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UK Demand for Hyperlocal Media

Research Report

April 2013

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FOREWORD AND INTRODUCTION BY NESTA

Introduction to our report

In March 2012, we published 'Here and now',[1] the first landscape review of hyperlocal media in the UK. Since then, we have continued our programme of practical experimentation and research, called 'Destination Local'. Our objective is to address the gaps in knowledge and understanding about hyperlocal media which were identified in 'Here and now'. We believe that it is only by developing a strong evidence base that the potential of the hyperlocal sector in the UK can be properly understood and encouraged. Our approach has been to focus on critical information needed by practitioners, potential funders/investors in the sector, as well as policymakers.

One area of research which we believe is of critical importance to stakeholders concerns the demand for and the use of hyperlocal media. This is of particular interest given the rapid take-up of connected devices such as smartphones and tablets, which enable citizens and audiences to consume hyperlocal media in new ways and may help to drive new business models towards long term sustainability.

We commissioned some consumer research with Kantar Media using a nationally-representative Omnibus face-to-face survey in January 2013 to address key questions concerning the nature of demand for hyperlocal media across the UK. More than one definition of hyperlocal media has been proposed by industry, practitioners and academics, but we believe that our working definition of hyperlocal set out in 'Here and now' is robust and has therefore been used to define the scope of the survey:

"Online news or content services pertaining to a town, village, single postcode or other small, geographically defined community".

We think that this definition is appropriate given the different genres of content which people consume on a range of connected devices. It covers a number of services and content genres beyond news and includes online services provided by organisations with a background in local broadcasting, local newspapers and local authorities ('traditional hyperlocal'), as well as independently-owned hyperlocal news sites and blogs ('online native hyperlocal') as well as local, social media.

We believe that this research examines the use of hyperlocal media in more detail than previous studies. We hope that it is useful in assessing the scale of its use, and illustrates barriers to, and drivers for its consumption. We have designed this survey so that it can be easily repeated by others in the future.

While significant audience reach is important, we also acknowledge that a hyperlocal media service does not necessarily need large numbers of users for it to generate public value.

Our findings show that people consume hyperlocal media from a range of sources, aided by the take-up of connected devices including smartphones and tablets.

The majority of adults in the UK are interested in news and information about the immediate area in which they currently live, and overall 45 per cent of all UK adults have accessed some form of hyperlocal media. Overall, 66 per cent of those who use at least one device such as a computer, mobile phone, or tablet to access hyperlocal content, said they accessed it on at least one of their devices on at least a weekly basis (equivalent to 30 per cent of UK adults).[2] In total, 35 per cent of

[1] Radcliffe: Here and Now: UK hyperlocal media today, 2012

[2] This number is derived from survey responses and relates to the most frequently used device for consuming hyperlocal media out of any of the devices used by the respondent which are listed in the survey (smartphone, non-smartphone mobile phone, desktop computer, laptop/notebook, desktop computer and tablet computer). This means that examining use on a

UK adults have accessed hyperlocal media in relation to where they currently live, though smaller numbers report using it for a place where they were visiting, where they work or where they currently work. We find that use of hyperlocal media has been stimulated by the increasing take-up of connected devices such as tablets and smartphones - over a half (55 per cent) of those who use more hyperlocal media more now said they did so because they now had a smartphone and/or a tablet.

While much of the focus of much industry and academic discussion about hyperlocal media has been on stand-alone 'online native' and mobile services such as blogs, hyperlocal news and social media, 65 per cent of audiences are using sources of news and information about small defined geographic areas from traditional organisations such as local broadcasters, local newspapers, local authorities and directories. We know from other research that there is a new breed of growing media businesses that offer hyperlocal media content, but this research identifies that audiences tend towards using traditional media brands for their hyperlocal consumption. We also note that the respondents may have attributed a service such as a 'blog' to another category such as, 'newspaper/magazine websites or app', especially if this service also produces a print edition. Our research finds that hyperlocal media users are more satisfied with all sources of news and information about their local area[3] than non-hyperlocal media users. This may suggest that traditional media might need to provide more granular content to remain competitive.

Search engines are also used by over half (56 per cent) of those who use hyperlocal media. In contrast, fewer than a quarter (24 per cent) say that they use hyperlocal media from online native sources while 17 per cent of hyperlocal media users use social media, such as Facebook, Twitter or a blog to consume news or information about a locality.[4]

The results of the survey suggest that the rationale for hyperlocal media consumption appears to be primarily about access to functional information, with half (50 per cent) of hyperlocal media users accessing weather information and 41 per cent consuming local breaking news. Information about local public services such as local social services and schools is accessed by fewer people, although for some of these groups, these subjects are very important.

Overall, the offline impact of hyperlocal media beyond the provision of news and information may be relatively limited. For example, relatively few say that their use of hyperlocal media makes them feel they have influence in making decisions about the local area in which they live (29 per cent) and 21 per cent of hyperlocal media users said that their use of hyperlocal media had resulted in friendships in their local area. In short, the perceived benefit of hyperlocal media in developing local social capital appears secondary to users getting useful and timely information about their local area.

Our findings suggest that partnerships between different sectors of hyperlocal media, and use of geotagging may be important for improving the visibility of some of forms of hyperlocal media

Search engines are a key portal through which people access hyperlocal media, perhaps unsurprising, given that much of the information people are seeking is relatively functional such as weather or news. Given this, we believe that accurate geotagging of content and the appropriate use of search engine optimisation are important in ensuring that relevant hyperlocal content is easy to find. To this end, we also note the role search engines can play in ensuring that geo-tagged content is fully reflected in results. There is some concern among hyperlocal practitioners that search

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single device by device basis results in lower level of at least weekly use. For example, 29 per cent of hyperlocal media users with smartphones said they used their smartphone to access hyperlocal content on at least weekly basis (equivalent to 13 per cent of UK adults).

[3] Which may include non-hyperlocal sources

[4] Respondents were able to select multiple sources of hyperlocal media, meaning for example, that those who reported using search engines may also use other sources.

engines may filter out search results linking to hyperlocal media content which, although providing public value does not have the means to compete commercially for advertising space with big brands. This may be an issue of as much concern to search engines as it is to practitioners or policymakers.

Our findings suggest that organisations with a background in traditional local media, such as local newspaper groups and local broadcasters, in addition to local authorities, retain a key role in providing people with news and information about the areas in which they live, work, or travel through. The survey suggests that this is where audiences look to when accessing hyperlocal media content. We note that there are already collaborations taking place between local newspaper groups and others in the hyperlocal media sector. For example, the 'Birmingham Mail' website links to hyperlocal blogs. At this point, we believe that further collaborations between established local media brands and those creating hyperlocal content on social media or via stand-alone services may uncover valuable ways for audiences to reach hyperlocal content, as well as testing new, more sustainable business models.

The findings of the survey underline the importance of local media sources being up-to-date, accurate and reliable and trustworthy. Audiences access different genres of content at different frequencies. For those seeking to offer local news, weather and sport, frequent updating is important for maintaining attention. Convenience and free content are key drivers behind hyperlocal media consumption. Therefore, hyperlocal outlets are likely to struggle to attract and retain audiences if they are unable to offer an easy to access, and free-to-use service.

Conclusion and next steps

In conclusion, we believe this research is a valuable contribution to the on-going collection of a solid evidence base regarding hyperlocal media and we would like to thank Kantar Media for their help and assistance throughout the project.

We intend to complement and build upon the findings of this work with other pieces of research we are intending to publish over the coming months, including our findings from the hyperlocal services we have funded in 'Destination Local'. Through our work and our partnerships with other organisations active in this area we believe that we can help to make the UK one of the most attractive environments for hyperlocal media.

Jon Kingsbury

Director, Creative Economy Programme

Nesta

UK DEMAND FOR HYPERLOCAL MEDIA

1.0 KEY FINDINGS

1.1 Who is interested in and who is using hyperlocal media?

The majority (66 per cent) of adults in the UK are interested in news and information about the immediate area in which they currently live. Overall, 45 per cent of UK adults (53 per cent of those with internet access) have (ever) accessed some form of hyperlocal media*. *Among those who use the hyperlocal media sources listed in the survey, at an overall level, one-third use them every day (34 per cent) and a further one-third on a weekly basis (33 per cent). The definition used in the survey for 'hyperlocal media' was a broad one, designed to capture the use of any local area news or information that is viewed online, either via a computer or laptop, mobile phone or tablet. This also captured hyperlocal media use across multiple locations, including the immediate area in which people live, the area where they work, an area where they may have previously lived but no longer live and areas people are visiting.

Thirty-five per cent of UK adults (42 per cent of those with internet access) report using hyperlocal media for the immediate area in which they currently live. Eighteen per cent of UK adults (21 per cent of those with internet access) use it for a place that they are visiting where they want to access specific local information. Hyperlocal media is also accessed for other settings. Eight per cent use hyperlocal media for the area where they work, and 8 per cent for an area where they previously lived but no longer live in.

Those with internet access and with devices such as mobile phones, computers or tablets are more likely to be 'very interested' in local news and information. Compared to those who do not use hyperlocal media, a greater proportion of hyperlocal media users have internet access.

Use of hyperlocal media has been stimulated by the increasing take-up of connected devices. Overall, nearly two-thirds (66 per cent) of those who use hyperlocal media use a device such as a mobile phone, computer or tablet to access hyperlocal content at least on a weekly basis. Those who use smartphones and tablets are the most likely to use them on a daily basis (twenty-nine per cent of users of each device use these to access hyperlocal media every day). Those who are using mobile phones that are not smartphones access it far less often, with three-quarters not using their phone at all to access this kind of information. Over one-half (55 per cent) who state they use hyperlocal media more now than two years ago said this was due to them getting a smartphone and / or a tablet.

Overall, 28 per cent of hyperlocal media users have used an app to access hyperlocal media. A greater proportion of those who use hyperlocal media in an area where they work use apps compared to those who use hyperlocal media in other settings.

1.2 Sources of hyperlocal media used

***At a UK-wide level, search engines are the most common way for people to get hyperlocal content*.** Fifty-six per cent of hyperlocal media users report doing this. In order to understand what variation there might be in the use of different types of hyperlocal media, an analysis was done of the use of hyperlocal media across several broader categories. These categories included 'traditional', 'native-online hyperlocal' services (which are unlikely to have an offline presence) and 'social media'.

Traditional, established providers of local information such as local newspaper or magazine and radio/TV companies and local authorities remain important for hyperlocal media. Websites and apps of traditional local media providers such as newspapers or magazines (used by 27 per cent of hyperlocal media users) and local authorities (used by 30 per cent) seem to be important sources of hyperlocal content. There is little evidence of stand-alone providers making a major impact across the UK as a whole.

1.3 What is driving the use of hyperlocal media?

***The rationale for hyperlocal media consumption appears to be primarily about getting functional information*.** Fifty per cent of hyperlocal media users get information about local weather, and 41 per cent information about local breaking news. Other popular topics include information on local entertainment (32 per cent), restaurants, clubs or bars (30 per cent) and community events (27 per cent). The mix of topics selected indicates that hyperlocal media is about more than just getting news.

Convenience and the fact that sources are free are key drivers behind choice of hyperlocal media source. Key reasons given as to why people choose their hyperlocal sources include convenience (59 per cent), its availability for free (45 per cent), and their interest in the local area (32 per cent). It is also used by some because it is perceived to be more up to date, more accurate and reliable and more comprehensive than other sources of local information. Hyperlocal media users also say that having to pay for hyperlocal media (49 per cent), and concerns about convenience (26 per cent) and being up to date (18 per cent) would limit their use of a source of hyperlocal media.

While users agree hyperlocal media keeps them informed, fewer agree that it gives them local influence or helps them build relationships. The use of hyperlocal media for functional information appears consistent with the finding that while over half (56 per cent) hyperlocal users felt that their use of local websites and apps made them more informed about their neighbourhood. Only 29 per cent agree that their use of hyperlocal services means that they have influence in the decisions made about the area in which they live. About one-fifth (21 per cent) feel that use of hyperlocal services has resulted in friendships in the local area.

1.4 Frequency of using hyperlocal media

Frequency of use varies with the type of content users get information for. Unsurprisingly, time-critical content such as local weather, local sports and local news is most likely to be used at least daily by those who use it. One-half of all those seeking information on the local weather get this information every day. Information sources covering local public services (e g. education, social services, planning) are among the genres which tend to be used less frequently.

1.5 The role of social media in hyperlocal media

Social media is used by 17 per cent of hyperlocal media users as a source of hyperlocal content. Users of social media sources are more likely to be using them every day for hyperlocal media (39 per cent for a person followed on Twitter and 36 per cent for a person or organisation followed on a social networking site). In contrast, one of the most frequently cited sources, the app or website of a newspaper or magazine is only used every day by 15 per cent.

1.6 Demographic dynamics

Overall, it appears those who are more affluent and in the 35-54 age group are more likely to consume hyperlocal media. Fifty-two per cent of 35-54 year olds have used hyperlocal media compared to 36 per cent of those aged 55 and over. Those who own a home with a mortgage, are ABC1 and perhaps can afford connected devices are more likely to use hyperlocal media. Consumption of hyperlocal media may also be driven by life cycle factors. The 35-54 age group is more likely to use hyperlocal media than other age groups, and from a greater number of source types. This is potentially because of the distinctive needs people this age group has for local services e.g. schools, council services etc. There are no significant differences between urban and rural populations.

There are some differences in those who are most interested in local news and information and those who are using hyperlocal media. Those people who are most interested in general local news or information (i.e. not just hyperlocal) tend to be older, have lived in an area for a long time (more than 20 years) and own their property outright. Unlike those who are most interested in their local area, a higher percentage of those who rent privately use hyperlocal media.

Different topic genres appeal to different age groups, suggesting that life-stage factors influence the consumption of hyperlocal media. Younger respondents (16-34) place a greater importance on information about restaurants and sports than those aged 35-54, while those aged 55 and over place more emphasis on local arts and cultural activities than the youngest age group. Those in the 35-54 age group are more likely to choose schools and local education information as their most important topic. Local job openings and other local government activity are more important among the C2DE group than ABC1s.

Those who are more likely to use hyperlocal media in general (for example ABC1s and those who are married or living as married) tend to use hyperlocal media for a greater range of topic areas.

1.7 Satisfaction with local and hyperlocal media

Overall citizen satisfaction with local media appears high. Just over three-quarters feel that local media gives them 'some' or 'all' of the information that matters to them. Among hyperlocal media users this is even higher (88 per cent). Of the attributes rated, 'accuracy and reliability', 'trustworthy' and being 'up to date' are rated as the most important factors when choosing a local news and information source. Local sources in general score well on these attributes. The biggest gaps between how important certain attributes are and how they are perceived to perform is with 'accuracy and reliability' and 'trustworthy' (the attributes ranked as most important) and the smallest gap is with information being 'comprehensive' (the least important attribute overall).

Among hyperlocal media users, there is a good level of satisfaction with the sources they use. Three-quarters of all hyperlocal media users score their sources seven or more out of ten for satisfaction.

Lack of visibility and concerns about quality are <u>not</u> inhibiting the uptake of hyperlocal media among non-users of hyperlocal media. Among those not using hyperlocal media, apart from lack of internet access (cited by 27 per cent of non-hyperlocal users), the most frequent reasons given for people not using it are lack of interest in their local area (17 per cent of non-hyperlocal users) and a belief that they already have enough information from other sources (23 per cent).

1.8 Participation in hyperlocal media

Relatively small numbers of hyperlocal users have either contributed towards or created content about their local area. Just over one-fifth of hyperlocal users have ever 'contributed' to hyperlocal media (i.e. by posting a comment, or uploading a photo) while 10 per cent of hyperlocal users have created content about their local area from scratch. Those more likely to contribute content are those who have tablets and smartphones.

2.0 WHO IS INTERESTED IN AND WHO IS USING HYPERLOCAL MEDIA?

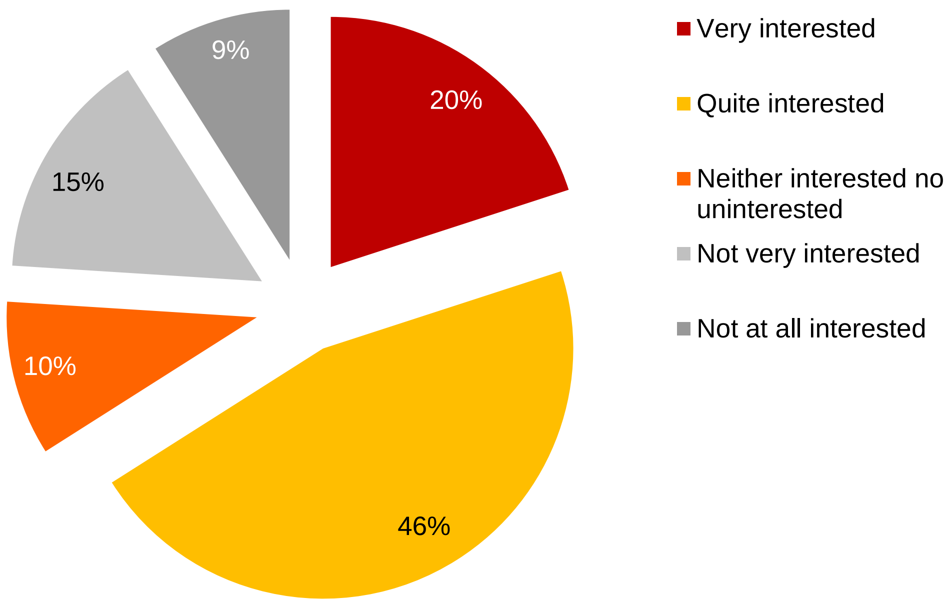
2.1 Interest in local news and information

Respondents were asked about their general interest in local news and information for the immediate area in which they live.

The majority (66 per cent) of adults in the UK are interested in local news and information about the immediate area in which they currently live

There is significant interest in local news and information in the United Kingdom. Sixty-six per cent state that they are either 'very interested' or 'quite interested' in local news or information. Of these, one-fifth are 'very interested'. In comparison to this, just 24 per cent claim to be either 'not very interested' or 'not at all interested'. In addition to this, 29 per cent of the population read a local newspaper nowadays, indicating further their interest in local media.

Figure 1- Interest in news or information about the immediate area in which respondents currently live



Base: All adults in the UK (2,248)

Q2 How interested are you in news or information about the immediate area in which you currently live, that is your town, village or local neighbourhood?

Levels of interest vary according to age, life-stage and social-demographic factors

The more senior age category (those aged 55 and over) is more likely to be 'very interested' in local news and information with 25 per cent of those in this age group 'very interested' compared to only 11 per cent of those aged 16-34. Twenty-five per cent of those who are retired are 'very interested', compared to 19 per cent of those who are in full-time work.

The higher social grade categories (ABC1) are more likely to be either ‘very’ or ‘quite’ interested in local news and information, with 71 per cent of ABC1 respondents answering in these categories compared to 60 per cent of C2DE respondents. By contrast, respondents citing little or no interest in hyperlocal content show a significant skew towards the C2DE social grouping (29 per cent of C2DE answered ‘not very interested’ or ‘not at all interested’ compared to 20 per cent of ABC1).

There are marginally more women than men who are ‘very interested’ in local news and information (22 per cent of women compared to 18 per cent of men). Those who are single are less likely to be ‘very interested’ (10 per cent compared to an average of 20 per cent).

Establishing links between interest in local news and information and the length of time lived in an area

There is some relationship between keen interest in local news and information and the length of time lived in a given area. This is most accentuated where respondents have lived in an area for a very long time. Twenty-six per cent of those who have lived in their current area ‘for more than 20 years’ are ‘very interested’ in local news and information, compared to just 7 per cent of those who have lived in their current area for ‘less than one year’. It is important to note, however, that there is not a linear progression in this relationship (for example, the per cent of those who are ‘very interested’ in their local area goes down to 11 per cent for those who have lived in their area for ‘four to five years’).

Those who own their house outright and those that have a mortgage are ‘very interested’ in local news and information

Tenure also impacts this relationship. Twenty-six per cent of those that own their house outright and one-fifth of those that have a mortgage are ‘very interested’, compared to 12 per cent of those who rent privately.

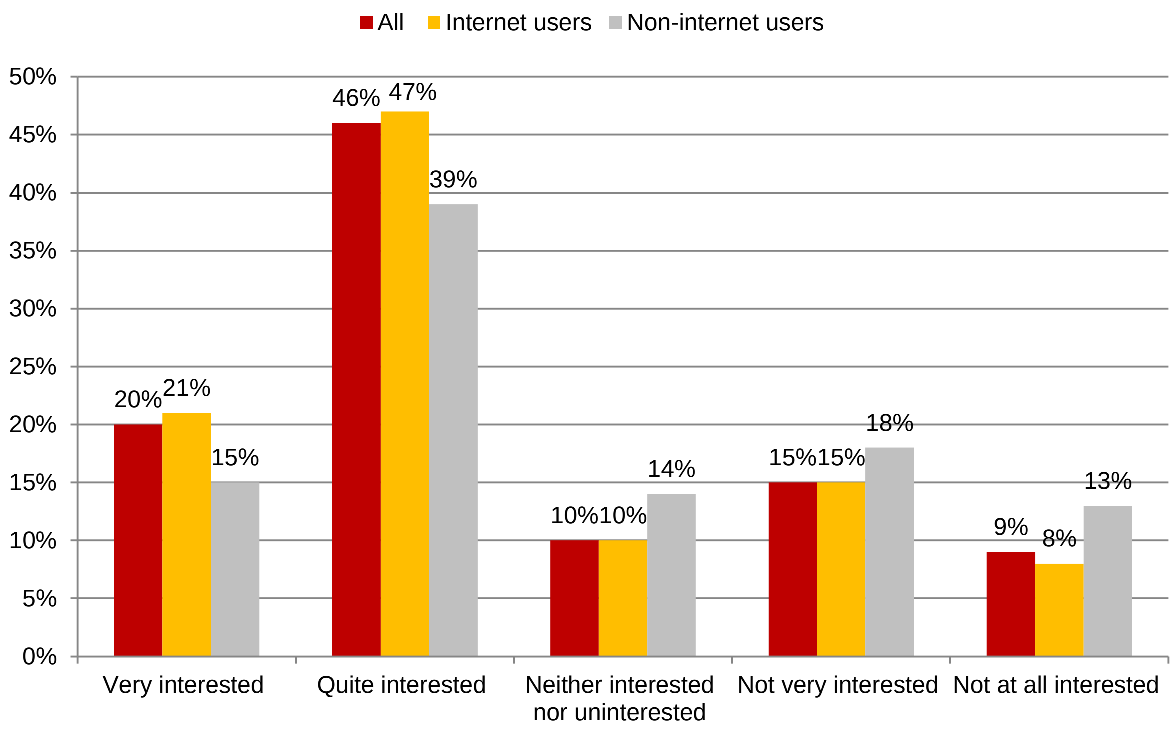
There is no general distinction between urban and rural areas in levels of interest; however, those in Greater London are less likely to be ‘very interested’

Among regions, it is difficult to draw any significant conclusions due to the size of the bases in the survey, however, one interesting finding is that those in Greater London are less likely to be ‘very interested’ in local area news and information (58 per cent say they are ‘very interested’ or ‘quite interested’ compared to the UK average of 66 per cent). At an overall urban level, however, there are no significant differences between the urban and rural populations surveyed.

Those with internet access and connected devices are more likely to be interested than those without

Those with internet access are more likely to be ‘very interested’ in local news and information compared to those who do not have internet access (21 per cent of those with internet access versus 15 per cent of those without). Those who personally use a device such as a mobile phone, computer or tablet computer are more likely to have an interest than those who do not. Among those who have one or more of these devices, 68 per cent are either ‘very interested’ or ‘quite interested’ in local news and information, compared to 52 per cent of those who do not have one of these devices.

