

# Welcome

UK Internet Governance Forum

24 October 2019

We encourage you to tweet about the event by using  
**@UKIGF** and **#UKIGF19**



# Opening remarks:

Eleanor Bradley, MD Registry & Public Benefit,  
Nominet



# Discussion of the future of internet governance over the next 30 years:

Adrian Lovett, President and CEO of World Wide Web Foundation

Eleanor Bradley, MD Registry & Public Benefit, Nominet



# Current developments/ proposals for the future of internet governance:

Stacie Hoffman, Oxford Information Labs

Sheetal Kumar, Global Partners

Maeve Walsh, Carnegie

Dominique Lazanski, Last Press Label



# Use of and attitudes to the internet in the UK: key findings from Ofcom's *Online Nation* report:

Ian Macrae, Ofcom



# Uses of and Attitudes to the Internet in the UK: Key Findings of Ofcom's Online Nation Report.



## Online Nation

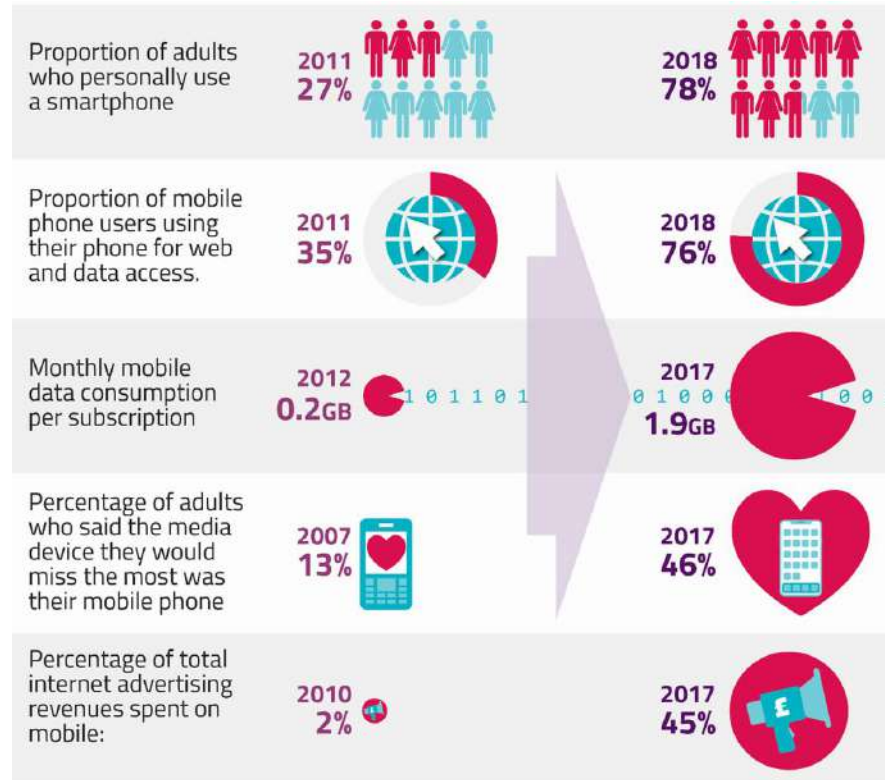
A new annual report on what people are doing online, and their attitudes to and experiences of using the internet

## Online Nation

A man in a dark suit and white shirt is holding a tablet computer. He is looking upwards and to the right with a thoughtful expression. The background is a large, stylized, metallic-looking letter 'N' with rivets, suggesting a modern or industrial setting.

- Published 30 May 2019
- Narrative report
- Interactive report
- Research report into adults' media use and attitudes
- Online harms research (jointly commissioned with the ICO)

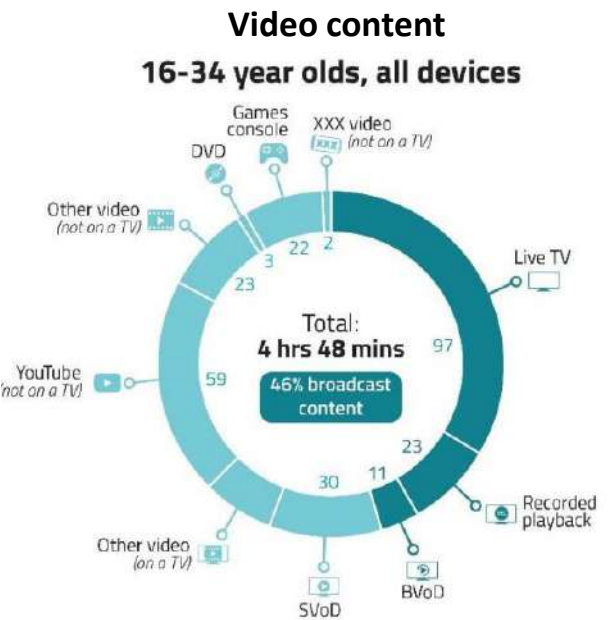
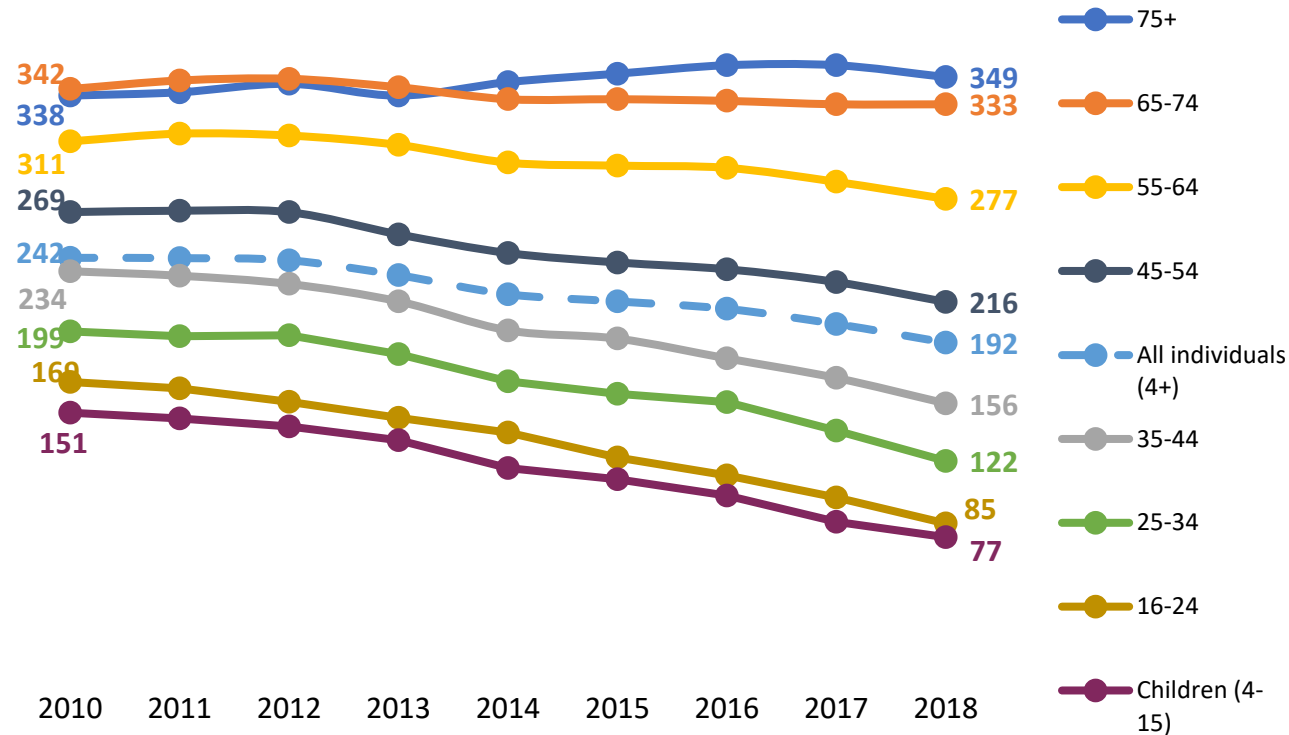
# Online is transforming the communications sector...



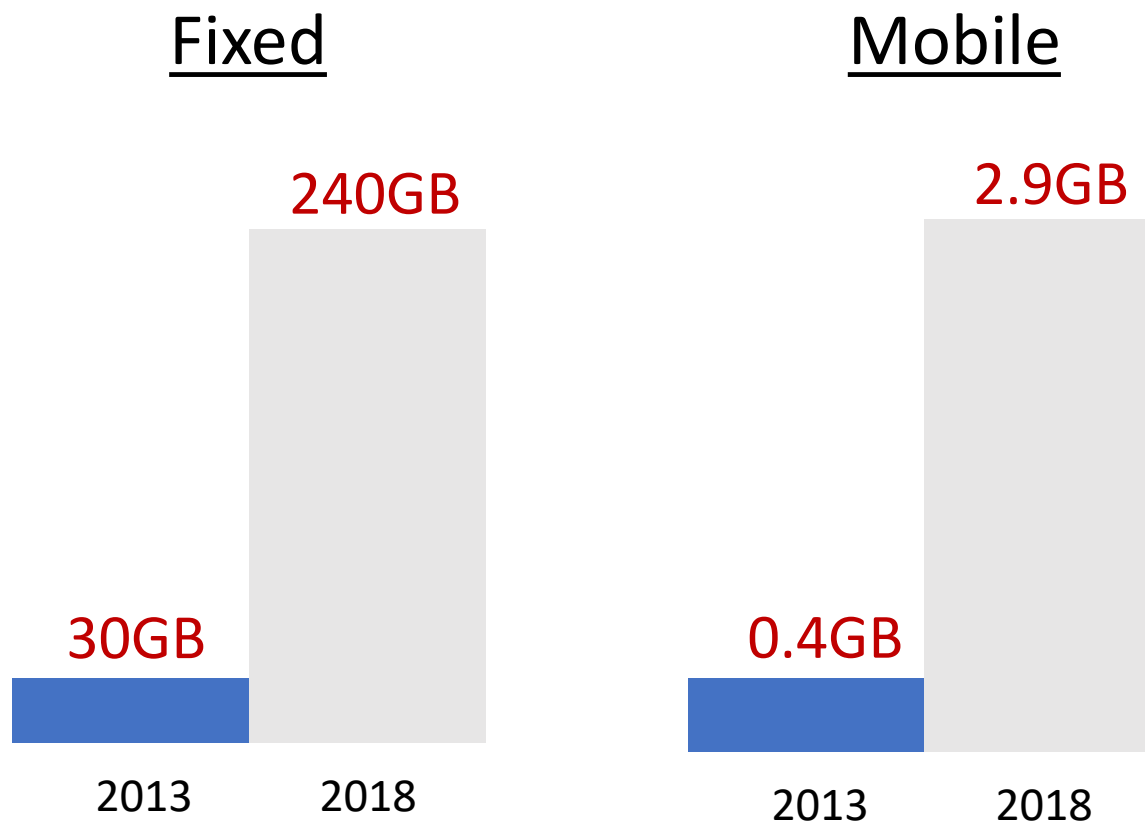
The average frequency people use their smartphone



