

Speaker's Commission for Digital Democracy

Written Evidence by Arqiva

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Summary of Key Points and Recommendations:

- Arqiva welcomes the opportunity to respond to the Speaker's Commission on Digital Democracy.
- Over the past decade the UK's media, broadcasting, telecommunications and technology industries have undergone unprecedented, profound and exciting change. Without doubt, technology is becoming an integral part of modern life. Meanwhile, there remains a wide disparity between technological aptitude, confidence, competence and literacy for those who have access – and a worrying, growing Digital Divide for those without access. We therefore agree with the Mr Speaker's warnings to the Hansard Society on 27 November 2013 that: *"A digital democracy should not reinvent the divide in franchise of the 19th century in a new high technology form. It has to be universally inclusive and not simply a narrow Geeks nirvana."*
- Whilst others are certainly better-placed to discuss the merits of 'online voting' with regards to increasing turnout, Arqiva believes the Commission should consider seriously the current practical limitations of digital participation, namely current lack of access. Whilst, online voting could be an *additional* method to encourage democratic participation, until there is **universal access** to broadband, (which is free at the point of use), we warn that online voting cannot be a complete substitution or replacement to traditional methods of voting, either in person in the ballot box or by postal-vote.
- However, ensuring adequate infrastructure is only half the challenge. Sadly, the actual take-up in some areas falls far short of potential access. According to the Office of National Statistics, 14% of the UK population (over seven million people) have never used the Internet (ONS 2013) and Ofcom has found that a large proportion of these people say they do not intend to do so. Arqiva believe that, in addition to ensuring the infrastructure provides universal access, the government need to consider additional measures to combat digital illiteracy for adults – as well as young people.
- None of this, however, automatically translates to a "democratically-engaged" electorate. Technology is not a panacea which alone will cure voter-disengagement. Arqiva believes that serious and sustainable democratic engagement requires a combination of 'new media' and conventional or 'traditional' media. For example, we note the key role of the UK Public Service Broadcasters who all have clear remits to inform and educate society via the provision of quality news and current affairs.
- There is no doubt that, in recent years the UK's broadcasters have provided engaging cross-platform innovative reporting and digital content and services available on a wide range of digital platforms and devices, such as digital television, digital radio, mobile devices and the internet. Arqiva believes that harnessing such new technology for election-specific or politics programming or to improve our political engagement, civic and democratic understanding could be for the benefit of audiences and citizens alike.

About Arqiva

Arqiva is a media infrastructure and technology company operating at the heart of the broadcast and mobile communications industry and at the forefront of network solutions and services in an increasingly digital world. Arqiva provides much of the infrastructure behind television, radio and wireless communications in the UK and has a growing presence in Ireland, mainland Europe and the USA.

Arqiva was responsible for UK Digital 'Switch-Over' – engineering from analogue television to Freeview – a huge logistical exercise which touched every Parliamentary constituency, requiring an investment by Arqiva of some £630m and was successfully delivered to time and budget.

Arqiva is also a founder member and shareholder of Freeview (Arqiva broadcasts all six Freeview multiplexes and is the licensed operator of two of them) and was a key launch technology partner for Freesat. Arqiva is also the licensed operator of the Digital One national commercial DAB digital radio multiplex.

Arqiva operates five international satellite teleports, over 70 other staffed locations, and thousands of shared radio sites throughout the UK and Ireland including masts, towers and rooftops from under 30 to over 300 metres tall.

In addition for broadcasters, media companies and corporate enterprises Arqiva provides end-to-end capability ranging from –

- satellite newsgathering (30 international broadcast trucks);
- 10 TV studios (co-located with post-production suites)
- spectrum for Programme-Making & Special Events (PMSE)¹;
- playout (capacity to play out over 70 channels including HD); to
- satellite distribution (over 1200 services delivered).
- Connect TV - who launched the first live streaming channel on Freeview.