Figure 2 – Level of interest in area by internet access



Base: All adults in the UK (2,248)

Q2 How interested are you in news or information about the immediate area in which you currently live, that is your town, village or local neighbourhood?

2.2 Use of hyperlocal news and information

Overall, 45 per cent of respondents (53 per cent of those with internet access) have accessed some form of hyperlocal media, for the immediate area in which they currently live, a place they are visiting, the area where they work, or an area where they have previously lived. The definition used in the survey for 'hyperlocal media' was a broad one, designed to capture the use of *any* local area news or information that is viewed online, either via a computer or laptop, mobile phone or tablet *ever* used across multiple locations. As such, this definition is broader than the question capturing local newspaper readership (which asked which newspapers are read nowadays).

Hyperlocal media use is highest in the 35-54 year old age group
In individual age categories, the penetration of hyperlocal media use is highest for 35-54 year olds (52 per cent of 35-54 year olds have used hyperlocal media), followed by 16-34 year olds (49 per cent of this group have used hyperlocal media) and then by those aged 55 and over (35 per cent have used hyperlocal media). Fifty-four per cent of those who work full-time have used hyperlocal media (compared to 46 per cent of those who are not working and not looking for work, and 41 per cent of those who are not working but are looking for work).

Hyperlocal media use is higher among ABC1s than C2DEs
Hyperlocal media use is significantly higher among ABC1s (56 per cent of ABC1s report using hyperlocal media compared to 34 per cent of C2DEs). There are no significant differences between gender. A higher percentage of those who are married or living as married use hyperlocal media (50 per cent of this group) compared to those who are single (44 per cent of this group) or widowed, divorced or separated (31 per cent of this group). Those with children at early school age (aged six to nine) are the group with the highest hyperlocal media use (56 per cent of this group) compared to 43 per cent of those with no children in the household. Compared to single households, households

with three or more people have a higher proportion of hyperlocal media users (50 per cent of those households with three people and 50 per cent of those households with four or more people compared to 32 per cent for single households).

Hyperlocal media use is similar across the UK, however, use is highest in the South West (53 per cent of respondents in this area have used hyperlocal media) and lowest in the North West (39 per cent of respondents in this area). There is no significant difference between those who live in an urban and those who live in a rural area.

Those who rent property from the local authority are less likely to use hyperlocal media

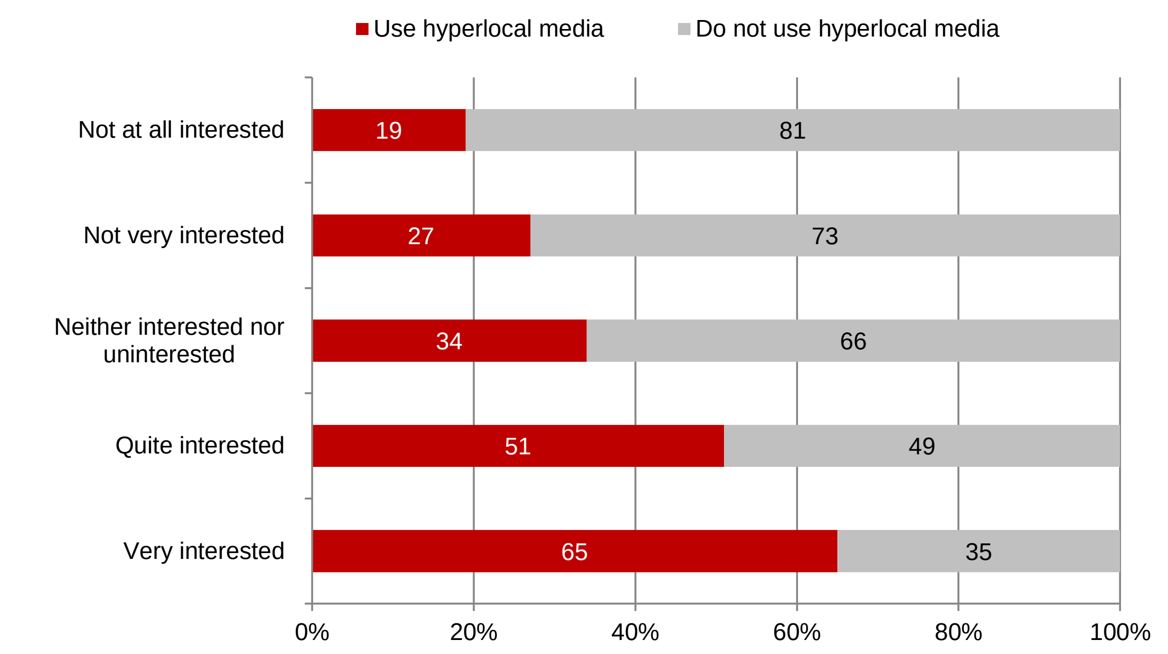
Hyperlocal media use is lowest among those who rent local authority property (only 27 per cent of this group have used it). Use is highest among those who have a mortgage (54 per cent of those with a mortgage have used it), followed by those who rent privately (52 per cent). A lower percentage of those who own their property outright use hyperlocal media (41 per cent).

As with interest in local media in general, there is some relationship, but not a linear one, between the length of time lived in an area and the use of hyperlocal media

In terms of the relationship between how long someone has lived in an area and their hyperlocal media use, the group with the lowest percentage of hyperlocal media use are those who have lived in their area for more than 20 years (only 39 per cent of this group had used hyperlocal media). The next lowest proportion of users are those that have lived in their current area for less than one year and those that have lived in their area for four to five years (42 per cent of those in each category). Use is highest among people who have lived in an area for two to three years (53 per cent) or six to ten years (53 per cent). The 55 and over age group is more likely to have lived in the same area for more than 20 years than both 16-34 and 35-44 age groups. This may explain why the percentage use of hyperlocal media dips among those who have lived in an area for an extended length of time.

A much clearer relationship exists between how interested someone is in local area news and information in general and their use of hyperlocal media. Sixty-five per cent of those who are 'very interested' in news or information about their local area use hyperlocal media compared to only 19 per cent of those who are 'not at all interested'.

Figure 3 – Level of interest in area by hyperlocal media and non-hyperlocal media users



Base: All adults in the UK (2,248)

Q2 How interested are you in news or information about the immediate area in which you currently live, that is your town, village or neighbourhood?

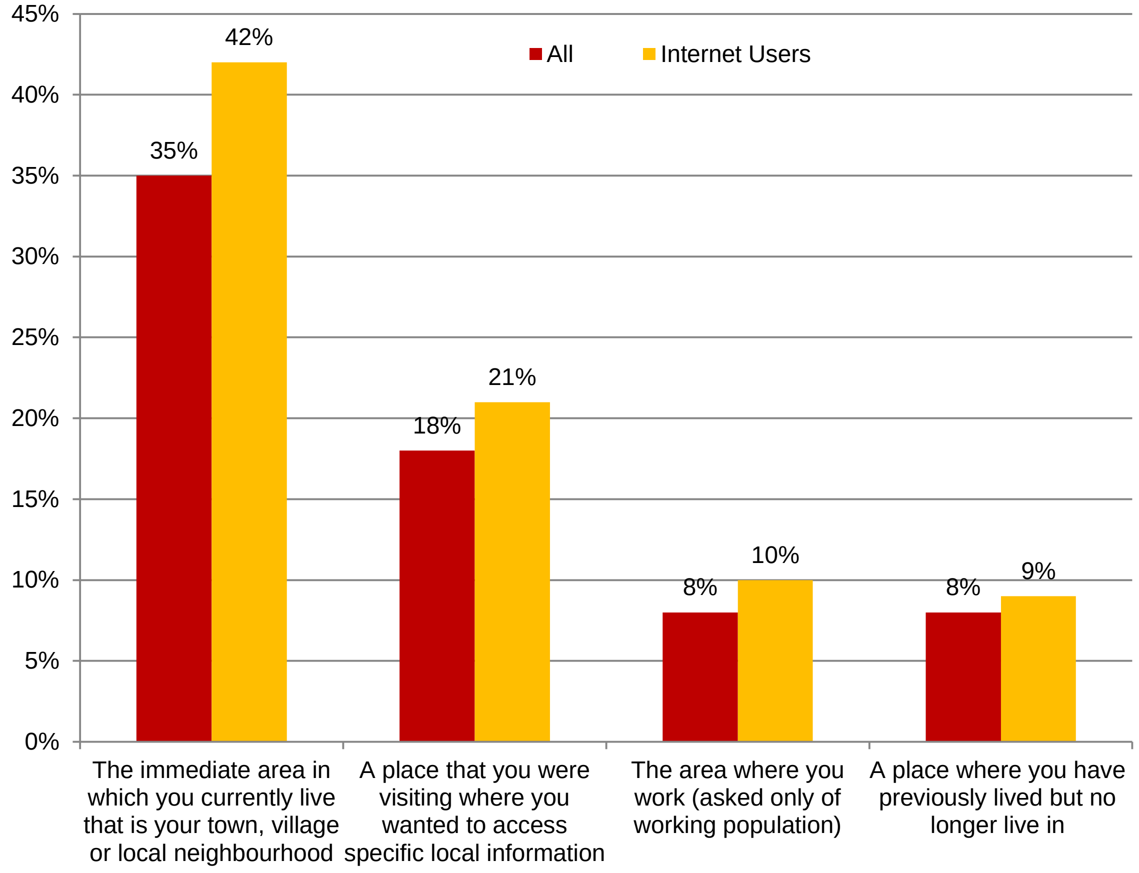
A lower level of interest among those that read local newspapers

Whilst not being significantly lower in terms of their use of hyperlocal media overall, the percentage of those who read a local newspaper and do not use hyperlocal media is higher than for those who read other newspapers (for example, 57 per cent of those who read a local newspaper nowadays have not used any hyperlocal media compared to 34 per cent of those that read a Sunday Quality paper, 40 per cent of those who read a Daily Quality and 48 per cent of those that read a Daily Mid-Market paper).

2.3 The context in which hyperlocal services are used

By far the highest proportion of hyperlocal media access is for the immediate area in which people currently live. Thirty-five per cent of the total sample (and 42 per cent of those with internet access) indicate they access local information for this area. Eighteen per cent of the total sample (and 21 per cent of those with internet access) access hyperlocal media content for a place they are visiting where they want access to specific local information. Eight per cent use hyperlocal media for the area where they work (10 per cent internet users), and 8 per cent for a place where they previously lived but are no longer living (9 per cent internet users).

Figure 4 – Areas for which hyperlocal media is used



Base: All adults in UK who are hyperlocal media users (939)
Please note: The area where you work was asked only of the working population

Q4 Have you ever accessed any local area news or information online, on your computer or laptop, mobile phone or on your tablet for any of the following?

2.3.1 Hyperlocal media use for the area where people currently live

Thirty-five per cent of respondents (and 42 per cent of those with internet access) state they use hyperlocal media for the immediate area in which they currently live.

Use is higher among 35 to 44 and 55 to 64 year olds and among ABC1s

Among those who access hyperlocal media for the immediate area in which they currently live, use is higher in the 35 to 44 year old and 55 to 64 year old categories compared to the 16 to 24 year old age group and those aged 65 and over (42 per cent of 35 to 44 year olds, 43 per cent of 55 to 64 year olds compared to 32 per cent of 16 to 24 year olds and 19 per cent of 65 and over). There are no significant differences by gender. Use of hyperlocal media for this setting is higher among ABC1s compared to C2DEs (43 per cent of ABC1s compared to 28 per cent of C2DEs).

Use is higher for those who are married or living as married

Compared to those who are single or widowed, divorced or separated, use is higher for those who are married or living as married (39 per cent compared to 32 per cent single and 28 per cent widowed, divorced or separated). Those who are retired are less likely to use hyperlocal media for this setting (only 24 per cent of those who are retired use hyperlocal media for the current area in which they live). Those with children aged zero to 15 are more likely to use hyperlocal media for the current area where they live compared to those with no children (an average of 42 per cent of those with children versus 33 per cent). Those living alone are less likely than those in larger households to use hyperlocal media for this setting (27 per cent of those in a household of one person versus 37 per cent in those with two, 37 per cent in those with three and 39 per cent in those with four or more).

Those with a mortgage are more likely to use hyperlocal media for their current area

In line with general hyperlocal media use, those with a mortgage are more likely to use hyperlocal media for their current local area (42 per cent compared to 33 per cent of those who own their property outright and 22 per cent of those who rent their property from the local authority). Use among those who rent property privately is higher than those who rent from the local authority (39 per cent of those who rent privately) and is higher than those who own their property outright.

There are some regional variations in hyperlocal media use

In terms of regional use, hyperlocal media use for the current vicinity is highest in the South West (42 per cent of those that live in the area) and Wales (40 per cent – though care must be taken given a low base) and Northern Ireland (40 per cent). By contrast, use is lower in the North West (28 per cent). There is no significant difference between urban and rural areas.

Some differences among different ethnic origin groups

There is some significant difference between White and Minority Ethnic origin groups on hyperlocal media use for their current area. Thirty-seven per cent of White ethnic origin respondents state they use hyperlocal media for the area where they currently live compared to 25 per cent of Minority ethnic origin respondents.

Those who read a daily or Sunday quality newspaper are more prevalent users of hyperlocal media for the area where they currently live

Compared to other newspaper readers, those who read either a daily or Sunday quality newspaper are more prevalent users of hyperlocal media for the immediate vicinity (48 per cent of daily and 51 per cent of Sunday quality newspaper readers). Local newspaper readers are similar to the total average (36 per cent of local newspaper readers compared to a total sample average of 35 per cent).

Hyperlocal media use in the area of current residency is lowest among those who have not lived there for very long

As with general use of hyperlocal media, use of hyperlocal media for the current area in which people live is lowest among people who have lived in their area for the least amount of time (26 per cent of those who have lived in their area less than a year have used hyperlocal media). Use also drops off among those who have lived in an area for more than 20 years (33 per cent). Use is more prevalent among those who have lived in their area for two to three years (40 per cent), six to ten years (42 per cent) and 11 to 20 years (40 per cent).

Use of hyperlocal media for the current area in which people live is higher among those with an interest in news and information about the area in which they live (57 per cent of those who are 'very interested' in news or information about their local area have used hyperlocal media in this setting compared to only 11 per cent of those who are 'not at all interested').

2.3.2 Hyperlocal media use for a place people are visiting

Eighteen per cent of respondents (and 21 per cent of those with internet access) state they use hyperlocal media for a place that they are visiting where they want access to specific local information.

Thirty-five to 54 year olds are more likely to be using hyperlocal media for an area they are visiting

Among those using hyperlocal media for a place they are visiting, those in the 35 to 54 year old age group are more likely to be using hyperlocal media in this setting (23 per cent of this age group compared to 15 per cent of those aged 55 plus and 16 per cent of those aged 16 to 34). There is no significant difference between gender.

ABC1s are more likely to use hyperlocal media in this setting

As with those who use hyperlocal media for the immediate area in which they currently live, ABC1s are more likely to use hyperlocal media for a place they are visiting (23 per cent of ABC1s compared to 13 per cent of C2DEs). Those who are married or living as married are also more likely to use hyperlocal media in this context (21 per cent compared to 11 per cent of those who are widowed, divorced or separated and 15 per cent of those who are single). As with other hyperlocal media use, those who are retired are less likely to use hyperlocal media for a place they are visiting (11 per cent compared to 21 per cent of those who work full-time).

Use is more prevalent among larger households

Use among people with children aged six to nine is more prevalent than for those with younger children (26 per cent of those with children aged six to nine compared to 17 per cent of those with children aged zero to two), and higher than for those with no children (17 per cent of those without children access hyperlocal media for this setting). Those in larger households are more likely to access hyperlocal media for a place they are visiting (20 per cent of those with two adults in the household and 19 per cent of those with three or more in the household compared to 13 per cent of those with only one person).

As with the use of hyperlocal media for the immediate area people currently live in, those with a mortgage are more likely to use hyperlocal media for a place they are visiting (24 per cent compared to 8 per cent of those who rent local authority property and 16 per cent of those who own their property outright).

There are some regional variations: use is more prevalent in the South West and East Midlands and less prevalent in Northern Ireland

Use of hyperlocal media for an area visited is less prevalent among those in Northern Ireland (7 per cent of those in Northern Ireland report using hyperlocal media in this setting). Use is highest in the South West (25 per cent) and the East Midlands (24 per cent). There is no significant difference between urban and rural areas.

The survey shows some differences among different ethnic origin groups

As with use in the current local area, there is some significant difference between White and Minority ethnic origin groups on hyperlocal media use for areas people are visiting. Nineteen per cent of White ethnic origin respondents state they use hyperlocal media in this setting compared to 13 per cent of Minority ethnic origin respondents.

Not all those with access to the internet are using hyperlocal media for a place they are visiting

Only 21 per cent of those with internet access use hyperlocal media for a place that they are visiting. This is compared to 42 per cent of those with internet access who access hyperlocal media for the immediate area in which they currently live.

2.3.3 Hyperlocal media use for the area people work in

Eight per cent of respondents (and 10 per cent of those with internet access) state they use hyperlocal media for the area where they work. This represents 16 per cent of the working population surveyed.

Use in work areas is more prevalent among ABC1s

Use is more prevalent among ABC1s (12 per cent compared to 5 per cent C2DEs) and is also more prevalent among those who are married or living as married or those who are single (9 per cent for each of these categories) compared to only 4 per cent of those who are widowed, divorced or separated.

Use is more prevalent among those with children aged six to nine compared to those with no children

As with hyperlocal media use for a place where people are visiting, use of hyperlocal media for a work area is more prevalent among those with children aged six to nine compared to those with no children and those with very young children (14 per cent of those with children in the six to nine age group compared to 8 per cent of those with no children and 5 per cent of those with children aged zero to two). Use is also more prevalent in households with three or more adults (10 per cent) compared to single adult households (5 per cent).

Those who have a mortgage are more likely to use hyperlocal media for the area they work in

Those who have a mortgage are more likely than those who own their property outright, rent from a local authority or rent privately to use hyperlocal media for the area where they work (15 per cent of those with a mortgage compared to 3 per cent of those who own outright, 3 per cent of those who rent from a local authority, and 9 per cent of those who rent privately). There are no significant differences between urban and rural populations.

As might be expected, use is more prevalent among the groups with internet access at work (25 per cent) and those with a work e-mail address (also 25 per cent).

2.3.4 Hyperlocal media use for a place where people have previously lived but no longer live

Eight per cent of respondents (and 9 per cent of those with internet access) state that they use hyperlocal media for a place where they have previously lived but no longer live.

Use is least prevalent among those aged 55 and over

Use of hyperlocal media for this location is least prevalent among the 55 and over age group compared to other age groups (6 per cent compared to 8 per cent of 16 to 34 year olds and 9 per cent of 35 to 54 year olds). Related to this, those who are retired also have less prevalent usage in this setting (4 per cent) compared to the rest of the population.

Use is more prevalent among ABC1s

As elsewhere, use was more prevalent among ABC1s (9 per cent compared to 6 per cent of C2DEs). A higher proportion of people who are married or living as married use hyperlocal media for an area they previously lived in (9 per cent) compared to 7 per cent of those who are single and 5 per cent of those who are widowed, divorced or separated.

As with other areas for which hyperlocal media is accessed, use for an area where people have previously lived is more prevalent among those with children aged six to nine compared to those with no children (12 per cent compared to 7 per cent) and more widespread higher in households with three or more adults (9 per cent) compared to single adult households (4 per cent).

Those with mortgages and those who rent privately are more likely to access hyperlocal media for a place where they have previously lived compared to those who own their property outright or rent from a local authority (11 per cent of those with a mortgage and 10 per cent of those who rent privately compared to 5 per cent of those who own their property outright and 3 per cent of those who rent from a local authority).

There are no significant differences between urban and rural populations.

3.0 HOW ARE USERS ACCESSING HYPERLOCAL MEDIA?

3.1 Internet access

In terms of general internet access, eighty-four per cent of the respondents surveyed have internet access. Among those that have used hyperlocal media, 96 per cent have access to the internet at home, 22 per cent have access at work, and 44 per cent have access to the internet via a mobile phone. Among those who have not used hyperlocal media, internet access levels are lower, although nearly three-quarters (seventy-one per cent) do have some form of internet access. Sixty-eight per cent have access to the internet at home, 10 per cent at work, and 24 per cent via a mobile phone.

3.2 Device use

Respondents were asked about which devices they personally use. They were presented with a list that included mobile phones (either smartphones or other types of mobile phone), computers (either desktop computers or laptop and netbooks) and tablets. This was asked to establish what levels of access people have and how they might be using various devices to access hyperlocal media.

Overall, 85 per cent of the survey population personally use at least one of the listed devices
Laptops or netbook computers are the most widely used (used by 58 per cent), followed by smartphones (used by 46 per cent), desktop computers (used by 34 per cent), mobile phones that are not smartphones (used by 28 per cent) and tablet computers (used by 22 per cent).

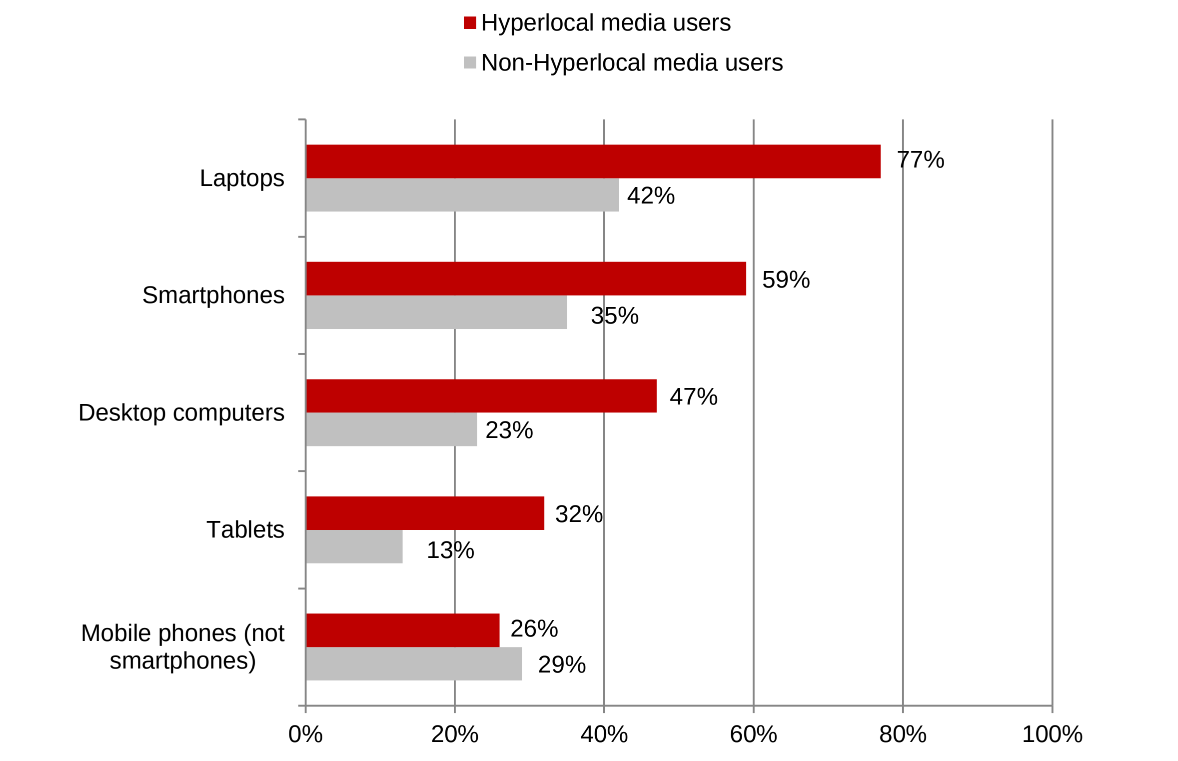
There are some differences across demographic groups for device use
Those with a mortgage are more likely to use a device such as a smartphone (62 per cent of those with a mortgage compared to 27 per cent of those who own their property outright and 29 per cent of those who rent from a local authority), a desktop computer (44 per cent compared to 33 per cent and 21 per cent for owners / those who rent from a local authority), a laptop or netbook computer (72 per cent compared to 49 per cent for owners and 36 per cent for renters from a local authority), or a tablet (33 per cent of those with a mortgage compared to 15 per cent of owners and 11 per cent of renters from a local authority).