...threatening “traditional” media services



... and massively increasing demand on network infrastructure



# Raising awareness of online harms is critical to Ofcom's duties to promote media literacy

## Experienced potential online harm



61%

Of adults have had **potentially harmful online experiences** in the last 12 months



79%

Of children (12-15) had **potentially harmful online experiences** in the last 12 months

Relating to interaction with other people/content

47%

71%

Relating to data/privacy

39%

39%

Relating to hacking/security

30%

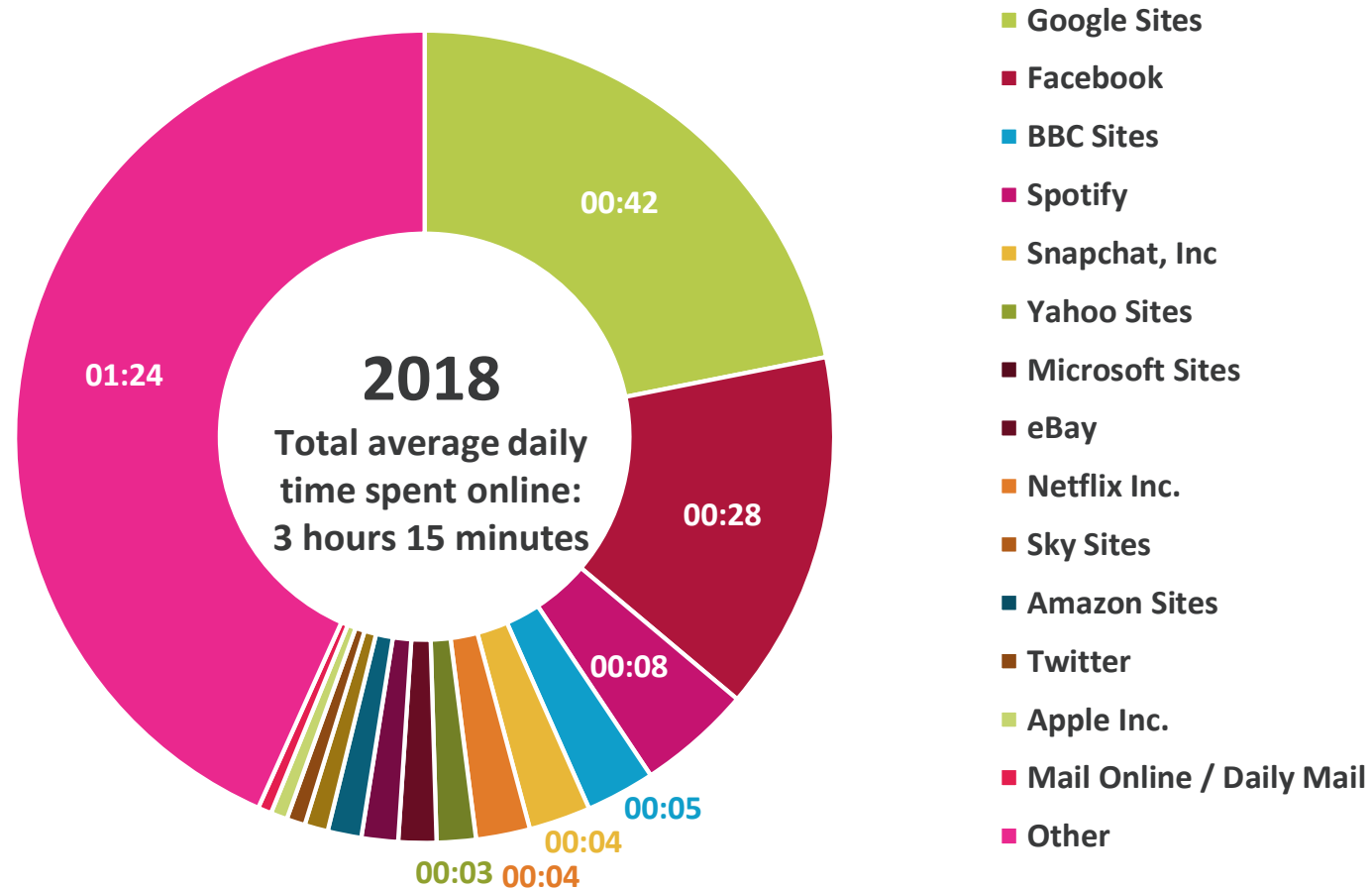
26%

■ Adults  
■ Children

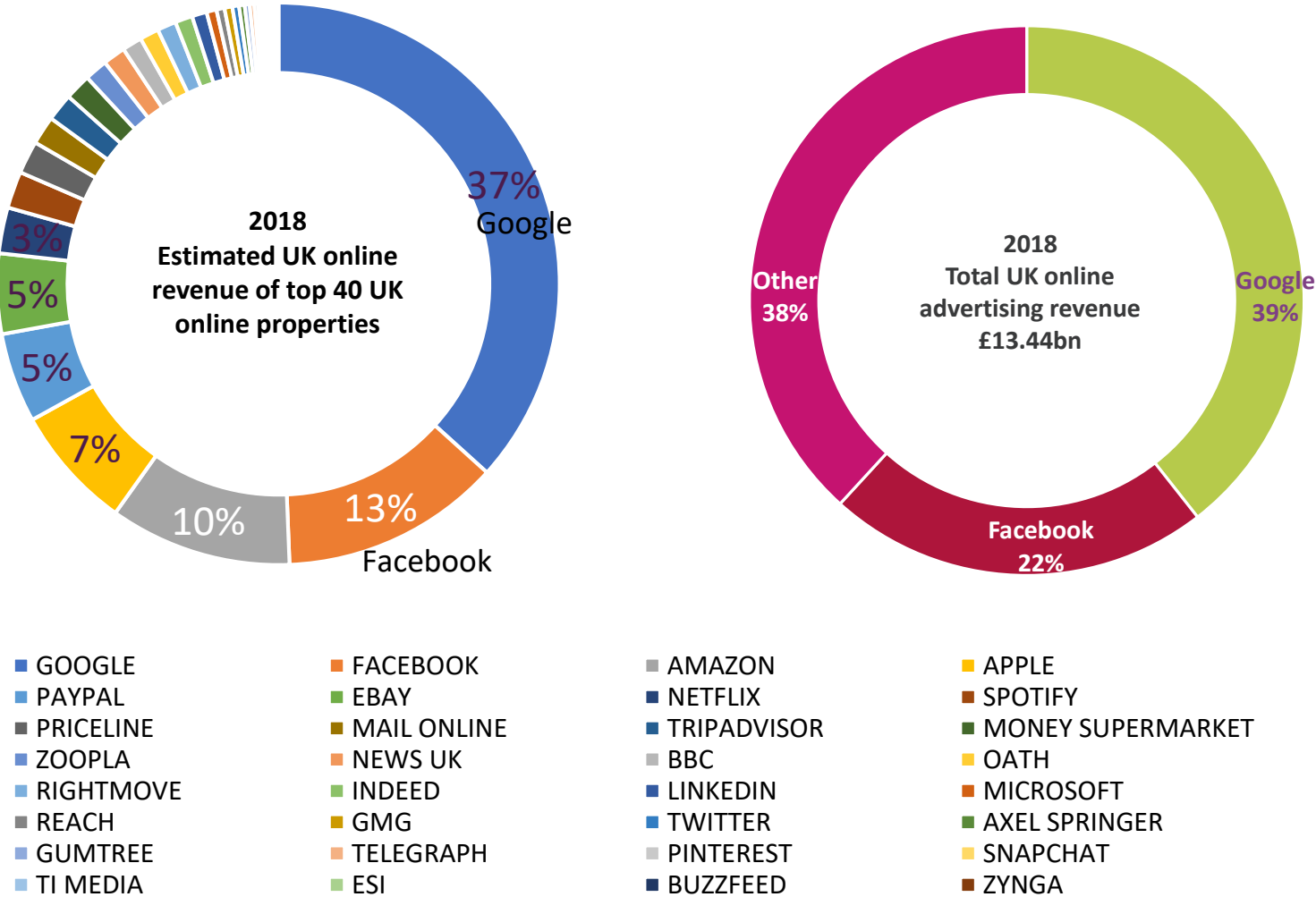
## To regulate or not to regulate online services is a very hot public policy question

- *Addressing harmful online content* - Ofcom
- *UK Advertising in the Digital Age* - HOL Select Committee on Communications
- *Right to Privacy (Article 8) and the Digital Revolution* - Joint Committee on Human Rights
- *Online Advertising in the UK* - Plum Consulting (Commissioned by DCMS as part of Caincross Review)
- *The Caincross Review: a sustainable future for journalism* - DCMS
- *Disinformation and 'Fake News'* - DCMS
- *Digital Services Tax Consultation* - HMT
- *The Internet: to regulate or not to regulate* - HOL Select Committee on Communications
- *Unlocking Digital Competition* (Furman Review) - HMT
- *Online Harms White Paper* - DCMS, Home Office
- *National Data Strategy* - DCMS
- *Tech Competitiveness Study* - Industry led
- *Smart Data: putting consumers in control of their data and enabling innovation* - BEIS and DCMS
- *White Paper - Regulation for the Fourth Industrial Revolution* - BEIS
- *Global Alliance for Responsible Media* - Industry led
- *Digital Charter* - DCMS
- *Update report into adtech and real time bidding* - ICO
- *Fake and Misleading Online Reviews* - CMA