Arqiva's WiFi network includes almost every UK airport – and reaches cross the hospitality and leisure sector, providing WiFi to 85,000 rooms in leading hotel chains, and many restaurants, retail chains and shopping centres and local high streets.

Elsewhere in the communications sector, the company supports cellular, wireless broadband, video, voice and data solutions for the mobile phone, public safety, public sector, public space and transport markets.

Arqiva's major customers include the BBC, ITV, Channel 4, Five, BSkyB, Classic FM, the four UK mobile operators, Metropolitan Police and the RNLI.

¹ Such as the wireless cameras operated by the BBC and Sky News, and the radio microphones used in virtually all television production and many West End shows.

Speaker's Commission for Digital Democracy

INTRODUCTION

1. Arqiva welcomes the opportunity to respond to the Speaker's Commission on Digital Democracy.
2. Over the past decade the UK's media, broadcasting, telecommunications and technology industries have undergone unprecedented, profound and exciting change. As a result of digitisation, the traditional boundaries between what were once separate universes: Content, Communications and Computing are eroding. Such "convergence" has seen the blurring of boundaries between the media, telecoms and information technology sectors. Without doubt, technology is becoming an integral part of modern life. As this trend continues, the importance of understanding of, and confidence in using, technology grows. Meanwhile, there remains a wide disparity between technological aptitude, confidence, competence and literacy for those who have access – and worrying, growing Digital Divide for those without access.
3. We therefore agree with the warnings laid out by Mr Speaker in his ground-breaking speech to the Hansard Society on 27 November 2013: when he warned: *"We also need to ask searching questions about the digital divide, the haves and have-nots of the internet and the smartphone, not least because of the accumulating evidence that the Berlin Wall which undoubtedly exists in this terrain is no longer about age but relates to affluence or the lack of it. A digital democracy should not reinvent the divide in franchise of the 19th century in a new high technology form. It has to be universally inclusive and not simply a narrow Geeks nirvana."*²
4. Whilst others are certainly better-placed to discuss the merits of 'online voting' with regards to increasing turnout, this submission will concentrate on the current practical limitations of digital participation, namely current lack of access. Whilst, online voting could be an *additional* method to encourage democratic participation, until there is **universal access** to broadband, (which is free at the point of use), we warn that online voting cannot be a complete substitution or replacement to traditional methods of voting, either in person in the ballot box or by postal-vote.

LACK OF UNIVERSAL ACCESS

5. The government has set a target of 95% of UK households having access to superfast broadband (24mbps or above) by 2017, and 99% by 2018, through a combination of fixed-line, wireless and 4G mobile services. £1.2 billion is being invested in a combination of rural and urban programmes to ensure that super-fast broadband is available to those communities which may not have been served by the market alone.³
6. However, only two years ago, the House of Lords Communications Committee, in their report '*Broadband for All – an Alternative Vision*', warned that *"...there is a real risk that some people and businesses are being left behind...the spectre of a widening digital divide is a profound source of concern which requires the Government to address its origin with greater vigour than we believe is currently the case..."*⁴ The Committee concluded *"...the delivery of certain speeds should not be the guiding principle; what is important is the long term assurance that as new*

² "Towards a 21st Century Parliament" – Speech by Speaker Bercow to Hansard Society on 27 November 2013.

³ "Investing in Britain's Future" - Speech by Rt Hon Danny Alexander MP, Chief Secretary to the Treasury: House of Commons, 27 June 2013.

⁴ Lords Communications Committee Report: *Broadband for All - an Alternative Vision* –published August 2012, Summary page 5.

internet applications emerge, everyone will be able to benefit, from inhabitants of inner cities to the remotest areas of the UK.” Arqiva agrees with these conclusions. Certainly, there would be a considerable opportunity cost (both economically and socially) if, consumers who already have access to broadband were “super-served” with fibre... while millions who currently have little, or no, broadband provision remain under-served, forgotten or left behind.