Those in urban areas are more likely to use a smartphone (47 per cent compared to 37 per cent living in rural areas). A higher proportion of those in the Minority ethnic origin group use a smartphone (56 per cent of this group compared to 45 per cent for White ethnic origin respondents).

3.3 Hyperlocal media use among device users

An analysis was conducted on how device usage differs between those that use hyperlocal media and those that do not. With the exception of mobile phones that are not smartphones, general use of each of the devices listed was significantly higher among those who have used hyperlocal media than those who have not.

Figure 5 - Device usage (hyperlocal media users and non-users compared)



Base: Hyperlocal media users (939), Non-Hyperlocal media users (1,309)

Q3 Do you personally use any of the following devices?

3.4 Hyperlocal media use for the immediate area where people live - by device

Tablet users are the group most likely to use hyperlocal media for the immediate area where they live

Hyperlocal media access in this context is much higher among tablet users, with 54 per cent of tablet users having accessed content for the immediate area in which they live. This is in contrast to only 34 per cent of mobile phone users who do not use a smartphone. Usage is higher for desktop computer users (50 per cent), laptop or netbook computer users (48 per cent) and smartphone users (47 per cent).

3.5 Hyperlocal media use for other areas - by device

Hyperlocal media use for areas where people are visiting is lower for those with mobile phones that are not smartphones compared to other device users

Among those with devices, use of hyperlocal media for an area where people are visiting is lower among those with mobile phones that are not smartphones (17 per cent of those with such devices) compared to tablet users (29 per cent of tablet users access hyperlocal media in an area they are visiting), desktop users (27 per cent), smartphone users (25 per cent) and laptop or netbook users (24 per cent). This could indicate that people with devices capable of accessing hyperlocal content on the go are more likely to access content for this setting (although they may not necessarily be physically on the go when accessing content for this area in particular).

Hyperlocal media use for areas where people work and for where people used to live but no longer live is also less prevalent among mobile phone users who do not use a smartphone

As with hyperlocal media use for areas where people are visiting, accessing hyperlocal media for the area where people work is lower among those who use a mobile phone that is not a smartphone compared to those who use other devices (7 per cent of those who use a non-smartphone mobile compared to 17 per cent of tablet computer users and 16 per cent of desktop computer users). Non-smartphone mobile phone owners are also less likely than those with other devices to access hyperlocal media for areas where they used to live but no longer live (7 per cent compared to 12 per cent of tablet owners and 12 per cent of desktop computer owners).

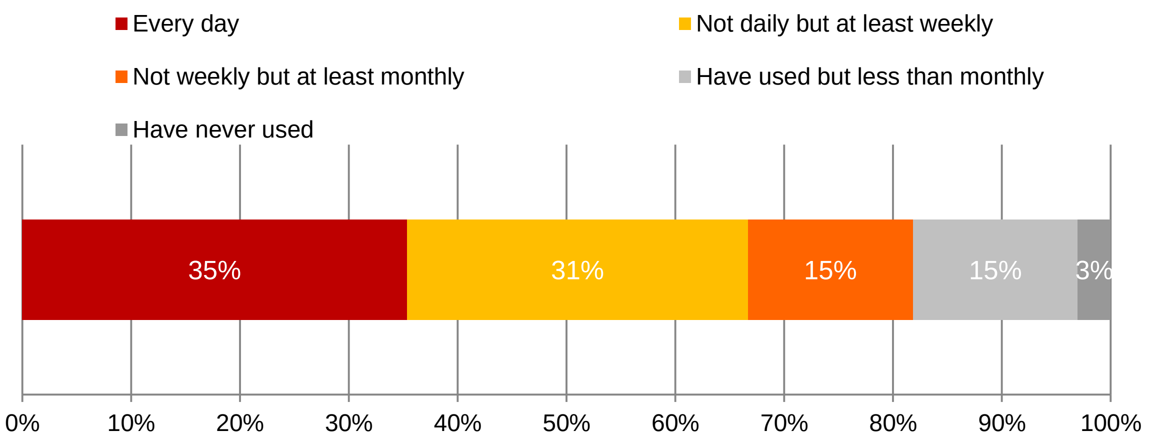
3.6 Frequency of hyperlocal media access by device

Hyperlocal media users were asked how frequently they access hyperlocal content for each of the devices they use.

Overall, nearly two-thirds of those who have one of the devices listed have used one of these devices to access hyperlocal content at least weekly

Just over one-third (thirty-five per cent) use ‘any’ device to access local news and information content every day. Thirty-one per cent access content ‘at least weekly’.

Figure 6 - Frequency of use by ‘any’ device

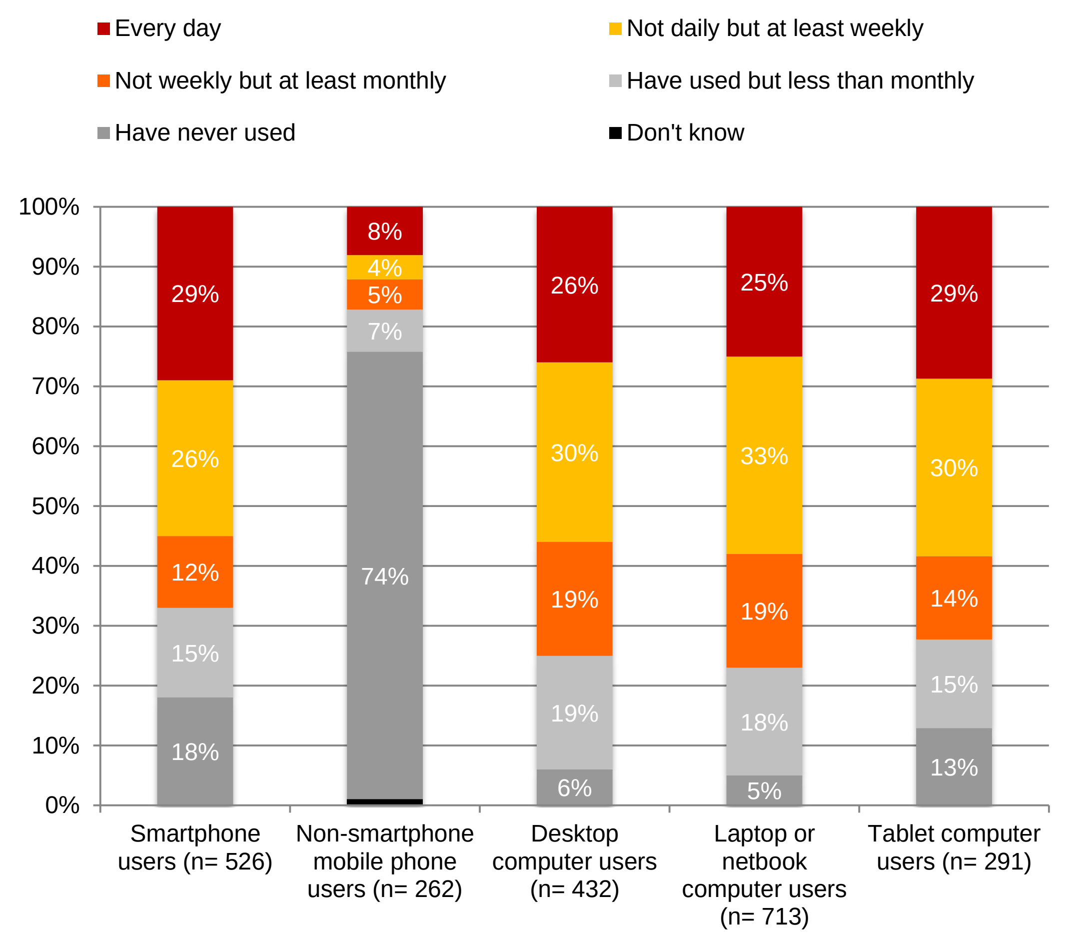


Base: Hyperlocal media users with a named device

Q6 How frequently do you use each of the following devices to access news or information online about the immediate local area you are in, such as a town, village or local neighbourhood? This could be either where you live, work, used to live but no longer live or are visiting. Aggregated responses.

There is some variation, however, in the frequency of device use between different devices
When individual device use is examined, there is some variation in the frequency with which users access hyperlocal content. Among hyperlocal media users with a smartphone, nearly one-third (29 per cent) use their devices to access hyperlocal media every day. This usage is echoed by tablet users (29 per cent users use the device to access hyperlocal media every day) and is followed by similar levels of use from both desktop computer users (26 per cent) and laptop or netbook users (25 per cent). Mobile phone users who do not have a smartphone, however, have very different usage patterns. Only eight per cent of non-smartphone mobile phone users access hyperlocal media content every day and 74 per cent have never used their device for accessing hyperlocal media.

Figure 7 - Frequency of accessing local news or information by device



Base: Hyperlocal media users with a named device.

Q6 How frequently do you use each of the following devices to access news or information online about the immediate local area you are in, such as town, village or local neighbourhood. This could be either where you live, work, used to live but no longer live or are visiting.

3.7 Use of mobile phone applications (apps) for hyperlocal media

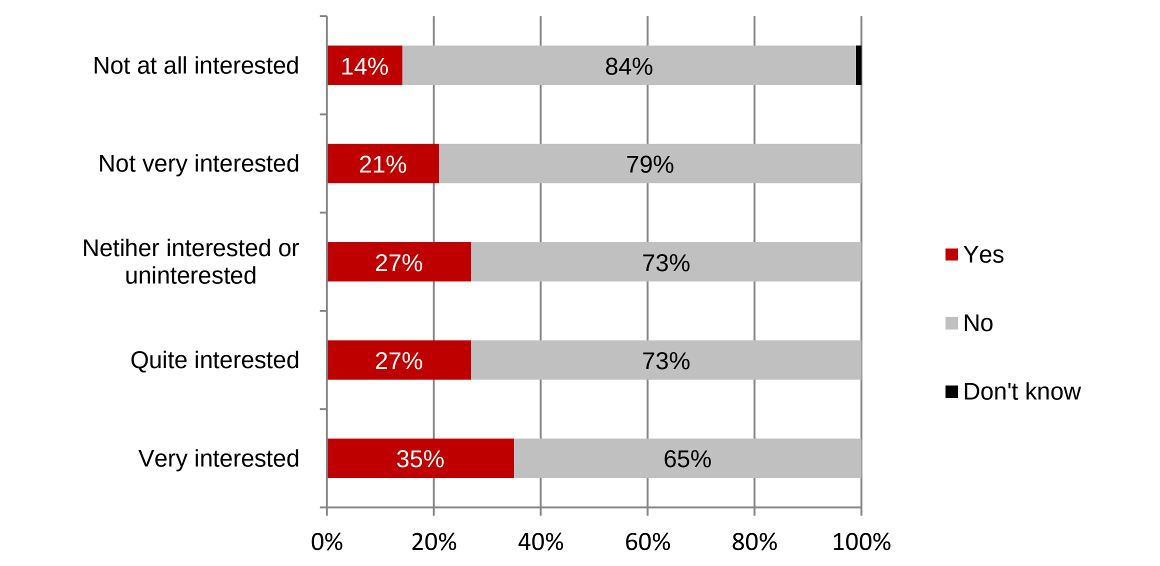
Respondents were asked if they have used a mobile phone app to access hyperlocal media.

***Just under one-third of hyperlocal media users (28 per cent) have used an app when using hyperlocal media*.**
App use in this context is highest among the 35 to 44 year old age group (38 per cent use among this age group), followed by 16 to 24 year olds (37 per cent use) and then 25 to 34 year olds (36 per cent). Usage is lower among the 55 to 64 year old age group (19 per cent) and the 65 and over age group (5 per cent). App usage is lowest among those who are retired (10 per cent reported use compared to 36 per cent of those in full-time work).

In a hyperlocal context, there are some demographic differences in app use
App use is higher among males (33 per cent have used apps for hyperlocal media) compared to females (24 per cent). A higher proportion of single respondents (36 per cent) have used an app in this setting compared to those who are married or living as married (27 per cent) and those who are widowed, separated or divorced (19 per cent). Usage is also higher among those households with three or more adults (35 per cent use) compared to those with only one (25 per cent). Those who own their properties outright are less likely to use an app for hyperlocal media (21 per cent) compared to those who have a mortgage (33 per cent).

Apps are most widely used for hyperlocal media for areas where people work
Interestingly, although hyperlocal media is most widely accessed for the area where respondents currently live, a higher proportion of those accessing hyperlocal content for the area where they work (42 per cent) have used apps compared to other settings (for example, 31 per cent of those who use hyperlocal media for the current area they live). In line with hyperlocal media use in general, app use tends to be more prevalent for those who have an interest in the area they live in.

Figure 8 - Use of apps by level of interest in area lived in



Base: Hyperlocal media users (939)

Q11 Have you used a mobile phone app to access local news or information about the immediate area you are in, such as a town, village or local neighbourhood. This could either be where you live, work, used to live but no longer live or are visiting? / Q2 How interested are you in news or information about the immediate area in which you currently live, that is your town, village or local neighbourhood?

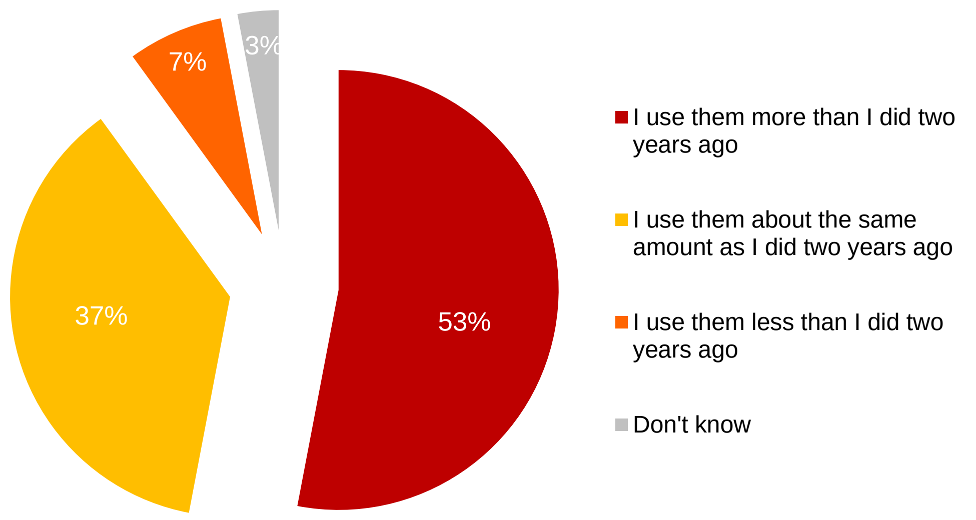
3.8 Are users accessing the services more or less than two years ago?

Respondents were asked whether their use of hyperlocal media services has increased, stayed the same or decreased over the last two years.

Just over one-half of hyperlocal media users use hyperlocal media more than they did two years ago

Among existing hyperlocal media users, 53 per cent state they use hyperlocal content more than they did two years ago. Thirty-seven per cent use this content about the same amount and seven per cent use these services less than they did previously. The increase in use is relatively consistent across all age groups other than those aged 65 and over (39 per cent use it more than they did two years ago in this age group compared to 58 per cent of 55 to 64 year olds and 57 per cent of 25 to 34 year olds). The increase in use is also consistent across gender, socio-economic grade, marital status, and size of adult household. The increase is lower for those who rent privately (43 per cent) compared to those who have a mortgage (57 per cent), those who own their property outright (54 per cent), and those who rent from a local authority (59 per cent).

Figure 9 - How levels of hyperlocal use have changed over a period of two years



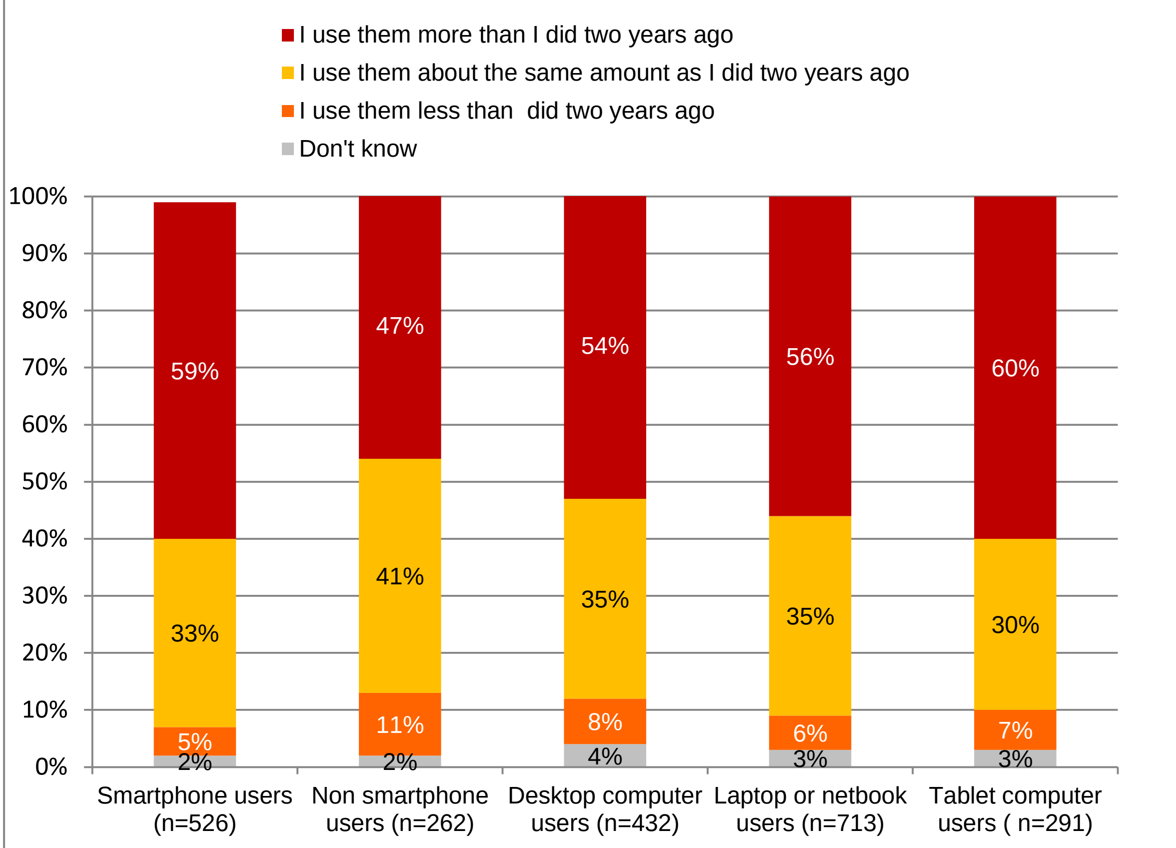
Base: Hyperlocal media users (939)

Q15 Which of the following statements would you say, is the most relevant to you about your use of local websites and /or mobile or tablet applications for local news or information about the immediate local area you are in. This could be a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting?

Increase in use less prevalent among non-smartphone users compared to other devices

Increase in use of hyperlocal media services is more prevalent among tablet users (60 per cent), smartphone users (59 per cent) and laptop or notebook users (56 per cent) compared to non-smartphone users (47 per cent).

Figure 10 - How levels of hyperlocal usage have changed (over two years) by device ownership



Base: Hyperlocal media users (939)

Q15 Which of the following statements would you say, is the most relevant to you about your use of local websites and\ or mobile or tablet applications for local news or information about the immediate local area you are in. This could be a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting.

Those with a heavy interest in their local area are more likely to have increased their use of hyperlocal media over the last two years

Those who are 'very interested' in their local area are more likely to have increased their use of hyperlocal media over the last two years (62 per cent compared to 52 per cent who are 'quite interested', 42 per cent who are 'neither interested nor uninterested', 41 per cent are 'not very interested' and 33 per cent are 'not at all interested'). Those who are 'highly satisfied' with hyperlocal media are more likely to have increased their use (59 per cent compared to 48 per cent of those with medium satisfaction and 54 per cent with low satisfaction).

Over one-half (55 per cent) of those who say they use hyperlocal media more now than two years ago say this is due to them getting a smartphone and / or tablet

The link between smartphone and / or tablet ownership and an increase in the use of hyperlocal media is most marked in the 16 to 24 year old age group, where 72 per cent of respondents agreed that their increase in use is linked to ownership of these devices compared to 51 per cent of 45 to 54 year olds, 32 per cent of 55 to 64 year olds and 21 per cent of those aged 65 and older.

4.0 SOURCES OF HYPERLOCAL MEDIA USED

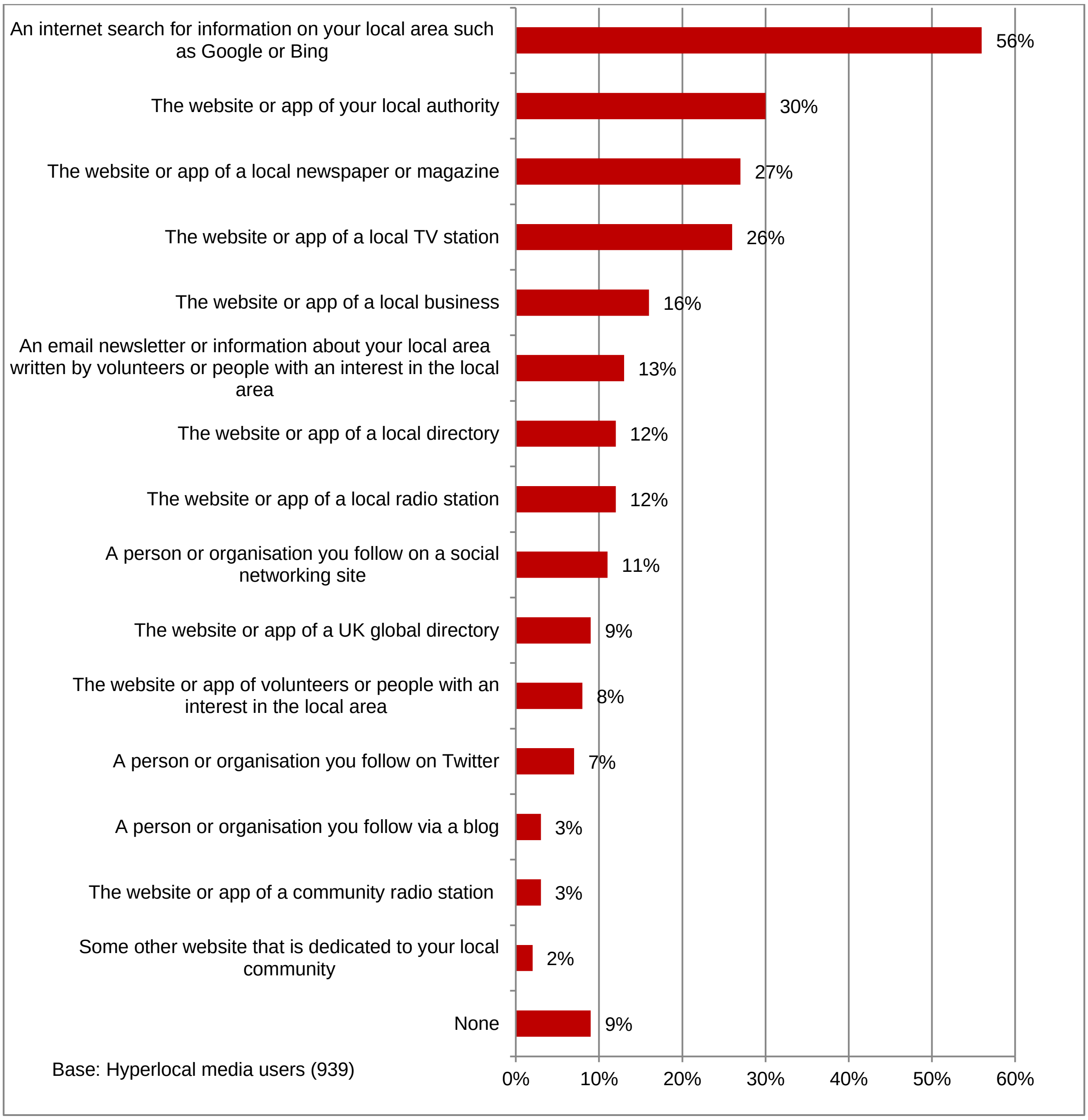
4.1 Sources of hyperlocal media used

Respondents were asked which particular sources of hyperlocal media they use. Sources were selected from a pre-identified list.