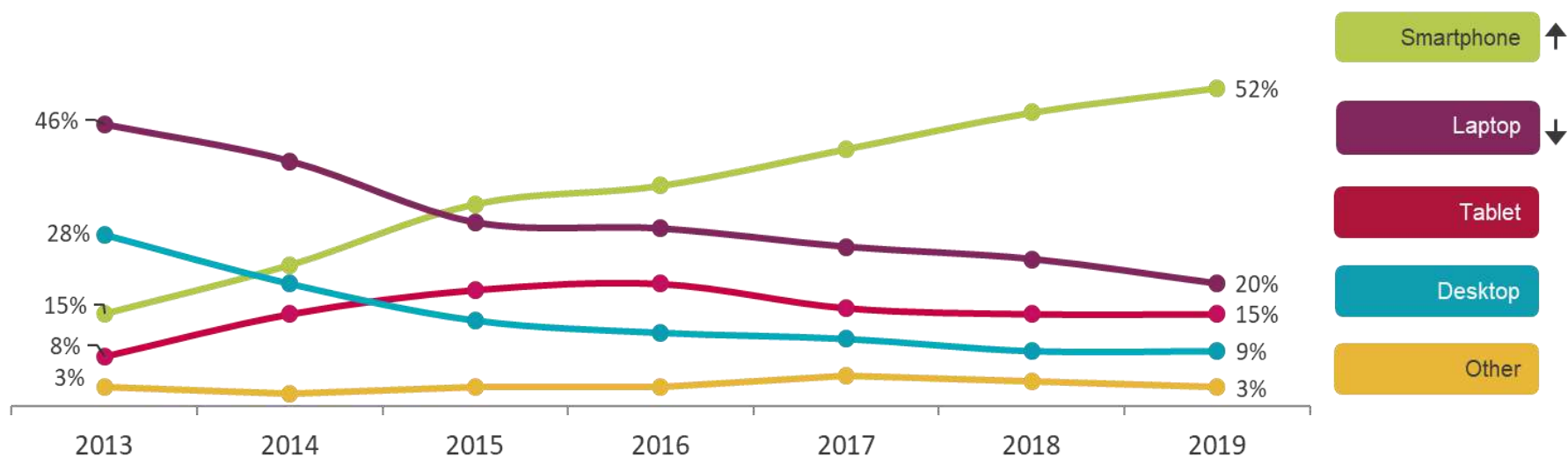
People spend far more time on Google and Facebook sites than any other sites – but the ‘long tail’ accounts for over 40% of time



Google and Facebook account for c.50% of UK online services revenue of top 40 UK properties and 61% of online revenues



## And half of adults consider the smartphone to be their most important device for getting online



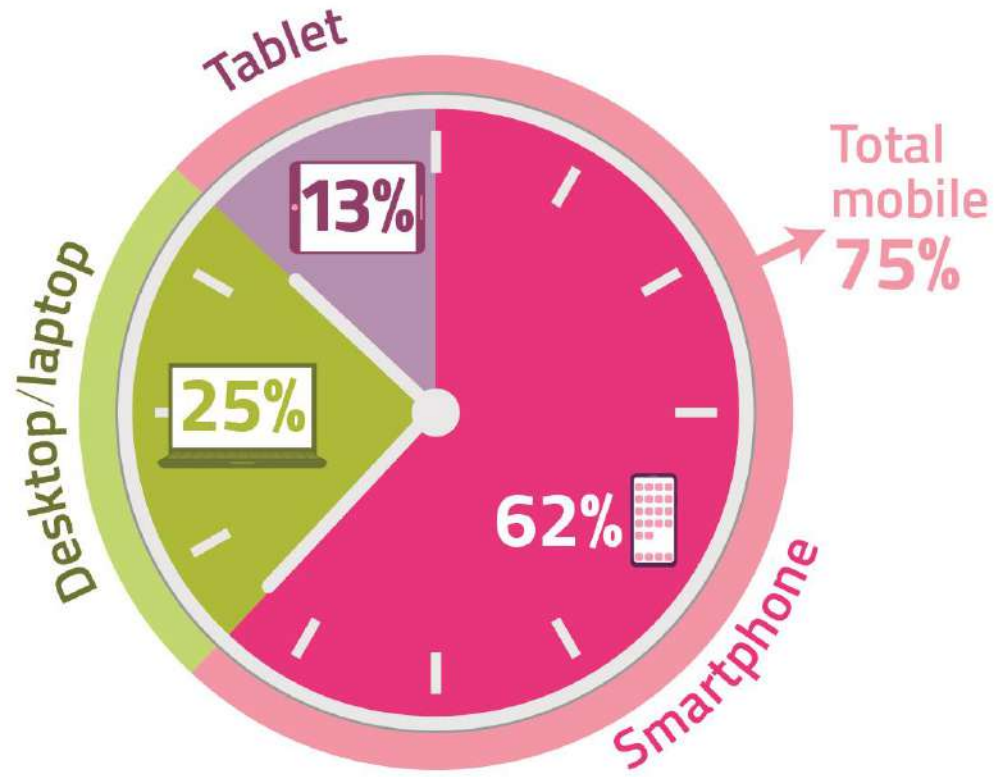
Source: Ofcom Technology Tracker

QE40. Which is the most important device you use to connect to the internet, at home or elsewhere? 'Other' responses include: 'Netbook', 'Games console', 'E-reader', 'TV set', 'Smart watch', 'Other portable/handheld device', 'Other device', 'None' and 'don't know'.

Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3346 UK).

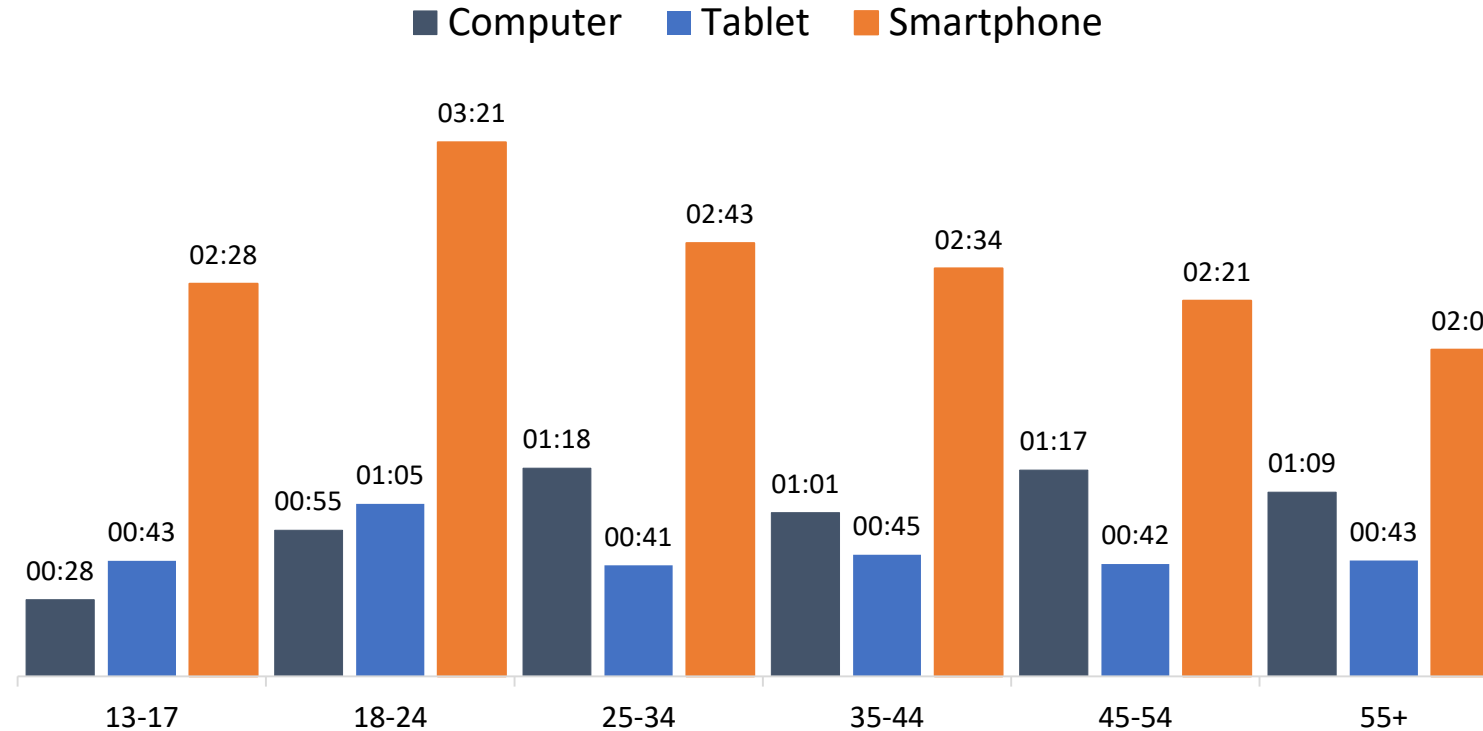
Three quarters of the time people spend online is on mobile devices

