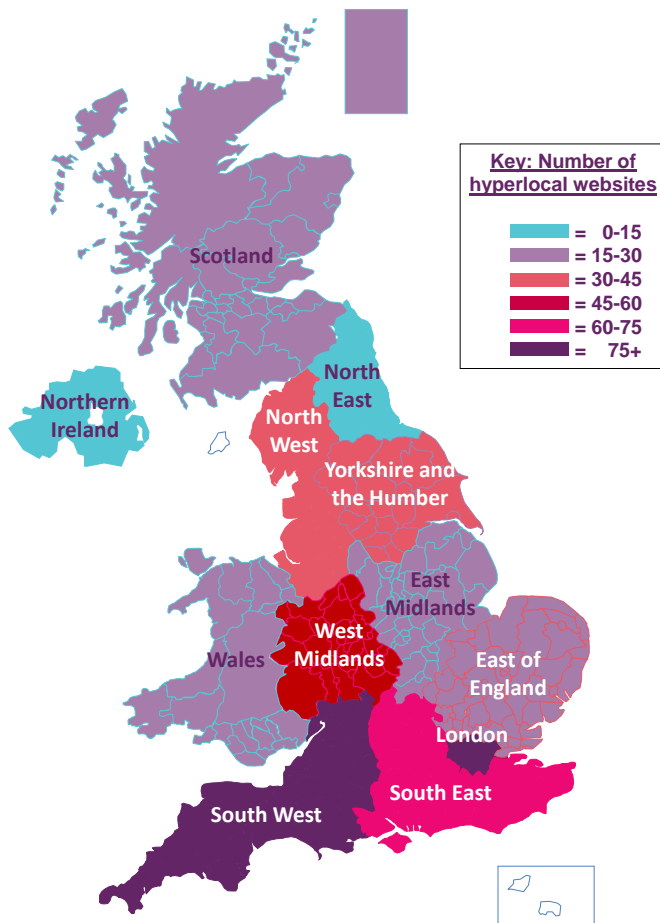
⁷¹ The data appearing in the database have been analysed by Birmingham City University, as part of an Arts and Humanities Research Council and Engineering and Physical Sciences Research Council funded programme (of which Ofcom is a partner) which focuses on the creative citizen. See <http://creativecitizens.co.uk/>

⁷² An active hyperlocal website is defined as one that has published at least once in the five months prior to the sample period or functioned as a forum-only or wiki-based website. The directory contains some sites which are no longer operating (the URL either does not resolve or points to a site no longer publishing news items).

media, it was estimated that approximately 1,600 websites associated with local and regional newspapers existed in the UK in 2013⁷³.

Figure 31 below presents the number of hyperlocal websites by region and nation. Most hyperlocal websites identified as active by Openly Local are based in England (90%) with a high concentration of focus on urban areas (93 sites focused on communities in London and 26 in Birmingham), although some rural areas are well-served by sites targeted mainly at small towns and villages. However, according to the database, many areas in the UK do not appear to have any hyperlocal websites at all. While not all UK hyperlocal sites are recorded in the Openly Local database, this finding suggests that the availability of hyperlocal media differs substantially from place to place.

Figure 31: Location of hyperlocal websites in the UK: 2013



Source: Data from Openly Local / Ofcom / Birmingham City University (June 2013)

73 See <http://www.newspapersoc.org.uk/> NB: some of these newspaper websites may fall within certain definitions of hyperlocal websites.

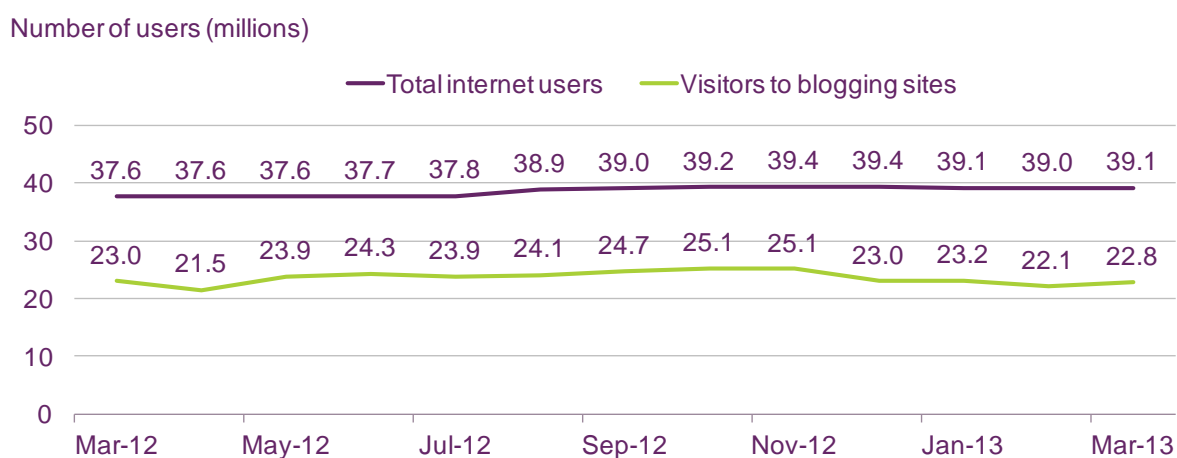
5.5 Citizen journalism

Citizen journalism provides news and information that is created and reported on by internet users, rather than news organisations.⁷⁴ This information is usually distributed and spread via social media, such as the micro-blogging site Twitter, and other blogging websites.

Over half of UK internet users visit blogging websites

Figure 32 below shows the use of blogging websites⁷⁵ and the month-on-month trend between March 2012 and March 2013. In March 2013, blogging websites attracted 22,785,000 unique visitors (58% of active internet users aged 15+). The average visitor spent 3.3 minutes on such blogs in the month.