At a UK-wide level, search engines are the most common way for people to use hyperlocal content

Fifty-six per cent of hyperlocal media users report that they use ‘an internet search for information on your local area such as Google or Bing’ to access hyperlocal media. This is followed by ‘the website or app of your local authority’ (30 per cent) and ‘the website or app of a local newspaper or magazine’ (27 per cent) and ‘the website or app of a local TV station’ (26 per cent).

Figure 11 - Sources of hyperlocal media ranked by use



Q7 Do you use any of the following sources of information to get news or information about the immediate area you are in, such as a town, village or local neighbourhood? This could be either where you live, work, used to live but no longer live or are visiting.

Around one-third of hyperlocal media users use more than two sources of information, with some variation by demographic

The number of sources selected by respondents was also recorded. Thirty-five per cent of respondents who use hyperlocal media select just one source, a further 20 per cent use two sources. Finally, thirty-five per cent select more than two sources. When comparing the average number of sources used by different demographic groups, the mean number of sources used is higher for those aged 35-54 compared to other age groups (2.9 sources for this age group compared to 2.3 sources for 16-34 year olds and 2.6 sources for those aged 55 and older). The average number of sources is also higher for those who are married or living as married (2.7 sources) and those who are widowed, divorced or separated (2.8 sources) compared to those who are single (2.3 sources). Those with a mortgage tend to use more sources than those who own their property outright or rent privately (an average of 3.0 sources compared to 2.3 for owned and 2.4 for rent privately). Those of White ethnic origin use an average of 2.7 sources compared to 2.1 for Minority ethnic origin respondents.

Note that 9 per cent of hyperlocal media users selected 'none' of these sources in response to this question. This could either be people who do use hyperlocal media but do not identify their use with any of the sources listed, or people who have not understood the question. Some further analysis was conducted to see what types of information this 9 per cent use hyperlocal media for.
Just over a third (39%) selected 'none' (that is, no topics), showing consistency in their selection of "none" from question to question. Of those who did select a topic but not a source, the top topics selected were local weather (selected by 27 per cent), local breaking news (selected by 18 per cent) and local job openings (selected by 15 per cent). We could speculate that a source connected with these topics was missing from the list of source options, but this is speculation. It is also worth noting that the 9 per cent constitutes a relatively small number of respondents (n=86).

4.2 Understanding usage by type of source

In order to understand what variation there might be in the use of different types of hyperlocal media, an analysis was done of the use of hyperlocal media across several broader categories. These categories included 'traditional', 'native-online hyperlocal' services which are unlikely to have an offline presence and 'social' media. These were used to compare uptake of hyperlocal media sources that are related to existing media such as local newspapers and radio / TV companies, as well as local authority services, to newer hyperlocal media services, such as those provided by local people or specific local services such as finding a restaurant through a service like Top Table. 'Search' was included as a standalone category given that it functions as both a source of content in itself and as a conduit to other categories. There is arguably some overlap between 'social media' and the other source categories, so some caution must be used when interpreting the results from this analysis. It is also worth noting that social media covers a range of different types of social media services which may be used in different ways by individuals.

Figure 12 - Grouping sources by category (classifications used)

Category (% selecting a source in this category)	Sources included in this category for analysis purposes
Traditional (65%)	The website or app of a local TV station (e.g local news and information from bbc.co.uk, ITV.com, STV, UTV)
	The website or app of a local radio station
	The website or app of a community radio station
	The website or app of a local newspaper or magazine (paid or free)
	The website or app of a local business (e.g local restaurant)
	The website or app of a local directory e.g (e.g Yell.com, Thomson Local)
	The website or app of your local authority (e.g council, police or local health services)
Search (56%)	An internet search for information on your local area such as Google or Bing
'Online native' hyperlocal (24%)	The website or app of volunteers or people with an interest in the local area / from the local area
	An e-mail newsletter or information about your local area written by volunteers or people with an interest in the local area \ from the local area
	The website or app of a UK or global directory or topic-led site filtered by local information (e.g. Craig's List, Mumsnet, Gumtree, Top Table)
	Some other website that is dedicated to your local community
Social Media (17%)	A person or organisation you follow on a social networking site
	A person or organisation you follow on Twitter
	A person or organisation you follow via a blog

Hyperlocal media use is strongest among more 'traditional' media sources and search
Based on this analysis, 'traditional media' is the highest scoring category (used by 65 per cent of hyperlocal media users), followed by 'search' (56 per cent) then 'online native hyperlocal' (24 per cent) and finally, 'social' (17 per cent'). This indicates that traditional, established providers of local information such as local newspapers, magazines and radio / TV companies as well as local authorities remain important for hyperlocal media.

ABC1s use 'traditional' hyperlocal media sources
The 'traditional' media sources listed show a skew in the social demographic with a significantly higher number of ABC1's (69 per cent) utilising these sources compared to their C2DE counterparts (58 per cent). Usage is also more prevalent among those who read local newspapers nowadays (75 per cent compared to an average of 65 per cent).

Among 'online native' sources, older age groups rather than the youngest are more likely to use websites / apps of volunteers or people with an interest in the local area / from the local area
Among the 'online native hyperlocal' sources, 35-44 year olds and those aged 65 and over are more likely to use 'the website or app of volunteers or people with an interest in the local area / from the local area' (11 per cent) compared to those in the younger age category (only 3 per cent of those aged 16-24 selected this source).

16-34 and 35-54 year olds are more likely to use 'social' sources than those aged 55 and over
Both those aged 16-34 and 35-54 are significantly more likely to use 'social sources' than those aged 55 and over. Only 7 per cent of the fifty five plus category claim to use any of the 'social' sources, compared to 19 per cent of 35-54 year olds and a considerably higher 24 per cent of those aged 16-34. Interestingly, whilst a similar percentage of 16-34 year olds and 35-54 year olds use 'a person or organisation you follow on a social networking site' (15 per cent and 14 per cent respectively), fewer 35-54 year olds select 'a person or organisation you are following on Twitter' (6 per cent of 35-54 year olds compared to 12 per cent of 16-34 year olds), indicating some differences among Twitter use for hyperlocal media users among different age groups. 'Social' source usage is

also higher for those who are single (25 per cent) compared to a total of 17 per cent, and higher for those with a mortgage (22 per cent).

4.3 Frequency of use across different types of source

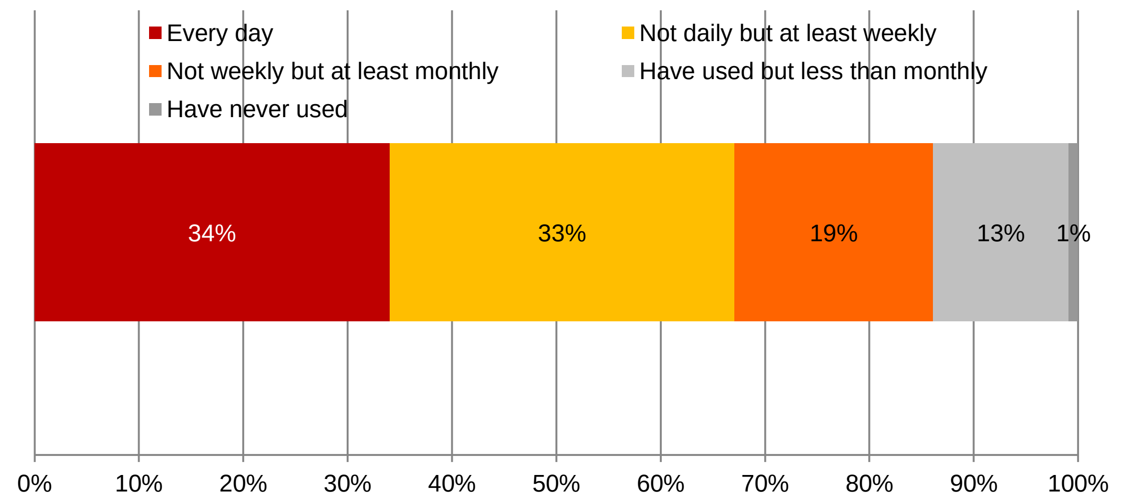
For the sources they use, hyperlocal media users were asked how frequently they used them. Frequency was measured in terms of: every day, not daily but at least weekly, not weekly but at least monthly, have used but less than monthly, have never used.

Please note that due to some of the low bases involved in analysis of the frequency of use of some sources (for example, only 30 respondents selected 'the website or app of a community radio station'), care should be taken in any frequency analysis, particularly when comparing one source against another. For this reason, any source with less than 60 respondents has been taken out of the chart analysis in figure 14.

When asked specifically about frequency, a small percentage of source users selected 'have never used' for some of the sources. This was never more than one per cent of the sample, however, so can probably be attributed to respondent lapse in concentration or not understanding how this question related to what they had previously stated, rather than a significant finding.

Overall, around one-third (34 per cent) of respondents use one of the named sources every day, and a further one-third (33 per cent) not daily but at least weekly.

Figure 13 – Frequency of use by any source



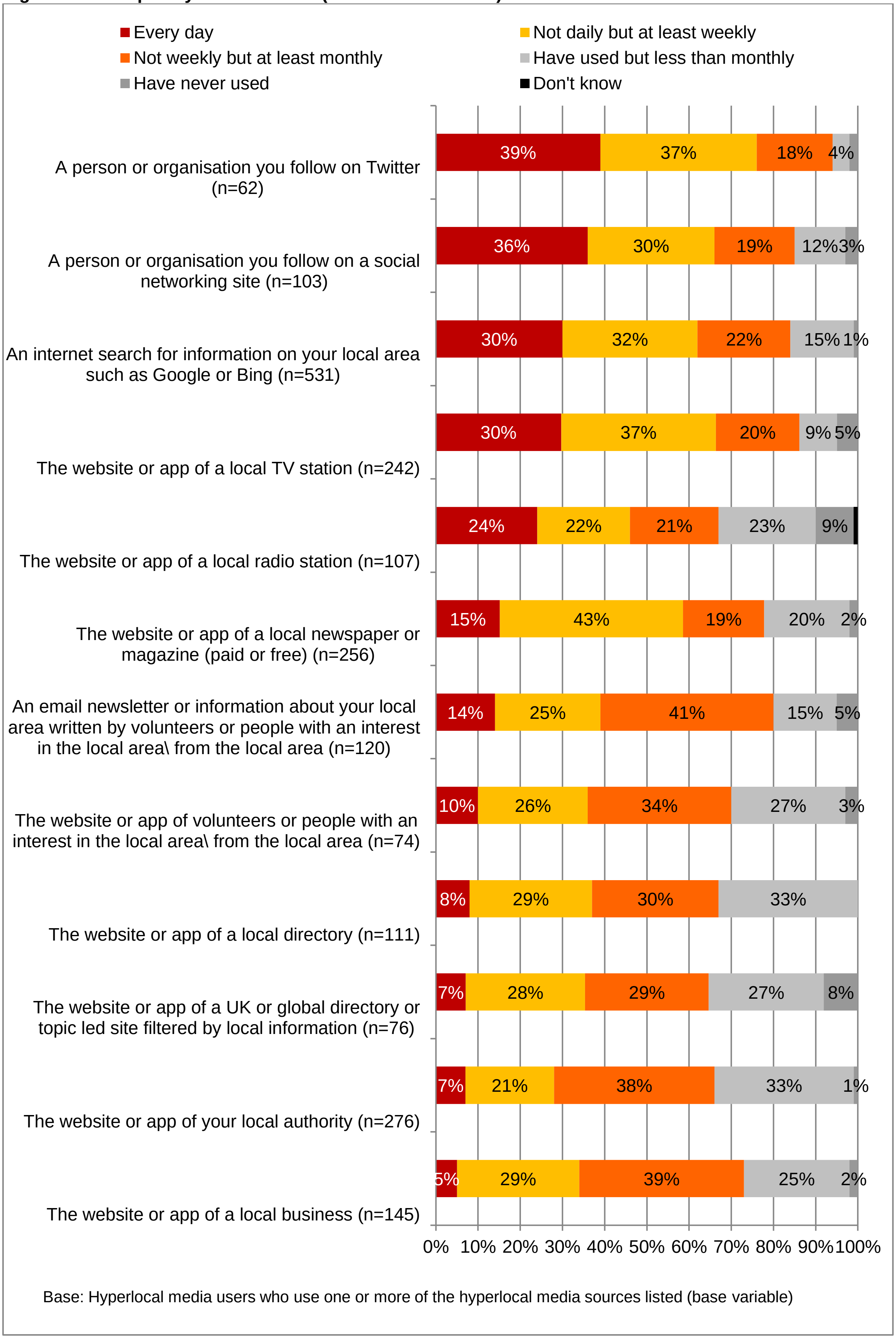
Base: Hyperlocal media users using one of the named sources

Q.9 On average, how frequently do you use each of the following to get news or information about the immediate area you are in such as a town, village or local neighbourhood? Again, this could either be where you live, work, used to live but no longer live or are visiting. Aggregated responses

There is some variation in the frequency with which hyperlocal media users use different sources

Among the most widely-used hyperlocal media source ('an internet search for information on your local area such as Google or Bing'), 30 per cent use this source 'every day' and another 32 per cent 'not daily but at least weekly'. By contrast, for the next most used source, the 'website or app of your local authority', only 7 per cent report using this 'every day', and 21 per cent 'not daily but at least weekly'. For the 'website or app of a local newspaper or magazine (paid or free)', 15 per cent use it 'every day' and 43 per cent 'not daily but at least weekly'. For 'the website or app of a local TV station', the pattern is different to local newspapers, with 30 per cent using this source 'every day' and 37 per cent 'not daily but at least weekly'.

Figure 14 – Frequency of source use (low bases excluded)



Base: Hyperlocal media users who use one or more of the hyperlocal media sources listed (base variable)

Q9 On average, how frequently do you use each of the following to get news or information about the immediate area you are in such as a town, village or local area you are in such as town, village or local neighbourhood?

5.0 WHAT IS DRIVING THE USE OF HYPERLOCAL MEDIA?

5.1 What types of information are hyperlocal media users looking for?

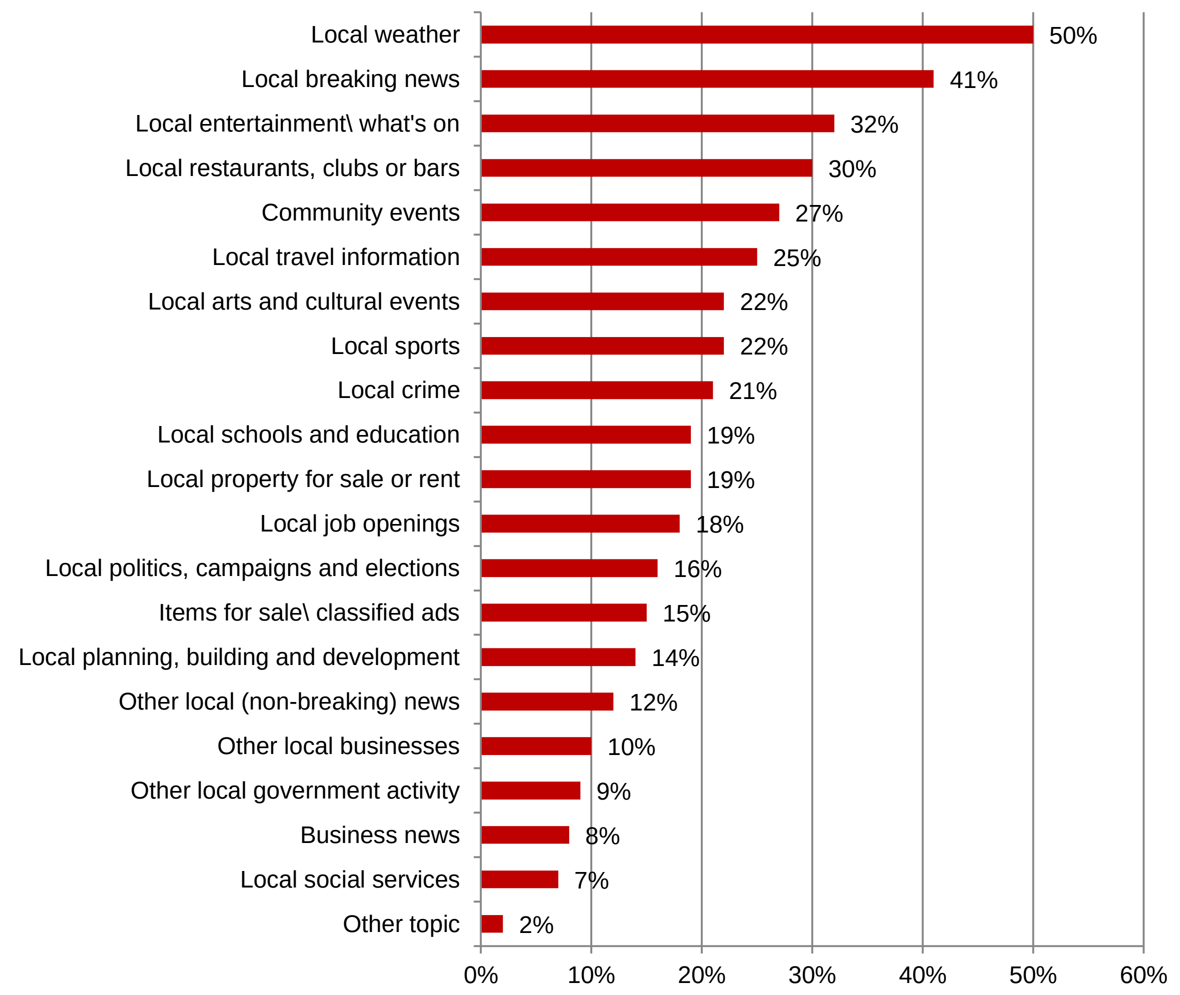
5.1 Genre selection

Hyperlocal media users were asked about what types of information they seek when using hyperlocal media. Users were asked to select responses from a list provided.

People are looking for information on a wide range of topics
The average number of genres of information selected by hyperlocal media users is 4.6. Nearly two-thirds of users (63 per cent) selected more than two genres. Only 12 per cent selected one genre only.

16-34 year olds select fewer genres than other age groups
Compared to other age groups, 16-34 year olds look for fewer genres of information (they select an average of 4 genres compared to 5 for 35-54 year olds and 4.6 for the 55 and over).

Figure 15 - Hyperlocal media use ranked by topic areas



Base: Hyperlocal media users (939)

Q12 Which of the following topic areas do you get information about? Here we are referring to when you get news or information online, on your computer or laptop, mobile phone or on your tablet about the immediate area you are in, such as a town, village or local neighbourhood. This could either be where you live, work, used to live but no longer live or are visiting?

The rationale for hyperlocal media consumption appears to be primarily about getting functional information.

The most widely selected genre of hyperlocal media information is local weather (selected by 50 per cent of hyperlocal media users). Forty-one per cent select local breaking news and 32 per cent information on local entertainment or what's on (for example local cinema listings and events). Users are also interested in getting information on local restaurants, clubs or bars (30 per cent) and community events (27 per cent).

Males are more likely to get information on business news, local sports and local politics, campaigns and elections

There are some gender differences in the genres of information hyperlocal media users seek. A greater percentage of males select information on business news (12 per cent of males compared to 4 per cent of females), local sports (32 per cent of males compared to 12 per cent of females) and local politics, campaigns and elections (18 per cent of males compared to 13 per cent of females). More females select information on local schools and education (23 per cent of females compared to 15 per cent of males).

16-34 year olds have different interests in topics selected compared to the 55 and over age group

Compared to the 55 and over age group, a greater percentage of the 16-34 year age group select information on local sports, local job openings, local crime and local schools and education. A greater percentage of the 55 and over age group select information on local planning, building and development (22 per cent of 55 and over compared to 6 per cent of 16-34 year olds), local entertainment (34 per cent compared to 25 per cent), local arts and cultural events, such as concerts, plays and museum exhibits (27 per cent compared to 14 per cent), local travel information (29 per cent compared to 19 per cent), local politics, campaigns and elections (21 per cent compared to 12 per cent), information on other local government activity, such as council meetings, hearings or local trials (15 per cent compared to 6 per cent) and community events (30 per cent compared to 21 per cent).

More 35-54 year olds select local weather, entertainment, arts and cultural events, planning, building and development, items for sale/classified ads, local schools and education and cultural events than 16-34 year olds

Compared to their younger counterparts, a greater percentage of 35 to 54 year olds select information on the local weather (57 per cent of 35-54 year olds compared to 43 per cent of 16-34 year olds), local entertainment (38 per cent compared to 25 per cent), local arts and cultural events, such as concerts, plays and museum exhibits (24 per cent compared to 14 per cent), local planning, building and development (16 per cent compared to 6 per cent), items for sale / classified ads (20 per cent compared to 12 per cent), local schools and education (28 per cent compared to 17 per cent), local travel information (27 per cent compared to 19 per cent) and community events (31 per cent compared to 21 per cent).

More 35-54 year olds select local breaking news, items for sale / classified, other local business information, local job openings, and local schools and education than the 55 and over

Compared to the 55 and over age group, a greater proportion of 35-54 year olds select information on local breaking news (45 per cent compared to 34 per cent), items for sale / classified ads (20 per cent compared to 12 per cent), other local business information (12 per cent compared to 7 per cent), local job openings (21 per cent compared to 11 per cent) and local schools and education (28 per cent compared to 9 per cent). Compared to the 35-54 age group, a higher proportion of the 55 and over selected information on local planning, building and development (22 per cent compared to 16 per cent) and other local government activity, such as council meetings, hearings or local trials (15 per cent compared to 8 per cent).

More ABC1s select a larger number of genres of hyperlocal media and are more likely to seek information on local entertainment, restaurants, clubs and bars, travel information, arts and cultural events, other local businesses, and business news.

ABC1s select an average of 4.8 genres of information for hyperlocal media compared to 4.3 for C2DEs. A greater percentage of ABC1s select information on local entertainment / what's on (37 per cent compared to 25 per cent), local restaurants, clubs and bars (34 per cent compared to 23 per cent), local travel information (27 per cent compared to 21 per cent), local arts and cultural events (25 per cent compared to 16 per cent), other local businesses (11 per cent compared to 7 per cent) and business news (9 per cent compared to 5 per cent C2DEs). A greater percentage of C2DEs select looking for local job openings compared to ABC1s (25 per cent compared to 14 per cent). Of those who are currently not working but looking for work, 51 per cent selected information on local job openings.