Share of total minutes, 18+

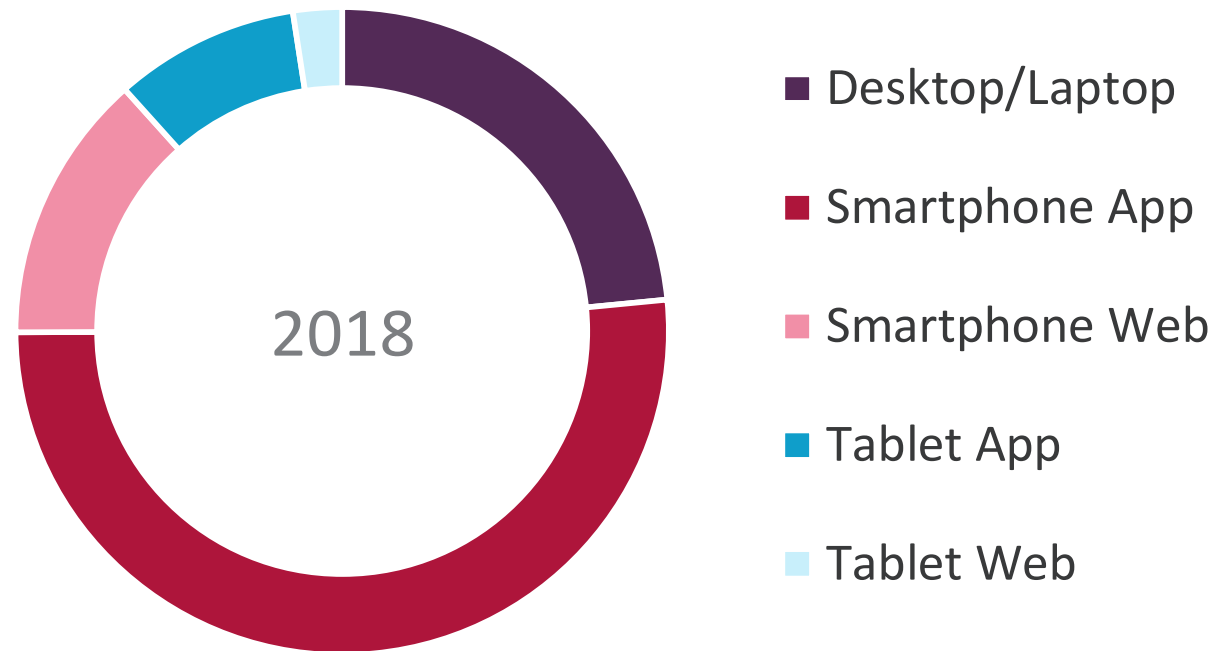




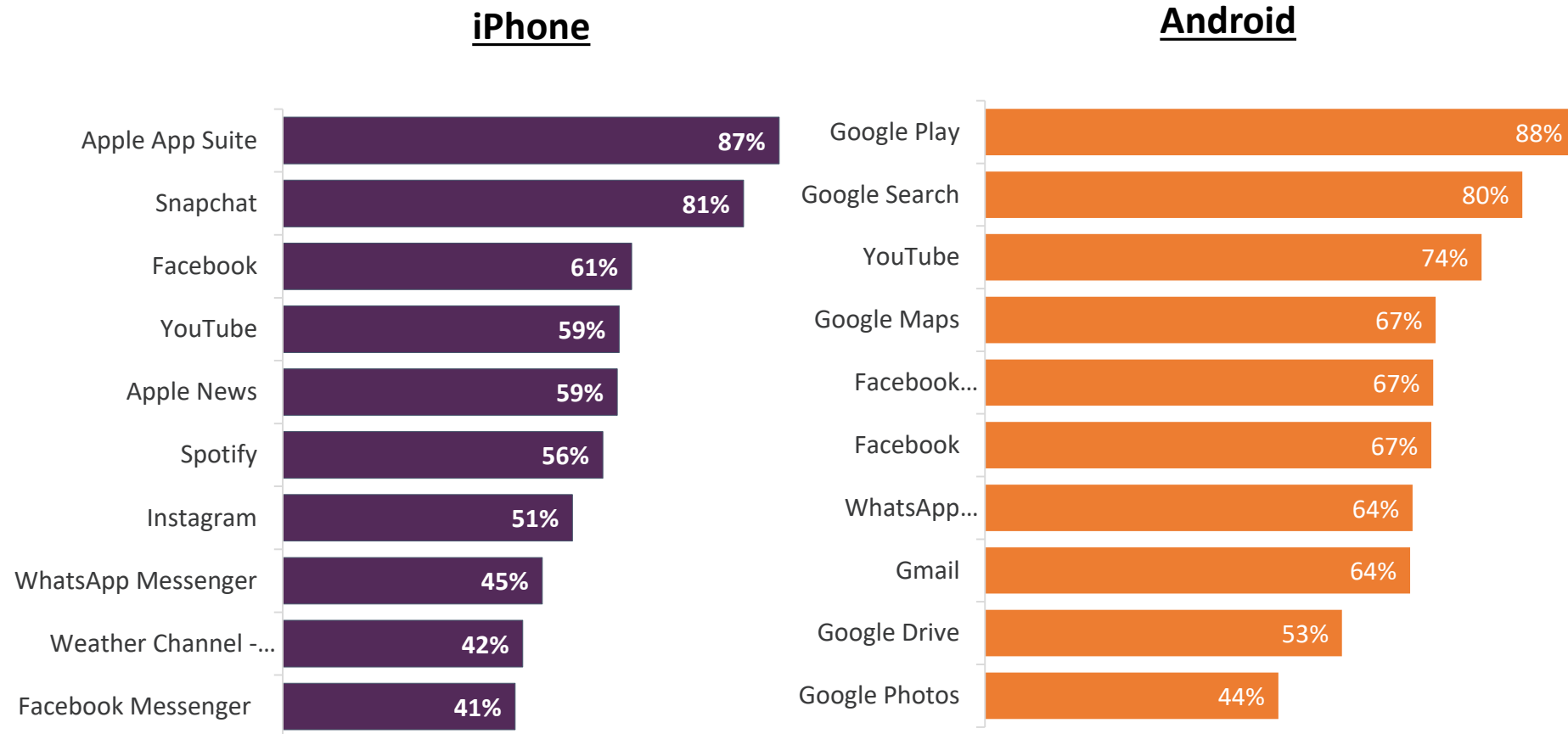
## Internet users of all ages spend much more time online on smartphones than computers



## Most of this time on apps...



## There are big differences between the top 10 apps used on iPhone and on Android devices



# The collection of user data powers the internet...

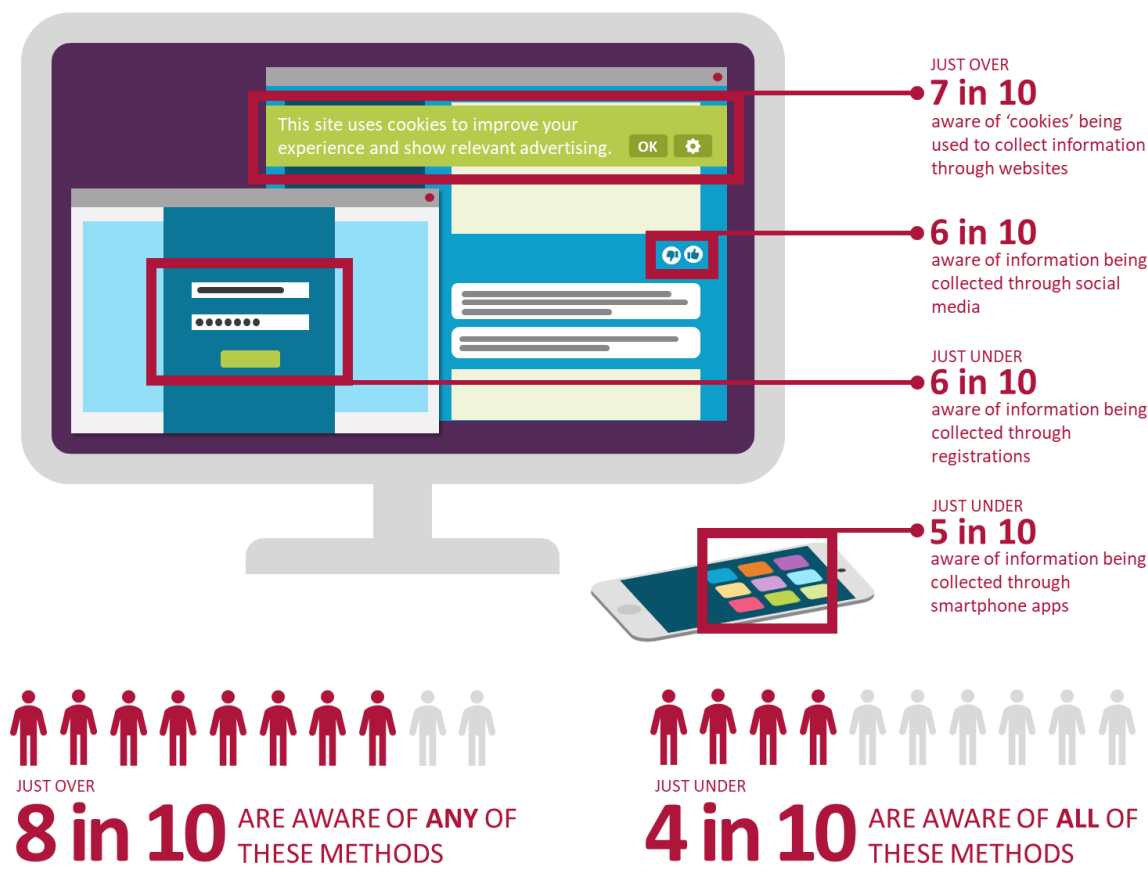
Selected permissions asked on Android by top ten apps in the UK, 2018

	Read calendar events (incl. confidential info)	Add / modify calendar events & email guests (w/o user's knowledge)	Read phone status and identity	Find accounts on device	Read contacts	Approximate location	Precise location	Read text messages (SMS or MMS)	Read call log
WhatsApp			•	•	•	•	•		
Facebook	•	•	•	•	•	•	•	•	•
Facebook Messenger	•		•	•	•	•	•	•	•
Instagram			•	•	•		•		
Amazon Shopping			•	•	•	•	•		
eBay							•		
Snapchat			•	•	•		•		
Twitter			•	•	•	•	•		
Spotify			•	•					
BBC News				•		•			

Source: Top ten from App Annie, The state of mobile 2019 (non-game apps, iPhone and Android MAUs combined). Permissions from Google Play store, <https://play.google.com/store/apps> [analysis conducted April 2019].

# Consumers have limited awareness of how their data is collected...

Awareness of ways in which companies can collect internet users' personal information



