



The Communications Market in Scotland

4 Internet and web-based content

4.1 Internet and web-based content

4.1.1 Recent developments in Scotland

UK Digital Champion

In June, Martha Lane Fox was appointed by the Prime Minister as the UK Digital Champion.²¹ Her role includes encouraging as many people as possible to get online in the lifetime of the Parliament, as well advising the government on how efficiencies can best be realised through the online delivery of public services.

In July, Race Online 2012, headed by Martha Lane Fox, launched a manifesto²² for a 'Networked Nation'. The manifesto noted that one fifth of the population in the UK, 10 million people, are missing out on consumer savings, access to vital information and educational success as a result of not being online.

The manifesto called for urgent action to get millions more online by the end of 2012, with key roles for government, industry and charities and the aim "to get everyone of working age online by the end of this Parliament, so that everyone who then retires will have skills to enjoy the benefits of the web"²³.

Race Online 2012 aims to sign up 10,000 partner organisations and individual advocates to help achieve its goal of making the UK one of the first developed countries in the world to achieve near-total internet use by 2012.²⁴

Digital Participation Scotland Network (DPSN)

This year saw the Media Literacy Network in Scotland evolve into the Digital Participation Scotland Network (DPSN).

Much of Ofcom Scotland's work went into strengthening the place of digital participation on the agenda in Scotland; politically, and among practitioners and policy makers. DPSN produced a strategy with the aim of generating discussion, and a list of actions to help broaden and deepen Scotland's digital engagement²⁵. The result of this has been confirmation of a co-ordinating role at Ministerial level for digital participation and a number of other agencies coming forward with strategy documents and suggestions. This is a considerable step forward, and will help to mitigate changes to the entire digital participation programme at a UK level as a result of public spending cutbacks.

Given the role of libraries in Scotland in performing the same role as UK Online centres in England, it is important to understand more about their capacity and how other partners can support them.

²¹ <http://www.number10.gov.uk/news/statements-and-articles/2010/06/letter-of-appointment-to-martha-lane-fox-52045>

²² <http://raceonline2012.org/manifesto>

²³ http://raceonline2012.org/sites/default/files/resources/manifesto_for_a_networked_nation_-_press_release.pdf

²⁴ <http://raceonline2012.org/why-get-involved>

²⁵ <http://digitalparticipation.com/sites/default/files/national-plan/Digital%20Participation%20in%20Scotland.pdf>

Scottish Parliament Cross Party Group

A Scottish Parliament cross-party group (CPG) on digital participation was also launched, supported by Ofcom Scotland, to provide a political platform for the issues surrounding digital participation and digital inclusion. The group provides a forum for MSPs to engage with a range of organisations on issues relating to digital participation. It will provide an opportunity to consider how best Scotland can maximise the social and economic benefits derived from the development of digital technologies.²⁶

Following the publication of the DPSN Strategy document and the re-scoping of the digital participation project, it was decided to merge the DPSN hub and members of the cross-party group, as some of their functions overlapped. The CPG partners will run events and projects as and when required, while maintaining the CPG as a platform for sharing best practice, looking at the broader digital agenda and showcasing innovative projects and ideas.

Health portal

A new secure website allowing patients to access and update their own health records online was launched in a £175,000 pilot earlier this year in Ayrshire and Arran. The online Patient Portal is being trialled in two GP practices - Townhead Surgery in Irvine and the Kilwinning Medical Practice. It allows registered patients to log in from their own home - or anywhere else with an internet connection - to undertake a number of tasks, such as booking appointments online or monitoring their blood pressure.

Firelink

Scotland's eight fire and rescue services have become the first in Britain to begin operating a new state-of-the-art digital communication system.

The Firelink system is now operational in over 1,100 fire service vehicles and 368 fire stations nationwide, coordinating emergency responses using both voice and data communication. The £38m Scottish Government-funded system is part of a UK-wide project and will cover 90,000 square miles, from urban areas to the most remote rural communities.