Figure 32: Visitors to blogging websites, compared to total internet users: March 2012 - March 2013



Source: comScore MMX, March 2012 to March 2013, adults 15+, home and work panel

Blogging sites are more popular in Northern Ireland than other nations

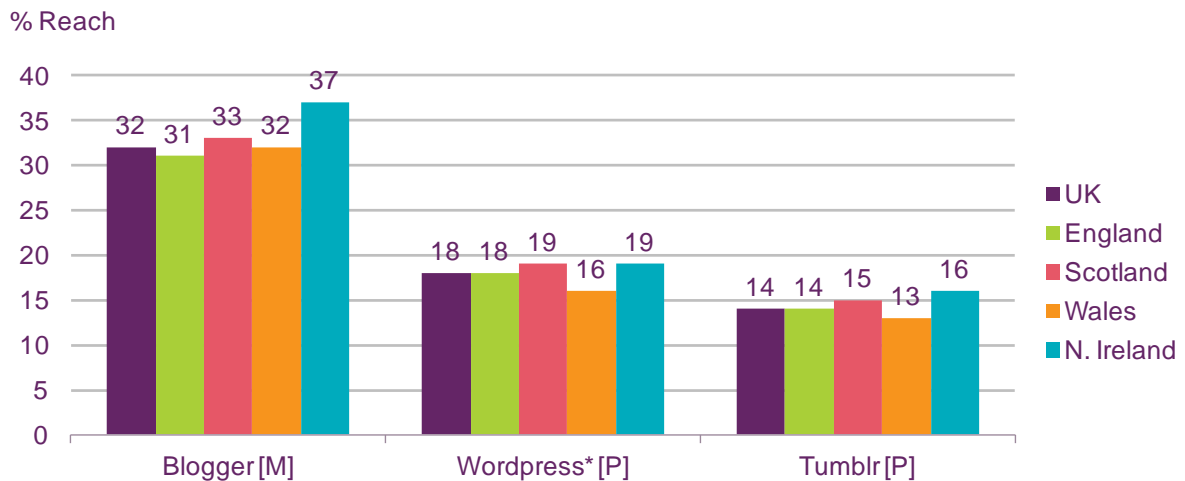
Figure 33 shows the active reach by nation of the top three UK blogging websites in March 2013. The most popular blogging website is Blogger, which around one third (32%) of UK active internet users visited in March 2013, compared to Wordpress.com and Tumblr (which reached 18% and 14% of UK active internet users respectively).

Blogging sites are more popular in Northern Ireland than in any other UK nation, particularly Blogger, which was visited by 37% of active internet users in Northern Ireland, compared to 32% for the UK as a whole.

⁷⁴ While there are several definitions of 'citizen journalism', they all tend to involve members of the public; i.e. citizens sourcing, gathering, analysing and reporting news and information. For example, Jay Rosen, professor of journalism at New York University, defines it as: "When the people formerly known as the audience employ the press tools they have in their possession to inform one another, that's citizen journalism" http://archive.pressthink.org/2008/07/14/a_most_useful_d.html [accessed 18 September 2013]

⁷⁵ Defined by comScore as sites where users post informal journals of their thoughts, commentaries and philosophies. This online journal is frequently updated and intended for general public consumption.

Figure 33: Active reach of top three UK blogging sites, by nation: March 2013



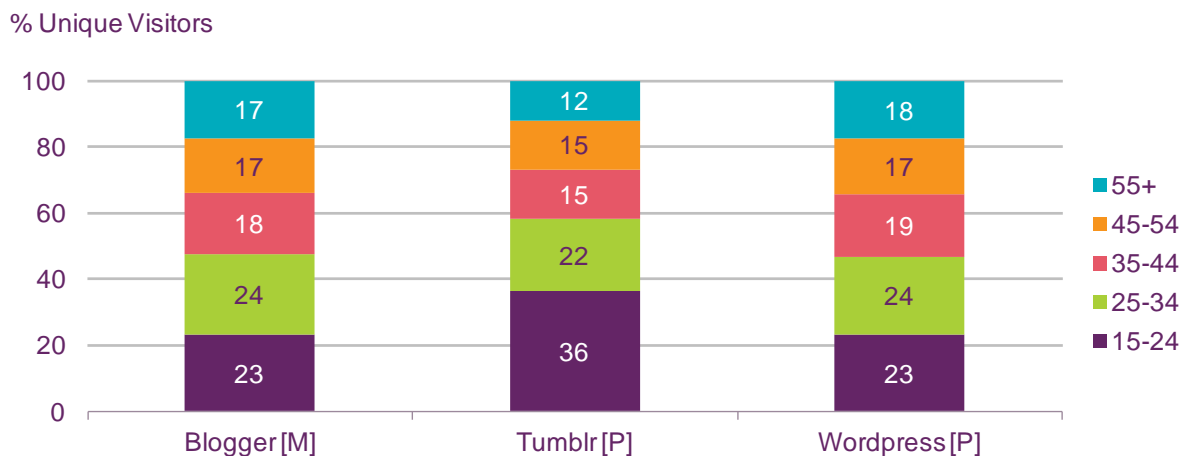
Source: comScore MMX, March 2013, adults 15+, home and work panel

* Wordpress here is a measure of the commercial hosting platform at Wordpress.com, and is neither a measure of the software website wordpress.org, nor a measure of visits to self-hosted Wordpress blogs.

Visitors to blogging sites are mainly younger and from higher socio-economic groups

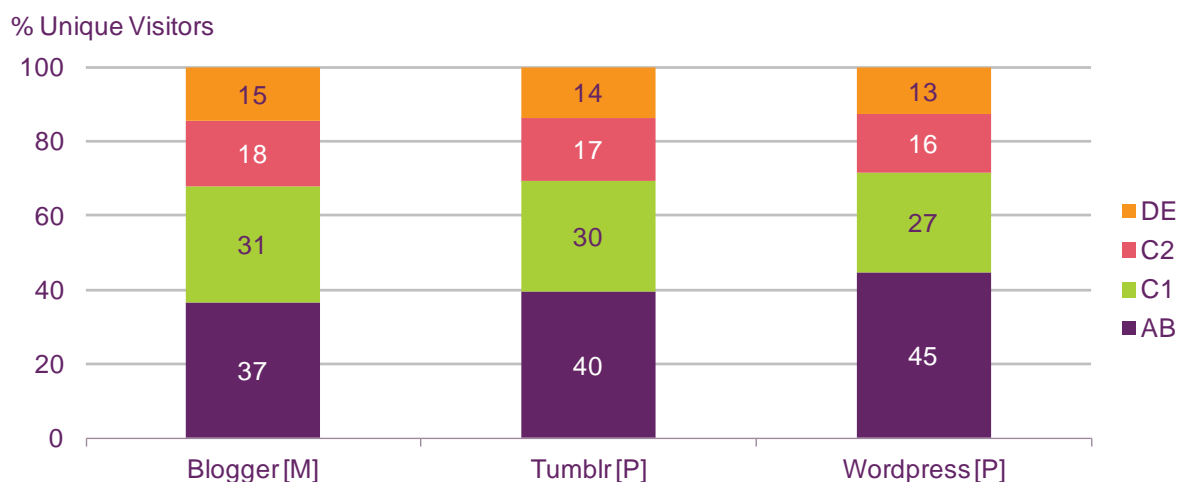
Figure 34 and Figure 35 show the age and socio-economic profile of visitors to the top three blogging websites. Tumblr has the youngest audience; over one third (36%) of visitors are aged 15 -24. It is also the site with the lowest proportion of older visitors; just over one in ten (12%) are 55 or over. The socio-economic profiles of each of the sites are fairly similar, with around four in ten visitors coming from AB groups, compared to around one in seven from DE groups.