Those who are married / living as married select more genres of hyperlocal media than those who are single

Compared to those who are single, those who are married or living as married select more genres of hyperlocal media (an average of 4.9 genres for those who are married or living as married compared to 3.8 genres for those who are single). A greater percentage of those who are married or living as married select information on: local weather (55 per cent compared to 41 per cent), local entertainment / what's on (35 per cent compared to 25 per cent), community events (30 per cent compared to 21 per cent), local travel information (27 per cent compared to 19 per cent), local arts and cultural events (24 per cent compared to 16 per cent), local schools and education (23 per cent compared to 12 per cent), local property for sale or rent (22 per cent compared to 13 per cent), local planning, building and development (18 per cent compared to 6 per cent), items for sale / classified ads (16 per cent compared to 11 per cent), other local breaking news (13 per cent compared to 7 per cent) and business news (10 per cent compared to 3 per cent).

There are some differences in the types of information different household sizes seek in a hyperlocal media setting

In terms of household size, a greater proportion of those households with two members are interested in information on local restaurants, clubs and bars (36 per cent of these households) compared to households with three or four people (26 per cent and 27 per cent respectively). By contrast, households with three or four people are more likely to select information on local schools and education (28 per cent of each household size) compared to those with two or one household members (10 and 8 per cent respectively). Households with children aged six to nine select more topics than those with no children (mean 5.7 topics compared to 4.4). A greater percentage of households with one member look at information on other local government activity such as council meetings, hearings or local trials (15 per cent of single households compared to 8 per cent of households of three members).

Households with two adults select more genres of hyperlocal media compared to households with three or more adults (mean number of topics selected is 4.8 for households with two adults and 4.2 for households with three or more adults). A greater proportion of households with two adults are interested in information about local planning, building and development (17 per cent) than those with three plus adults (10 per cent).

A higher percentage of principal shoppers look for local entertainment / what's on and information on local arts and cultural events compared to non-principal shoppers
A higher percentage of those who are principal shoppers select information on local entertainment / what's on (34 per cent compared to 26 per cent of non-principal shoppers) and information on local arts and cultural events (23 per cent compared to 17 per cent). A lower percentage of those who are principal shoppers select information on local sports (19 per cent compared to 30 per cent non-principal shoppers).

A higher percentage of non-chief income earners select information on local entertainment / what's on and information on local schools and education
A higher percentage of non-chief income earners select information on local entertainment / what's on (38 per cent compared to 29 per cent). A higher percentage of non-chief income earners select information on local schools and education (26 per cent compared to 15 per cent chief income earners).

Urban and rural hyperlocal media users are similar in their selection of genres, but a greater proportion of rural users select information on local weather
A greater percentage of those in rural areas look for information on local weather (59 per cent compared to 49 per cent in urban areas).

A higher proportion of tablet users select information on local schools and education compared to non-smartphone mobile phone users and desktop and laptop / netbook users
There are no significant differences in the genres of information sought across devices used by hyperlocal media users, other than in the category 'local schools and education', where a greater percentage of tablet users select this genre compared to mobile phone users not using a smartphone, desktop and laptop or netbook users (28 per cent tablet users compared to 16 per cent non-smartphone users and 20 per cent each of desktop users and laptop or netbook users).

5.2 Most important genres

Local breaking news, weather and community events are cited most frequently as the most important genres of hyperlocal media to users
Respondents were asked to rate how important each of the genres were to them personally. The top genres selected are local breaking news (selected by 21 per cent as the most important genre), local weather (selected by 18 per cent), community events (selected by 8 per cent), and local sports (selected by 7 per cent).

Some differences among socio-economic grades on the most important genres of information selected
When looking at the importance of these topics to different groups a disparity between social groups emerges, with ABC1's viewing local, restaurants, clubs and bars, business news, local arts, and travel as significantly more important than C2DE respondents (5 per cent of ABC1s selected local restaurants, clubs and bars compared to 2 per cent of C2DE, 2 per cent of ABC1s compared to no C2DEs for business news, 4 per cent of ABC1 compared to 1 per cent of C2DE for local arts and 6 per cent compared to 3 per cent of C2DEs for travel). In contrast, the C2DE group ranks local job openings and other local government activity as significantly more important than their ABC1 counterparts (8 per cent of C2DEs compared to 3 per cent of ABC1s for local jobs and 2 per cent of C2DEs compared to no ABC1s for other local government activity).

Compared to 35 to 54 year olds, 16-34 year olds are more likely to choose local sports and information on local restaurants, clubs and bars as most important

Those aged 16 to 34 are more likely to choose local sports as the most important genre for them personally (10 per cent of 16 to 34 year olds select this as the most important compared to 5 per cent of 35 to 54 year olds) and information on local restaurants, clubs or bars (6 per cent of 16 to 34 year olds compared to 2 per cent of 35 to 54 year olds). Those aged 55 and over are significantly more likely than the youngest age bracket to state information on local planning, building and development as the most important hyperlocal media topic to them (6 per cent of those aged 55 and over who use hyperlocal media for this purpose cite this as the most important genre to them personally compared to only 1 per cent of 16-34 year olds).

35-54 year olds more likely to choose local schools and education information as their most important topic compared to those aged 55 and over

Those aged 35-54 are significantly more likely to cite information about local schools and education as their most important topic compared to those in the 55 and over age group (7 per cent compared to 3 per cent).

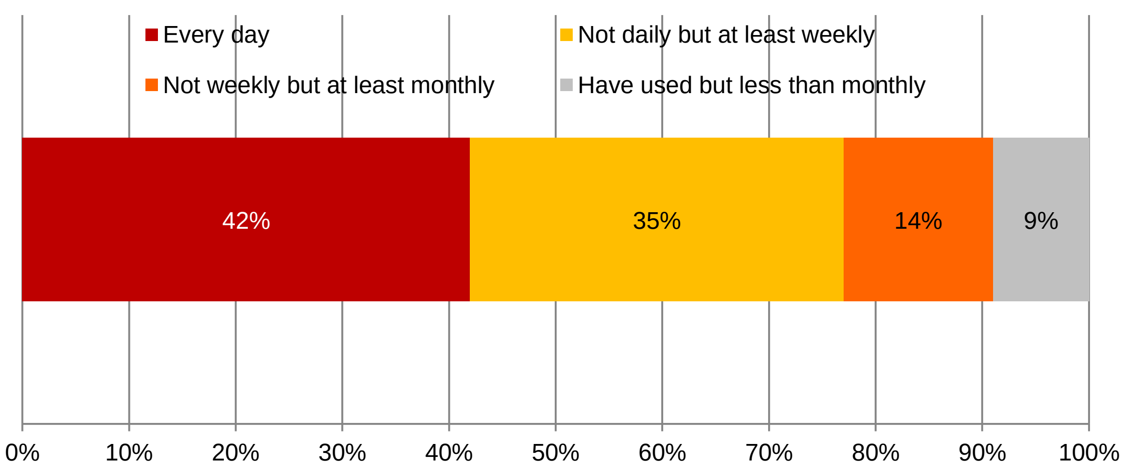
For those aged 55 or over, local arts and cultural events are seen as more important compared to 16-34 year olds

Those aged 55 and over are more likely to choose local arts and cultural events as the most important genre for them personally compared to the much younger generation (5 per cent selected this as their top genre compared to 2 per cent of 16 to 34 year olds). Compared to 35-54 year olds, those aged 55 and over are more likely to select local politics, campaigns and elections as their most important genre of information (selected by 4 per cent of those aged 55 plus compared to 1 per cent of 35-54 year olds).

5.3 Frequency of use across genres

In order to understand further what is driving hyperlocal media use, respondents were asked about how frequently they get information on each topic area. Overall, people are interested in getting local news and information on a regular basis. Forty-two per cent say that they get specific genre content ‘every day’, and a further 35 per cent ‘not daily but weekly’.

Figure 16 – Frequency of use by ‘any’ genre



Base: All who get information about any of the topic areas listed

Q12a. On average, how frequently do you get information on each of the following topic areas online, on your computer or laptop, mobile phone or on your tablet for the immediate area you are in, such as a town, village or local neighbourhood? This could either be where you live, work, used to live but no longer live or are visiting?

Frequency of use does vary, however, according to the type of content users get. The most frequently consulted genres of information are local weather, sports and news

Hyperlocal media users vary the frequency with which they get specific genre information depending on the genre in question. The most frequently consulted genres are local weather, sports and news (business, breaking and other local non-breaking). One-half of all of those seeking information on the local weather get this information every day. Other topics that attract daily use are local business news (36 per cent of those using this information use it every day), local breaking news (35 per cent of those using this information use it every day), other local (non-breaking) news (35 per cent of those using this information), and local sports (34 per cent of those using this information).

Other genres such as local planning, building and development tend to be consulted less frequently

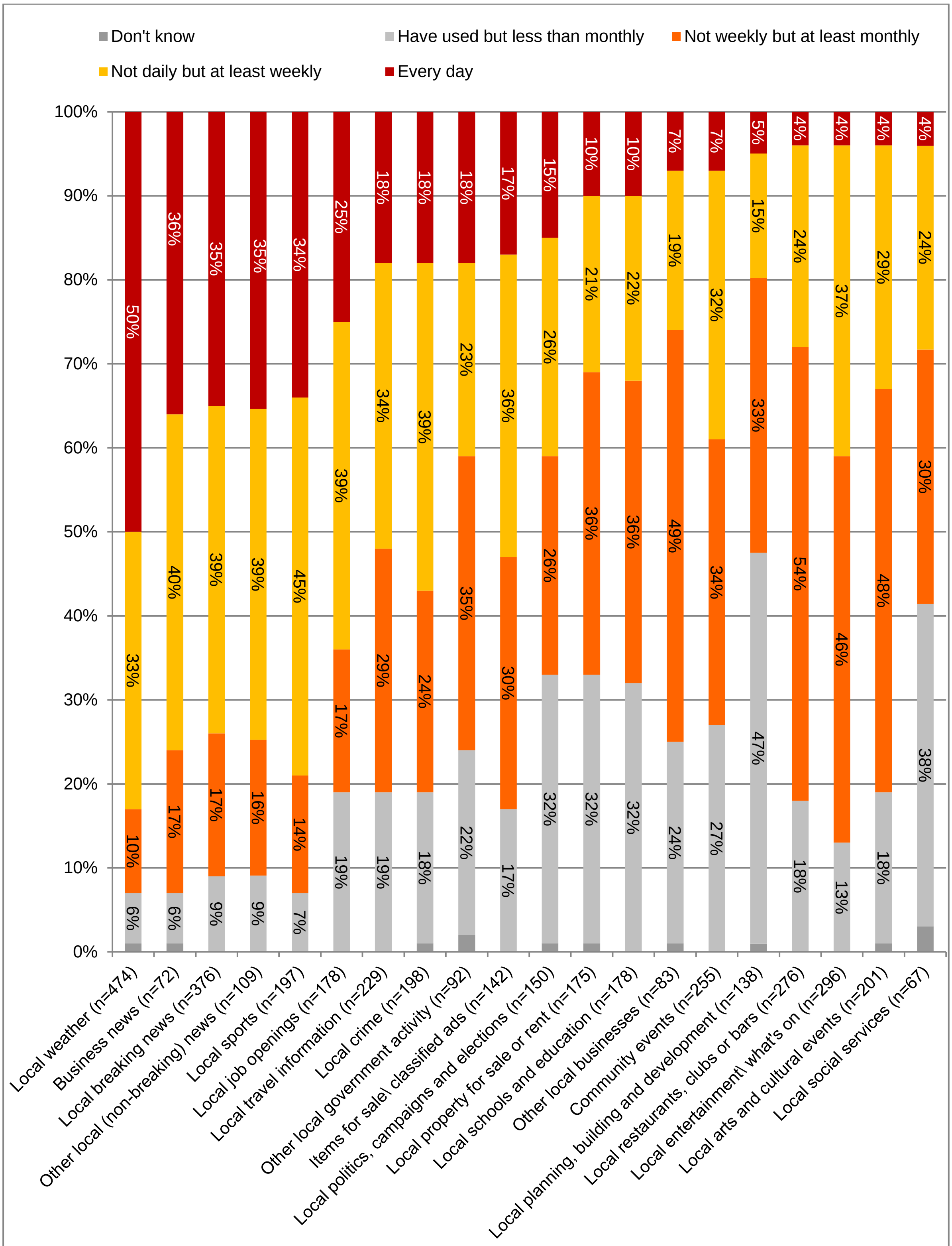
Genres such as local planning, building and development, local social services and other local business information are consulted on a less frequent basis.

It is difficult to highlight any demographic differences in frequency of genre use due to low bases; however, there is some difference among social grade for seeking local weather information every day

In terms of any differences between different demographics, it is difficult to draw any substantial conclusions on differences between demographic groups due to the low base sizes involved. However, one area where we can draw comparison is with the local weather genre, where a greater proportion of C2DEs seek information on local weather every day compared to ABC1s (59 per cent of C2DEs compared to 45 per cent of ABC1s). Whilst a greater proportion of rural hyperlocal media users seek information on local weather, there are no differences in terms of the frequency with which urban and rural users seek this information. Those who use a mobile phone that is not a smartphone are less likely to be frequent users of local weather information in a hyperlocal media setting (13 per cent selected 'have used but less often than monthly' compared to a total of 6 per cent).

Please note that some of the sources which were selected by a low number of people have been excluded from the chart in figure 17.

Figure 17 – Frequency of getting genre information



Base: All who get information about any of the topic areas listed (base variable - bases only above 60 included)

Q12a: On average, how frequently do you get information on each of the following topic areas online, on your computer or laptop, mobile phone or on your tablet for the immediate area you are in, such as a town, village or local neighbourhood? This could either be where you live, work, used to live but no longer live or are visiting?

Figure 18 – Top genres of hyperlocal media by time period

Top 5 genres per time category	Percentage of hyperlocal media users seeking information on this genre who selected given time period
Every day	
1. Local weather	50%
2. Business news	36%
3. Local breaking news	35%
4. Other local (non-breaking) news	35%
5. Local sports	34%
Not daily but at least weekly	
1. Local sports	45%
2. Business news	40%
3. Local breaking news	39%
4. Other local (non-breaking) news	39%
=5. Local job openings	39%
=5. Local crime	39%
Not weekly but at least monthly	
1. Local restaurants, clubs or bars	54%
2. Other local businesses	49%
3. Local arts and cultural events	48%
4. Local entertainment\ what's on	46%
=5. Local schools and education	36%
=5. Local property	36%
Have used but less than monthly	
1. Local planning, building and development	47%
2. Other topic	42%
3. Local social services	38%
4. Local schools and education	32%
=5. Local property for sale or rent	32%
=5. Local politics, campaigns, elections	32%

Base: All who get information about any of the topic areas listed (base variable - bases only above 60 included)

5.4 Why people use hyperlocal media

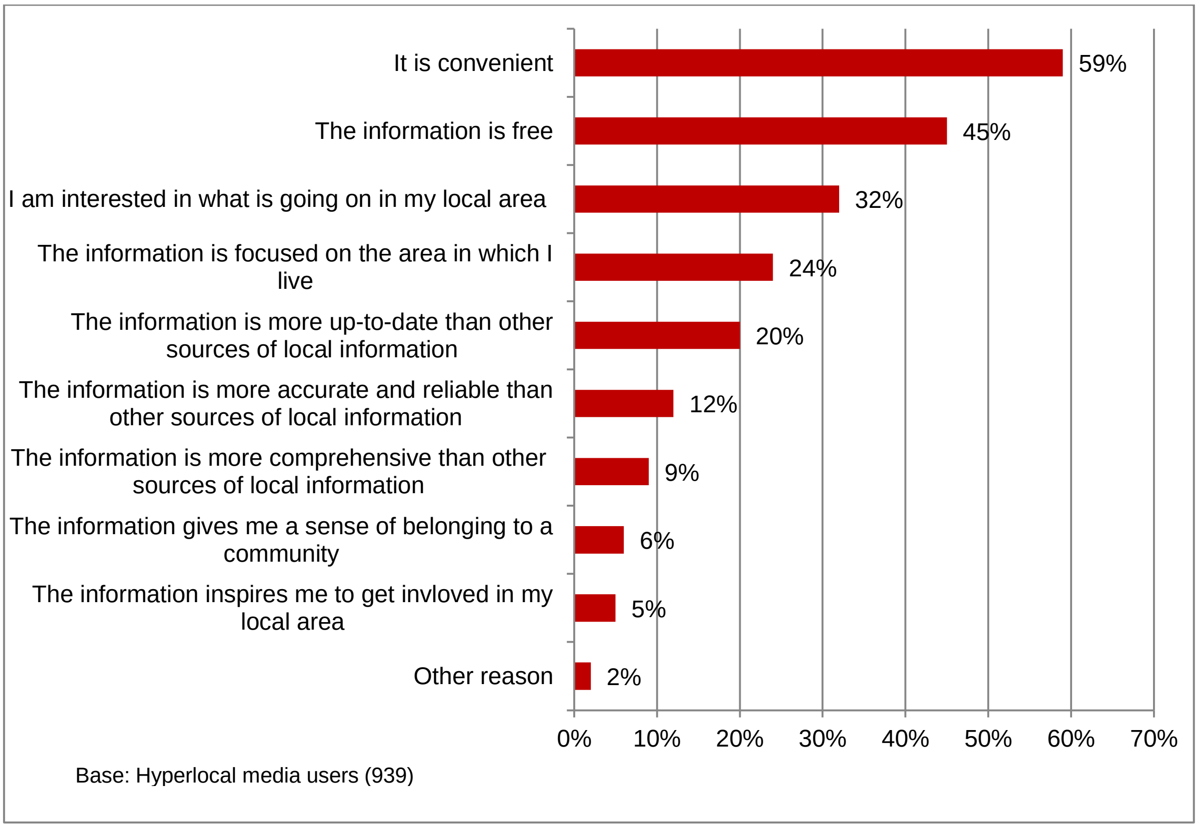
Convenience and the fact that sources are free are key drivers behind choice of hyperlocal media

Respondents were asked to explain why they use hyperlocal media by selecting from a list of potential reasons. The top reasons selected relate to attributes of hyperlocal media itself. Fifty-nine per cent use it because it is convenient and 45 per cent are attracted to it because the information is free. Other reasons reflect hyperlocal media users' interest in the local area. Just over one-third (32 per cent) use it because they are interested in what's going on in their local area and 24 per cent because the information is focused on the area in which they live. Their interest is less motivated, however, by the opportunity to 'actively' participate in the local community. Only six per cent said that 'the information gives me a sense of belonging to a community' and five per cent said that the use of hyperlocal media 'inspires me to get involved in my local area'.

One-fifth of users say they use hyperlocal media because the information is more up to date than other sources of local information

When comparing hyperlocal media with other sources of local information, 20 per cent use hyperlocal media because 'the information is more up to date than other sources of local information', 12 per cent because 'the information is more accurate and reliable than other sources of local information' and 9 per cent because 'the information is more comprehensive than other sources of local information'.

Figure 19 - Reasons for using hyperlocal media



Q13 Thinking about when you seek news or information online, on your computer or laptop, mobile phone or on your tablet about the immediate local area you are in, such as a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting, for which of the following reasons, if any, do you turn to this source of information in particular?

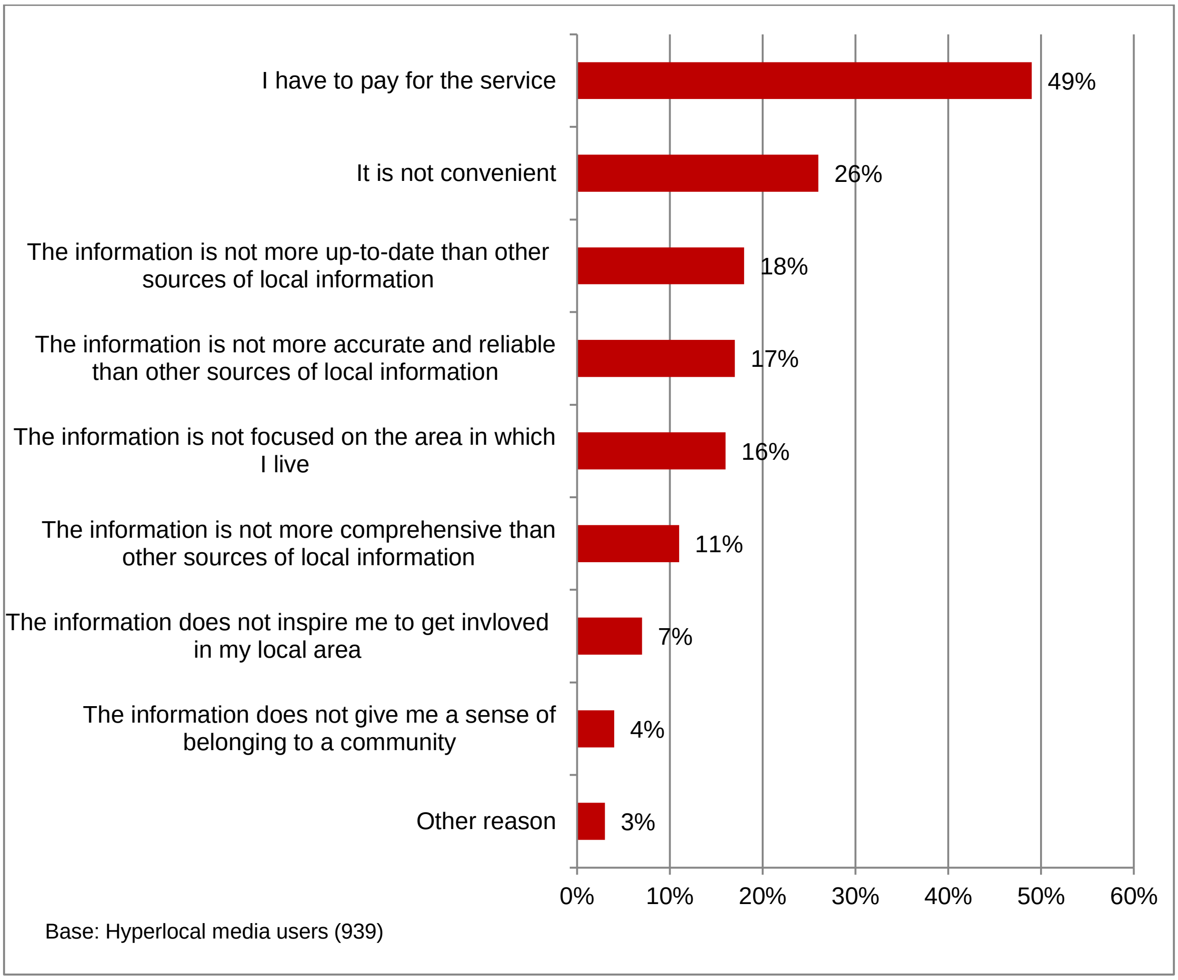
Some demographic variation in the drivers behind the use of hyperlocal media

Thirty-five to forty-four year olds and 55-64 year olds are more likely to select ‘the information is more up to date than other sources of local information’ (25 per cent for both compared to 14 per cent of 16-24 year olds, 16 per cent of 45-54 year olds and 15 per cent of those aged 65 and over). A ‘sense of belonging to a community’ resonates more with those aged 65 and over (8 per cent), 25-34 year olds (10 per cent) and 45-54 year olds (9 per cent) compared to 35-44 year olds (2 per cent), but ‘I am interested in what is going on in my local area’ is selected by a higher proportion of 35-54 year olds (37 per cent) compared to 16-34 year olds (26 per cent). Those with children aged 3-5 are more likely to select ‘the information is more up to date’ (28 per cent compared to only 15 per cent of those with children aged 0-2 or 19 per cent of those with no children). Those with children aged 6-9 are more likely to select ‘the information is focused on the area in which I live’ (33 per cent compared to 23 per cent with no children). A higher proportion of those in Northern Ireland selected ‘the information is more comprehensive than other sources of local information’ (22 per cent in this area compared to 8 per cent in England).