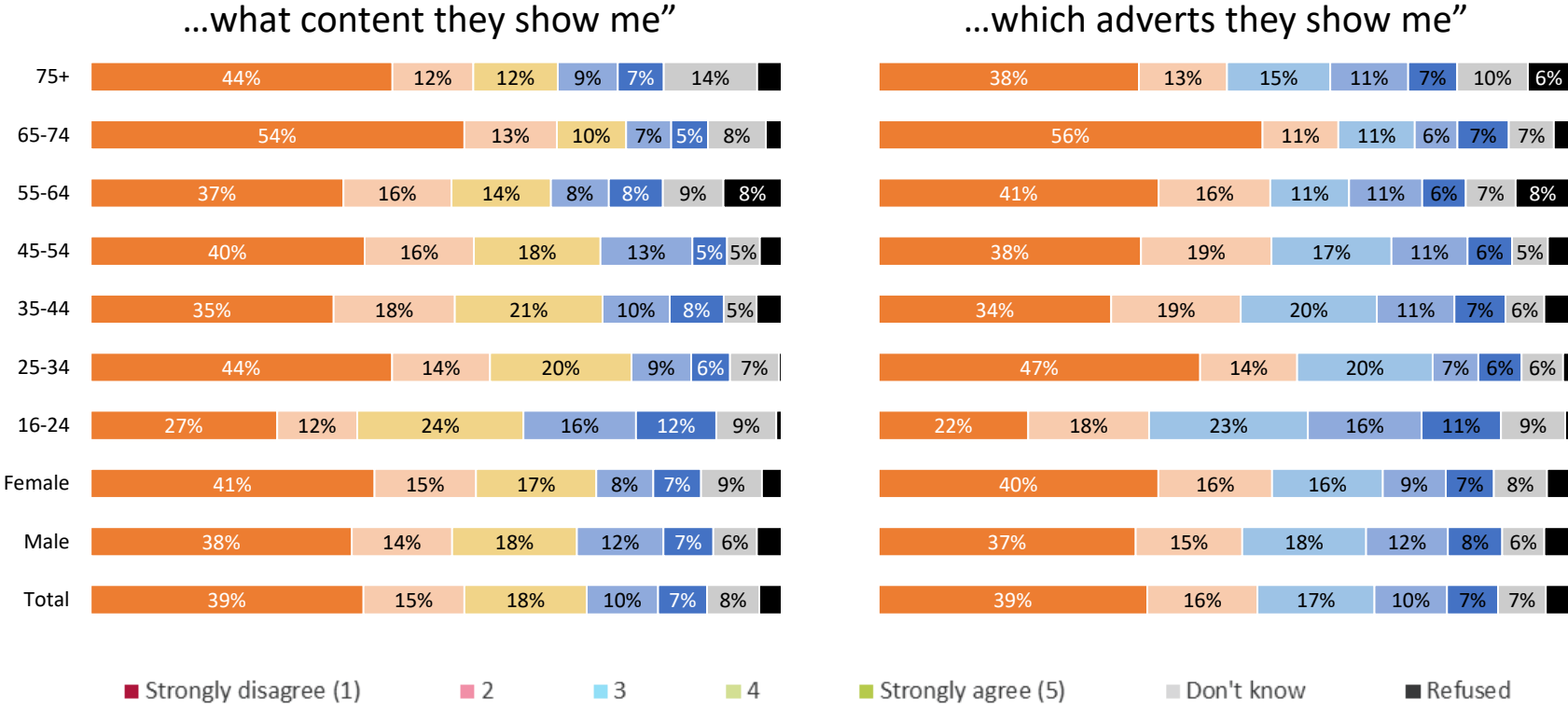
Source: Ofcom Adults' Media Literacy Tracker 2018

IN52. There are many ways that companies can collect information about people based on what they do online. Which, if any of the following ways are you aware of? (prompted responses, multi-coded)

Base: All adults aged 16+ who go online (1570 in 2017, 1602 in 2018)

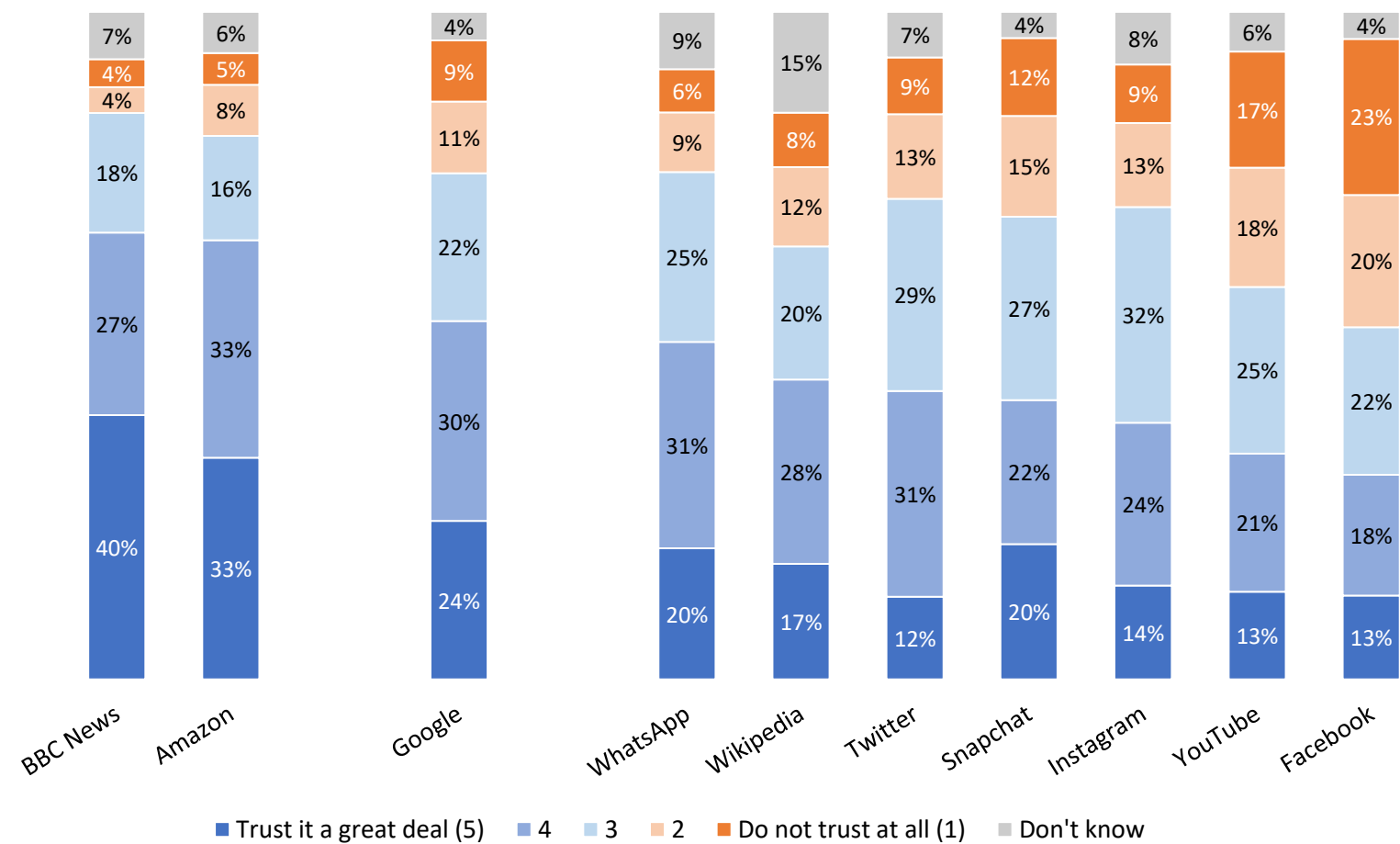
# ... and are concerned about how their data is used

“I don’t mind if organisations use information about me to decide...



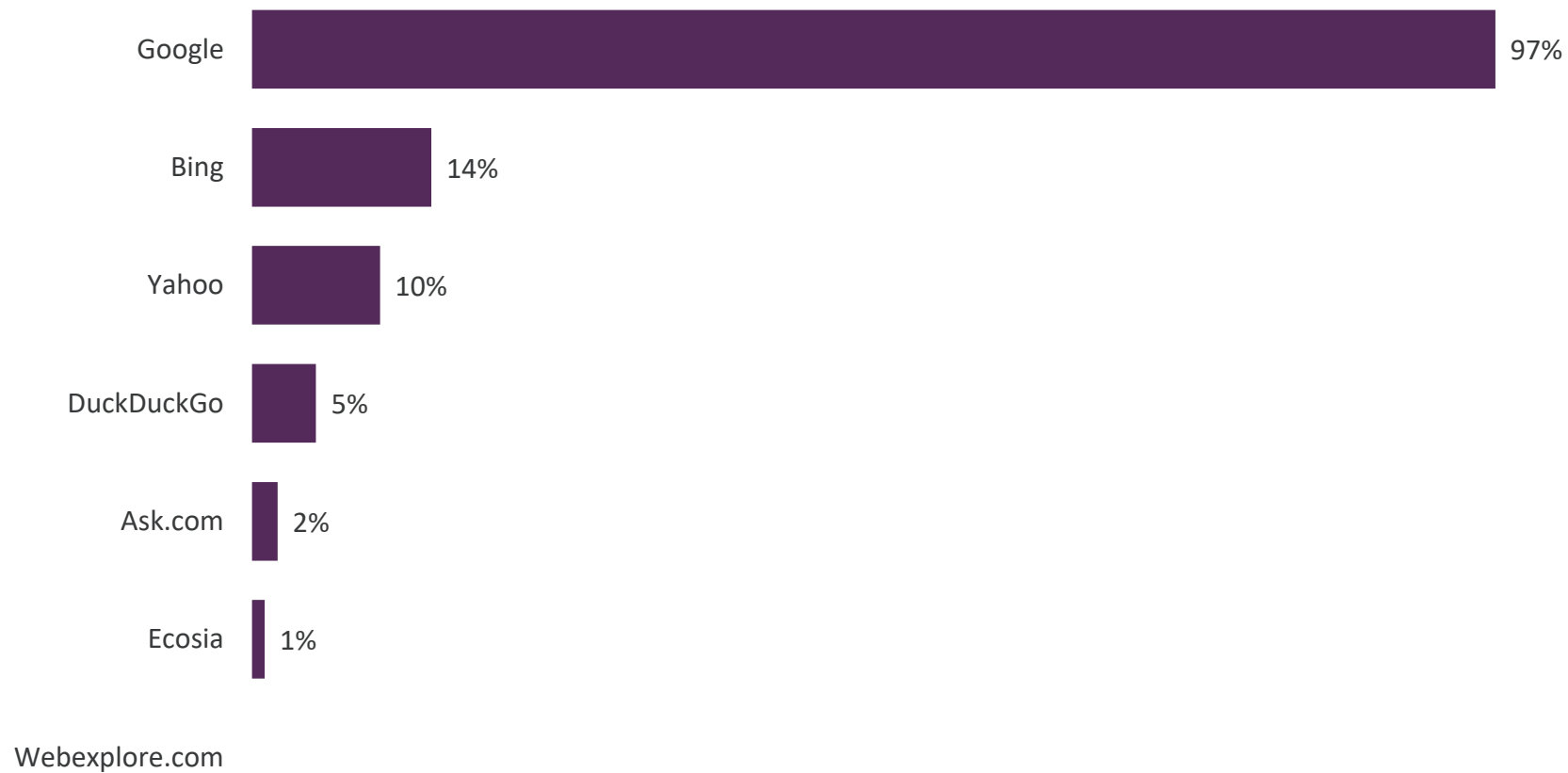
# And many do not trust the largest internet sites to use their data responsibly

Level of trust in selected companies to protect users' data/use their data responsibly



Source: Ofcom Online Harms Quantitative Research (Adults), 2019  
Base: all respondents who use the service (BBC News, 259; Amazon, 420; Google, 607; WhatsApp, 506; Wikipedia, 214; Twitter, 158; Snapchat, 198; Instagram, 234; YouTube, 433; Facebook, 557)