Figure 34: Profile of visitors to the top three UK blogging sites, by age: March 2013



Source: comScore MMX, March 2013, adults 15+, home and work panel

Figure 35: Profile of visitors to the top three UK blogging sites, by socio-economic group: March 2013



Source: comScore MMX, March 2013, adults 15+, home and work panel

Around three in ten say they have contributed to someone else’s blog

Figure 36 below, from Ofcom’s 2013 *Adults’ Media Use and Attitudes Report*, compares several online activities which have a collaborative element and are often used in the context of citizen journalism, across the nations.

There are few differences between nations, with around three in ten online users saying they have ever contributed comments, one in eight saying they have set up their own blog, and one in ten saying they have contributed to a site such as Wikipedia.

Figure 36: Experience of using the internet for creative activities, by nation: 2012

IN19A-G – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested. (prompted responses, single coded)

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

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

Summary

This section describes a range of online citizen content that is broadly media- and news-focused.

In terms of PSB content online, the BBC is by far the most popular website, and this is also the case for online news consumption.

Television is the most popular means of accessing local information, followed by the press, radio and online sources. However, 14% of regular online news users say that online is their most important source for local news.

Hyperlocal activity continues to grow, with higher concentration of activity in urban areas.

Blogging websites are visited by over half the internet population each month (58% in March 2013) and people in Northern Ireland are more likely than those in other parts of the UK to visit them.

Section 6

Culture

This section examines how people engage with cultural institutions and cultural content over the internet; in particular, in the areas of heritage, archives, and museums and galleries. The internet and the development of digital media have changed the way in which people can engage with arts, culture, and cultural organisations. People can now purchase tickets, renew and reserve books, search for information, preview shows and exhibitions, and take virtual tours on museums' and galleries' websites and/or apps.

Cultural institutions with an online presence can provide users with additional or enhanced access to collections. For instance, artefacts and objects that require special care because they are rare or fragile become more widely accessible through being visible online. Over the internet, cultural institutions can highlight and link material across a single website or a number of cultural institutions. Digital access may also benefit those who are unable to visit collections or exhibitions due to financial or physical constraints. Given these potential benefits, policy makers and funding bodies are actively promoting the use of digital technology by arts organisations to expand audience reach and develop new business models.⁷⁶

In addition to comScore data, this section uses the Department for Culture, Media and Sport (DCMS) data gathered through the Taking Part Survey⁷⁷, as it provides a wide range of data about digital engagement in culture and leisure. It should be noted that this survey is carried out only in England.

Looking at these types of cultural provision in the devolved nations, we cannot report on a number of relevant websites, including Historic Scotland and Cadw in Wales, and the various devolved nations' archives, using the comScore measurement system. Where possible, however, we have included specific museums and galleries.

6.2 Digital participation in culture

Two in five adults in England said they participated in culture online in 2011/12

According to research undertaken by the Department for Culture, Media & Sport (DCMS), in 2011/12, two in five (40%) adults in England⁷⁸ had participated digitally in culture⁷⁹, an

⁷⁶ For example, the Digital R&D Fund for the Arts, a three-year programme backed by Council England, the Arts and Humanities Research Council (AHRC) and Nesta. Similar funds have been launched for Wales and Scotland backed by their arts funding bodies (Arts Council Wales / Creative Scotland), Nesta and the AHRC.

⁷⁷ The Taking Part Survey is commissioned by the Department for Culture, Media and Sport (DCMS) in partnership with various organisations including Arts Council England, English Heritage, and Sport England. Taking Part is a continuous face-to-face survey with adults aged 16 and over living in private households in England. The survey has run since mid-July 2005. It does not include data on the devolved nations. <https://www.gov.uk/government/collections/taking-part>

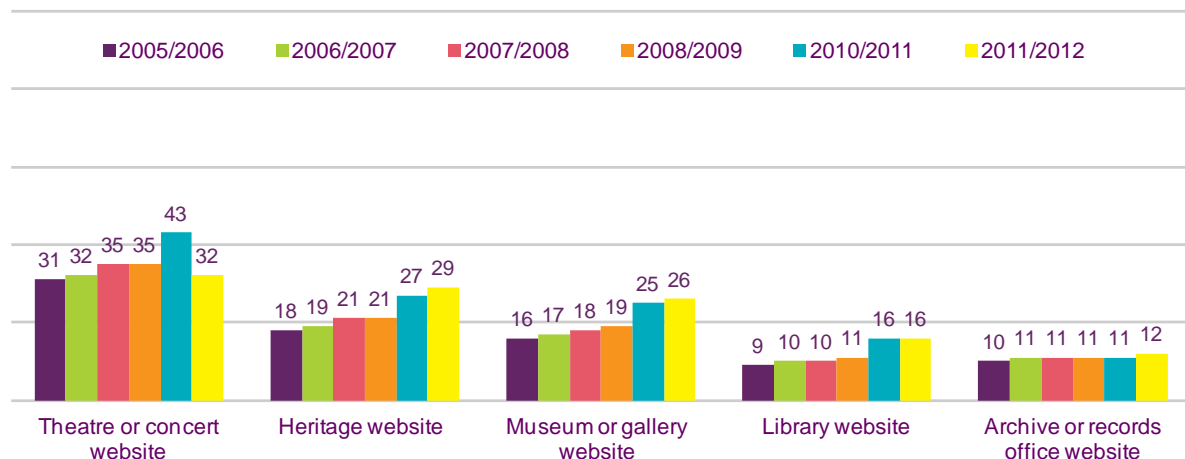
⁷⁸ The Taking Part Survey measures participation by adults (aged 16 and over) living in private households in England. It should be noted, however, that no geographical restriction is placed on where the activity or event associated with participation occurred.

