



The Communications Market in Northern Ireland

4 Internet and web-based content

4.1 Internet and web-based content

4.1.1 Recent developments in Northern Ireland

UK Digital Champion

In June 2010, Martha Lane Fox was appointed by the Prime Minister as the UK Digital Champion.¹⁸ Her role includes encouraging as many people as possible to get online in the lifetime of this 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 manifesto¹⁹ for a 'Networked Nation'. The manifesto noted that one fifth of the population in the UK, ten 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 the skills to enjoy the benefits of the web"²⁰.

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 2012.²¹

Northern Ireland Media Literacy Network

During 2009/10 the remit of the Northern Ireland Media Literacy Network was extended to include those organisations with a remit for, or interest in, digital inclusion and digital life skills.

The Network is chaired by the Ofcom Content Board Member for Northern Ireland, Professor Paul Moore of the University of Ulster, and comprises representatives from the Northern Ireland Executive, broadcasters, telecoms companies, colleges, libraries, learning organisations and voluntary organisations.

The Network has produced a strategy for promoting media literacy in Northern Ireland; its objectives will be achieved by co-ordinating existing activity across Northern Ireland and by creating partnerships between stakeholders to extend the reach and remit of relevant projects.

My GroupNI

MyGroupNI is a digital inclusion initiative supported by the Department of Finance and Personnel for Northern Ireland. It is designed to bring together the public, voluntary, community and private sectors and supports 3,500 community groups across Northern Ireland by linking them to a single web portal - one of the largest community portals in Europe.

¹⁸ <http://www.number10.gov.uk/news/statements-and-articles/2010/06/letter-of-appointment-to-martha-lane-fox-52045>

¹⁹ <http://raceonline2012.org/manifesto>

²⁰ http://raceonline2012.org/sites/default/files/resources/manifesto_for_a_networked_nation_-_press_release.pdf

²¹ <http://raceonline2012.org/why-get-involved>

During 2009/2010 the portal received over 25 million hits and had 10 million page impressions generated by 1.8 million visitors. The programme has also deployed 50 public access kiosks at sites across Northern Ireland, including government buildings, council offices hospitals, shopping centres and tourist locations. Total usage figures for all purposes shows use averaging approximately 400,000 page views per month.

NI Direct

With the launch of www.nidirect.gov.uk Northern Ireland became the first of the devolved administrations to develop a dedicated website for citizens. Based on the Directgov model, the website has approximately 3,500 pages of information from all Northern Ireland government departments and agencies, organised by theme, and making over 150 types of online transaction available to citizens. Traffic to the site has grown steadily and it is now one of the most-accessed government sites.

Other initiatives

In May 2010, the Department of Employment and Learning announced the introduction of free entry-level ICT classes for anyone wishing to improve their computer skills. As part of the Department's Essential Skills provision, these classes will be available to anyone in Northern Ireland from 1 August 2010. In July, the Department of Agriculture and Rural Development launched a rural IT project in County Tyrone, targeted at low-paid workers in the Carrickmore and surrounding areas. The project provides ICT courses at the Milestone Centre in conjunction with the South West College outreach services.

Other initiatives included Silver Surfers' Day, an annual day-long event offering over-50s the opportunity to learn more about how to get online and make the most of the internet; the launch of www.digimumsni.co.uk - a forum-based website with blogs, groups, discussions and directory listings on a wide variety of issues and with a particular emphasis on digital safety; and the digital participation initiatives offered by the Community Media Association to community radio station volunteers.

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 by consumers means that the majority of households can now receive content in this way (though by no means all do). 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
- it has allowed **new, specifically internet-based forms of content** to emerge (such as social networking sites, blogs and other user-generated content).