Charging for hyperlocal media and a lack of convenience are seen as key limiting factors to use

Hyperlocal media users were also asked about what factors might limit their use of hyperlocal media (reasons again selected from a list). The most frequently selected reasons mirror what users state drove them to use hyperlocal media (that is, they would limit their use if the service was not free or was not convenient). Interestingly, having to pay for the service was the top limiting factor selected (chosen by 49 per cent of users). The change in this condition overtook a lack of convenience (selected by 26 per cent) as the overriding limiting factor.

Figure 20 - Reasons that would limit use of hyperlocal media sources

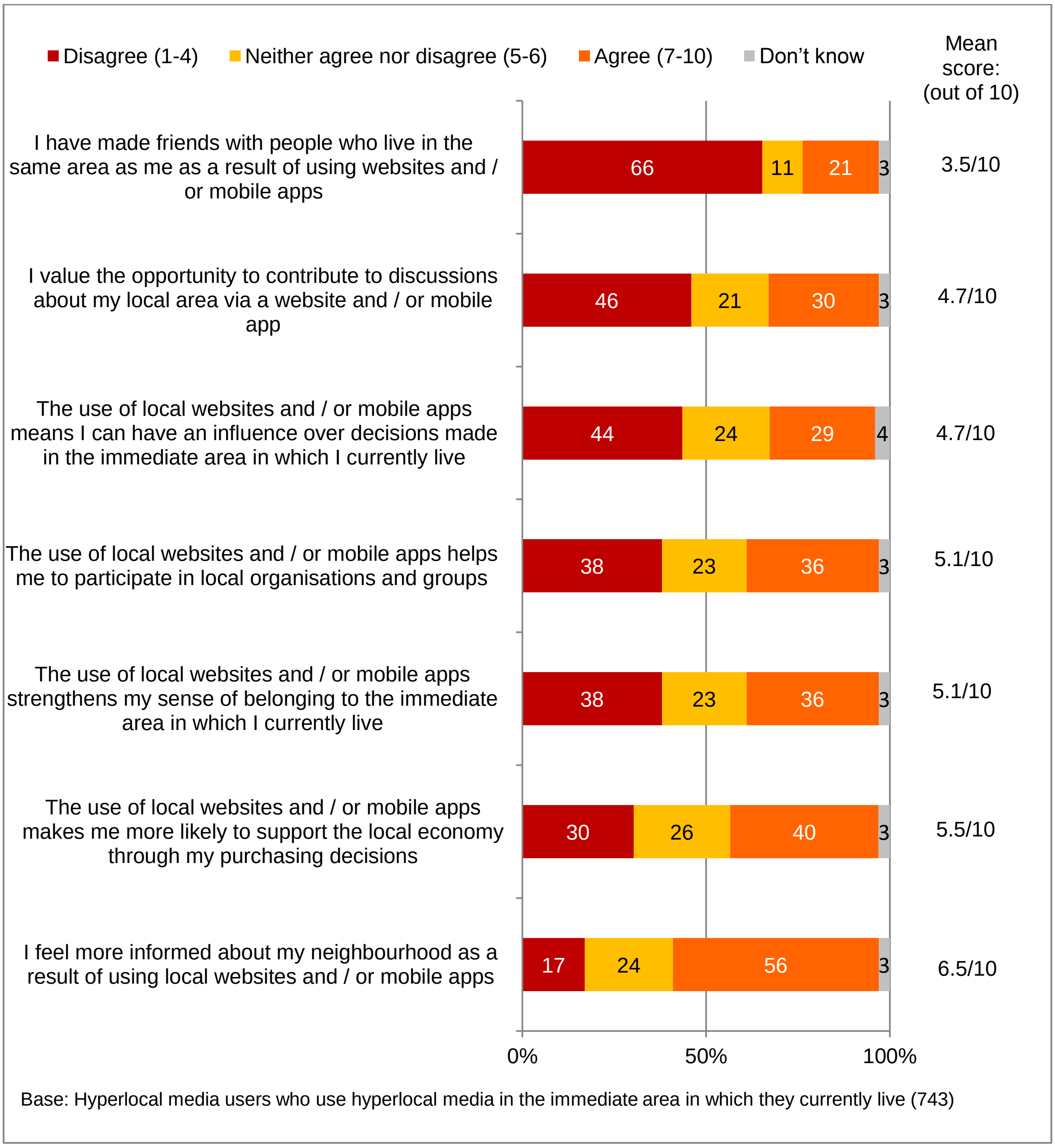


Q14 Thinking about when you seek news or information online, on your computer or laptop, mobile phone or on your tablet about the immediate local area you are in, such as town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting, which of the following reasons, if any, would limit your use of these sources?

5.5 The impact of hyperlocal media (for the area in which users currently live)

In order to assess the impact of hyperlocal media on its users, respondents were asked how much they agreed with a set of statements about hyperlocal media. Users were asked on a scale of one to ten, where one is completely disagree with the statement, and ten is completely agree with the statement. Responses have been coded into one of three categories below (disagree, scores of one to four, neither agree nor disagree, scores of five and six, and agree, scores of seven to ten). Respondents were asked here to think just about the area in which they currently live and only those who use hyperlocal media in this setting were selected to answer the question.

Figure 21: Impact of hyperlocal media – agreement with statements



Q16 Now thinking just about news or information about the immediate area in which you currently live , by immediate area, we mean your town, village or local neighbourhood, how much you agree or disagree with each of the following statements. Please answer on a scale of 1 to 10, where 1 is completely disagree and 10 is completely agree.

While users agree hyperlocal media keeps them informed, fewer agree that it gives them local influence or helps them build relationships

Agreement with the statements varied. The highest mean score was achieved for “I feel more informed about my neighbourhood as a result of using local websites and / or mobile apps” (mean score of 6.5), followed by “the use of local websites and / or mobile apps makes me more likely to support the local economy through my purchasing decisions” (mean score of 5.5). The more community-orientated statements, for example “I have made friends with people who live in the same area as me as a result of using websites and/or mobile apps” scored lower (mean score of 3.5), and attracted a larger percentage of ‘disagree’ scores (66 per cent disagreed with this statement).

Agreement with “I feel more informed about my neighbourhood as a result of using local websites and/ or mobile apps” is highest among 35-44 year olds (65 per cent) and lowest among those aged sixty-five plus (42 per cent). Agreement is also more prevalent among desktop computer users (63 per cent) and smartphone users (60 per cent). Disagreement is most prevalent among non-smartphone mobile phone users (24 per cent).

For the statement “I have made friends with people who live in the same area as me as a result of using websites and/ or mobile apps” there are no significant differences across age groups. The 16-34 group is only slightly higher than the older age bracket (23 per cent of 16-34 years olds compared to 19 per cent of those fifty-five plus). Agreement is also fairly consistent, with no significant differences, across device usage. Smartphone users are only marginally higher (22 per cent) than desktop computer, laptop or netbook and tablet users (each 21 per cent). Agreement is highest for those who rent from a local authority (35 per cent) and rent privately (27 per cent) compared to those who own their property outright (17 per cent).

Interestingly, agreement with each attitudinal statement is significantly higher for those who use social media sources (for example Twitter, social networking sites and blogs) compared to hyperlocal media users who do not use social network sources but do use a combination of traditional, native and online search options.

6.0 SATISFACTION WITH LOCAL AND HYPERLOCAL MEDIA

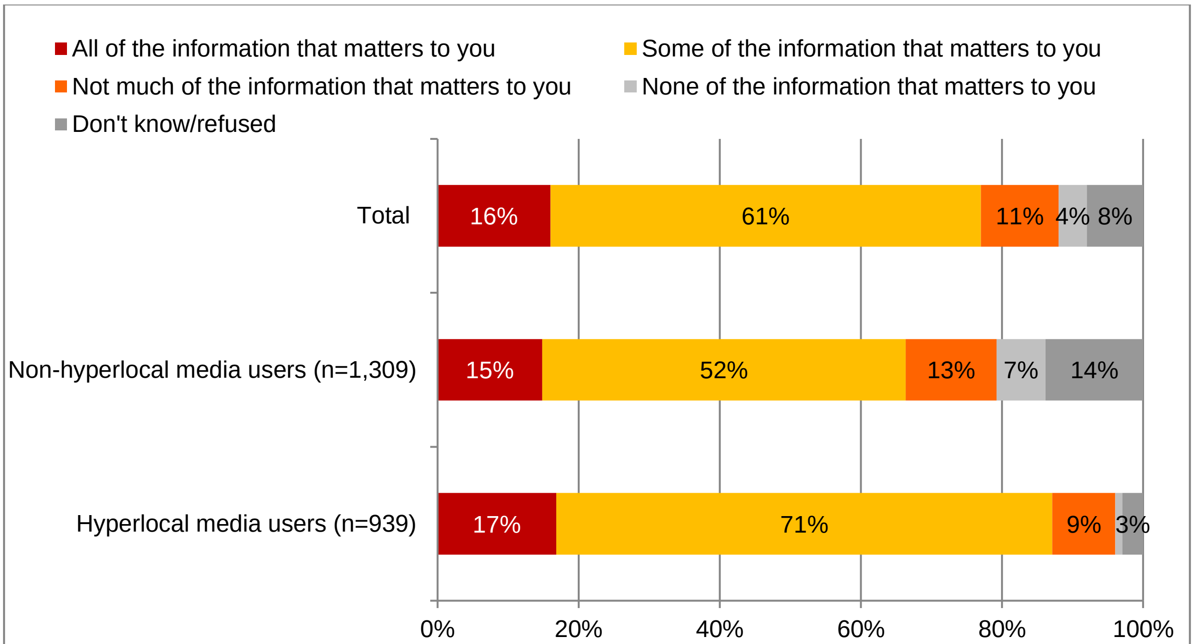
6.1 Overall performance of local media

Respondents were asked how well the sources of local media they use perform on giving them the information that matters to them.

Overall, citizen satisfaction with local media overall (not just hyperlocal media) appears high
Just over three-quarters (77 per cent) feel local news or information gives them ‘all’ or ‘some’ of the information that matters to them. Those aged 55 or over are more likely to agree it gives them ‘all’ compared to younger respondents. A greater percentage of those in the 55 years of age and above category feel they have ‘all’ the information they need, (17 per cent) compared to 16 to 34 year olds (13 per cent). Those who are widowed, divorced or separated are more likely to give a higher score compared to those at other life stages (20 per cent compared to 15 per cent each for those who are married or living as married or those who are single). There is no difference between those with access to the internet and those without access to the internet among top category scorers (16 per cent of internet users agree local media gives them ‘all’ the information they need and 17 per cent of non-internet users). A greater proportion of those in Northern Ireland state that their use of local media gives them ‘all’ of the information they need compared to the average (41 per cent compared to 16 per cent).

Among hyperlocal media users, satisfaction is even higher
Eighty-eight per cent of hyperlocal media users state that their local sources of news and information give them either ‘all’ or ‘some’ of the information that matters to them. This is in contrast to non-hyperlocal media users, where only 67 per cent give these responses. Care should be taken here to note, however, that hyperlocal media users may well have been referring to non-hyperlocal media sources as well as hyperlocal media ones when rating the overall performance of local media.

Figure 22 - Overall satisfaction with local sources of news and information, hyperlocal media users compared to non-hyperlocal media users



Base: All adults in the UK (2,248) Hyperlocal media users (939), Non-Hyperlocal media users (1,309)

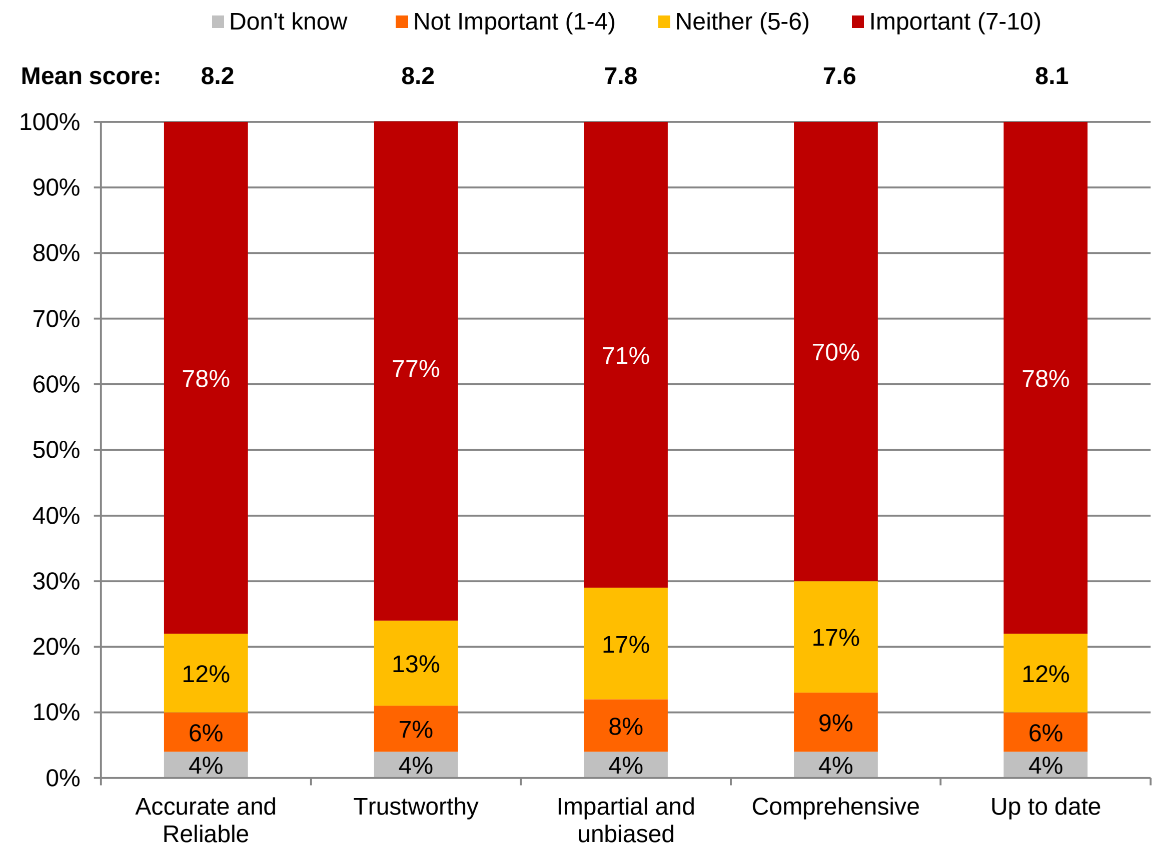
Q20 Thinking about ALL of the local news or information sources you use for the immediate local area you are in. How well do these sources give you the information you need?

Satisfaction is similar across devices used, although those with tablets are more likely to say their local sources give them 'all' or 'some' of the information that matters to them (83 per cent select these options compared to 77 per cent in total).

6.2 Factors of importance when choosing a local news or information source

All respondents were asked how important various attributes are when choosing a news or information source for a local area in which they live, work, used to live or are visiting.

Figure 23 - Personal importance of attributes when choosing a source for local news and information



Base: All adults in the UK (2,248)

Q5 How important are the following aspects to you personally in terms of choosing a news or information source for the immediate local area you are in? This could either be where you live, work, used to live but no longer live or are visiting.

Accuracy and reliability, trustworthiness and being up to date the most important factors
All of the attributes measured were judged to be important. Those with the highest mean scores are 'accurate and reliable', 'trustworthy' (mean scores of 8.2 each), and 'up-to date' (mean score of 8.1). 'Impartial and unbiased' scored a mean score of 7.8 and 'comprehensive' a mean score of 7.6.

Older respondents ranked all attributes as more important
All attributes listed above are significantly more important to the older age group than to younger respondents. For example, for 'trustworthy', 81 per cent of those aged fifty five and over cite this as important, while only 72 per cent of 16-34 year olds claim this attribute is important to them personally.

Accuracy, reliability and being up-to-date are significantly more important to those with internet access and hyperlocal media users compared to those who do not have access or use these sources

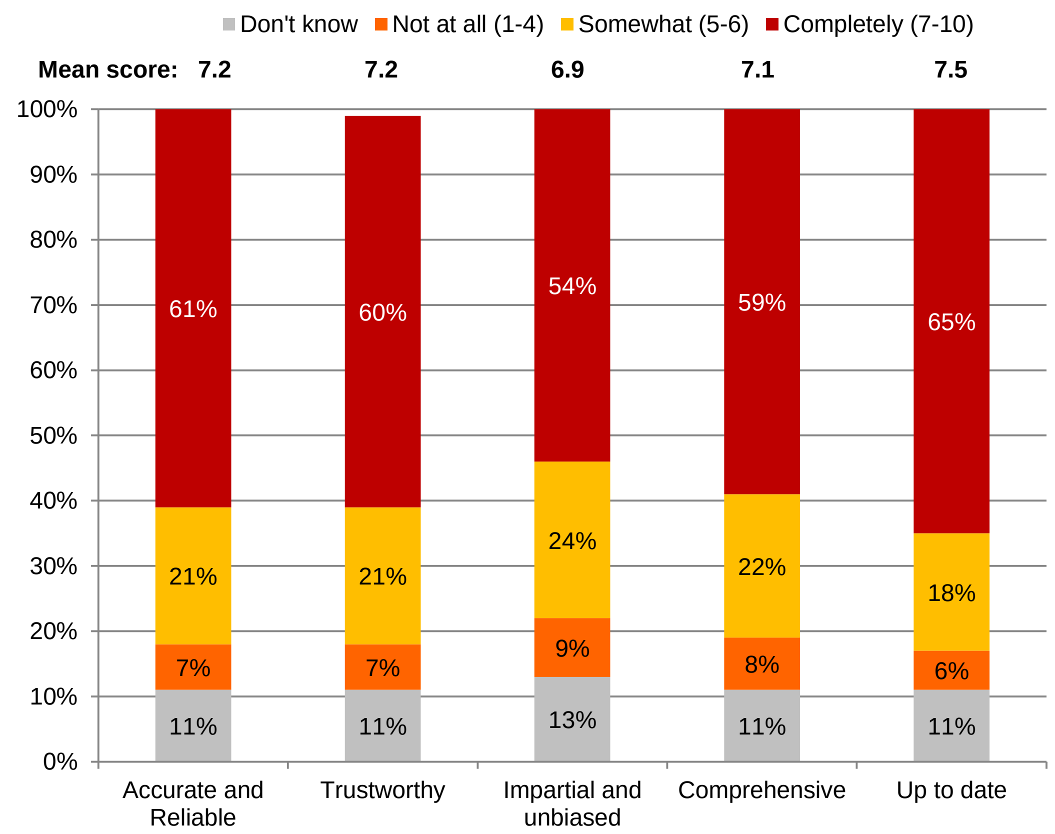
‘Accurate and reliable’ and ‘up to date’ are local media attributes that are significantly more important to those with internet access (79 per cent of respondents with ‘any’ internet access cite ‘accurate and reliable’ and 80 per cent cite ‘up to date’ as extremely important, versus 69 per cent of those with no internet access for each attribute). These attributes are also deemed more important to hyperlocal media users compared to non-users (90 per cent of hyperlocal media users cite ‘accurate and reliable and 91 per cent cite ‘up to date’ as extremely important in choosing a source compared to 67 per cent and 68 per cent of non-hyperlocal media users).

‘Accurate and reliable’ is also a significantly more important attribute to ABC1s (82 per cent) than to C2DEs (73 per cent). Respondents who own their house outright (82 per cent) or who have a mortgage (82 per cent) view this attribute as more important than both those who rent privately (75 per cent) and those who rent from the local authority (65 per cent). ‘Accurate and reliable’ is also more important to those in Northern Ireland (90 per cent) than those in Wales (64 per cent).

6.3 How local media sources perform

Respondents were asked how well their local news and information sources reflect the attributes they deem important for local media (note this can include both hyperlocal and non-hyperlocal media). Each attribute was scored on a scale of one to ten, where a score of one out of ten meant that the attribute did not apply at all to the local media sources they used and ten out of ten meant it applied completely.

Figure 24 - Performance of sources used for local news and information



Base: All adults in the UK (2,248)

Q19 To what extent do you think the following statements apply to the local news or information sources you use for the immediate local area you are in.

Overall, local sources in general score well on the most important attributes

Existing local media is judged to perform best on being 'up-to-date' (mean score 7.5), 'accurate and reliable' (mean score 7.2) and 'trustworthy' (mean score 7.2). Scores are lowest for 'impartial and unbiased' (mean score 6.9).

The biggest gaps between what's important and how existing sources perform is with accuracy and reliability and being trustworthy

To determine the difference between how important each attribute was seen to be in a local media context and how it actually performs, a gap analysis was performed. This was conducted by examining the difference in mean scores for importance versus performance for each attribute. The biggest gaps between expectation and how local media sources perform are with the attributes that are considered to be most important ('accurate and reliable' and 'trustworthy'). The smallest gap is between the attribute judged to be least important ('comprehensive').

Figure 25 - Importance versus performance of various local media attributes

Attribute	Importance (mean score)	Performance (mean score)	Gap
Accurate and reliable	8.2	7.2	1.0
Trustworthy	8.2	7.2	1.0
Up-to-date	8.1	7.5	0.7
Impartial and unbiased	7.8	6.9	0.8
Comprehensive	7.6	7.1	0.5

Q5 How important are the following aspects to you personally in terms of choosing a news or information source for the immediate local area you are in? This could either be where you live, work, used to live but no longer live or are visiting / Q19 To what extent do you think the following statements apply to local news or information sources you use for the immediate local area you are in.
Base: All adults in the UK (2,248)

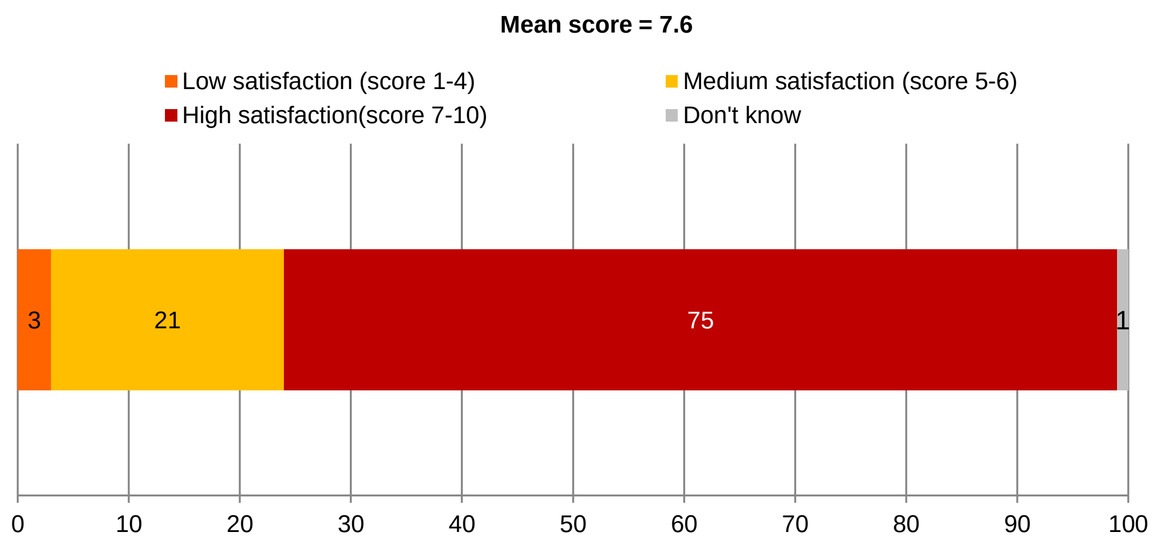
All attributes score higher among hyperlocal media users, although these higher scores cannot be directly attributed to hyperlocal media use

Mean scores for how local media sources in general perform are significantly higher for all attributes other than 'impartial and unbiased' among hyperlocal media users, although it is difficult to attribute these users use of hyperlocal media in particular as the reason for this higher score.