⁷⁹ DCMS defines digital participation as "visiting a museum or gallery, library, heritage, theatre or concert, archive or records office website for any purpose other than to buy tickets. or for information on opening hours etc." Furthermore, DCMS states that the measure of digital participation "captures activities such as viewing an online gallery collection, taking a virtual tour of a

increase of 15 percentage points since 2008/9 (25%). Those aged 25-44 had the highest digital participation rates (40%) and those aged 75+ the lowest (12%).

In 2011/12, one third of adults in England visited a theatre or concert website, three in ten (29%) visited heritage websites, about a quarter (26%) visited a museum or gallery website, 16% visited library⁸⁰ websites, and 12% used archive or records office websites. The proportion of people visiting all types of culture websites has increased since DCMS started gathering data through its Taking Part survey⁸¹ in 2005. However, the proportion of people visiting theatre or concert websites decreased in 2011/12 after a peak in 2010/11, as shown in Figure 37 below.

Figure 37: Digital participation in cultural activities in England: 2005-2012⁸²



Information for 2009/2010 is unavailable. Source: *Taking Part: England's Survey of Leisure, Culture and Sport, years 2005-2012*, Department for Culture Media and Sport research, data collected by TNS-BMRB

Base: Adults 16+. DCMS 2005/6: 28,117; DCMS 2006/7: 24,174; DCMS 2007/8: 25,720; DCMS 2008/9: 14,452; DCMS 2009/10: N/A; DCMS 2010/11: 14,102; DCMS 2011/12: 9,188.

6.3 Heritage

The main use of heritage websites is to plan how to get to a historical site

'Heritage' is a broad concept that has been defined by the International Cultural Tourism Charter as one that: "includes the natural as well as the cultural environment. It encompasses landscapes, historic places, sites and built environments, as well as biodiversity, collections, past and continuing cultural practices, knowledge and living experiences [of a group or society]"⁸³. In other words, 'heritage' can be understood as both the intangible attributes and the physical assets forming a people's legacy. In England, English Heritage⁸⁴ is responsible for managing the country's historic environment. In Scotland, this responsibility is discharged by Historic Scotland, in Wales by Cadw, and

historic site or viewing an arts performance." The overall measure of digital participation is derived from several variables.

⁸⁰ For further information on libraries, please see next section.

⁸¹ *Taking Part: England's Survey of Leisure, Culture and Sport*, DCMS, 2011-2012

⁸² Excludes visits to websites for information on opening hours or to buy tickets

⁸³ International Cultural Tourism Charter, ICOMOS, 1999

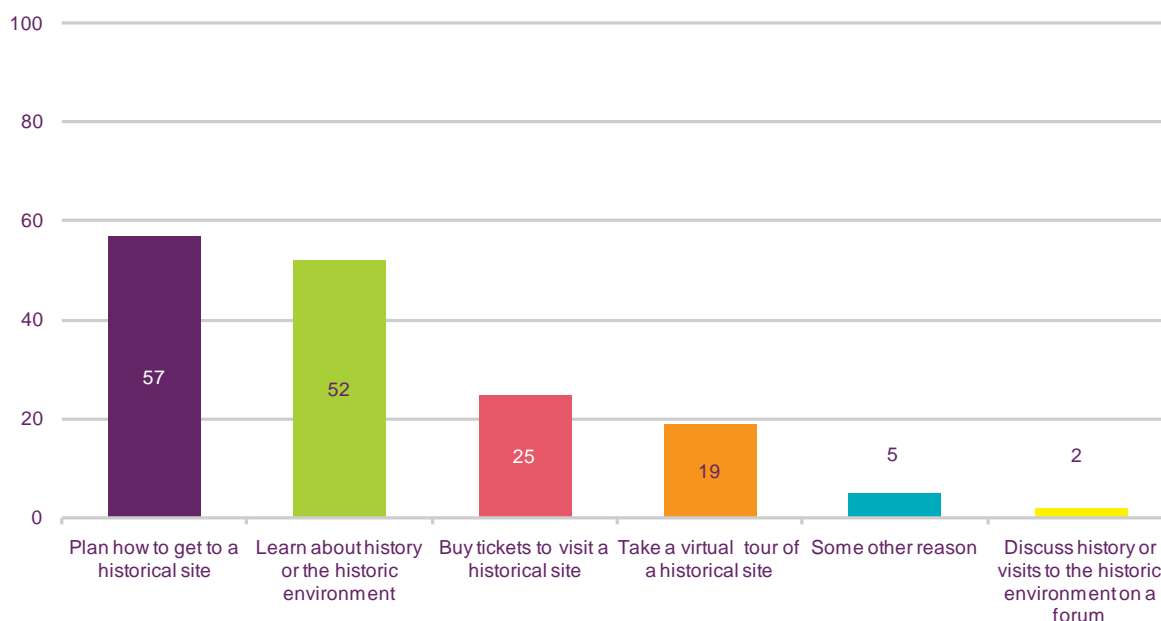
⁸⁴ Officially known as the Historic Buildings and Monuments Commission for England

similar responsibilities are carried out in Northern Ireland by the Northern Ireland Environment Agency⁸⁵.

According to the Taking Part survey, the proportion of adults in England visiting heritage websites has significantly increased since 2005/6, with 29% of adults visiting heritage websites in 2011/12, compared to 18% in 2005/6 (see Figure 37).

Heritage websites are used for a variety of reasons, including to take virtual tours of historical sites, and to buy tickets to visit a historical site. According to the survey, adults in England are most likely to use heritage websites to plan trips to historical sites (57% of adults in 2011/12) and to learn about history or the historic environment (52% of adults in 2011/12), as shown in Figure 38 below.