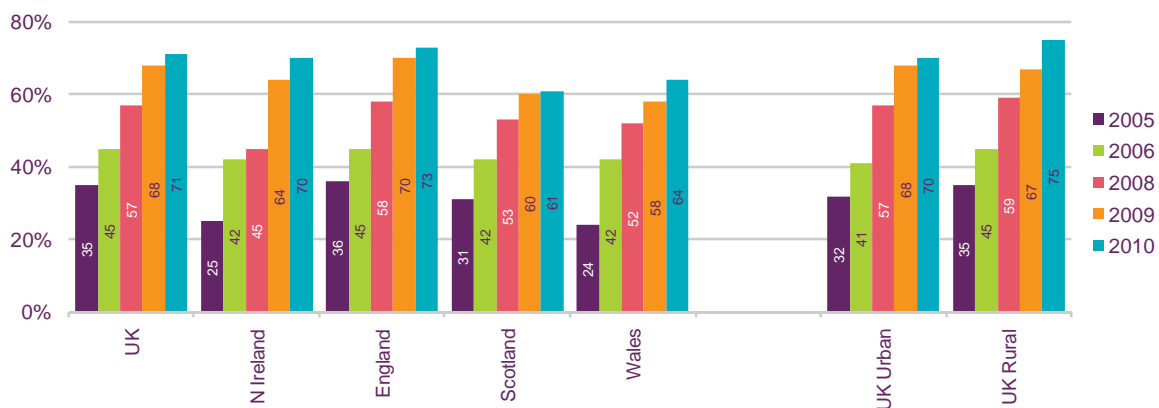
At 70%, broadband take-up is higher in Northern Ireland than in Scotland or Wales

Figure 4.1 shows that while broadband penetration in Northern Ireland remained lower than the UK average until 2010, the general trend in broadband take-up mirrored that of the rest of the UK, with the proportion of connected homes increasing significantly year on year, from 64% in 2009 to 70% in 2010.

In 2010, broadband take-up in Northern Ireland caught up with England and is now ahead of Scotland and Wales. Between March 2004 and March 2009, Northern Ireland has

benefited from a DETI (Department of Enterprise, Trade and Investment) initiative to ensure that a minimum of 512 k/bits is available to every residence and business in Northern Ireland. Ninety-nine per cent of addresses are covered by DSL broadband and the remaining 1% by satellite - now administered by Avanti, which had 927 subscribers in May 2010.

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



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 7511 UK urban, 1502 UK rural. QE9. Which of these methods does your household use to connect to the internet at home?

Mobile broadband is used by 14% of households in Northern Ireland

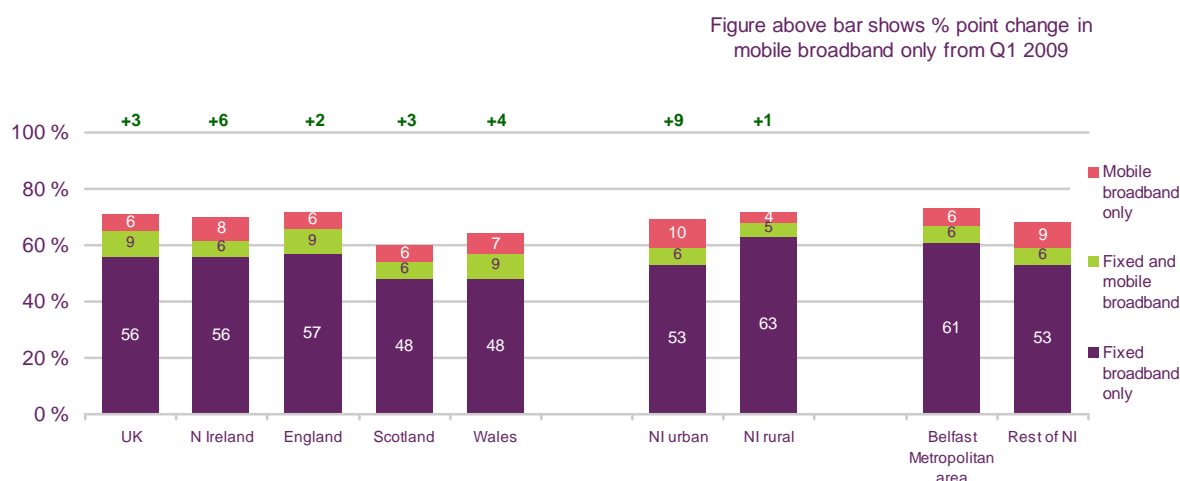
During 2009, take-up of mobile broadband continued to grow, as consumers increasingly accessed the internet via cellular networks. In Q1 2010, 14% of households in Northern Ireland claimed to be accessing the internet via mobile broadband, compared to 15% across the UK as a whole.