Caledonian Mercury Launched

The Caledonian Mercury is Scotland's first truly online national newspaper, featuring unique content from specialist writers in Scotland. It was launched in January 2010 and is read by 150,000 users a month, from Scotland, England and the US. In the 2010 UK Newspaper Awards, it was "Highly Commended" in the Best Digital Service category, alongside the Guardian²⁷.

4.1.2 Broadband take-up

The growth of the internet has provided another platform over which content can be delivered to consumers. Rapid take-up of fast broadband connections means that the majority of households can now receive content in this way (though by no means all do). As a result, in recent years the internet has had a significant impact on how content can be consumed. For example:

- it allows **existing services** such as some government services, banking and other information services to be delivered to citizens and consumers online; and

²⁶ <http://www.scottish.parliament.uk/msp/crosspartygroups/DigitalParticipation.htm>

²⁷ <http://www.newspaperawards.co.uk/index.php?pid=6>

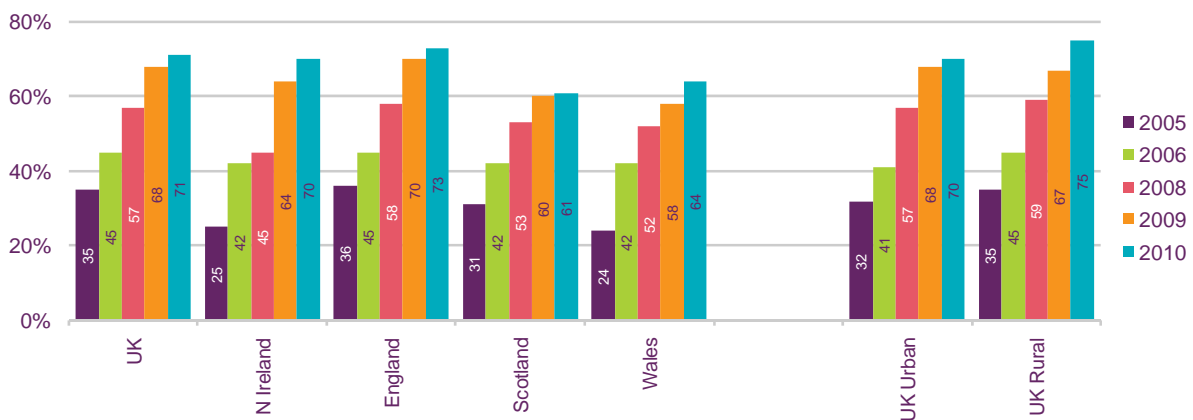
- it has allowed **new, specifically internet-based forms of content** to emerge (such as social networking sites, blogs and other user-generated content).

Scotland has the lowest level of broadband penetration in the UK, at 61%

Figure 4.1 shows that despite take-up having doubled in the last five years, Scotland has the lowest level of broadband take-up in the UK, at 61%.

But within Scotland take-up varies widely (see Figure 5.12, page 117). In Lothian and the Forth Valley, take-up is on a par with the UK average, at 72%, but in the Glasgow, Clyde and Lanarkshire region it is significantly lower at 53%. This is consistent with findings in previous years, when we identified that take-up of broadband in the city of Glasgow was among the lowest in the UK. There is little difference in take-up between rural and urban areas.

Figure 4.1 Broadband take-up trend in Q1, 2005-2010



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK)

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

Source: Ofcom research, Q1 2005 - 2010

In common with the rest of the UK, internet take-up in Scotland is higher among younger people than among older consumers, and higher in ABC1 social groups than C2DEs.

Mobile broadband is especially high in Grampian, Tayside and Fife

Over one in ten adults (12%) in Scotland use a mobile broadband connection (either through a USB 'dongle' or a similar device built-in to a laptop), with that number rising to almost one in five (18%) in the Grampian, Tayside and Fife area.