6.4 Satisfaction with hyperlocal media sources

Respondents were asked how satisfied they were with the hyperlocal media sources in particular.

Figure 26: Satisfaction with hyperlocal media sources used



Base: Hyperlocal media users who use one or more of the hyperlocal media sources listed at question 7

Q8 Still thinking of the sources you have used and using a scale of 1 to 10, where 1 is extremely dissatisfied and 10 is extremely satisfied, overall, how satisfied are you with these sources for news and information about the immediate area you are in (e.g town, village or local neighbourhood)?

Among hyperlocal media users, there is a good level of satisfaction with the sources used
Overall, among users, satisfaction with hyperlocal media is good (with users giving a mean score of 7.6 out of 10), and three quarters of all users scoring their sources seven or more out of ten. Only 3 per cent of users gave a low score (a score of 1-4) and 18 per cent gave a score of 10. Hyperlocal media in general scores higher at a mean score level than the highest scoring attribute for local media in general (7.5 for ‘up to date’).

Figure 27 - Performance of various local media attributes compared to the performance of hyperlocal media

Attribute	**Q19 Performance of local media – mean score (all respondents)**	**Q8. Performance of hyperlocal media sources used - mean score (hyperlocal media users)**
Accurate and reliable	7.2	
Trustworthy	7.2	
Up to date	**7.5**	
Impartial and unbiased	6.9	
Comprehensive	7.1	
Total	-	**7.6**

Bases: Q19 Performance (mean score) across attributes – all respondents (2,248)
Q8 Performance (mean score) total – hyperlocal media users who use one of the hyperlocal media sources listed (840)
Q8 Still thinking of the sources you have used and using a scale of 1 to 10, where 1 is extremely dissatisfied and 10 is extremely satisfied, overall, how satisfied are you with these sources for news and information about the immediate area you are in (e.g town, village or local neighbourhood)? / Q19 To what extent do you think the following statements apply to the local news or information sources you use for the immediate local area you are in.

35-54 year olds and larger households rate the hyperlocal media sources they use higher compared to other groups

Those in the 35-54 age group rate their hyperlocal media sources higher than those aged 55 and over (giving a mean score of 7.8 compared to 7.4). C2DEs rate their sources higher than ABC1s (giving the sources they use a mean score of 7.9 compared to 7.5). Those with three or more adults in the household rate their hyperlocal media sources higher than those with two adults (score 7.8 compared to 7.5). Their evaluation is the same, however, as those who live in single adult households (also a mean score of 7.8). Those with children aged 6-9 score higher than those with children age 0-2 (a mean score of 7.8 compared to 7.2).

There are no significant differences in satisfaction across different devices used or location where hyperlocal media is accessed.

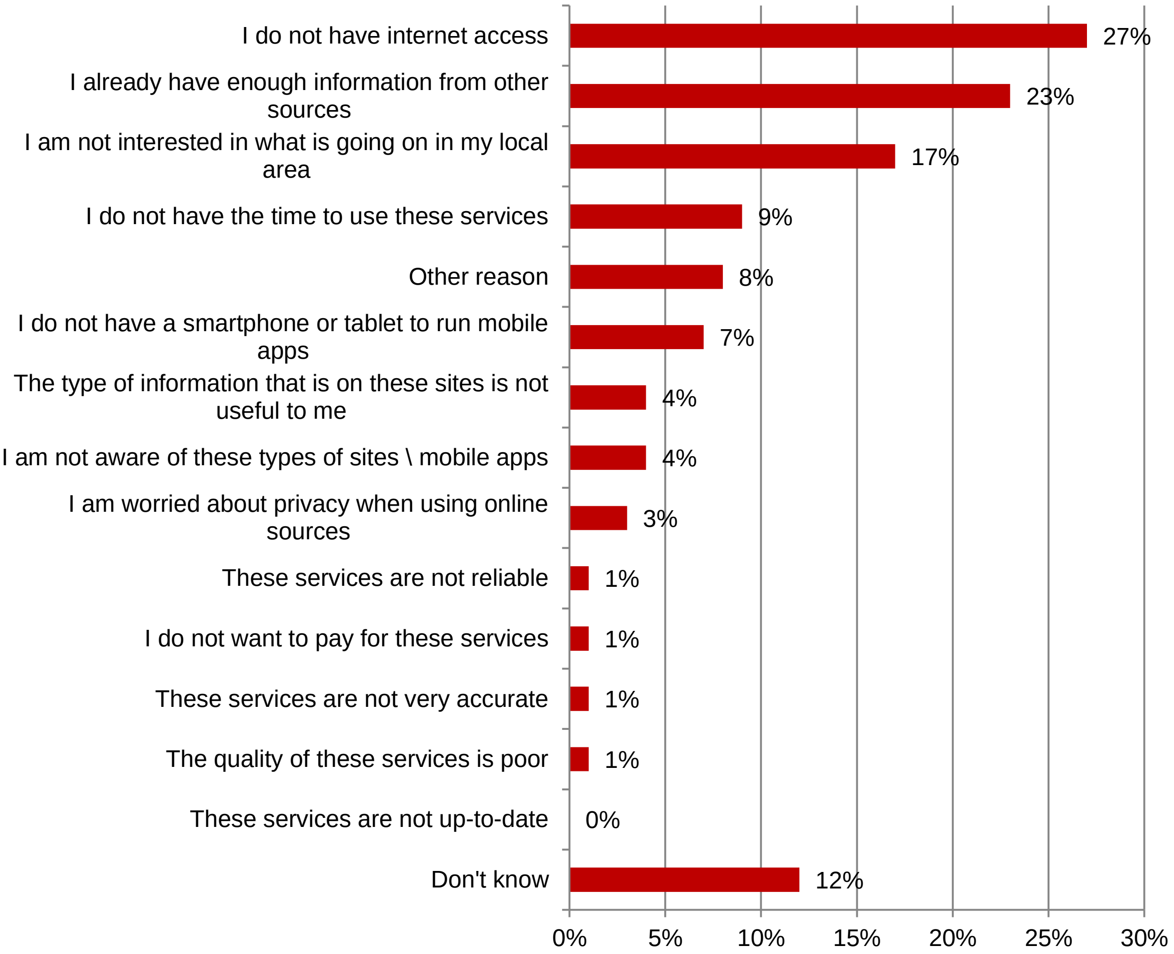
6.5 Why people do not use hyperlocal media

Compared to hyperlocal media users, non hyperlocal media users have different reasons for not using hyperlocal media

Non hyperlocal media users were asked why they did not make use of these services. Respondents were asked to select reasons from a list provided.

The top reason selected among non-users is ‘I do not have internet access’ (selected by 27 per cent of non-users). Other reasons selected are because respondents ‘already have enough information from other sources’ (23 per cent) and ‘because they are not interested in their local area’ (17 per cent). Nine per cent say that they do not have time to use these services, and seven per cent because they do not have a smartphone or tablet to run mobile applications. A very small percentage select reasons connected with a perceived poor performance of hyperlocal media services (for example, one per cent selected ‘the quality of these services is poor’, one per cent selected ‘these services are not very accurate’, one per cent ‘these services are not reliable’ and less than one per cent because ‘these services are not up-to-date’).

Figure 28 - Reasons listed for not using hyperlocal media



Base: Non-hyperlocal media users (1,309)

Q4a You said that you have not accessed any local area news or information online, on your computer, or laptop, mobile phone or your tablet for the immediate local area you are in, that is a town, village or local neighbourhood, either where you live, work, used to live, work, used to live but no longer live or are visiting. For which of the following reasons, if any, do you not use these sources?

There are some differences among those who have internet access and those that do not for why they do not use hyperlocal media

Among those who have internet access but do not use hyperlocal media, the top reason selected is 'I already have enough information from other sources' (30 per cent of those with internet access select this reason compared to 5 per cent without any internet access). A higher proportion of those with internet access also state 'I am not interested in what is going on in my local area'. This was selected by 22 per cent of this group compared to 6 per cent of those without internet access.

7.0 PARTICIPATION IN HYPERLOCAL MEDIA

Hyperlocal media users were asked whether they had either authored content for or contributed to a website, mobile app or social network related to their local area.

Just over one-fifth of hyperlocal media users have 'contributed' to hyperlocal media
Twenty-three per cent of hyperlocal media users state that they have posted a comment or thread, or uploaded a photo or other content in the local setting. Male users are more likely than female users to do this (30 per cent compared to 17 per cent). Responses do not vary much between age groups, although those aged 65 and over are less likely to participate in this way (14 per cent of 65 plus hyperlocal media users have contributed). Those who are using mobile phones that are not smartphones are less likely to contribute compared to those with other devices (17 per cent of non-smartphone users compared to 29 per cent of tablet users, 28 per cent of desktop computer users, 27 per cent of smartphone users and 25 per cent of laptop or netbook users).

Those using hyperlocal media in an area where they work or where they used to live are more likely to say they contribute
A greater proportion of those who access hyperlocal media in an area where they work contribute to hyperlocal media compared to those who access it where they live (36 per cent compared to 25 per cent). Those who access hyperlocal media in an area where they have previously lived also score higher (34 per cent).

Ten per cent of hyperlocal media users claim to have 'authored' content
Ten per cent of hyperlocal media users have 'written something from scratch' (for example, written an article or developed a blog) for a website, mobile app or social network for their local area. There are no significant age or gender differences among these authors. Whilst it is difficult to ascertain many significant differences between population groups here due to the low base sizes, there is some significant difference between tablet users and mobile phone users who do not use a smartphone (15 per cent of tablet owners say they have authored content compared to 8 per cent of non-smartphone mobile phone users). As with those who contribute content, a greater proportion of those who access hyperlocal media for an area where they work and those who access hyperlocal media for an area where they have previously lived have authored content compared to those who use hyperlocal media where they live (18 per cent for each location compared to 11 per cent for those who access the media in the area where they live).

8.0 APPENDIX

SURVEY METHODOLOGY

The survey was conducted with adults aged sixteen plus in the United Kingdom (UK). Research was carried out via a face-to-face omnibus survey using Computer Assisted Personal Interviewing (CAPI). The total sample of 2,248 was collected over two waves of the omnibus to allow for a greater range of sampling points to be included. Sample was selected by random location sampling. The sample has been weighted to represent the adult population of the UK aged sixteen plus. Significance testing was at the 95% level. The survey was in field from 4 January 2013 to 13 January 2013.

Sampling frame

2001 Census small area statistics and the Postcode Address File (PAF) were used to define sample points. These are areas of similar population sizes formed by the combination of wards with the constraint that each point must be contained within a single Government Office Region (GOR). In addition, geographic systems were employed to minimise the drive time required to cover each area as optimally as possible. Six hundred points were defined south of the Caledonian Canal in Great Britain (GB) with five points defined north of the Caledonian Canal. These latter differ in size from the other points and each other to meet the need to separately cover the different parts of the Highlands and Islands.

Stratification and sample point selection

Two-hundred and eighty-five points were selected south of the Caledonian Canal for use by the omnibuses after stratification by Government Office Region and Social Grade. They were also checked to ensure they are representative by an urban and rural classification. Those points are divided into two replicates. One set are used in one week. The other set are used in the next week. One of the points north of the Caledonian Canal is also used. Sixteen of the points in Northern Ireland are selected and divided into four replicates. Those replicates are used in rotation to give a wide spread over time. Similarly the statistical accuracy of the GB sampling is maximised by issuing sequential waves of fieldwork systematically across the sampling frame to provide maximum geographical dispersion. This ensures that the sample point selection remains representative for any specific fieldwork wave.

Selection of clusters within sampling points

All the sample points in the sampling frame were divided into two geographically distinct segments each containing, as far as possible, equal populations. The segments comprise aggregations of complete wards. For the omnibuses, alternate A and B halves were worked for each wave of fieldwork. Each week different wards are selected in each required half and Census Output Areas (OAs) selected within those wards. Then, groups of OAs containing a minimum of 125 addresses are sampled in those areas from the PAF.

Interviews

All interviews were conducted via the CAPI omnibus field team in accordance with strict quality control procedures. Quotas were set by gender/housewife. Within female housewife, presence of children and working status was set. Within men, working status was set to ensure a balanced sample of adults within effective contacted addresses. All interviewers had to leave three doors between each successful interview.

STUDY BACKGROUND AND METHODOLOGICAL CONSIDERATIONS

The survey was commissioned to measure the nature of demand for hyperlocal media in the UK and how this demand is likely to evolve over time. The initial brief was to find quantitative evidence of both reported ('stated preference') hyperlocal media activities and 'revealed preference' (what can be inferred about user demand for hyperlocal media from observed behaviour among users).

Measuring 'stated preference'

'Stated preference' was measured using primary market research via a face-to-face omnibus survey. A face-to-face methodology was chosen so that all groups of the UK population could be represented (including those without internet access). An omnibus approach was selected to allow for cost-effective, single source data collection at a national level which can be replicated in the future. Data was collected at a UK level rather than a more forensic examination of specific hyperlocal media activities in a particular locality.

Measuring 'revealed preference'

'Revealed preferences' were more challenging to measure and ultimately did not form part of this research study. 'Revealed preference' was not included due to the following concerns:

1) The lack of a single-source measurement tool. Whilst there are several data sources that capture media usage at a local level, there is no method for single-source measurement. Existing panels generally exist in industry silos, for example, local newspapers and regional television, making it difficult to capture a single data point.

2) Issues with access. Not all of these sources are publicly available.

3) Identifying which 'preferences' to monitor. It can be difficult to identify which sources to categorise as 'hyperlocal media', for example, the definition could include sources across a multitude of platforms, including local community websites, a local person followed on Twitter, or a service used on a mobile application. For a monitoring exercise to be comprehensive, it would need to have a platform-neutral approach and cover a wide range of media outlets.

4) Tracking preferences at a UK level. Due to the nature of the service provided, hyperlocal media services tend to be limited in geographical scope. The challenge for monitoring preference is how to make it representative across the UK.

Website tagging

While there are trade-offs to be made between geographical comprehensiveness and granularity in measuring 'revealed preference', one potential approach that was identified was to conduct website-specific measurement for a selection of hyperlocal media services. The proposed methodology for this was via a website tagging solution (Kantar Media's Spring™ Tag solution). The Spring™ tag solution is a site-specific monitoring system which collects usage data for websites in line with EU cookie consent rules. The monitor can also trigger a website survey with a current web user to collect more detailed demographic and attitudinal data. This provides the researcher with both 'revealed preference' and 'stated preference' data in one single source.

A tagging exercise such as this relies on a number of pre-requisites in order to be successful. Firstly, as the monitoring is triggered by a tag embedded into the website itself, this has to be set up by site owners. Site owners have to be willing and able to administer this technically. From a user perspective, the user has to be amenable to accepting the tracking device and to taking the survey. Site traffic has to be high enough to generate sufficient respondents (not everyone responds to a website survey). In the case of this study, whilst site owners were willing to embed the tag, a number of the websites selected for tagging were hosted on Wordpress.com. The Spring™ Tag solution works for Wordpress sites that are run by Wordpress or on Wordpress servers, however, site owners using Wordpress.com sites are not able to add in the tags on their sites. For this reason, the tagging solution was not included in this research study.

Auditing previous surveys on hyperlocal media

In the past, a range of surveys have been conducted on topics related to hyperlocal media, covering different populations and topic areas. As part of the preparation for this study, an audit of the tools and techniques used in some of this research was conducted. The scope of the audit included evaluating methodologies, questionnaires and results from past studies to help inform the design of the new study. Findings from the audit which had an impact on study design are detailed below.

Defining 'hyperlocal media'

Nesta's 'Here and Now: UK hyperlocal media today' report published in 2012 defined 'hyperlocal media' as: "online news or content services pertaining to a town, village, single postcode or other small geographically defined community." [5] This is a broad definition, which encompasses a number of different areas both in terms of platforms and content covered.

A diverse set of services

Ofcom's 'Communications market report 2012' focused on the use of hyperlocal *websites* in particular. In this report, Ofcom commented that the Nesta definition of hyperlocal media "is a wide definition covering a diverse set of services, including content produced both professionally and voluntarily. It includes websites that publish original stories, those that act as aggregators for news items from other providers, and forums or message boards focused on a particular geographic community."[6] Such content could include the types of areas highlighted in Flouch and Harris' research in 'Councils and online neighbourhood networks' in 2011 in London, including "local bloggers, chat groups, Facebook pages (local residents' personal Facebook profiles, area-based Facebook pages or groups (not council run), Council Facebook pages, member Facebook profile/page and Twitter streams (Local residents' personal Twitter streams, Twitter streams set up as neighbourhoods channels, Council Twitter stream)."[7] Given the diversity of 'online' content that can be classified in a broader 'media' category, a range of sources (including websites, social media outlets, internet search and mobile apps) were included in list of 'hyperlocal media' sources identified for this study. In order to establish overall 'hyperlocal media' use, respondents were asked "have you ever accessed any local area news or information online, on your computer or laptop, mobile phone or on your tablet…" and then asked to detail which sources in particular they used.[8]

[5] Radcliffe: *Here and Now: UK hyperlocal media today*, 2012
[6] Ofcom: Communications market report, 2012.
[7] Flouch / Harris: Online neighbourhood networks: report of the second neighbourhood networks survey of council officers and elected members, 2011.
[8] Question 4 and Question 7: Hyperlocal media questionnaire, Nesta 2013.

A range of content

In terms of the content covered by hyperlocal media, the definition adopted for this study included both locally-produced content from volunteers or local people with an interest in the area as well as content produced by the more 'traditional' media providers (e.g local newspapers and magazines, community radio and local TV). This makes the definition broader than some, but this categorisation was chosen in order to provide a comprehensive measure across all local media sources. Whilst a range of content was included in the overall classification of 'hyperlocal media', different types of hyperlocal media content were coded at an individual level so that the penetration of individual content types could also be analysed.

Measuring frequency

In some of the research studies to date, local media usage has been recorded in terms of weekly or monthly use. The time period in which a service has been used does vary according to the medium in question, for example a weekly print newspaper may be 'used' on a less frequent basis than a daily bulletin. Given the diversity of sources measured by this survey, hyperlocal media usage was asked in terms of "have you *ever* accessed…" Whilst this makes the scope broader, individual source use was also measured with a frequency question in order to provide a more comprehensive breakdown.[9] A question was also added to measure perceived change in use over time. This question built on research conducted by Ofcom in 'Local and regional media in the UK' in 2009 whereby "one in five consumers claim to use community websites at least monthly and a third of these say they have increased their use of such websites over the past two years."[10]

Talking about locality

There is some debate about what is meant by 'local' and how this should be defined in a questionnaire on a hyperlocal media topic. Nesta has defined the geographical scope for 'hyperlocal media' to be the respondent's "town, village, single postcode or other small geographically-defined community". In 'Local and regional media in the UK', Ofcom commented that "concepts of 'localness' are complex and vary between individuals and contexts – there is no single definition of 'local' or 'regional'". For the purposes of reporting on local and regional media, however, Ofcom used the following categories: "media on a regional (county or broader geographic area), local (town or local district) and ultralocal (immediate community or neighbourhood) basis." [11]
In a national survey that asks respondents to focus on their 'local' area, using the Nesta definition of "town, village, single postcode or other small geographically-defined community" allows the research to include areas which fall into Ofcom's description of 'local (town or local district)' or 'ultralocal (immediate community of neighbourhood)'. This survey follows the broader Nesta definition, asking respondents whether they have accessed hyperlocal media in "the immediate area in which you currently live that is your town, village or local neighbourhood".[12]

Using hyperlocal media for other areas

When examining concepts of 'locality', it is also important to remember that not all 'consumers' of hyperlocal media may actually *live* in the immediate area in which they are consuming the media. The Networked Neighbourhoods group alludes to this phenomenon in their description of 'neighbourhood websites'. In 'Online neighbourhood networks: report of the second neighbourhood networks survey of council officers and elected members' published in 2011, the group commented "our survey this year referred to 'independent citizen-led neighbourhood websites', which we describe as websites having the following characteristics: they are established and run by local citizens, with most of the content relating to local issues or interests, and are open to discussion and contributions *from anyone living in the area or with an interest in the area*"(our italics).[13] This

[9] Question 9: Hyperlocal media questionnaire, Nesta 2013.
[10] Ofcom: Local and regional media in the UK, 2009. Question 15: Hyperlocal media questionnaire, Nesta 2013.
[11] Ofcom: Local and regional media in the UK, 2009.
[12] Question 1: Hyperlocal media questionnaire, Nesta, 2013.
[13] Flouch / Harris: Online neighbourhood networks: report of the second networked neighbourhoods survey of council officers and elected members, 2011.

acknowledges a broader audience of those 'with an interest in the area'. Likewise, Ofcom observes that "despite the difficulties in defining localness, a common theme is that local content and services relate to a specific geographic area, rather than being of general interest or utility to the wider population, although *local content and services may be consumed by individuals outside the geographic area to which the content and services relate*" (our italics).[14] Given the potential for hyperlocal media to be used in locations other than just where respondents live, hyperlocal media usage in this study was examined from a number of locations, including:

a) Consumption in the work area (that is, consulting a hyperlocal media source to check out 'local' services in and around where a respondent works)
b) Diaspora use (that is, where a user used to live, or has family roots)
c) Hyperlocal as proximity – hyperlocal media use on the move (that is, where one is at a given time for example, visiting / passing through any given location and of particular relevance to location based services on mobile).[15]

Establishing topics of interest to hyperlocal media users

Some of the previous research conducted in this area has asked people about their consumption of *news* in a local context. Hyperlocal media, however, covers a wide range of services in addition to news, and it is important to include these in a survey of the hyperlocal media landscape. In a US study conducted by the Pew Research Center in partnership with the Knight Foundation on 'How people learn about their local community', survey respondents were asked about the range of topics they used local information sources for. These included areas such as "[information on] local restaurants, clubs or bars, other local businesses, local traffic or transportation, community or neighbourhood events, such as parades or block parties, local crime, local taxes or tax issues, local housing and real estate and local schools and education." Other areas included: "local politics, campaigns and elections, other local government activity, such as council meetings, hearings or local trials, local weather, local arts and cultural events, such as concerts, plays and museum exhibits, local breaking news, local job openings, local zoning, building and development, local social services that provide assistance with things like housing, food, health care and child care".[16]

The 2011 Networked Neighbourhoods' 'Networks' study among council officers and elected members in London was useful in examining some additional applications for neighbourhood websites from a UK perspective, including: "sharing council news and information on council services and events, [providing] a link to council online services, quickly identifying issues of concern for residents, getting informal and formal feedback from residents, [providing] a channel of communication with residents, [promoting] civic and pro-social behaviour, support[ing] residents who are ready to work in partnership with the council, generating solutions to local problems and dealing with rumours and incorrect information"[17]. Given the wide range of topics that could potentially be covered in a study on hyperlocal media, it was decided to draw on these sources to design a question which asked respondents about the kinds of topic areas they use hyperlocal media for. Question 12 was developed as a pre-coded list to capture this information.[18] This was also analysed at a platform and device level to give a more detailed view of the hyperlocal media landscape.

[14] Ofcom: Local and regional media in the UK, 2009.
[15] Location use summarised in question 4: Hyperlocal media questionnaire, Nesta, 2013.
[16] Rosenstiel, Mitchell, Purcell, Rainie: How people learn about their local community, Pew Research Center project for excellence in journalism and internet & American life project in partnership with the Knight Foundation, 2011.
[17] Flouch / Harris: Online neighbourhood networks: report of the second networked Neighbourhoods survey of council officers and elected members, 2011.
[18] Question 12: Hyperlocal media questionnaire, Nesta, 2013.