Eight per cent of households in Northern Ireland (6% in the UK as a whole) used mobile broadband as their only means of accessing the internet; the majority of mobile broadband users also have a fixed-line broadband connection at home.

Despite the large number of mobile-only households in Belfast (where 24% of households have no fixed-line connection), mobile broadband-only in Belfast was lower (at 6%) than across Northern Ireland as a whole. Use of mobile broadband is more common in urban areas, with 16% of households using it, than in rural areas (9%). However, use in the Belfast metropolitan area (at 12%) remains lower than in other parts of Northern Ireland (15%).

In Q1 2010, just 2% of households in Northern Ireland had a dial-up connection (compared to 3% a year previously and 9% in Q1 2008). This is consistent with the rest of the UK.

Figure 4.2 Broadband take-up



Source: Ofcom research, Q1 2010

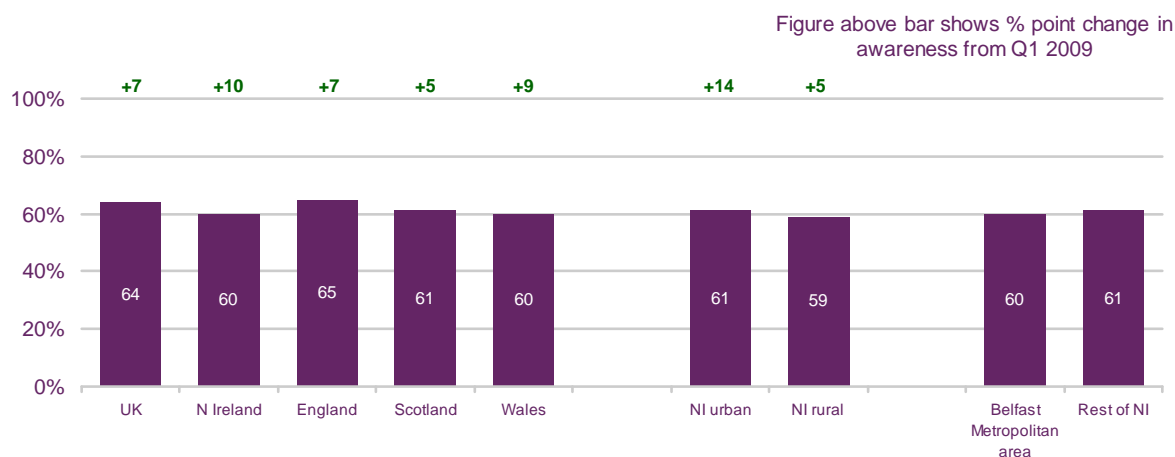
Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 501 Northern Ireland urban, 260 Northern Ireland rural, 349 Belfast metropolitan area, 412 rest of Northern Ireland)

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

Mobile broadband awareness has increased by 10% in Northern Ireland

Awareness of mobile broadband in Northern Ireland has increased by 10% since Q1 2009, bringing levels into line with awareness across the rest of the UK. There has been a growth of 14 in awareness among consumers living in urban areas. This may help explain the 9% growth in mobile broadband penetration in the same areas.

Figure 4.3 Awareness of mobile broadband



Source: Ofcom research, Q1 2010

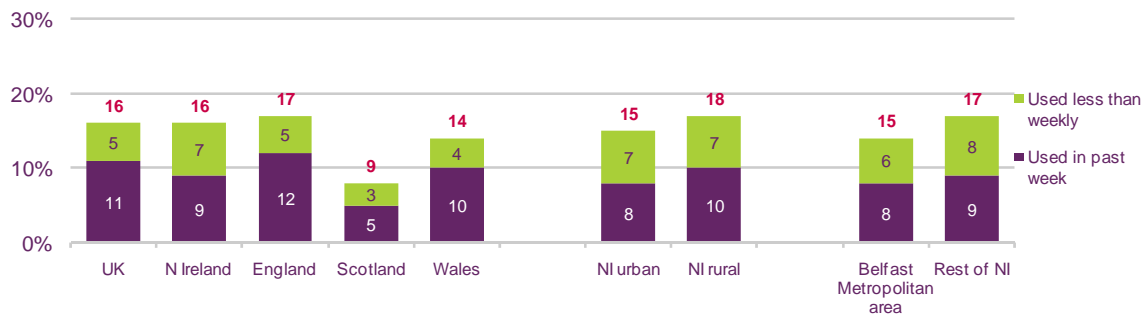
Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 501 Northern Ireland urban, 260 Northern Ireland rural, 349 Belfast metropolitan area, 412 rest of Northern Ireland)

