

Many are enjoying the benefits of ICT

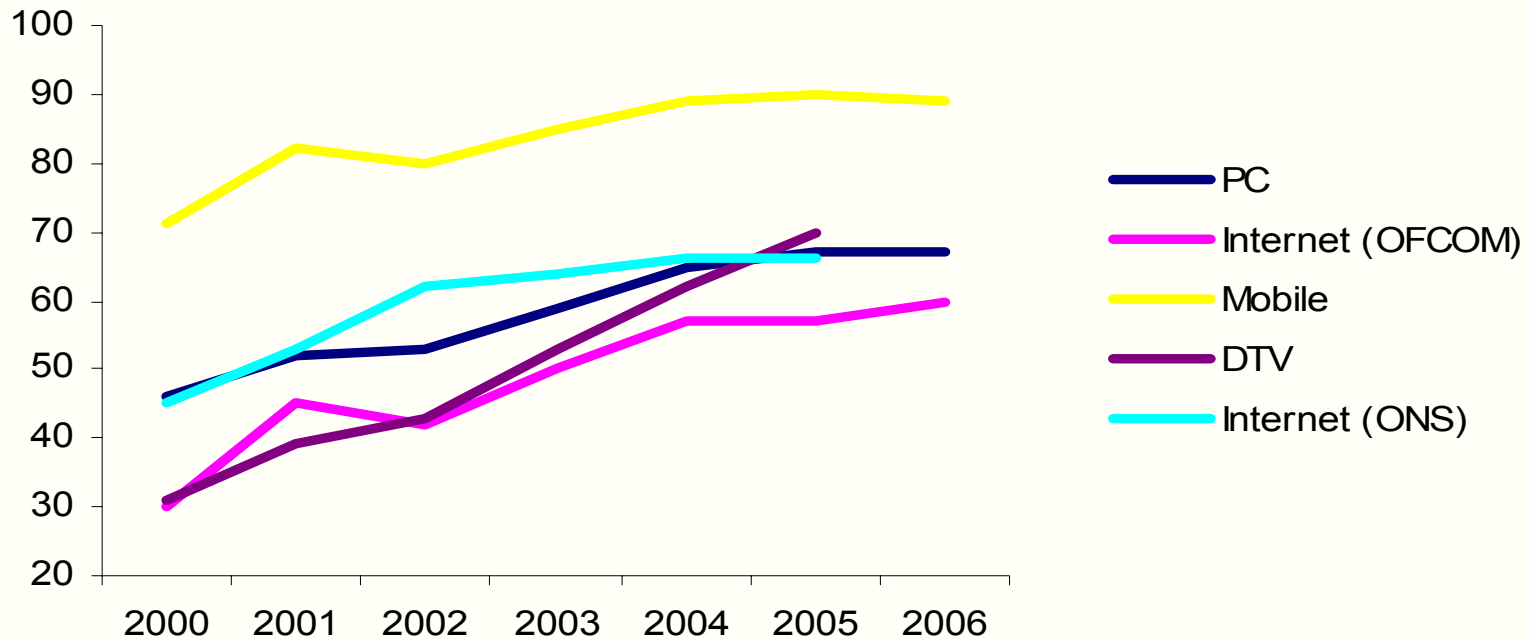
- >12 million broadband connections in UK over twice as many as narrowband
 - half of all Internet users now report using it > once per day
- Many urban areas covered by wifi hotspots
- Over 66 million mobile phone subscriptions,
 - 30% use mobiles as their main phone
 - 35 billion text messages sent in the UK during 2005
- Social networking sites are very popular
 - MySpace and Bebo in top 10 with 5.1m and 3.9m unique users in Apr 06 respectively
 - Over half of online 16-24 year olds regularly use social networking websites
- Internet viewed as a practical tool – banking, shopping and holiday websites considered most useful
- In the first quarter of 2006 an estimated 11.5m music tracks were downloaded legally
- 37% of online 18-24s report contributing to a website or blog

“The Google Generation” - over 19m unique visitors measured in April 2006.

But many are excluded ...

- 11% don't have a mobile phone
- 27% don't yet have a digital TV, and many who do, have limited interactive forms of Digital Terrestrial
- 33% of UK households don't have a home computer
- 39% of adults in the UK don't use the internet
- 50% of households don't use broadband
- 29% of children lack access from home

and adoption has slowed considerably.