7. However, broadband penetration currently varies considerably by area, as does its speed and reliability for consumers who are able and can afford to access it (Remember:- Broadband is not free at the point of use !). Likewise, Mobile connectivity remains patchy – with rural areas plagued by both full and partial ‘not spots’. Meanwhile, the roll-out of City Wi-Fi remains in its infancy – with few boroughs, cities and towns having strategic plans in place.
8. For those fortunate enough to have adequate online access the story is more encouraging. According to Ofcom, more than eight in ten households had internet access in Q1 2014. The number of adults with household internet access grew to 82%. Fixed broadband increased by one percentage point to 73% in Q1 2014, while mobile broadband rose to 8% of UK households.⁵ Two-thirds of adults aged between 65 and 74 had access to the internet in Q1 2014. The average adult in the UK spends over half of their waking hours engaged in media or communications activities⁶, with our media and communications consumption still growing. This is likely to be due to increased take-up and use of smartphones, and generally more time spent on communication activities, especially among the 16-24 age group.

ENGAGING THE DIGIALLY EXCLUDED

9. However, ensuring adequate infrastructure is only half the challenge. Sadly, the actual take-up in some areas falls far short of potential access. According to the Office of National Statistics, 14% of the UK population (over seven million people) have never used the Internet (ONS 2013) and Ofcom has found that a large proportion of these people say they do not intend to do so⁷.
10. We note the stark findings of the recent report by the Tinder Foundation which says 78% of the UK adult population currently have Basic Online Skills, leaving 11 million people still left without the basics needed to use the web in the 21st century.⁸ The report argues *“Some of these 11 million people will go online by 2020 without additional interventions...[however] if no additional activity occurred beyond current levels, we predict that 89% of the UK population will have Basic Online Skills by 2020...This means that, on current trends and using current programmes, around 6.2 million people in 2020 will not have the Basic Online Skills they need to regularly use the internet for themselves.”*
11. Paradoxically, the growth in types of communication could lead to a deepening generation gap. Twenty-five years ago, there were fewer, but more ubiquitous communications platforms; landlines and letters were the main means of person-to-person communication. Since then, methods of communication have proliferated. While the majority of younger people are engaged with these newer forms, older people use them far less, and so are less visible across a range of communication and connection platforms.⁹ There are large differences between the younger and

⁵ Ofcom – The Communications Market 2014. p

⁶ Ofcom – The Communications Market 2014. p5

⁷ Ofcom 2013a The Communications Market 2013; 2: Television and audio-visual.

⁸ A Leading Digital Nation by 2020: *Calculating the cost of delivering online skills for all - Report by Catherine McDonald, for Tinder Foundation and Go ON UK, February 2014*

⁹ Ofcom – The Communications Market 2014. p9

older age groups: 94% of those aged between 16 and 24 had access to the internet, while only 32% of those aged 75 and over had access.

12. Arqiva believe that, in addition to ensuring the infrastructure provides universal access, the government need to consider additional measures to combat digital illiteracy for adults – as well as young people.

DOES A CONNECTED-PUBLIC MEAN A DEMOCRATICALLY-ENGAGED ELECTORATE?

13. According to Ofcom: 90% of children live in a household with access to the internet through, a PC, laptop or netbook;¹⁰ whilst 65% of children use the internet ‘almost every day’.¹¹ Young people are increasingly taking part in a wide range of activities online, enabling them to discover and access a wide range of content, connect with their friends and family, as well as offering the potential to create and distribute their own content. Young people are understandably excited, stimulated and motivated by these developments. Indeed, recent research suggests that even primary age children are “highly engaged” with digital technology.¹² It is essential for policy makers and educators to continue to research and understand the many different ways that young people are using internet enabled devices - especially in the home and within social environments.
14. None of this, however, automatically translates to a “democratically-engaged” electorate. Technology is not a panacea which alone will cure voter-disengagement.¹³