## Most people who use search engines use Google



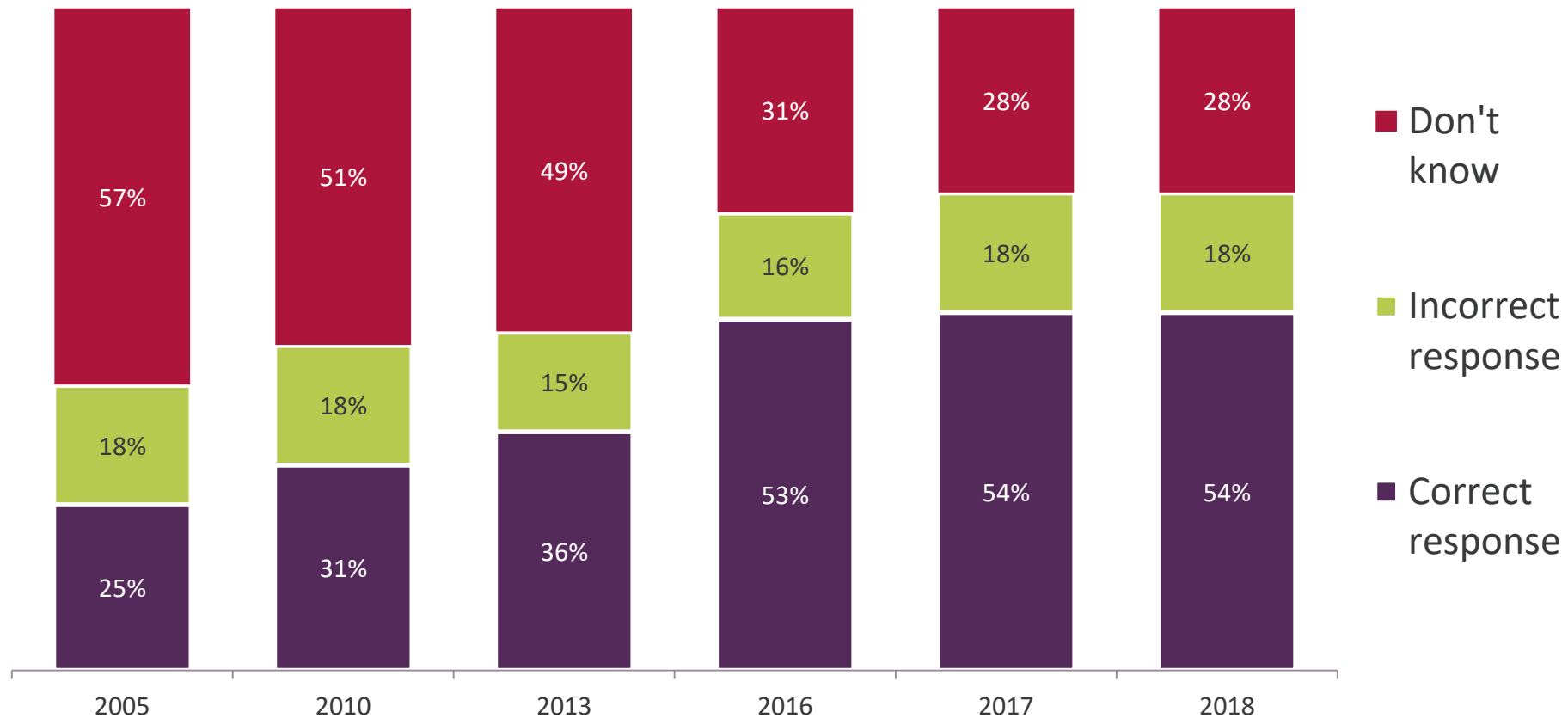
Source: Ofcom Search and Discovery Research 2019

Question: Q3. You said you used search engines to search for things on the internet. Which of the following search engines do you use?

Base: All who use a search engine unweighted (1387) weighted (1390)



# Around half of UK online advertising revenue comes from paid-for search (£6.7bn in 2018) but there is widespread misunderstanding about how search engine are funded



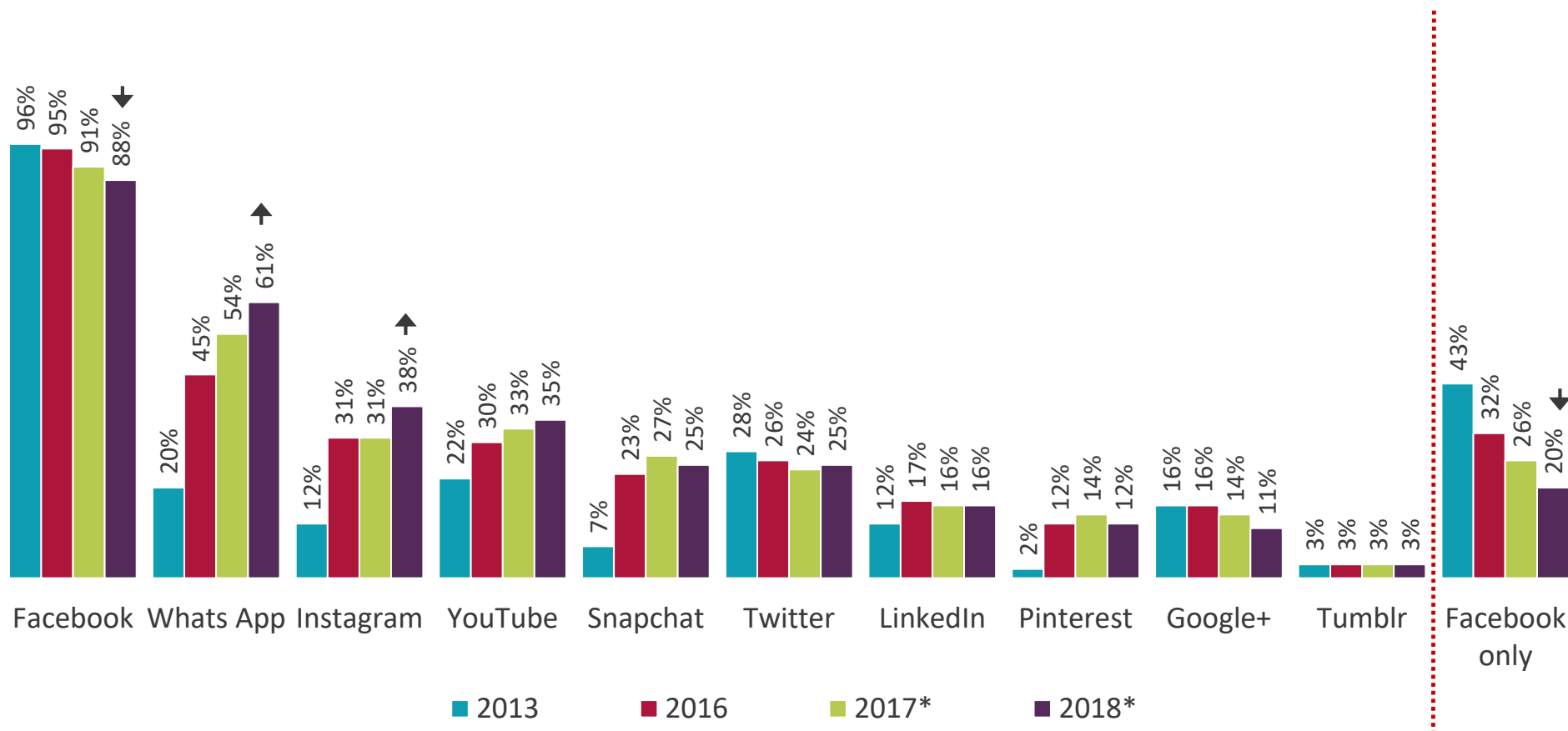
Source: Ofcom Adult Media Literacy Tracker 2018

IN32. How do you think search engine websites such as Google or Bing are mainly funded? (unprompted responses, single coded)

Base: All adults aged 16+ (1875 in 2017, 1882 in 2018)

Arrows show significant changes (95% level) between 2017 and 2018

# Facebook is still by far the social media network with the greatest reach – although fewer are using it as their only one



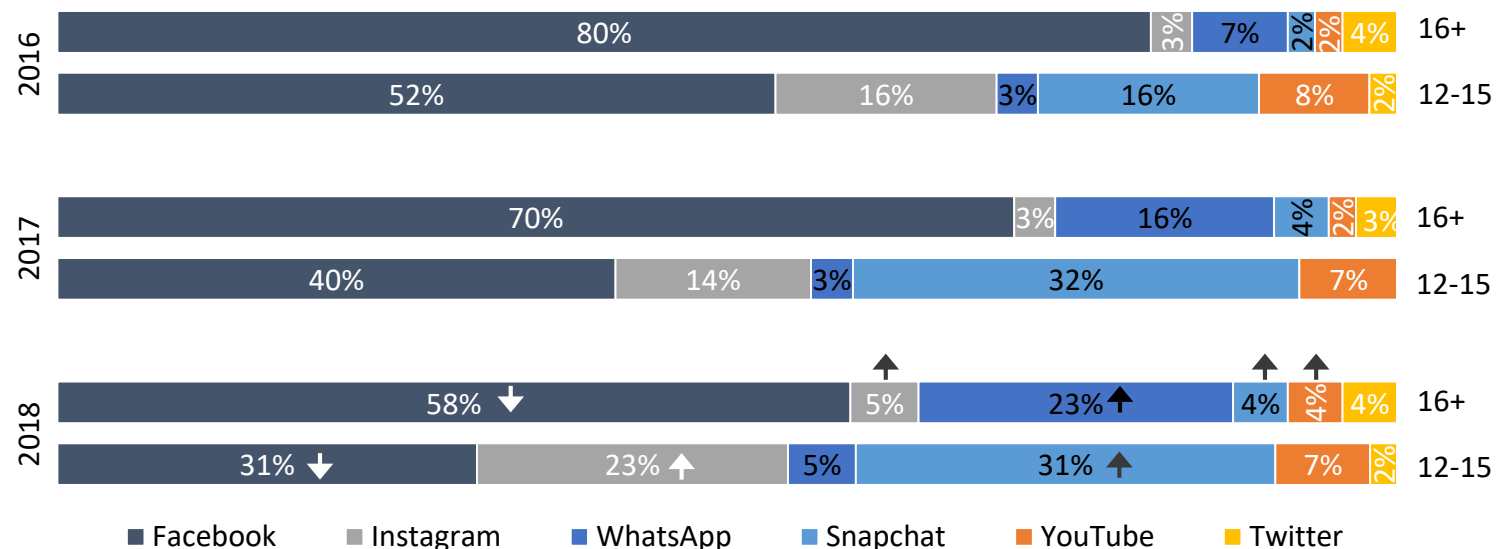
Source: Ofcom Adult Media Literacy Tracker 2018

IN22. Which social media or messaging sites or apps do you have a profile or account on, that you still use? (prompted responses, multi-coded) – showing responses of 3% or more of adults in 2018 aged 16+ with a social media profile / account \* NB – definition expanded since 2017 to also include messaging sites or apps, previously just asked about social media \*\* NB Showcard amended from 2016 reducing the prompted responses to the top ten most popular social media sites .