- Internet, PC and mobile growth relatively flat since 2004
- Broadband take-up has been rapid but largely substitutional
 - Internet households: 57% (2004) to 60% (2006) a 3pp increase
 - Broadband households: 15% (2004) to 41% (2006) a 26pp increase

Those who are excluded are not representative of society as a whole

- Use falls with age:
 - younger people (16-24) are more than twice as likely to use the internet, use a PC or a mobile phone than older people (65+)
- Use increases with wealth:
 - people on the highest incomes are more than three times as likely to use the Internet than those on the lowest incomes.
 - They are over twice as likely to use a PC and also more likely to have a mobile phone.
- Use increases with socio-economic status:
 - ABs are more than twice as likely to use the Internet than DEs.
 - Usage of mobile phones is below average for DEs.
- Results true for broadband as well, however:
 - some evidence that once online, lower income and lower socio-economic status groups are as likely as the average online person to have broadband

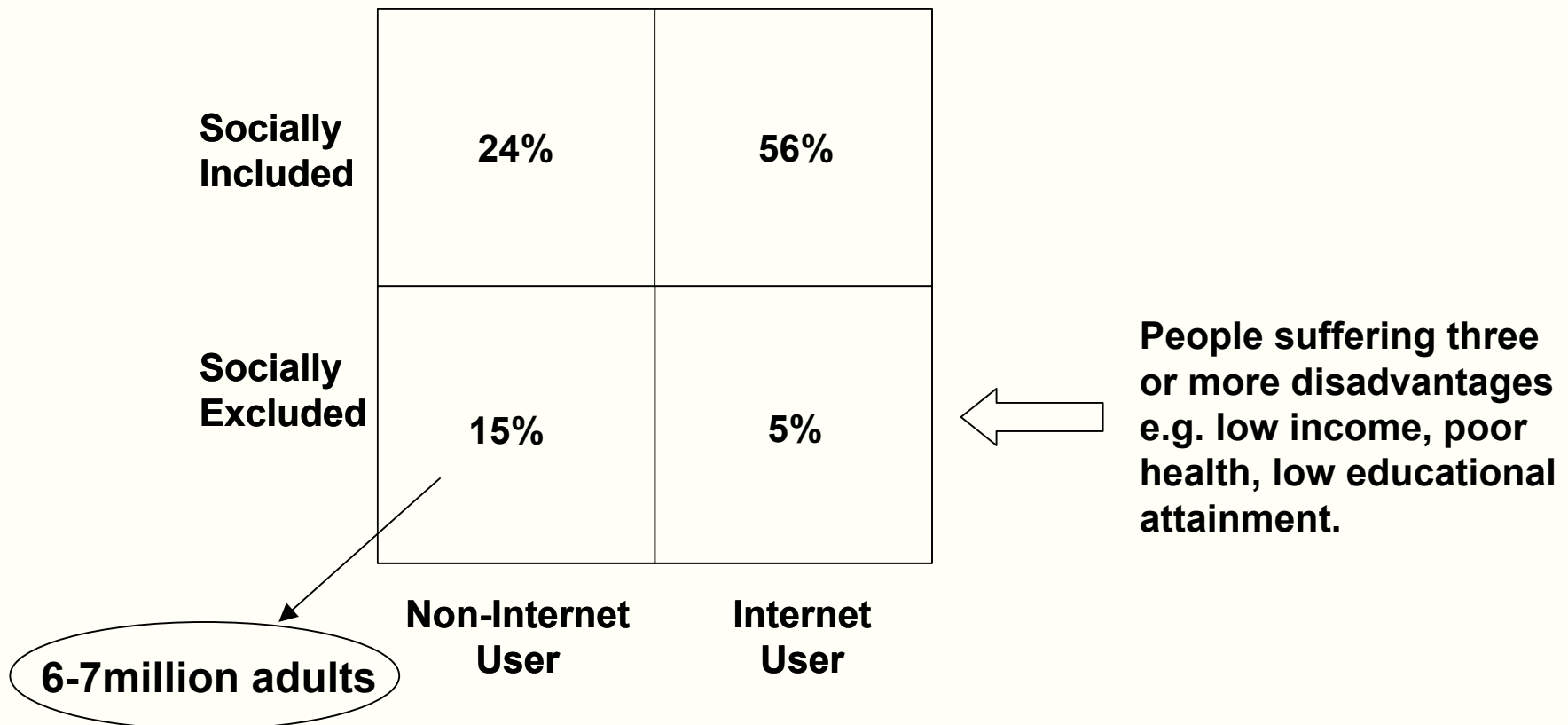
Reasons for non-use are a complex mix

- Key issues are around:
 - Motivation: disinterest and lack of need (46%*)
 - Access: lack of access to equipment/ connections (40%*)
 - Skills: lack of confidence or skills (36%*)
- but complicated by the fact that many who are not engaging with technology also:
 - suffer multiple social disadvantages
 - live in deprived areas