* Base size less than 100: Apply caution

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

Figure 4.4 shows that the proportion of adults in Northern Ireland who have accessed the internet using a mobile phone is in line with the UK average (16%). In the past year, the number of adults using their mobile phone in this way in Northern Ireland has decreased very slightly (16% versus 18% in 2009).

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



Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 501 Northern Ireland urban, 260 Northern Ireland rural, 349 Belfast metropolitan area, 412 Rest of Northern Ireland)

Source: Ofcom research, Q1 2010

*Base size less than 100: Apply caution

QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week?

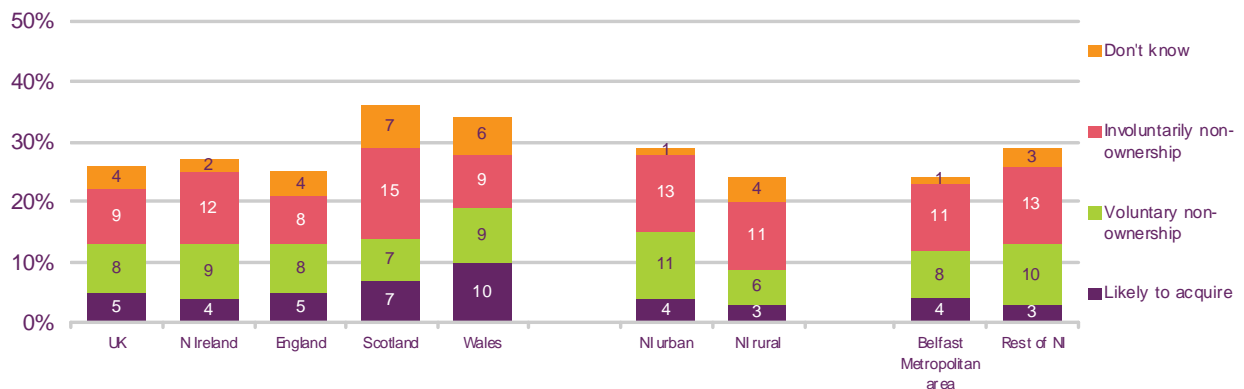
Non-ownership of broadband

There are many reasons for not having 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 potential consumers do without services, but not through choice; this is mainly due to affordability and lack of availability. In the following analysis, where consumers gave multiple responses which fell into both categories these have been reported as 'involuntary'.

In Northern Ireland 12% of people said that they did have internet access at home for 'involuntary' reasons. This was slightly higher than the UK average of 9%, but lower than in Scotland (15%). England was the nation least likely to state 'involuntary' reasons for non-ownership (8%).

People living in urban areas of Northern Ireland were nearly twice as likely as people in rural areas to say that they did not have the internet for 'voluntary' reasons (11% compared to 6%).

Figure 4.5 Non-ownership of internet services



QE24. How likely is it that your household will get a 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