Base: All adults aged 16+ with a profile or account on a social media or messaging site/app (1182 in 2017, 1247 in 2018).

Arrows show significant changes (95% level) between 2017 and 2018

## And many people – teenagers in particular – no longer consider Facebook as their main social media network



Source 16+: Ofcom Adult Media Literacy Tracker

IN23. And which one would you say is your main social media or messaging site or app – the one you use most often? (prompted responses, single coded)

Base: All adults aged 16+ with a profile or account on a social media or messaging site/app (1136, 2016; 1182, 2017; 1247, 2018).

Source 12-15: Ofcom Children's Media Literacy Tracker

QP45/ QC21 – And which is your main social media or messaging site or app, so the one you use most often? (unprompted responses, multi coded).

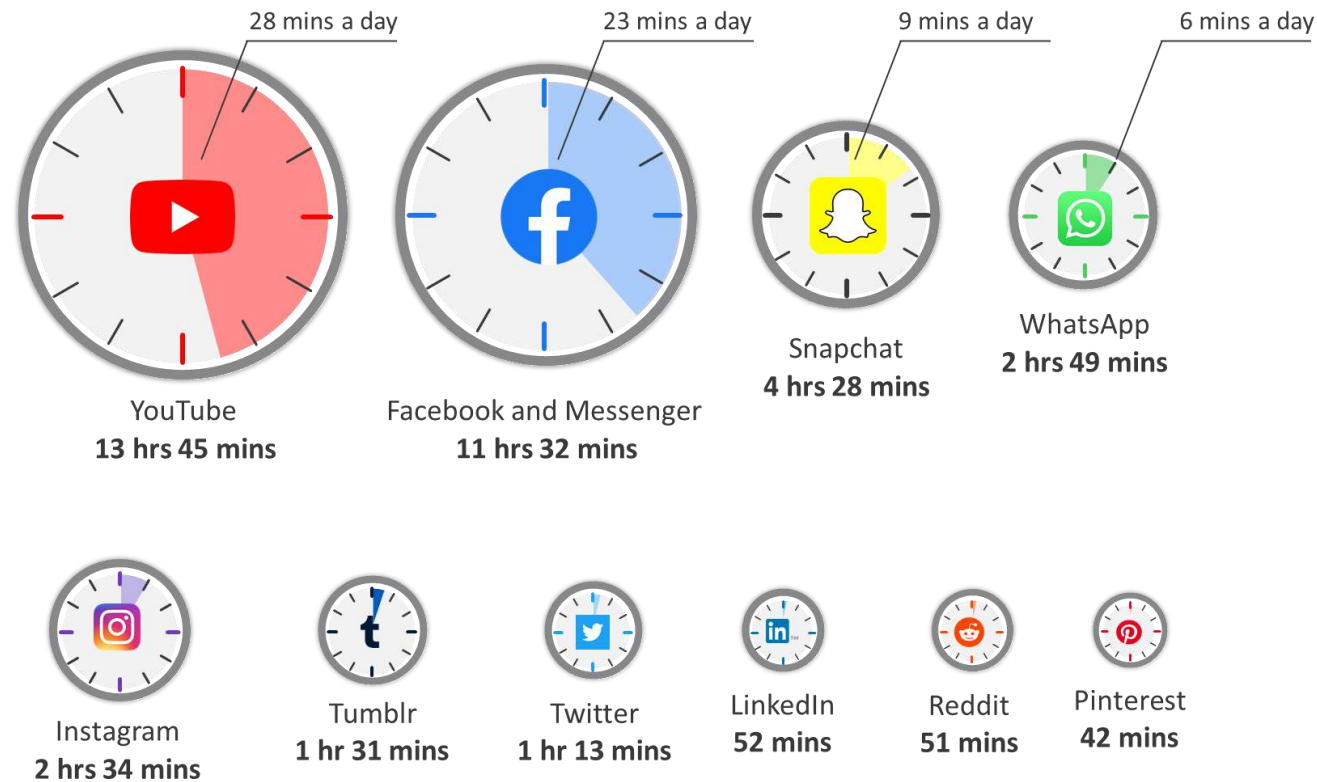
Responses from children aged 12-15.

Base: Children aged 12-15 who have a social media or messaging site app profile (2016, 335; 2017, 343; 2018, 322).

\*Before 2017 these questions in both Trackers asked only about use of social media sites or apps; the definition was expanded in 2017 to include messaging sites or apps.

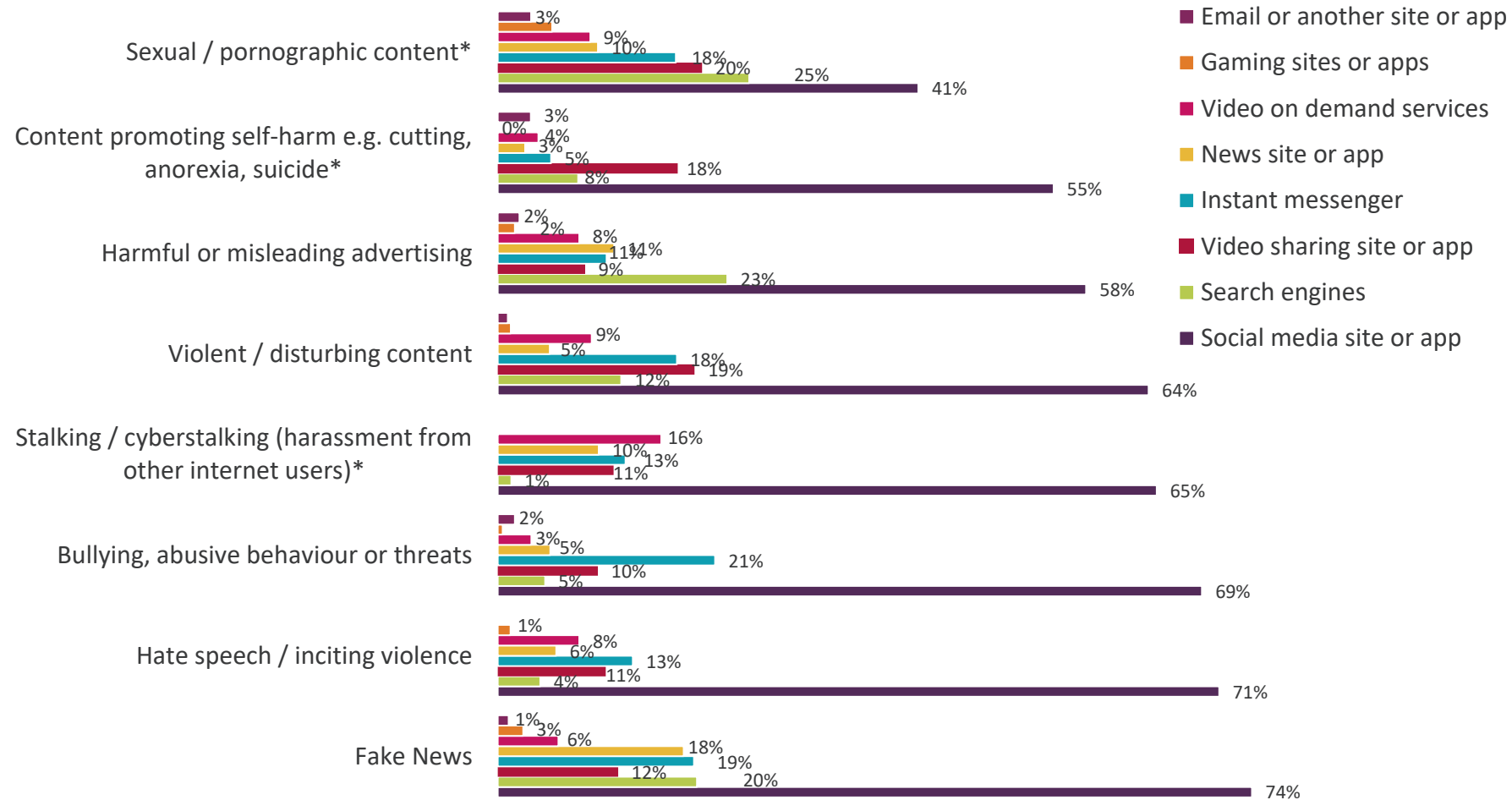
Arrows indicate any significant differences at the 95% confidence level between 2016 and 2018.

## Nevertheless, users still spend much more time on Facebook than its competitors



Source: Source: Comscore MMX Multi-Platform, [M] YOUTUBE.COM, [M] Facebook and Messenger, [P] Snapchat, Inc., [M] WhatsApp, [M] Instagram, [M] Tumblr, [P] Twitter, [P] LinkedIn, [P] Reddit and [P] Pinterest, September 2018, UK, Age: 18+. Size of clock represents relative time spent per month, while segment represents minutes spent each day.