* % of non-users citing this as reason for non-use

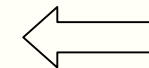
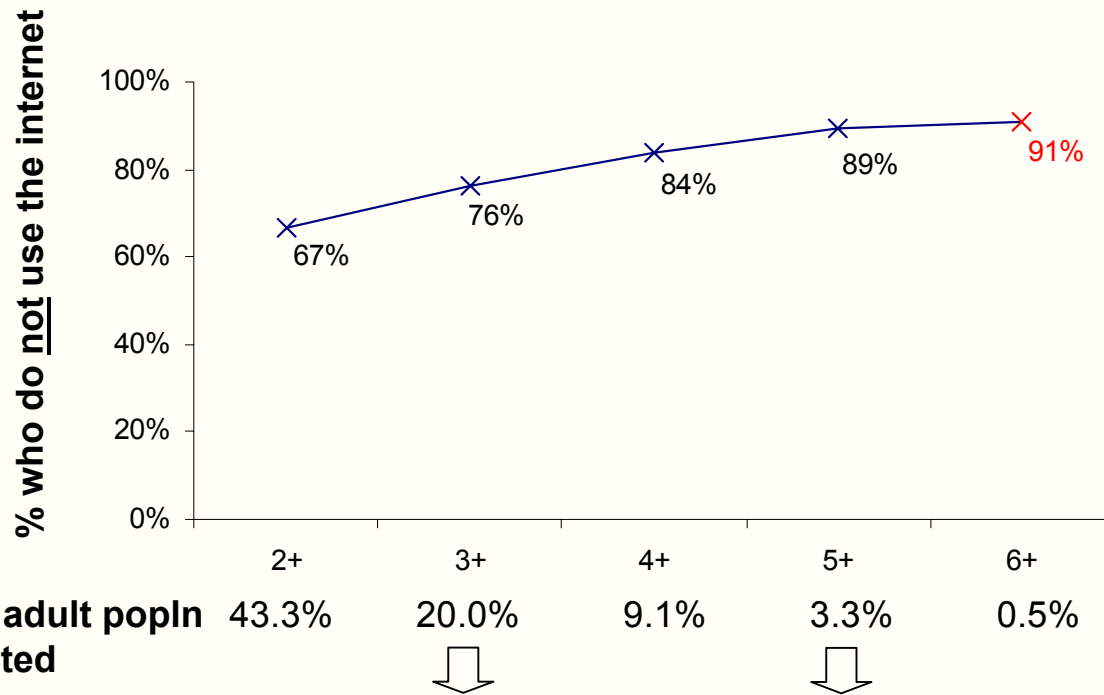
Many Non-Users are Socially Excluded

- Socially excluded are 3 times as likely to be non-internet users
- 75% do not use the internet



Internet Use falls as Social Exclusion Deepens

- 76% of the 'excluded' (3+ issues) do not use the internet
- 89% of the 'entrenched' (5+ issues) do not use the internet



No. of social disadvantages faced e.g. low income, poor health, low educational attainment.

4+ means 4 or more

Red = low sample size

Excluded:

~20% of population

76% do not use the internet

Entrenched - Deep and Persistent Exclusion:

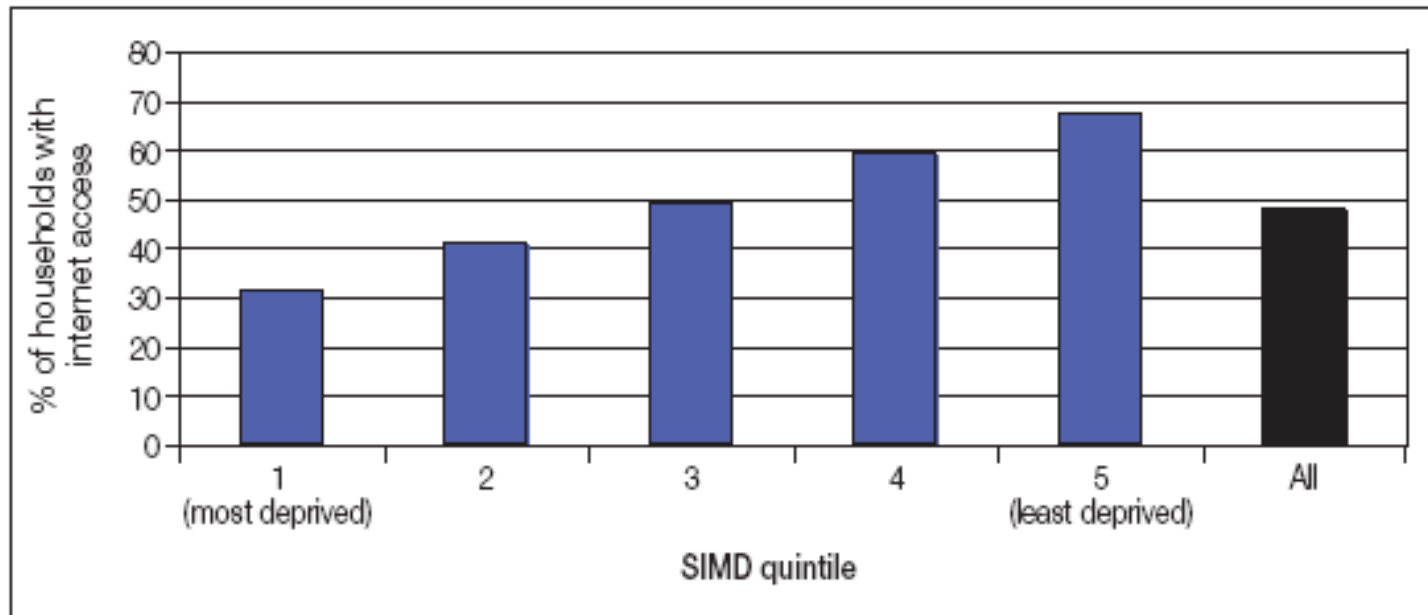
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Non-Use is Highest in Deprived Areas

Households in the least deprived 20% of communities are more than twice as likely to have home internet access as those in the most (Scotland)

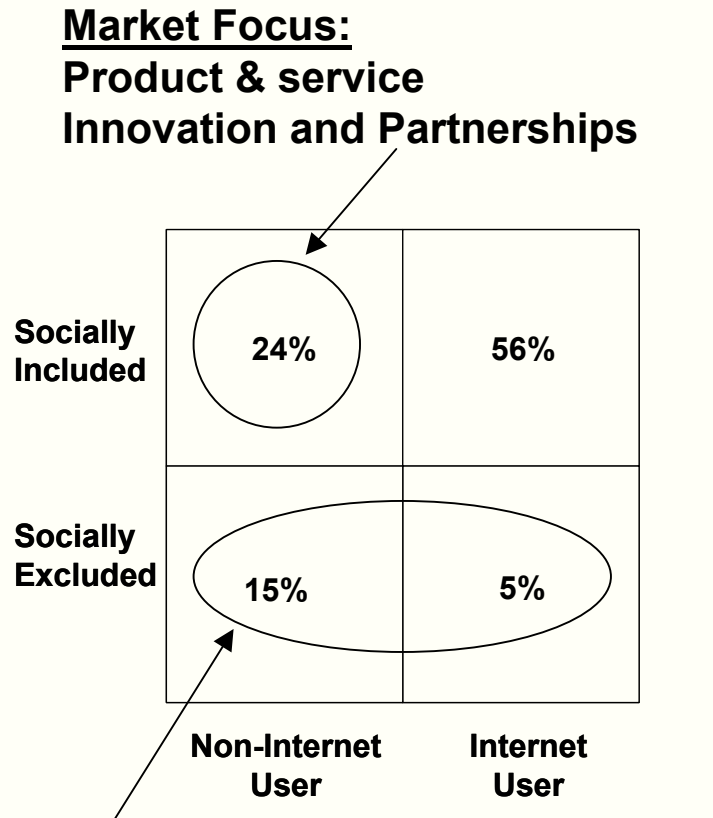
Household internet access by Scottish Index of Multiple Deprivation Quintile, 2005



Source: Scottish Household Survey, adults aged 16+

Issues and Opportunities

- **Issues:**
 - Social Exclusion is a barrier to closing the digital divide
 - Lack of engagement with ICT is another disadvantage suffered by the socially excluded
- **Opportunities:**
 - A market opportunity (24% of popn)
 - ICT can help to tackle social exclusion (20% of popn)
 - Combined interventions to tackle social and digital exclusion concurrently



Government Focus:
Combined policy interventions
e.g. Telecare/ Telehealth, Digital
Switchover, eMentoring, eClinics

Digital Inclusion

- Broader than:
 - the digital divide
 - direct access and use of any one form of technology
- Focused on:
 - social outcomes
 - most disadvantaged people
 - the most deprived places

***The use of technology, either directly or indirectly,
to improve the lives and life chances of people
and the places in which they live***