KEY ROLE OF ‘TRADITIONAL’ BROADCAST MEDIA

15. Arqiva believes that serious and sustainable democratic engagement requires a combination of ‘new media’ and conventional or ‘traditional’ media. For example, we note that the UK Public Service Broadcasters all have clear remits to inform and educate society via the provision of quality news and current affairs – and they all have a key role.
16. Indeed, we note the first of the BBC’s Public Purposes include: ‘Sustaining citizenship and civil society’. This has been defined by the BBC Trust as the BBC’s providing... *“high-quality news, current affairs and factual programming that keeps you informed and supports debate about important issues and political developments in an engaging way.”*¹⁴ *The BBC will aim to help connect British democracy – and its many democratic institutions – with the public, including those who may not see parliamentary politics as central to their concerns. Its output will aim to make politics and the political process engaging and understandable to a diverse audience, and will be found throughout the schedule and on a variety of outlets and platforms.*

¹⁰ Ofcom’s Communications Market Report 2013

¹¹ This is split across; 38% of 5-7 year olds, 62% of 8-11 year olds, 87% of 12-15 year olds - Ofcom’s Children and Parents: Media use and attitudes report (Oct’12)

¹² UK Safety Internet Centre – Safer Internet Day – Have Your Say Report February 2013: 86% of 7-11s use some form of online communication tool, such as social networks and virtual worlds (56%), chat functions in online gaming (38%) or using webcams (28%). The internet is crucial for schoolwork, and 94% of 7-11s say they have little trouble finding information for their school work on the internet. Secondary age children are prolific online communicators: 96% of young people age 11-19 use some form of online communication tool, including services such as social networks (74%), emails (72%), instant messaging (68%), webcams (52%), chat functions in online gaming (45%), chat rooms (17%) and blogs (14%). Young people are also contributing to the production of online content: a quarter (24%) of 11-19s have created a website, 21% have created a game, 14% have created an app and 12% have created a blog

¹³ Indeed, previous attempts to engage the electorate through technology “gimmicks” such as text-messages from Political Parties failed to raise voter turnout in 2001

http://news.bbc.co.uk/news/vote2001/hi/english/newsid_1370000/1370872.stm

¹⁴ BBC Public Purposes:

<http://www.bbc.co.uk/aboutthebbc/insidethebbc/howweare/publicpurposes/citizenship.html>

Central to this, the BBC will develop a multimedia proposition – using BBC Parliament and its other TV and radio services as well as online and mobile offers – that will engage and inform audiences about parliamentary politics from Westminster and national Parliaments and Assemblies to local government institutions (Digital Democracy).

17. Similarly, The Digital Economy Act 2010 requires Channel 4 to participate in *“the making of relevant media content that consists of news and current affairs...”* This includes an obligation *“...to promote measures intended to secure that people are well informed and motivated to participate in society in a variety of ways; and to support and stimulate well-informed debate on a wide range of issues, including by providing access to information and views from around the world and by challenging established views.”*¹⁵
18. As public service broadcasters, the Channel 3 and Channel 5 licence holders also both contribute to the purposes of public service broadcasting set out in section 264 of the Communications Act 2003.¹⁶ The purposes of PSB are designed to secure the delivery of a wide and balanced range of high quality programmes which meet the needs and satisfy the interests of as many different audiences as practicable. The Act specifically states *“...that those services (taken together) provide, to the extent that it is appropriate for facilitating civic understanding and fair and well-informed debate on news and current affairs, a comprehensive and authoritative coverage of news and current affairs in, and in the different parts of, the United Kingdom and around the world.”* The Act also requires licence holders to provide *“a sufficient quantity of programmes that reflect the lives and concerns of different communities, and cultural interests and traditions within the United Kingdom, and locally in different parts of the United Kingdom.”*¹⁷
19. Unlike Broadband which is not free-at-the-point-of-access, the Public Service Broadcasters are able to reach mass audiences partly because they remain free-to-air, and universally available. Certainly, when the House of Lords Communications Committee examined the criteria of Public Service Broadcasting in 2009, a number of witnesses noted a distinguishing characteristic of public service broadcasting was *universality of access.*¹⁸ Arqiva strongly agrees with this principle.
20. Indeed, as the transmission contractor for *all* UK terrestrial television services, Arqiva had the responsibility for implementing the digital switchover at all 1154 transmitter sites across the UK. Importantly the three largest news organisations BBC, ITN (who provide news for ITV and Channel 4) and Sky News – are all currently available on Freeview - the UK’s most popular TV platform, watched in almost 20 million homes (75% of all TV homes) and the sole television platform in almost 11 million homes.¹⁹ Terrestrial television will continue to grow:- The DTT platform (Freeview and YouView combined) is set to account for 40% of the country’s primary TV homes in