Figure 4.2 Mobile broadband take-up



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural, 368 Glasgow, Clyde & Lanarkshire, 357 Lothian & Forth Valley, 363 Grampian Tayside & Fife, 380 other Scotland)

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

Across the UK awareness of mobile broadband services is increasing (Figure 4.3), and in Scotland just over six in ten adults (61%) say they are aware of these services. Awareness is higher in urban areas and highest in Lothian and Forth Valley (at 71%). Awareness is also higher in urban areas of Scotland than rural areas.

Figure 4.3 Awareness of mobile broadband



Source: Ofcom research, Q1 2010

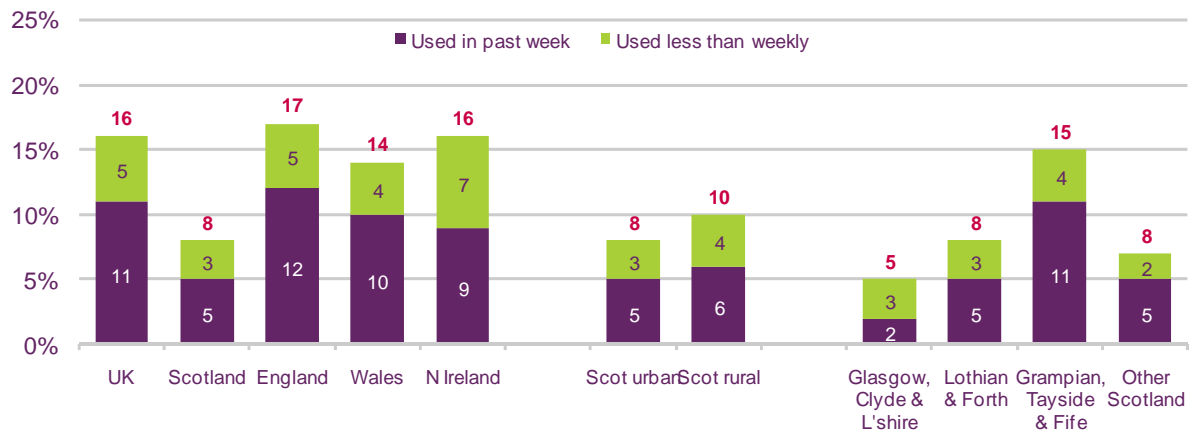
Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural, 368 Glasgow, Clyde & Lanarkshire, 357 Lothian & Forth Valley, 363 Grampian Tayside & Fife, 380 other Scotland)

QE21. Before now, were you aware that you can access broadband services on your PC or laptop by using a mobile network?

At 8%, Scotland has the lowest proportion of people who have accessed the internet via a mobile phone

The proportion of adults in Scotland who have accessed the internet using a mobile phone is below the UK average (8% compared to 16% across the UK) (Figure 4.4). In Grampian, Tayside and Fife 15% claimed they have accessed the internet in this way, with 11% having done so in the past week.

Figure 4.4 Proportion of adults who have used a mobile phone to access the internet



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural, 368 Glasgow, Clyde & Lanarkshire, 357 Lothian & Forth Valley, 363 Grampian Tayside & Fife, 380 other Scotland)

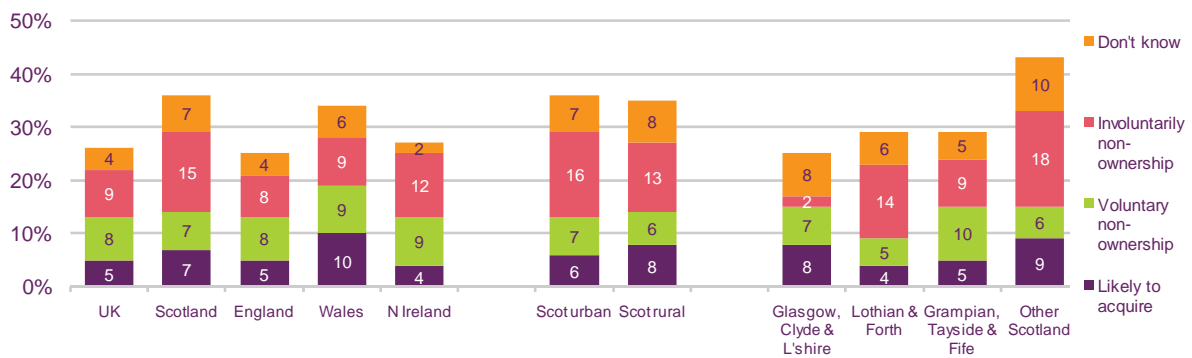
QD28. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?