Figure 38: Reasons for visiting heritage websites: 2011/12

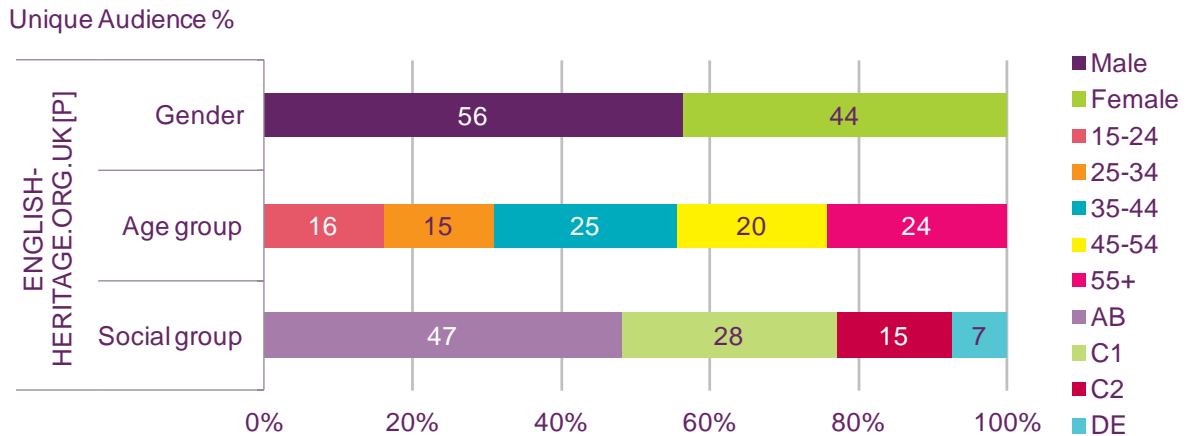


Source: *Taking Part: England's Survey of Leisure, Culture and Sport, 2011/12*, Department for Culture Media and Sport research, data collected by TNS-BMRB
 Base: Adults 16+. DCMS 2011/12: 1,908 for all reasons except to "Take a virtual tour of a historical site": 2,510.

In March 2013, the website english-heritage.org.uk was used by 0.4% of the internet population, corresponding to a unique audience of 172,000 people, with an average time spent of 2.3 minutes per visitor. One quarter of visitors were aged 55 and over, and nearly half (47%) were in the AB socio-economic group.

⁸⁵The sites from the devolved nations are not reportable in comScore

Figure 39: Visitor demographics of english-heritage.org.uk, by gender, socio-economic group and age: March 2013



Source: comScore MMX, March 2013, adults 15+, home and work panel

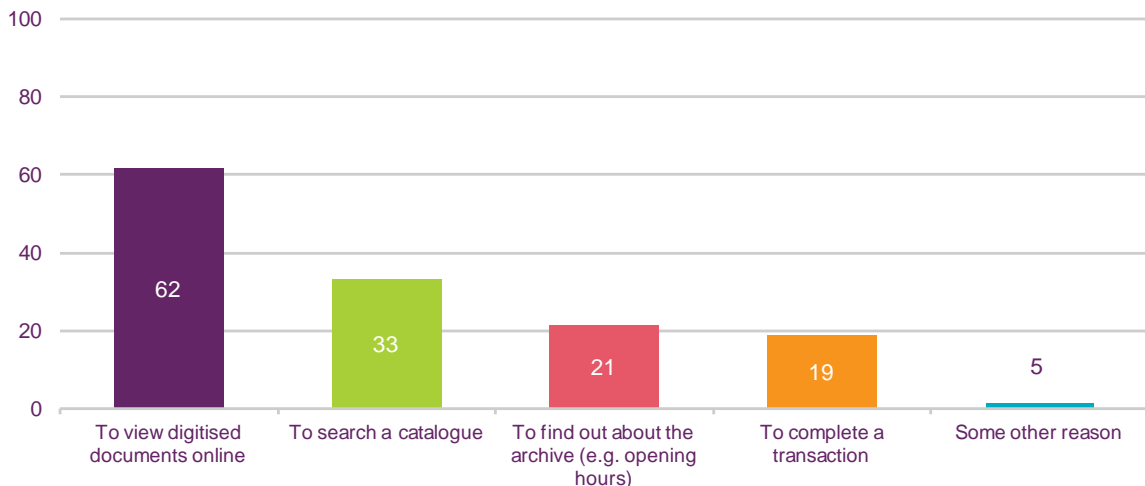
6.4 Archives

Over one in ten internet users say they have visited some sort of archives website

According to the Taking Part survey, in 2011/12 12% of adults in England had visited an archive or records office website.

People visit archive websites for a variety of reasons, including to search catalogues and to find out more about the archive (for example, opening hours). Figure 40 below shows that UK adults primarily visit archive or records office websites to view digitised documents over the internet and to search catalogues.

Figure 40: Reasons for visiting archive websites: 2011/2012



Source: Taking Part: England's Survey of Leisure, Culture and Sport, 2011/12, Department for Culture Media and Sport research, data collected by TNS-BMRB
 Base: Adults 16+. DCMS 2011/2012: 1,024

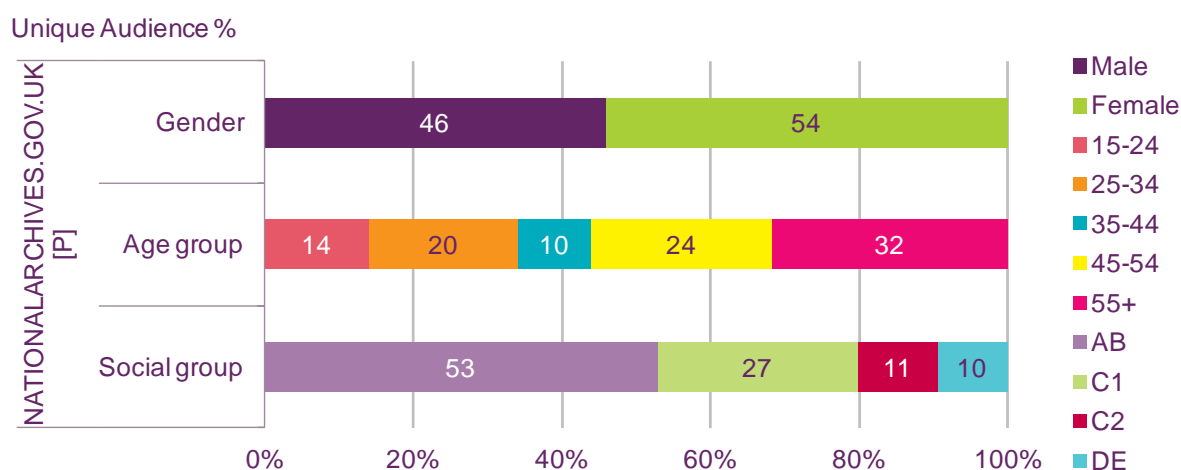
The National Archives is the government’s national archive for England and Wales⁸⁶. Its website allows internet users to view digitised documents.