¹⁵ See Channel 4’s remit in Digital Economy Act 2010, Section 22

<http://www.legislation.gov.uk/ukpga/2010/24/section/22>

¹⁶ <http://www.legislation.gov.uk/ukpga/2003/21/section/264>

¹⁷ According to Ofcom, ITV “provides competition for the BBC in the provision of universally accessible UK television news (with 18.8m viewers each week watching Channel 3’s UK bulletins, compared to 33.5m on the BBC); and deliver plurality in news coverage for the Nations and regions of the UK, rated by nearly four-fifths of viewers (79%) as an important aspect of public service provision.” Meanwhile, Channel 5’s news programming received a higher proportion of viewers from DE socio-economic groups than news on the other main PSB networks. Although the impact of its programming among this group may be limited by audience size, its main bulletin’s viewing figures – a nightly average of 700,000 viewers in 2010 – are broadly in line with those obtained by Channel 4 News (c.800,000). [Source: Ofcom Report – “Licensing of Channel 3 and Channel 5” – 23 May 2012]

¹⁸ Lords Communications Committee Report: “Public service broadcasting: short-term crisis, long-term future?” (March 2009)

¹⁹ BARB Establishment Survey, Q1 2013

2020 (12 million)²⁰. DTT broadcasts 95% of the country's most watched programmes²¹ subscription-free. Indeed, DTT delivers bigger audiences for public service channels than any other platform – accounting for 61% of viewing among terrestrial viewers (44% in cable satellite homes). DTT is highly valued by UK consumers and looks set to remain so by 2020 and beyond.

21. There is certainly some appetite for political programming on broadcast media. For example, in 2010, for the first time in British politics, the leaders of each of the three main parties took part in Prime Ministerial Debates during the general election campaign. Each debate ran for ninety minutes, and was broadcast weekly by ITV, BSkyB and the BBC over three successive Thursday evenings, starting on 15 April. The first half of each debate focused on a particular topic - domestic affairs, foreign affairs and the economy respectively - with the second half allowing for a discussion of general issues, with questions picked from the audience. They took place in various locations across the UK – the first in Manchester, the second Bristol and the final debate was in Leicester. Whether owing to their uniqueness, there was considerable advance-publicity, post-event analysis and comment on both national and social media. They impacted on the public consciousness²² – and changed the course of the campaign, even if their actual impact on the election result remains debatable. They were undeniably 'event television' and delivered the broadcasters large viewing audiences – and there is an argument that they should become a permanent feature of British elections and our democracy – benefitting viewers and voters alike.
22. The first debate was the most popular, with a *peak* audience of 9.9 million viewers, as opposed to 4.6 million for the second and 8.3 million for the final debate.²³ The *average* viewing figures across all the stations they were broadcast on were 9.4 million, 4 million and 8.1million for each debate respectively. It's worth noting that the second debate on Sky had significantly fewer than the other two. As Stephen Coleman et al note "...*this is not surprising considering the odd decision to air it live on non-terrestrial channels only*"²⁴ Indeed, the viewing figures produced by BARB showed that the viewing figures for the debate were only 2,212,000 viewers watching it on Sky News, 584,000 on Sky3 and 1,388,000 watching on the BBC News Channel and/or the later repeat shown on BBC Two at 23:30²⁵. It was also simulcast on BBC Radio 4.
23. Since then, we have witnessed continued interest in the debate format. An interesting case study is the LBC "Nick v Nigel" (ie: Clegg v Farage) Europe debate on 26 March 2014. According to BARB, approx. 1.3million watched live on Sky News and BBC News – with an average of 577,000 across the hour. Sky's figures were up 32% on the same day the previous year. Sky News's total audience 15.00-23.00 during which the channel was focussing on the LBC debate was 2.1m. The BBC News channel achieved 2.9m over the same time period.
24. More recently, we note that the first independence debate between Scotland's First Minister Alex Salmond and Better Together leader Alistair Darling was broadcast on STV on 5th August and was watched by 1.2m TV viewers. It attracted more than a third of viewers (36%) in Scotland, with STV claiming it the best-performing political debate in the country for more than 10 years. However, this first debate was also salutary lesson for those who believe the future is only 'new' media:- STV, (the ITV