Non-ownership of broadband

There are a variety of reasons why people may not have the internet, and these fall into two broad categories: voluntary and involuntary. Voluntary non-ownership is where potential consumers do without services because they perceive they do not need them, or because they are satisfied with alternative services. Involuntary non-ownership is where consumers do without a service, but not through choice; this is mainly due to cost and availability. In the following analysis, where consumers gave multiple responses which fell into both categories, these have been reported as 'involuntary'.

In Scotland 15% of adults said that they did not have access to the internet at home for involuntary reasons such as cost or lack of availability - the highest number of any UK nation and above the UK average of 9%. There was little difference in reasons for non-ownership of the internet between rural and urban areas. Involuntary non-ownership of internet services was highest in 'other' Scotland (18%), which includes areas such as the Highlands and Islands, Dumfries and Galloway and the Borders.

Figure 4.5 Non-ownership of internet services



QE24. How likely is it that your household will get internet access at home in the next 12 months?
 QE25. Why are you unlikely to get internet access at home in the next 12 months?

Source: Ofcom research, Q1 2010

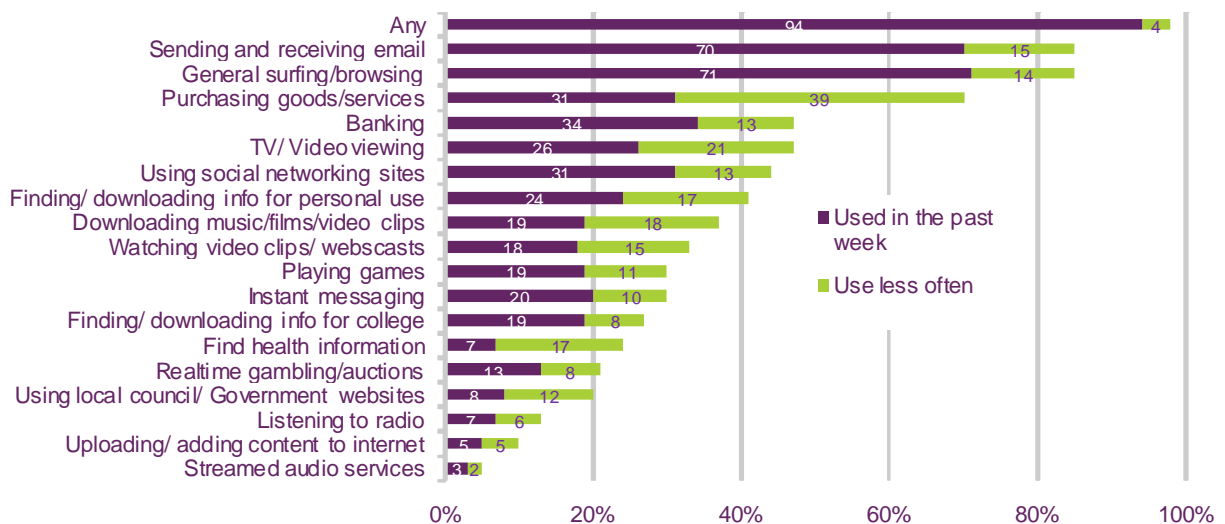
Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural, 368 Glasgow, Clyde & Lanarkshire, 357 Lothian & Forth, 363 Grampian Tayside & Fife, 380 other Scotland)

4.1.3 Regional use of the internet to access services

Sending emails and web browsing are the most popular internet activities in Scotland

Broadband users in Scotland use the internet for a variety of activities, as shown in Figure 4.6. The most common internet uses are sending/receiving email (85%) and general surfing/browsing (85%). However, many of Scotland's broadband users also use higher-bandwidth services such as streaming video content (51%) and downloading audio and video files (37%).