The collections held by National Archives can be searched through its online catalogue. According to National Archives, over 5% of National Archives’ records have been digitised (this translates into over 80 million historical documents having been digitised and published on the internet), and in 2011/12, close to 127 million records were downloaded by visitors to DocumentsOnline and other partner services operated by commercial licensees⁸⁷.

One in fifty internet users used the National Archives website in March 2013

In March 2013, the National Archives website attracted 677,000 users, or an active reach of 1.7%⁸⁸. Figure 41 below outlines nationalarchives.gov.uk visitors’ demographics by gender and age. A majority of visitors to the National Archives were female (54% vs. 46% male) and approximately half of visitors were aged over 45.

Figure 41: Visitor profile of nationalarchives.gov.uk, by gender, socio-economic group and age: March 2013



Source: comScore MMX, March 2013, adults 15+, home and work panel

6.5 Museums and galleries

One in four adults in England says they visit museum or gallery websites

The Taking Part survey reports that approximately one in four (26%) adults in England visited museum or gallery websites in 2011/12, up from 16% in 2005/6.

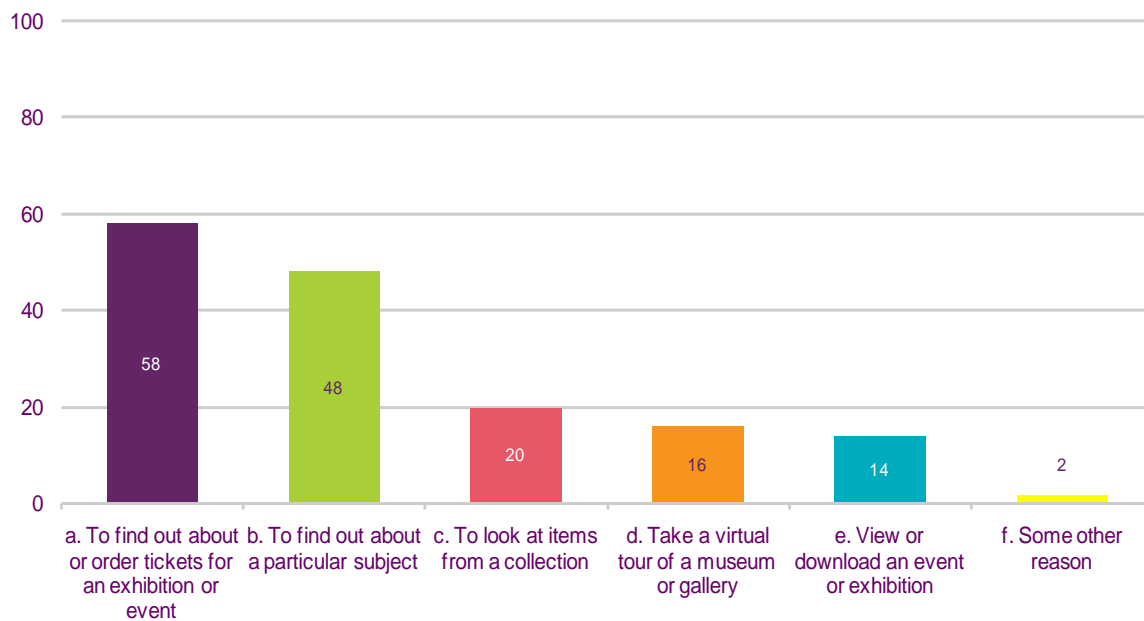
As with other online cultural sectors, people have a variety of motivations for visiting museum and gallery websites. Adults visit museum/gallery websites for exhibition/event information, to look at items in a collection, to take virtual tours of museums and galleries, and to view or download an event or exhibition, as shown in Figure 42 below.

⁸⁶ Scotland and Northern Ireland hold separate national archives. The National Archives of Scotland hold government and private documents relating to Scotland, while the Public Records Office of Northern Ireland holds private and official records for Northern Ireland. These are not reportable on comScore.

⁸⁷ www.nationalarchives.gov.uk

⁸⁸ comScore MMX, home and work, March 2013

Figure 42: Reasons for visiting museum or gallery website: 2011-2012



Source: *Taking Part: England's Survey of Leisure, Culture and Sport, 2011/12*, Department for Culture Media and Sport research, data collected by TNS-BMRB Base: Adults 16+. DCMS 2011/2012 reasons a-b-c: 2,299; reasons d-e-f: 1,747

The British Museum website is the most visited museum/gallery site

In March 2013, the top three UK museum/gallery websites visited were the British Museum with 206,000 unique visitors, the Tate Gallery with 179,000 and the Science Museum with 85,000.

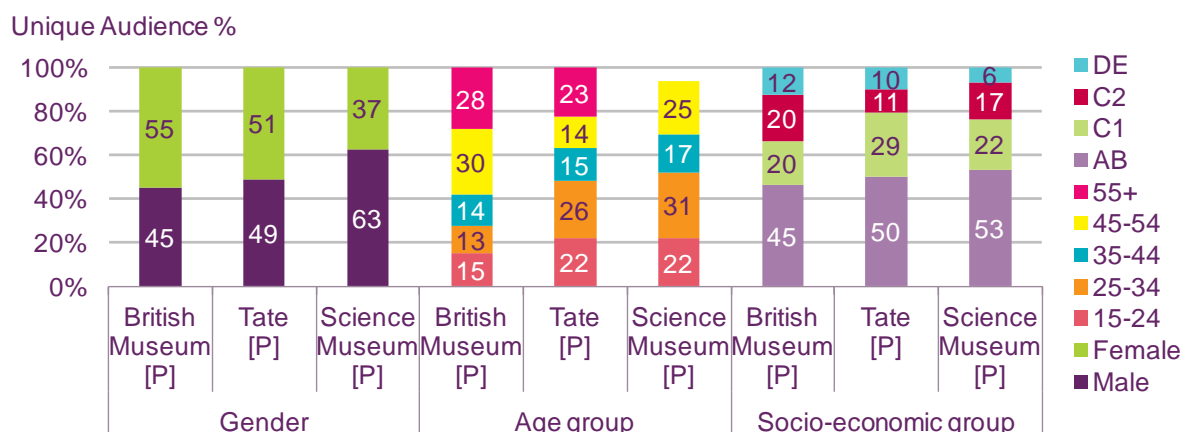
Figure 43: Top three most-visited museum/gallery websites: March 2013

Website	Unique audience	Active reach (%)
British Museum	206,000	0.5
Tate	179,000	0.2
Science Museum	85,000	0.2

Source: comScore MMX, March 2013, adults 15+, home and work panel

Figure 44 shows the profile of visitors to these three sites by age, gender and socio-economic group. Visitors to the Science Museum website are more likely to be men, and in the AB socio-economic groups. Visitors to the Tate website are more likely to be older people.