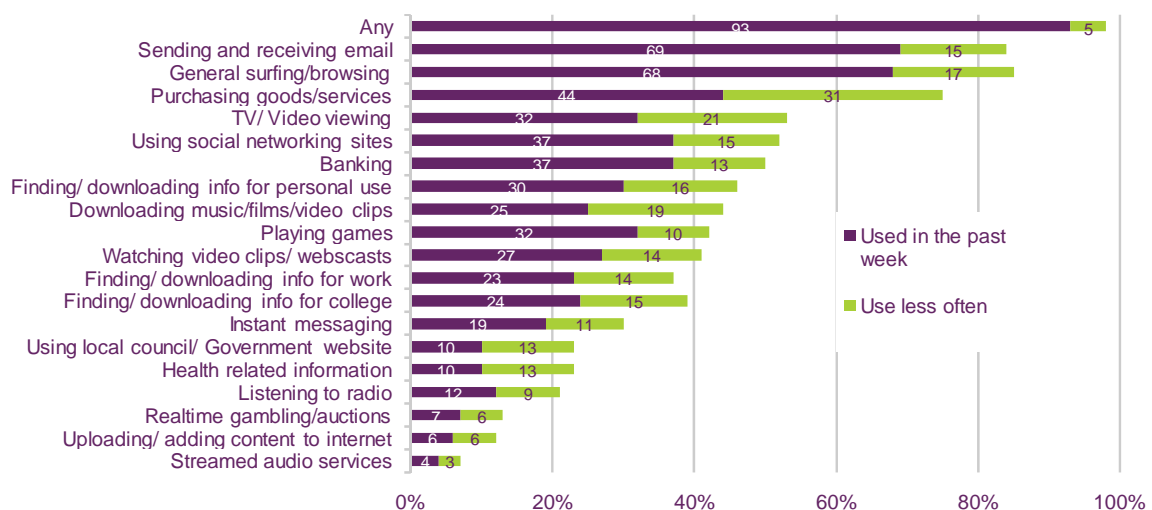
Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 501 Northern Ireland urban, 260 Northern Ireland rural, 349 Belfast metropolitan area, 412 rest of Northern Ireland)

4.1.3 Regional use of the internet to access services

Broadband users in Northern Ireland are most likely to use the internet to send emails and surf the web

The internet enables users to undertake a wide range of activities online. Our consumer research asked about a number of these and found that the most common and frequent internet use in Northern Ireland is sending/receiving email (69%) and general surfing/browsing (68%). Home internet access has an important entertainment function with 53% of people accessing TV online, 42% playing games, 44% downloading entertainment files, 41% watching video clips or webcasts and 21% listening to radio online. Over half of households with home internet have ever watched TV online (53%), used a social networking site (52%) or done online banking (50%).

Figure 4.6 Use of online applications among Northern Ireland broadband users



Source: Ofcom research, Q1 2010

Base: Adults aged 15+ with a broadband connection at home (n= 519 Northern Ireland)

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

Increasingly, people with a broadband connection are going online to access and engage in traditional 'offline' services and activities. Accessing services and content in this way has the potential to bring real benefits in terms of time, functionality and cost to citizens and consumers. In the light of these benefits, for the first time in this report we are presenting some of our consumer research findings on three of these topics: accessing government services, online banking, and accessing information on health-related issues.

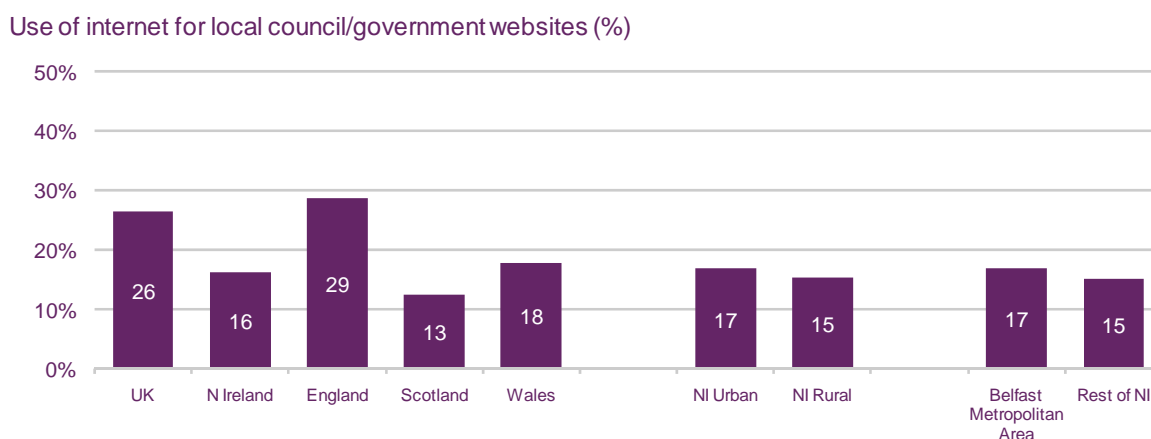
More than a fifth of people with internet access in Northern Ireland have accessed government services online