Figure 4.6 Use of online applications among Scotland's broadband users



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural, 368 Glasgow, Clyde & Lanarkshire, 357 Lothian & Forth Valley, 363 Grampian Tayside & Fife, 380 other Scotland)

QE5. Which, if any, of these do you or members of your household use the internet for while at home?

Increasingly, people with a broadband connection are going online to access and engage in activities that historically were conducted 'off-line'. Accessing services and content in this

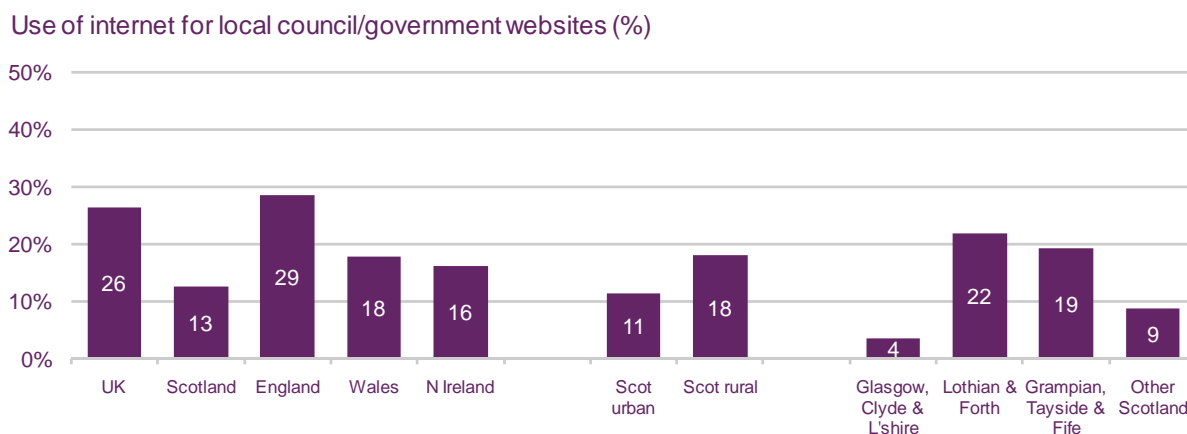
way has the potential to bring benefits to consumers in terms of time and money saved, and enhanced service interactivity and functionality. For the first time in this report we present some of the findings of our consumer research into three of these topics: accessing government services, online banking, and accessing information on health-related issues.

People in Scotland are less likely to use the internet to access government services

Almost all local, regional and central government departments, agencies, executives and bodies have a presence online. And as well as providing information, some services such as driving licence renewal are increasingly being delivered online. Looking at the regional coverage (or proportion of unique online persons) of government websites is one way of assessing engagement with these services in the nations and regions.

Ofcom research shows that across the UK, 26% of adults with internet access at home visited a government or local council website in Q1 2010. In Scotland the figure stood at 13%, the lowest of any nation in the UK. Within Scotland, claimed use of government services online varied widely. Twenty-two per cent of people in Lothian and Forth Valley claimed to use these sites, close to the UK average of 26%. But in Glasgow, Clyde and Lanarkshire the figure was just 4%, most likely due to lower broadband take-up in this area. People in rural areas of Scotland appeared slightly more likely to access these sites than those in urban areas, by 18% to 11%.