Figure 44: Visitor profile of top three most-visited museum/gallery websites, by gender, socio-economic group and age: March 2013



Source: comScore MMX, March 2013 (3 Month Average), adults 15+, home and work panel
 Note: Data for visitors to the Science Museum aged 55+ are omitted since they did not meet minimum reporting standards

While it is not possible to analyse many museums and galleries in the devolved nations on the comScore measurement system, due to their relatively small reach, the following museum/gallery websites in Scotland and Northern Ireland have an active reach of around 0.2%.

Figure 45: Major museums in Scotland and Northern Ireland⁸⁹

Website	Unique audience	Active reach
Scotland		
NMS.ac.uk	11,000	0.3%
Nationalgalleries.org	13,000	0.3%
Northern Ireland		
NMNI.com	3,000	0.2%
TitanicBelfast.com	3,000	0.3%

Source: comScore MMX, March 2013, adults 15+, home and work panel

Summary

Digital participation in the various cultural activities outlined in this section have seen some growth in recent years in England, with increases for museum/gallery websites from 19% in 2008/9 to 26% in 2011/12, and for heritage websites from 21% in 2008/9 to 29% in 2011/12, according to the Taking Part survey.

Visitors to these websites are more likely to be from AB households than from DE households. Digital participation in culture is more common among younger participants, although archives are more popular among older internet users; one third (32%) of visitors to the national archives website are aged 55 or over.

⁸⁹ Similar websites for Wales are not available on comScore.

Section 8

Libraries

Many libraries now have an online presence, thereby improving users' access to books, collections and other library resources. Similarly to museums and galleries, many libraries now use the internet to showcase fragile content⁹⁰, and link content across multiple institutions.

One in six adults in England say they use the internet to access libraries

UK adults can now use the internet to access libraries, with 16% of adults in England having visited a library website in 2011/2012, up from 9% in 2005/6, according to the DCMS Taking Part survey.

Figure 46: Digital participation in library websites: 2005-2012

Year	Percentage of adults participating
2005/6	9
2006/7	10
2007/8	10
2008/9	11
2010/11	16
2011/12	16

**Information for 2009/2010 is unavailable*

Source: Taking Part: England's Survey of Leisure, Culture and Sport, years 2005-2012, Department for Culture Media and Sport research, data collected by TNS-BMRB

Base: Adults 16+. DCMS 2005/6: 28,117; DCMS 2006/7: 24,174; DCMS 2007/8: 25,720; DCMS 2008/9: 14,452; DCMS 2009/10: N/A; DCMS 2010/11: 14,102; DCMS 2011/12: 9,188.

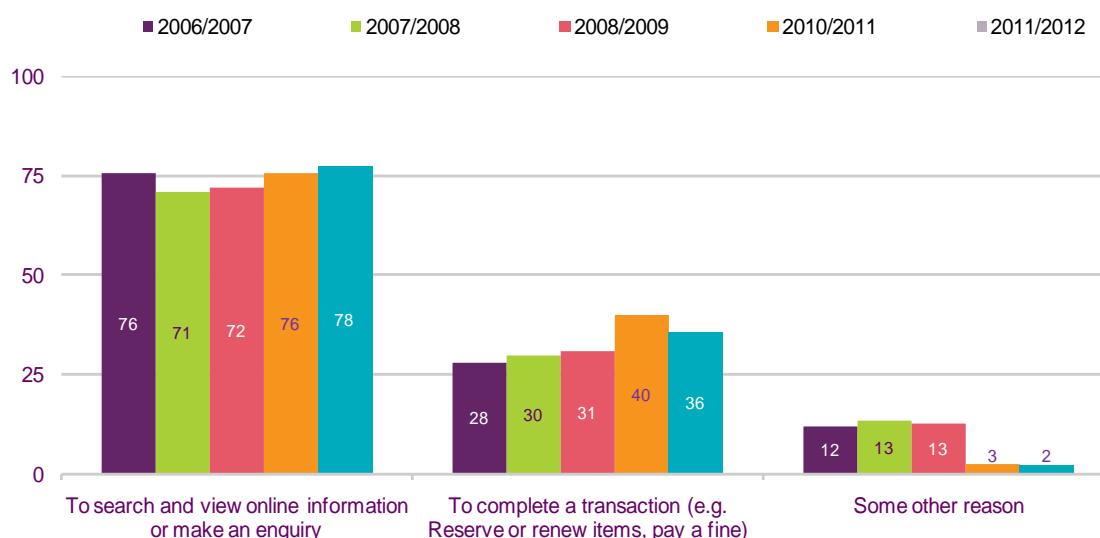
Over one third of adults use libraries to complete a transaction

People use library websites for various functions. Many libraries offer services that may be particularly useful to people facing financial or physical constraints to visiting in person. These include reserving titles, searching library catalogues, contacting the library service and reference information.

In 2011/12, 36% of online library users in England used a library website to complete an online transaction; an increase since 2006/7 of eight percentage points. According to the Taking Part survey, over three-quarters of users said they had used a library website to search and view online information or to make an inquiry in 2011/12. These findings are outlined in Figure 47 below.

⁹⁰ For example, the British Library has digitised such fragile content as pages from 18th and 19th century newspapers.

Figure 47: Reasons for visiting library websites, among users: 2006 – 2012



**Information for 2009/2010 is unavailable*

Source: *Taking Part: England's Survey of Leisure, Culture and Sport, years 2005-2012, Department for Culture Media and Sport research, data collected by TNS-BMRB*

Base: Adults 16+. DCMS 2006/7: 885; DCMS 2007/8: 2,502; DCMS 2008/9: 1,466; DCMS 2009/10: N/A; DCMS 2010/11: 2,061; DCMS 2011/12: 1,343.