²⁰ 3 Reasons LLP, Spring 2013 Market Model

²¹ BARB viewing figures, Jan-Mar 2013

²² Ed. Stephen Coleman, "Leaders in the living room: The Prime Ministerial Debates of 2010: evidence, evaluation and some recommendations," 2011, Reuters Institute

²³ Source: General Election 2010 - Commons Library Research Paper RP10/36

²⁴ Stephen Coleman, Fabio Steibel and Jay G Blumler, "Leaders in the Living Room" p17

²⁵ http://news.bbc.co.uk/1/hi/uk_politics/election_2010/8639485.stm

licence holder), controversially turned down requests by the BBC and Sky News to simulcast the debate. Consequently, the first STV debate was *only* shown on TV in Scotland and many viewers who tried to watch it outside of the country on the STV Player were unable to because of technical problems. In the event, a further 500,000 viewers across the UK attempted to watch the debate online as STV's website struggled to cope with demand and STV was left blaming 'unprecedented demand' for the online crash.

25. Fortunately, the second debate on 15th August 2014 was universally-available and broadcast free-to-view by the BBC across the whole UK. Overnight viewing figures suggested the average audience was a total 2.3 million for the broadcast via BBC1 in Scotland and BBC2 across the rest of the UK. BBC1 Scotland attracted 843,000 viewers – a 37% share of the people watching television in Scotland at the time. In addition, there was with a further 1.7 million viewers, a 6.8% share of the audience, on BBC2 between 8.30pm and 10pm. An average audience of 104,000 watched a Sky News simulcast of the debate, 52,000 watched on the BBC News channel and 60,000 watched a later repeat on STV. Analysis by the Robert Gordon University in Aberdeen found 64,000 tweets were sent during the 90 minute debate, compared to 50,000 tweets during the two hour STV debate.²⁶
26. Looking to the General Election 2015, whether the leadership debates are again produced and broadcast by BBC, ITV and Sky News - or the roster is widened to include Channel 4 or others... *any debates should be accessible to everyone – on all platforms and free at the point of consumption.*
27. Emerging broadcasting and distribution technologies - including red button, HD, IPTV, and mobile could also provide added benefits to the audience. Arqiva is proud to collaborate with the BBC and others in the industry, to continue to deliver improvements to the UK-wide distribution of public service content. For example, BBC News HD which is offered to all digital television platforms that carry HD channels.²⁷
28. There is no doubt that, in recent years the UK's broadcasters have provided engaging cross-platform innovative reporting and digital content and services available on a wide range of digital platforms and devices, such as digital television, digital radio, mobile devices and the internet. Arqiva believes that harnessing such new technology for election-specific or politics programming or to improve our political engagement, civic and democratic understanding could be for the benefit of audiences and citizens alike.

²⁶ <http://www.bbc.co.uk/news/uk-scotland-scotland-politics-28934691>

²⁷ Ofcom Press Release - New HD channels on terrestrial TV – 16 July 2013