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



QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Q 1 2010

Base: Adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 1075 Wales, 761 Northern Ireland)

Three in ten households in Scotland use online banking services (compared to 43% across the UK)

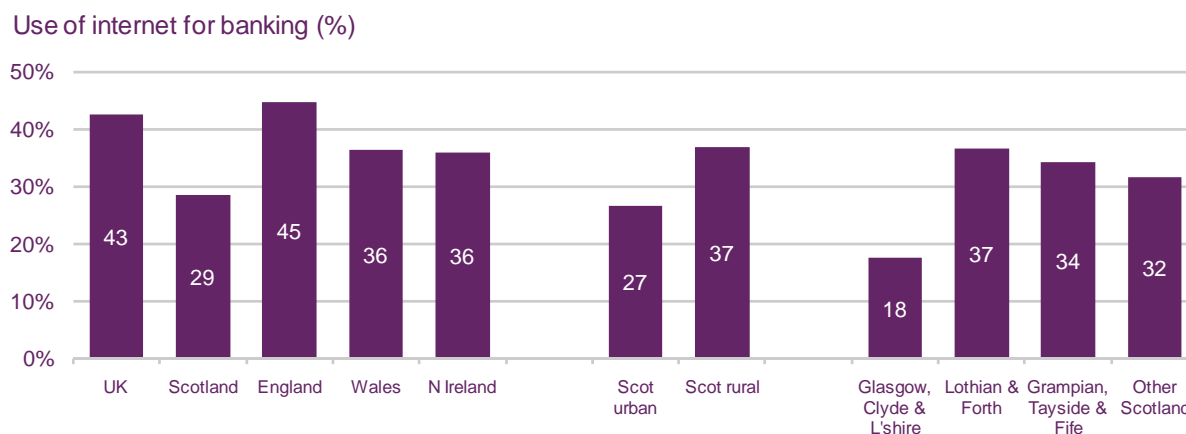
Online banking allows people to manage their money from the comfort of their own homes, allowing them to check balances, pay bills, open accounts and transfer money.

Our research shows that across the UK, just over four in ten (43%) people visited a banking website in the first quarter of 2010. Use of these sites was highest in England (45%), followed by Wales and Northern Ireland (36%). In Scotland just under three in ten (29%) people claimed to use these sites.

People in rural areas of Scotland were much more likely to claim to use online banking than those in urban areas (by 37% to 27%). This may be because people in urban areas have better access to high street branches of banks and so feel less need to do their banking online.

The data suggest that a number of internet users are not using online banking regularly. This may be because of concerns about security, the less than universal penetration of formal banking services, and the fact that under-18s are less likely to have a bank account.

Figure 4.8 Use of the internet to access banking websites



QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Q1 2010

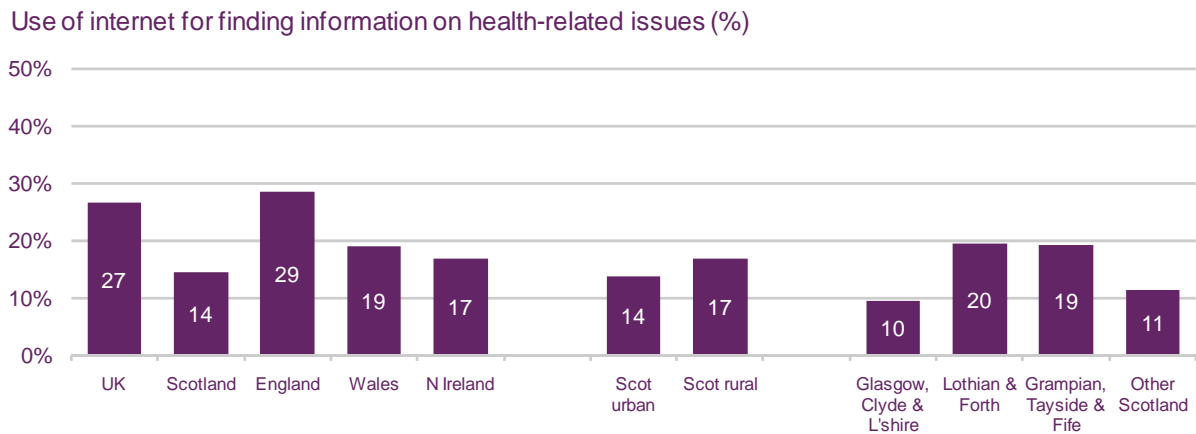
Base: Adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 1075 Wales, 761 Northern Ireland)