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

NI Direct (www.nidirect.gov.uk) is now one of the most-accessed government sites in Northern Ireland. In its first year, the site recorded 1.5 million visits and currently receives approximately 40,000 visits each week. Towards the end of 2009, the Benefit Advisory Service was launched on the site. This had been available on Directgov, but people from Northern Ireland had not previously been able to fully access the service. The application recorded 1,300 page impressions in its first week of official operation.

Ofcom research shows that 16% of adults in Northern Ireland with internet access at home visited a government or local council website in Q1 2010. Across the UK the figure was 26%, in Wales this stood at 18% and 13% in Scotland. There was very little variation within Northern Ireland, either by sub-region or between rural and urban areas.

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, Q1 2010

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

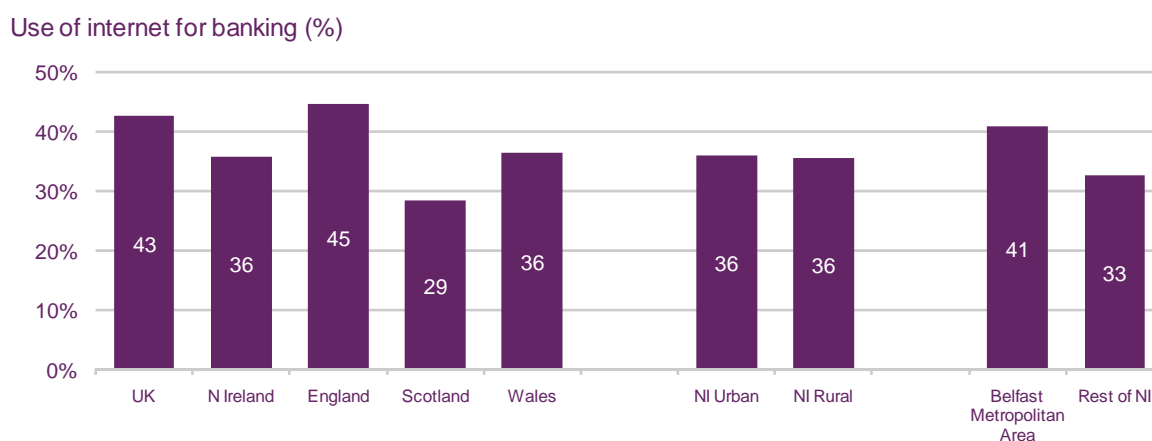
A third of people with internet access in Northern Ireland use the internet to access online banking services

Online banking allows people to manage their money from home, allowing them to check balances, pay bills online, open new accounts and transfer money.

Our research shows that across the UK, 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 (both 36%). In Scotland take-up was 29%. Within Northern Ireland, people in the Belfast area were more likely than in other areas of Northern Ireland to do their banking online (by 41% to 33%).

The data show that many internet users do not use online banking regularly. This is likely to be for a number of reasons, including concerns about security, and the fact that under-18s are less likely to have a bank account.