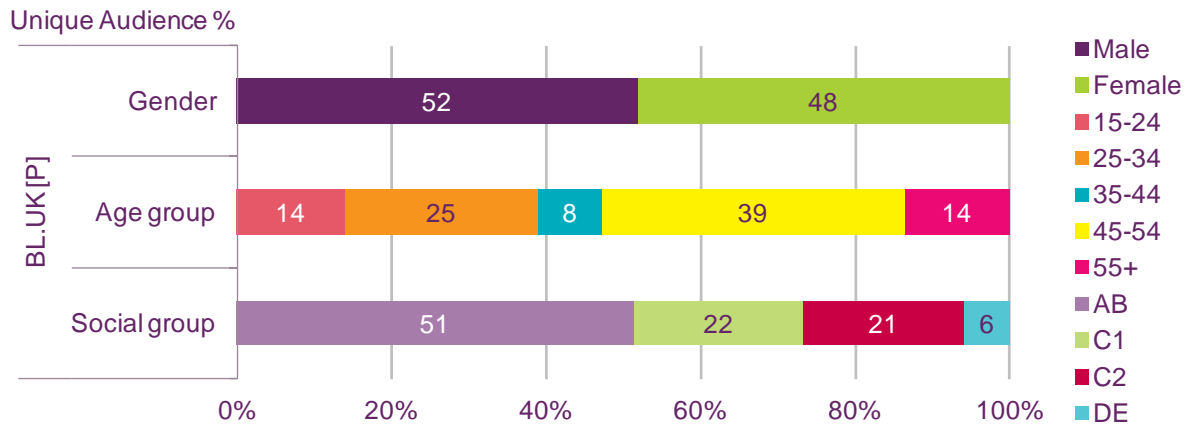
Many libraries, archives and museums use the internet to provide access to their collections while helping to preserve them. Some digital collections make rare and fragile content, otherwise only accessible in reading rooms, publicly and freely available to view online. In 2009, the British Library embarked on the digitisation of over two million newspaper pages, making them fully searchable online.

British Library visitors are more likely to be older and from higher socio-economic groups

In March 2013, the British Library website had an active reach of 0.5%, corresponding to 210,000 unique visitors. The average time spent per visitor was 2.9 minutes. Figure 48 below shows the make-up of visitors to the website. While the split by gender is broadly in line with the UK population, half of the visitors are in the AB socio-economic group.

It should also be noted that the National Library of Scotland (NLS) attracted 28,000 visitors to its website in March 2013 from across the UK, 18,000 of whom were from Scotland. This equates to an active reach of 0.4% within Scotland. The average time spent per visitor was 3.1 minutes.

Figure 48: Visitor demographics of bl.uk (British Library) by gender, socio-economic group and age: March 2013



Source: comScore MMX, March 2013 (3 Month Average), adults 15+, home and work panel
 Note: Unique audience is reported only for data points that met minimum reporting standards (MRS).

Wikipedia is used by over half of all internet users

In contrast, the user-generated information website Wikipedia has an active reach of over half (53%) of all internet users, equating to over 20 million unique users. The average time spent on the site is 21 minutes⁹¹.

Summary

Around one in six people in England say they use library websites, compared to one in ten in 2007/8. While, unsurprisingly, most use is for searching and viewing online information, over one third of users (36%) say they complete a library transaction online.

The British Library is used by one in a hundred internet users, and visitors are more likely to be in older age groups and the AB socio-economic group.

⁹¹ comScore MMX, home and work, March 2013

Annex A: comScore methodology

comScore's Unified Digital Measurement (UDM) methodology combines panel and census measurement techniques to measure digital audiences. UDM® uses comScore's global measurement panel to determine audience reach and demographics. Census-level activity is captured from publishers' digital content, such as on websites, videos, and computer and mobile applications. comScore combines this census-level data with that captured from the panel to provide an accurate view of audiences and their consumption habits. This approach allows comScore to capture the most accurate consumption activity from publishers, and attribute this to audience demographics in a manner that is not affected by cookie deletion, blocking, and rejection.

Dictionary

Each of the entities reported by comScore are attributed to a level in comScore's Client Focused Dictionary. Several entities can exist within one website (e.g. BBC Sport and BBC iPlayer) and comScore's dictionary defines how these entities are structured and related to each other. It is client-focused because comScore's clients define how their websites appear in reports according to this dictionary. All comScore reports use the same six-tiered dictionary structure, as explained below:

Property [P] - The highest level of reporting in the Client Focus structure, Properties represent all Full Domains (i.e. felmont.com), Pages (i.e. sports.felmont.com/tennis), Applications or Online Services under common ownership or majority ownership for a single legal entity. A Property may also contain any digital media content that is not majority owned but has been legally signed over for reporting purposes by the majority owner.

Media Title [M] - A Media Title is an editorially and brand consistent collection of content in the digital landscape that provides the marketplace with a view of online user behaviour. This may represent a domain, a group of domains, online service or application.

Channel [C], SubChannel [S], Group [G] and SubGroup [SG] - Within a Media Title there may be grouped URLs of editorially consistent content that make up a Channel. For some of the largest Media Titles, Channels themselves may be broad, and Subchannels, Groups and Subgroups within the larger Channels may prove useful for categorisation within the comScore Dictionary.⁹²

Metrics

Throughout this report we make reference to a number of metrics as defined below:

Unique audience: the total number of unique persons who visited a website or used an application at least once in a given month. Persons visiting the same website more than one time in the month are therefore counted only once in this measure.

Active reach (%): the unique audience of a website as a proportion of the total number of people who visited any website or used any internet connected application at least once in a given month (the active audience).

Time spent per month: the average time spent browsing a website per unique visitor per month (excludes time spent watching online video and listening to streamed audio).

⁹² "Glossary – Key Terms for comScore Dictionary", comScore.

Nation breaks

comScore provides geographic breaks which match the regions used by ISBA, the Incorporated Society of British Advertisers. For the purposes of this report we have used the following ISBA regions as proxies for each of the nations: Scotland – North East Scotland and Central Scotland; Wales – Wales and West; and Northern Ireland – Northern Ireland.