# Social media is the main source of all the content or conduct-related harms that we asked people about



Source: Ofcom Online Harms Research, 2019  
 Base: all respondents concerned about and with experience of (fake news, 184; hate speech/inciting violence, 103; bullying, abusive behaviour or threats, 108; stalking/cyberstalking, 40\*; violent/disturbing content, 155; harmful or misleading advertising, 107; content promoting self-harm, 52\*; sexual/pornographic content, 98\*). Note: low bases marked by \*

## Summary

- Understanding market developments and consumer implications is fundamental to Ofcom's purpose of making communications markets work for consumers
- A large proportion of online time is spent on Facebook and Google properties – but overall people have a varied online diet
- Changes in online behaviour are driven by being constantly connected, particularly to the mobile internet via mobile apps
- Many people are unaware about how user data is collected – and many are concerned about how it is used
- Search generated £6.7bn of ad revenues last year – but nearly half of internet users are unaware how search engines are funded
- Despite Facebook's large reach and large mount of time spent, the social media market is dynamic. It is also the most common source of consumer harms



# Online Nation

2019 report

Interactive report

Published 30 May 2019



Raising awareness  
of online harms

**Ofcom**  
making communications work  
for everyone

# Digital inclusion & education:

Eleanor Bradley, Nominet

Adam Micklethwaite, Good Things Foundation

Gareth Jones, Member of Scouts Board of Trustees





# Four thoughts about digital inclusion

Internet Governance Forum 2019

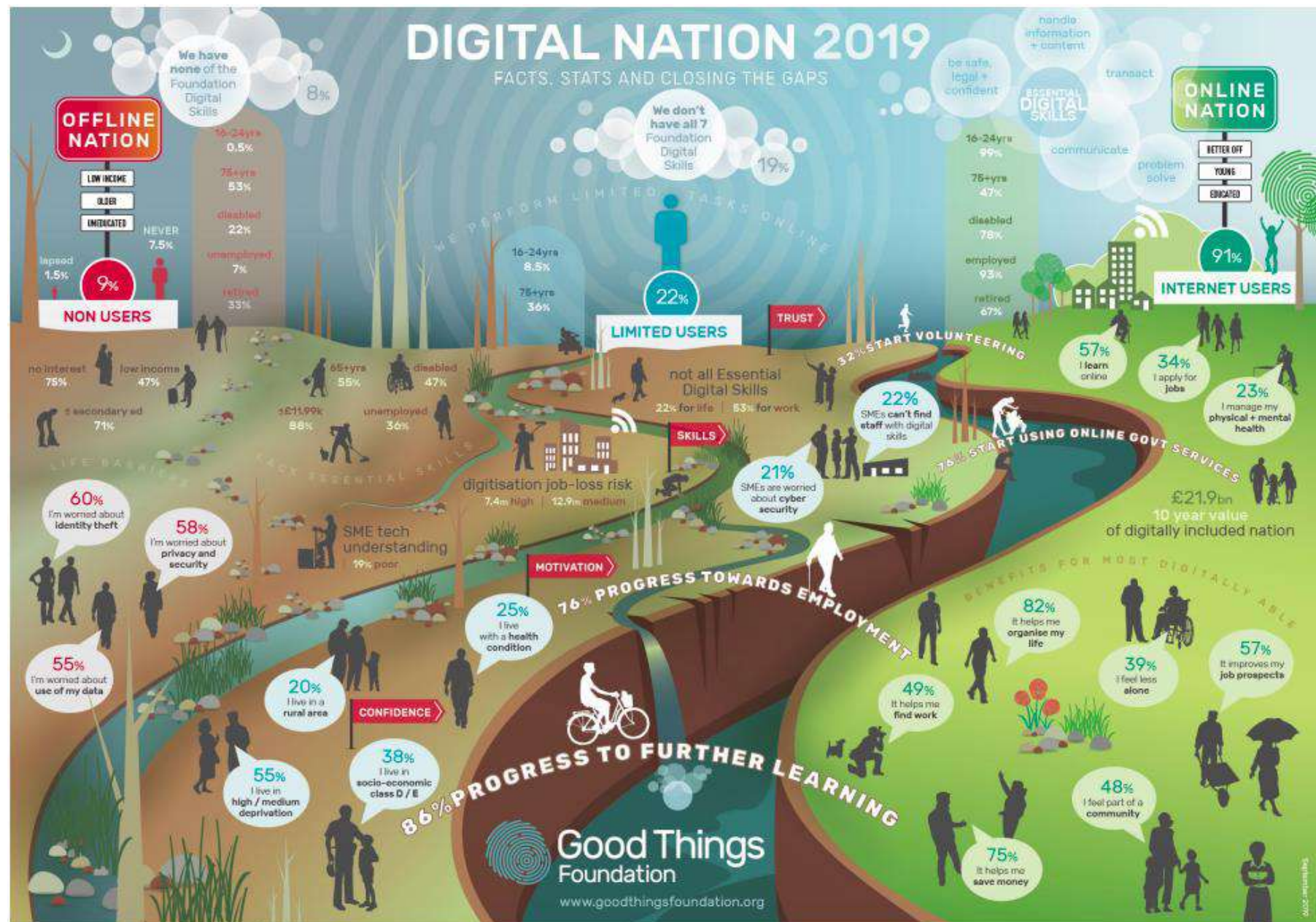


There is still a digital divide and it falls along the lines of other forms of inequality.

Digital inclusion is about people  
not tech.

# Building our digital future needs partnership.

Digital is both a leveller and an opportunity.





[www.goodthingsfoundation.org](http://www.goodthingsfoundation.org)





**Scouts**



Do more.  
Share more.  
Be more.

A presentation by  
Gareth Jones  
Trustee



Scouts 

# Digital Education

## Digital Citizens Programme

- Building young people's Skills in creating digital media (music, animations, videos, CAD, 3D sculptures).
- Creating and managing social network profiles for Scout Groups or generating content holding websites.
- Citizen-first.
- Building good online habits and attitudes.

**#SkillsForLife**

**[scouts.org.uk/join](https://scouts.org.uk/join)**

**Scouts** 



# Digital Inclusion

## Our New Brand



**7.33:1**

Contrast Ratio



**7.33:1**

Contrast Ratio



**12.91:1**

Contrast Ratio



**16.6:1**

Contrast Ratio



Name Surname  
Role



#SkillsForLife

Name Surname  
Role



I identify as:  
She / Her  
#SkillsForLife

Thank you



# Risk, harm & ethics in digital society: Healthy digital society?:

Alex Krasodomski-Jones, Demos  
Victoria Nash, Oxford Internet Institute  
Darren Jones MP  
Chloe Colliver, ISD

If you would like to ask a question or answer a poll, please visit [www.sli.do](http://www.sli.do) and use the code **UKIGF19**

Continue the conversation by contacting [alex.krasodomski@demos.co.uk](mailto:alex.krasodomski@demos.co.uk)



# Empowering users: Can 'Safety by Design' learn from Tech for Good:

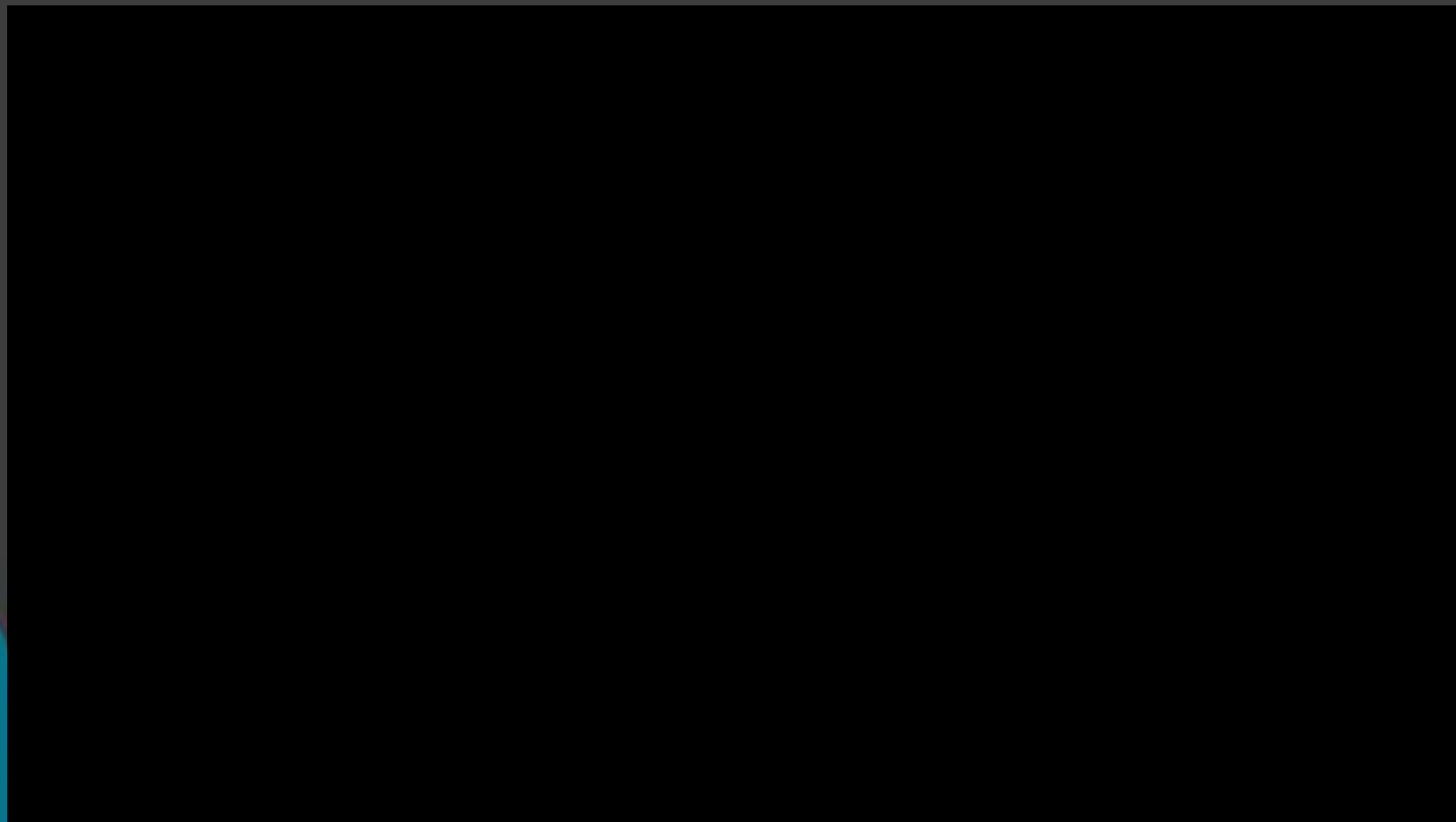
Ben Bradley, Tech UK  
Rachel O'Connell, Trust Elevate  
Antonia Bayly, Online Safety Policy at DCMS  
Noor Mo'alla, Doteveryone  
David Hunter, Crisp

If you would like to ask a question or answer a poll, please visit [www.sli.do](http://www.sli.do) and use the code **UKIGF19**



# Digital Minister's address.

Matt Warman MP, Minister for Digital and  
Broadband



# Cybersecurity: challenges and opportunities:

Sheetal Kumar, Global Partners  
Kat Jones, FCO



# Policy & technology: developing both in harmony:

Rowena Schoo, Nominet

Andrew Puddephat, Internet Watch Foundation

Vinous Ali, Tech UK

Lindsay Taylor, BEIS

Frédéric Donck, ISOC European Bureau



## Summary and close:

Paul Blaker, Head of Global Internet Governance, DCMS

Gareth Jones, Scouts

Dr Howard Leicester MBE, The Chartered Institute for IT (BCS) Digital Accessibility specialist group

Olivier Crepin-Leblond, Internet Society UK England Chapter



# Thank you

#UKIGF19