Figure 4.8 Use of the internet to access online banking services



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

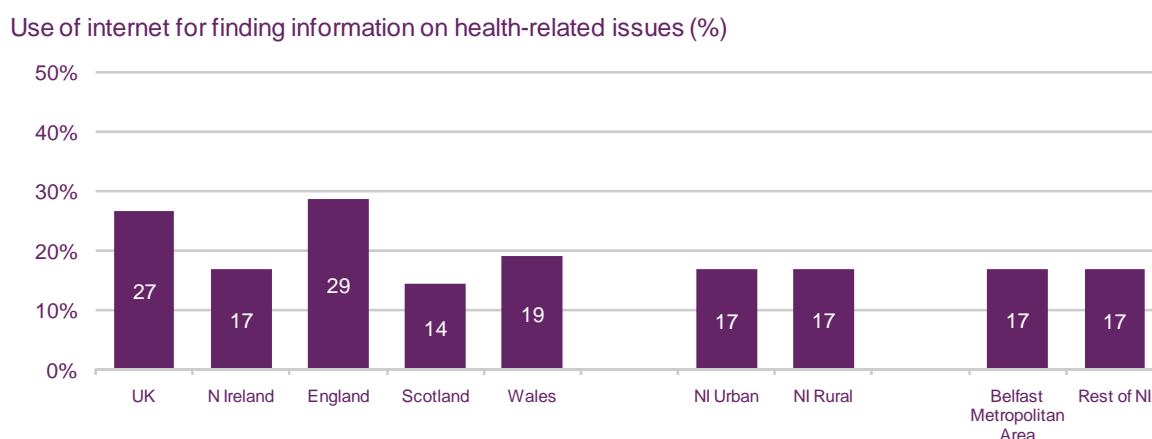
Base: Adults aged 15+ (n= 9013 UK, 5709 England, 1468 Scotland, 1075 Wales, 761 Northern Ireland)

Almost a quarter of people with internet access in Northern Ireland look for health-related information online

The internet has also had an impact on the provision of information about health issues. It gives information providers (whether the NHS, private providers or otherwise) 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 access advice through portals like *Direct.gov* and *NHS Choices*, which may have played a part in keeping infectious individuals away from surgeries. However, 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 information relating to health issues. This figure varies from 14% in Scotland and 17% in Northern Ireland, to 29% in England. Across Northern Ireland there was little distinction either between rural and urban areas, or between Belfast and other areas.

Figure 4.9 Use of the internet to find out information about 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.

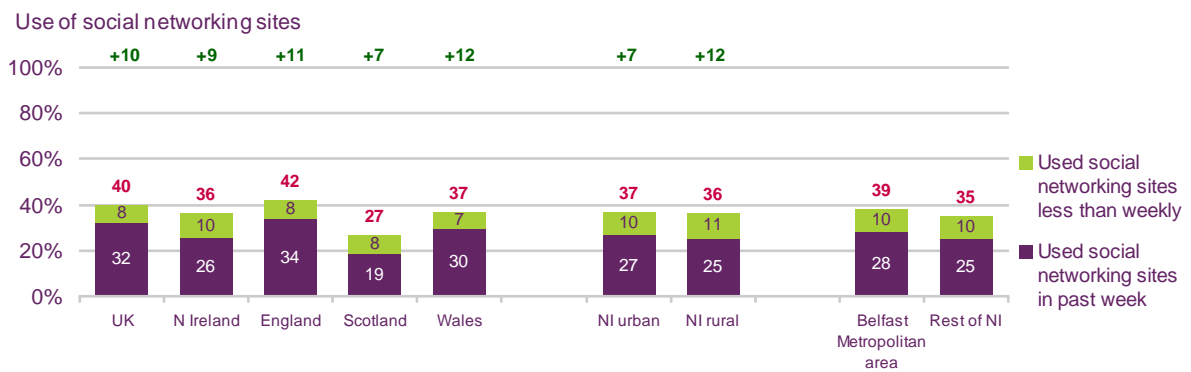
Use of social networking sites is consistent across all nations, except Scotland. Across the UK, 40% of adults live in a household that has used social networking sites, with 32% using them on a weekly basis.

The use of SNS in Northern Ireland has increased since 2009 (by nine percentage points) and is on a level similar to the UK as a whole (36% compared to the 40% UK average). Use of social networking sites is more common in Northern Ireland (36%) than in Scotland (27%) and is similar to Wales (37%).

Use of social networking sites is slightly more common in the Belfast metropolitan area (39%) than in the rest of Northern Ireland (35%).

Our *UK Communications Market* report shows that Facebook is the most popular SNS, 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 Frequency of use of social networking sites



Source: Ofcom research, Q1 2010

Base: All adults aged 15+ (n = 9013 UK, 761 Northern Ireland, 5709 England, 1468 Scotland, 1075 Wales, 501 Northern Ireland urban, 260 Northern Ireland rural, 349 Belfast metropolitan area, 412 Rest of Northern Ireland)

QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week?