In Scotland 14% of households claim to visit websites for health-related information (compared to 27% across the UK)

The internet has also had an impact on the provision of information about health issues. It offers information providers a way to reach their target audience easily and cheaply, and it offers individuals a vast array of information on almost any health issue. This brings both advantages and disadvantages. For instance, during the swine flu outbreak, concerned individuals could get advice through portals like *NHS24.com*, which may have kept some infectious individuals away from surgeries. But the sheer amount of available information on the internet has also raised concerns about inaccurate self-diagnosis.

Twenty-seven per cent of internet users in the UK claimed to use the internet to find health information. The figure ranged from 14% in Scotland to 29% in England. Within Scotland, there was little difference between rural (17%) and urban (14%) areas. Use of the internet to find health-related information was lowest in Glasgow, Clyde and Lanarkshire (10%) and highest in Lothian and Forth Valley (20%).

Figure 4.9 Use of the internet to access information on health-related issues



QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Q1 2010

Base: Adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 1075 Wales, 761 Northern Ireland)

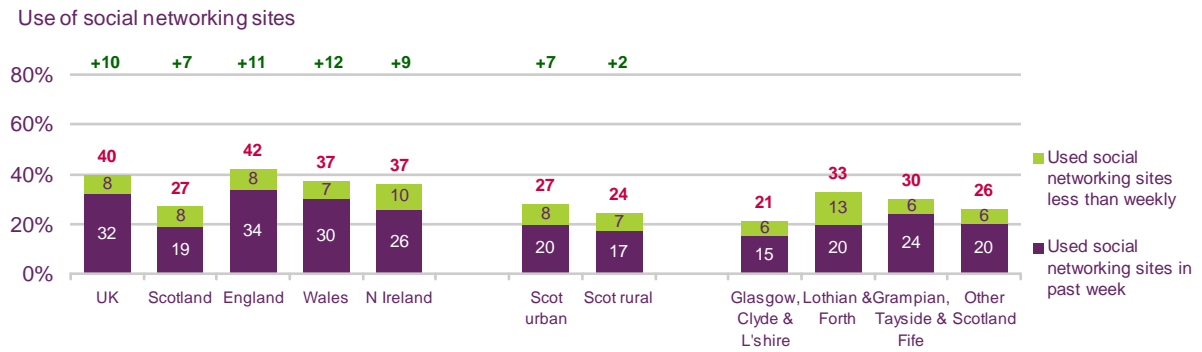
4.1.4 Social networking

Social networking sites (SNS) are websites such as Facebook and MySpace on which users can create their own profiles using text, graphics and photos, join groups of people with common interests and send messages to other site members.

The use of social networking sites in Scotland has increased since 2009 (by seven percentage points) but people in Scotland were still less likely than anyone else to use one (27% compared to the 40% UK average). Use was slightly higher in urban areas, with use in Lothian and Forth Valley the highest in Scotland, at 33%. The majority of those who accessed these sites did so frequently (19% of adults in Scotland had used one in the past week).

Our UK report shows that Facebook is the most popular SNS by some distance, and is likely to be responsible for much of the growth found in our research. All major SNS have now been optimised for mobile phones, and it is likely that this will be an area of future growth, particularly as smartphones become more widespread.

Figure 4.10 Number of households where someone has used a social networking site



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK, 1468 Scotland, 5709 England, 1075 Wales, 761 Northern Ireland, 1172 Scotland urban, 296 Scotland rural, 368 Glasgow, Clyde & Lanarkshire, 357 Lothian & Forth Valley, 363 Grampian Tayside & Fife, 380 other Scotland)

QE5a. Which, if any, of these do you or members of your household use the internet for whilst at home?