Identifying how people are accessing hyperlocal media – devices

Ofcom's 'Local and regional media' research in 2009 revealed that most adults in the UK (92%) consume some form of local media.[19] 'Regional / local TV' was cited as the most regularly-used source of local media and was the main source of local news for around half of all adults.[20] Over the past few years, internet use has grown. In Ofcom's 'Adults media use and attitudes report', 2011, Ofcom reported that "there has been a substantial increase in the proportion of the UK population now using the internet - from 59% in 2005 to 79% in 2011."[21] In 2012, 41 per cent UK adults claimed to use the internet for news[22]. Against this backdrop, in 2012, around one in seven (14%) UK adults stated they used community websites (using these services monthly or more frequently).[23] Mobile phone, and particularly smartphone usage is also growing. Whilst there are some differences in ownership among different age groups (mobile phone ownership among the 65+ group was 68% compared to 98% for 16-24 year olds in 2012), it is important to measure the impact such devices have on the consumption of local media. Alongside this, tablet ownership is also growing. As with mobile, tablet ownership varies by demographic. When it was measured by Ofcom in 2012, for example, tablet ownership was higher among those aged 45-54, households with children, AB social groups, higher-income groups, and those living in London and the south east.[24]

The Rosenstiel, Mitchell, Purcell and Rainie study in the US probed in more detail on the use of mobile in relation to local news and information. They reported that: "nearly half of adults (47%) use mobile devices to get local news and information. Not surprisingly, mobile is particularly popular for 'out and about' categories of information, such as restaurants. And 41% of all adults can be considered 'local news participators' because they contribute their own information via social media and other sources, add to online conversations, and directly contribute articles about the community."[25] Given the trends in this area, questions were included in this survey to look at the use of different devices when respondents look for local area news or information, the frequency with which they use them and the degree of interaction respondents have with the local media sources they are using.[26] Respondents were asked initially whether they 'personally' used any of a list of devices rather than asking about household ownership. This was done to avoid any potential confusion over device ownership and actual use (not all those who 'own' a device may actually use it, and conversely, those who 'use' a device may not necessarily 'own' it). The category list of devices used in the questionnaire was derived from Kantar Media's bi-annual TGI re-contact survey, 'futurePROOF', with separate categories for smartphones (with examples provided) and mobile phones that are not smartphones.[27] There was also a desktop computer, laptop or netbook computer, and tablet computer option.[28]

An area that was given additional attention was the use of mobile applications (apps) as a hyperlocal media source. Given the rising penetration of mobile phones, it made sense to start measuring the impact of mobile apps in particular, even if uptake proves to be relatively low at this stage. Respondents were asked therefore if they used 'the website or app' of a range of local media sources. An additional question was asked specifically about app usage later on the questionnaire to isolate app usage in particular.[29] It is also worth noting here that care was taken to differentiate between the practice of downloading apps and actually using them. For the purposes of this survey,

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[19] Ofcom: Local and regional media in the UK, 2009.
[20] Ofcom: Local and regional media in the UK, 2009.
[21] Ofcom: Adult media use and attitudes report, 2012.
[22] Ofcom: Measuring news consumption and attitudes, Annex 5 to Ofcom's advice to the Secretary of State for Culture, Olympics, Media and Sport, Kantar Media, 2012.
[23] Ofcom: Communications market report, 2012.
[24] Ofcom: Communications market report, 2012. For those aged 45-54 (16%), households with children (16%), AB social groups (19%), higher-income groups (22% of those with £30k+ household income have a tablet), and those living in London and the south east (15% and 17% respectively).
[25] Rosenstiel, Mitchell, Purcell, Rainie: How people learn about their local community, Pew Research Center project for excellence in journalism and internet & American life project in partnership with the Knight Foundation, 2011.
[26] Questions 6 and 11: Hyperlocal media questionnaire, Nesta, 2013.
[27] Kantar Media, futurePROOF, 2012.
[28] Question 3: Hyperlocal media questionnaire, Nesta, 2013.
[29] Question 7 and question 11: Hyperlocal media questionnaire, Nesta, 2013.

the question was designed to ask respondents specifically if they had *used* a mobile phone app to access hyperlocal media.[30]

One area to note when looking at how hyperlocal media is accessed by device in this survey is that respondents were only asked directly about the frequency of accessing hyperlocal media *in general* by device, rather than for each individual hyperlocal media source or topic area (e.g. they were not asked which device they used to access 'the website or app of a local TV station' or to get information on 'local weather' specifically). Results have been analysed by which devices respondents state they use when accessing hyperlocal media, but this is at a general, inferred level only. Likewise, for apps, respondents were asked about their app use at a general hyperlocal media level rather than for individual platform or topic areas.

Measuring the value of hyperlocal media

When measuring the nature of demand for hyperlocal media and how this demand is likely to evolve over time, it is useful to look at how hyperlocal media is valued. This was captured in a number of different ways in the survey as outlined below.

Reasons why people use hyperlocal media

As well as establishing who uses hyperlocal media, the survey captured some insights into the reasons why people use it. A list of potential reasons was drawn from a range of previous surveys with an 'other' option also added to capture any additional comments.[31] A follow-up question was also included to look at any potential barriers to the further use of hyperlocal media sources. This was designed to examine the impact of factors such as having to pay for hyperlocal media services, or a perceived weakness in the hyperlocal media service compared to other sources of local information (e.g. not being more 'accurate and reliable' or 'more comprehensive' than other sources).[32]

Importance and satisfaction

To put this into a wider context, a general question was asked at the beginning of the questionnaire to establish respondent interest in local news: "how interested are you in news or information about the immediate area in which you currently live, that is your town, village or local neighbourhood."[33] At the end of the questionnaire, another general question was asked about satisfaction with local news and information sources. This was asked in terms of how well these sources deliver on giving the respondent the information that 'matters' to them. This reflected a similar question used by Rosenstiel, Mitchell, Purcell and Rainie in their study.[34] This provided some base level information on the demand for general local news and information and how well current sources deliver against this demand.

The study also included a more detailed examination of how local media delivers on certain attributes associated with news sources, including whether the sources used are 'accurate and reliable', 'trustworthy', 'impartial and unbiased', 'comprehensive', and 'up-to-date'. These markers were adapted for this questionnaire from a longer list used by Ofcom in its report on 'Measuring news consumption and attitudes on media plurality' in 2012 and were included to give some indication of what were the most important drivers for the use of local media.[35] Respondents were

[30] Question 11, Hyperlocal media questionnaire, Nesta, 2013.
[31] Question 13, Hyperlocal media questionnaire, Nesta, 2013.
[32] Question 14, Hyperlocal media questionnaire, Nesta, 2013.
[33] Question 2, Hyperlocal media questionnaire, Nesta, 2013.
[34] Rosenstiel, Mitchell, Purcell, Rainie: How people learn about their local community, Pew Research Center project for excellence in journalism and internet & American life project in partnership with the Knight Foundation, 2011. The question asked: "Thinking about ALL of the local news and information sources you use...How well do these sources give you the information you need? Would you say they cover:" ALL of the information that matters to you / SOME of the information that matters to you / NOT MUCH of the information that matters to you/ NONE of the information that matters / (DO NOT READ) Don't know / (DO NOT READ) Refused / Question 20: Hyperlocal media questionnaire, Nesta, 2013.
[35] Ofcom, Measuring news consumption and attitudes, annex 5 to Ofcom's advice to the Secretary of State for Culture, Olympics, Media and Sport, Kantar Media, June 2012.

asked firstly how important these markers were to them personally, and then later asked to assess how well the sources they used performed against these markers.[36] The questions were separated in the questionnaire to enable due consideration to the performance of the sources used.

As well as these more general questions, there was also a more focused question for those who currently use hyperlocal media on how satisfied they were with the sources they used.[37]

How people use particular services

Another way of measuring the value of hyperlocal media is to explore how frequently people use hyperlocal media for different types of content. For this reason, respondents were asked to state how frequently they get information on each of the topic areas they used hyperlocal media for. They were also asked to identify which three topic areas were most important to them personally.[38]

Payment

In the research audit, it was highlighted that it may be useful to ask respondents how much they might be prepared to pay for various hyperlocal media services. Rosenstiel, Mitchell, Purcell and Rainie asked this in relation to local newspaper services: "If the only way to get full access to your local newspaper ONLINE on your computer, cell phone or other device was to pay a [FORM A: $10 / FORM B: $5] monthly subscription fee, would you pay it or not? Yes, would pay monthly subscription fee / No, would not."[39] The study captured the following volunteered answers: "Already pay fee for local online newspaper / Already get print version and online access is included in the cost / Local newspaper not available online/ No local newspaper / Don't know / Refused." In this example, respondents are asked to evaluate a service they are already familiar with, but in a different format. For the Nesta survey discussed here, it was felt it may be more of a challenge to ask people to evaluate new hyperlocal media services (e.g. a new mobile application) if they are not familiar with how the service will operate and what information it will provide. The fact that these services are mainly free at present, with consumers used to receiving information this way may also colour how respondents answer this question at present. As the market matures, this may become easier, so may be a topic area to include in future studies.

Measuring the impact of hyperlocal media on the community

In 'Local and regional media in the UK' in 2009, Ofcom underlined the importance of news and local journalism for democracy: "local and regional newspapers play a particularly important role in informing, representing, campaigning and interrogating and thus underpinning awareness and participation in the democratic process. Newspaper journalism is also a crucial part of the local and regional media ecology because it supports journalism on other platforms." It also states: "consumers and citizens value the role local and regional content plays in their lives; local and regional news in particular helps to inform people about what is going on in their local community, while news and other types of local content contribute towards reflecting UK cultural identity and representing diversity and alternative viewpoints."[40] The Networked Neighbourhoods' summary document, 'Online neighbourhood networks study 2010,' highlights some of the community benefits of hyperlocal websites, including "social capital and cohesion, communication and information-sharing, supportive behaviour, empowerment, civic involvement and co-production, civic activities and participation".[41] Given this perspective, some questions on the value of hyperlocal media from a civic perspective were included in the survey. Given that this is a large topic in itself, and space on the omnibus questionnaire was limited, this was confined for the purpose of this study to some

[36] Question 5 and Question 19: Hyperlocal Media Questionnaire, Nesta, 2013.
[37] Question 8: Hyperlocal Media Questionnaire, Nesta, 2013.
[38] Question 12a and 12b: Hyperlocal Media Questionnaire, Nesta, 2013.
[39] Rosenstiel, Mitchell, Purcell, Rainie: How people learn about their local community, Pew Research Center project for excellence in journalism and internet & American life project in partnership with the Knight Foundation, 2011.
[40] Ofcom: Local and regional media in the UK, 2009.
[41] Flouch/Harris: The online neighbourhood networks study, 2010.

attitudinal statements which measured the impact hyperlocal media has on user perspectives on local democracy, community and neighbourhood relations and other civic activity.[42]

The "non-user" perspective

Engaging with those who are not online

In any survey which looks at the use of services via the internet, it is important to remember that in 2012, not all households had internet access. (Ofcom reported in Q1 2012 that total home internet access (defined as a net figure for fixed broadband/mobile broadband /narrowband and smartphone access) was 80 per cent.[43] This this has an impact on how sample is collected for the survey and on analysis. From the perspective of questionnaire design, however, it is worth considering that respondents may have alternative access points to the internet outside of the home (e.g work, library, friends or family etc.), or via a mobile device (e.g a tablet) that is shared with others. For this reason, all respondents were asked whether they had accessed hyperlocal media (not just those who reported having internet access). When asked to qualify why they did not use hyperlocal media, 'I do not have internet access' was provided as a pre-coded option.[44]

Investigating barriers to using hyperlocal media

In order to understand why respondents did not use hyperlocal media, a pre-coded list of potential reasons for lack of use was developed. This was derived from a number of sources, and was designed to cover a range of issues, including access, lack of knowledge about the service, preferences for or satisfaction with other modes of communication, perceived issues with the quality of the service provided and unwillingness to give up time to use it.[45]

Codes focusing on concerns around the time investment and perceived reward (including 'I do not have the time to use these services' and 'I already have enough information' were based around some of the conclusions reached in a study conducted with local council officers and elected members in 'Councils and online neighbourhood networks' by Flouch and Harris. In this study, the report authors asked respondents to assess the significance of a number of factors in discouraging participation in neighbourhood websites from a council perspective. Reasons included: [participation was] too time consuming in relation to impact, lack of internet skills, lack of confidence in using, risk of encouraging negativity, fear that sites not representative, concern re protracted / discordant discussions, unrealistic resident expectations of responsiveness, lack of council guidance, no clarity on responsibility for interacting, council restrictions on the use of the internet."[46] Whilst these factors are focused on barriers from the perspective of councillors, these themes were also useful to develop into a 'barrier' list for the Nesta survey.

It is also important to remember that not all community-based enterprises are exclusively online. Ofcom notes: "Community media can be found across all platforms: radio and online broadcasting, TV and audio-visual materials, text-based websites and community print projects."[47] Rosenstiel, Mitchell, Purcell and Rainie also observe that: "at the same time, the survey finds both citizen-based information sources and some very old forms of media remain vital as well. Print newsletters, online listservs and old-fashioned word of mouth are important means by which people learn in particular about community events and local schools."[48] Ofcom does go on to note, however, that "ultra-local content, in contrast, tends to be more web- or print-focused, as it often targets a much smaller

[42] Question 16: Hyperlocal media questionnaire, Nesta, 2013.
[43] Ofcom: Communications market report, 2012.
[44] Question 4 and question 5: Hyperlocal media questionnaire, Nesta, 2013.
[45] Question 4a: Hyperlocal media questionnaire, Nesta, 2013.
[46] Flouch / Harris: Online neighbourhood networks: report of the second networked neighbourhoods survey of council officers and elected members, 2011.
[47] Ofcom: Local and regional media in the UK, 2009.
[48] Rosenstiel, Mitchell, Purcell, Rainie: How people learn about their local community, Pew Research Center project for excellence in journalism and internet & American life project in partnership with the Knight Foundation, 2011.

constituency and therefore is not always scalable in the way that radio and TV can be."[49] Whilst the nature of non-online community-focused activities was not within the scope of this study, hyperlocal media derived from more 'traditional' sources such as radio, TV and print was examined alongside 'newer' hyperlocal media sources.

Profiling considerations

When examining the use of 'community websites' in 2012, Ofcom noted an age bias to their use. They note "adults aged between 25 to 34 were more likely to use these services (22%), while those aged over 65 were less likely (7%)".[50] As previously discussed, there are also some demographic differences with the ownership of devices such as mobile phones and tablet computers. In terms of internet access, we know that broadband availability is different across the nations. Ofcom states that "superfast broadband services are *available* to an estimated 60% of UK homes (Q1 2012)" It notes, "there are significant variations in coverage across the nations, with availability highest in Northern Ireland (94%), compared to 34% in Wales (where it is lowest), whereas Scotland stands at 42% of homes".[51] As with the use of 'community websites', there are differences across age for internet access as a whole. There are also differences across social economic grade, where "home internet access is highest for the AB socio-economic group (92%) and lowest for DEs (63%)".[52] In any examination of hyperlocal media uptake via the internet and devices such as smartphones and tablets, it is important to take into account any potential demographic differences. For this reason, detailed profiling has been built into the survey (see table 1 for more detail on the profiling used).

Another area that merits attention is in analysis of hyperlocal media uptake by region. There are estimates that there are more than 400 hyperlocal websites in the UK[53]. As with age, however, there is a regional bias to these, with around 93 per cent of websites covering England and clustered around urban areas (e.g in London, Birmingham and Bristol).[54] Ofcom also notes that "there appears to be only a loose correlation between population size and hyperlocal website provision. The areas with the lowest populations (Northern Ireland and the North East) also have the smallest number of hyperlocal websites, while more populous areas of the UK (such as London and the South East) are well served by the sector. But there are significant variations between areas. While Scotland and the South West are similar in population terms, with a little over 5 million individuals each, they have strikingly different hyperlocal website sectors – only 13 in Scotland against 76 in the South West. It may be, therefore, that there are other variables which explain the distribution of hyperlocal websites across the UK."[55] It is more challenging in a survey designed to be nationally representative to draw detailed conclusions about the uptake of hyperlocal media by hyperlocal region due to the base sizes involved. A more detailed survey of the uptake of hyperlocal media sources focused on one particular area is more suited to a different type of survey, and is not within the scope of this study. This study does, however, examine any differences at a Government Office level and an urban / rural level for hyperlocal media.

Finally, Rosenstiel, Mitchell, Purcell and Rainie observe some interesting differences in the consumption of local information by length of residence in a given community. They observe "those who are older and those who have lived in their communities longer are more likely than younger people and community newcomers to be tuning in to information about many local topics, including social services, tax issues, and local schools."[56] Given that this might be the case, a question was included on how long a respondent had lived in an area, as well as what their general level of

[49] Ofcom: Local and regional media in the UK, 2009.
[50] Ofcom: Communications market report, 2012.
[51] Ofcom: Communications market report, 2012.
[52] Ofcom: Communications market report, 2012.
[53] Quoted by Ofcom in the Communications market report, 2012. Openly Local's directory of UK hyperlocal sites suggests that in the UK, there are at least 500 online sites which provide hyperlocal content, quoted in Radcliffe: Here and Now: UK hyperlocal media today, 2012.
[54] Ofcom: Communications market report, 2012.
[55] Ofcom: Communications market report, 2012.
[56] Rosenstiel, Mitchell, Purcell, Rainie: How people learn about their local community, Pew Research Center project for Excellence in Journalism and Internet & American Life Project in partnership with the Knight Foundation, 2011.

interest in local media (both online and offline) was. Results were analysed by these two variables and any differences discussed.[57]

Table 1: Demographic profiling

Area	Variables collected	Analysis considerations
Gender	Male, female	
Age	Exact age recorded	Groups used in the analysis reflect standard industry groupings (16-24, 25-34, 35-44, 45-54, 55-64, 65+).
Social grade	Collected at an individual grade level	Grouped for the purposes of analysis to ABC1 and C2DE.
Marital status	Married/living as married, widowed/divorced/separated, single	
Working status	Full time (30 hours+), part time (8-29 hours), part time (below 8 hours), retired, still at school, in full-time higher education, looking for work, not looking for work (not student / retired)	For questions focusing on the use of hyperlocal media in the area where a respondent worked, the base was filtered to those who either work full or part-time.
Household size and composition	Number of adults in household Household size Presence and age of children in household	Grouped as 1, 2, 3+ Grouped as 1, 2, 3, 4+ Grouped as child aged 0-2, 3-5, 6-9, 10-15, none (exact age and gender of each child is recorded, so other groupings can be provided).
Region	ITV Regions (overlap or non-overlap), Government Regions, North/Midlands/South, Urban/rural and Conurbation/urban/rural	A range of regional data was collected; however, analysis was mainly conducted at a Government Region level due to the base sizes involved. Some analysis was also conducted at the Urban / rural level. First three letters of postcode were also collected for more granular analysis, but again, due to the lower bases involved, were not included in the analysis for this report.
Tenure	Own outright, buying on mortgage, rent from local authority, rent privately, other	Analysis was conducted at a tenure level to identify any areas where property ownership status had an impact on the use of hyperlocal media.
Internet access	Access to the internet at home, access to the internet at work, access to the internet via mobile phone, other internet access. Also collected data on e-mail address ownership: an e-mail address at home, an e-mail address at work, other e-mail address. A 'none of these' option was also provided.	Codes were summarised into 'Any' internet access or 'None' for the purposes of analysis.
Ethnicity	White British, White Irish, Any other White, White & Black Caribbean, White & Black African, White & Asian, Any other mixed background, Indian, Pakistani, Bangladeshi, Any other Asian, Caribbean, African, Any other Black, Chinese, Any other, Refused	Codes were summarised into 'White' and 'Minority Ethnic' for the purposes of analysis.
Principal Shopper	Yes, No	
Chief Income Earner	Yes, No	

[57] Question 1 and question 2: Hyperlocal media questionnaire, Nesta, 2013.

Table 2: Additional profiling

Media	Q21: Which of the following newspapers, if any, do you read nowadays	Codes were grouped into Daily Quality (The Daily Telegraph/The Times/The Guardian/The FT/The Independent), Daily Mid-market (Daily Mail/ Daily Express), Daily Popular (The Sun/The Mirror/Daily Star/Daily Record), Sunday Quality (The Sunday Telegraph/The Sunday Times/The Observer/The Independent on Sunday) Sunday Mid-market (The Mail on Sunday/Sunday Express), Sunday Popular (The People/The Sun on Sunday/Sunday Mirror/Sunday Sport), Local newspaper, Other newspaper, Don't know /Not stated
Length of residence	Q1: Thinking about the immediate area in which you currently live that is your town, village or local neighbourhood, how long have you lived in this area? Less than 1 year, More than 1 year but less than 2 years, 2 to 3 years, 4 to 5 years, 6 to 10 years, 11 to 20 years, More than 20 years, Don't Know (hidden)	
Level of interest in local area	Q2: How interested are you in news or information about the immediate area in which you currently live, that is your town, village or local neighbourhood? Very interested, Quite interested, Neither interested nor uninterested , Not very interested, Not at all interested	

QUESTIONNAIRE

Hyperlocal Media Questionnaire

Filter = All adults in the UK

READ OUT

I would now like to ask you some questions about your access to local news or information.

SHOW SCREEN

Q.1 Thinking about the immediate area in which you currently live that is your town, village or local neighbourhood, how long have you lived in this area?

DO NOT INVERT

1: Less than 1 year
2: More than 1 year but less than 2 years
3: 2 to 3 years
4: 4 to 5 years
5: 6 to 10 years
6: 11 to 20 years
7: More than 20 years
DK (BUTTON) – USER DEFINED

Filter= All adults the UK

SHOW SCREEN

Q.2 How interested are you in news or information about the immediate area in which you currently live, that is your town, village or local neighbourhood?

ANSWERS WILL BE INVERTED RANDOMLY

1: Very interested
2: Quite interested
3: Neither interested nor uninterested
4: Not very interested
5: Not at all interested

Filter = All adults in the UK

SHOW SCREEN – MULTICHOICE

Q.3 Do you personally use any of the following devices?

PROBE: Which others?

ANSWERS WILL BE INVERTED RANDOMLY
ON THE INVERTED VERSION PLEASE SHOW CODE 1 ABOVE CODE 2

1: A mobile phone that is a Smartphone e.g. Apple iPhone, Blackberry, mobile phone with Android, mobile phone with Windows Mobile or other smartphone.
2: A mobile phone that is not a Smartphone
3: A Desktop computer
4: A Laptop or netbook computer
5: A Tablet computer e.g. iPad or Samsung Galaxy, Nexus 7, Kindle Fire, Microsoft Surface or other tablet computer
N (BUTTON) – USER DEFINED
DK (BUTTON) – USER DEFINED

Filter = All adults in the UK

SHOW SCREEN – MULTICHOICE

Q.4 Have you ever accessed any local area news or information **online, on your computer or laptop, mobile phone or on your tablet** for any of the following?

PROBE: Which others?

ANSWERS WILL BE INVERTED RANDOMLY

1: The immediate area in which you currently live that is your town, village or local neighbourhood
2: The area where you work (SCRIPTER: CODE 2 ONLY SHOWN IF QUOTA Q.13\1-3)
3: A place where you have previously lived but no longer live in
4: A place that you were visiting where you wanted to access specific local information
N (BUTTON) – USER DEFINED
DK (BUTTON) – USER DEFINED

IF N\DK AT Q.4 GOTO Q.4A, ELSE GOTO Q.5

Filter = All who have never accessed local area news or information (non-hyperlocal media users)

SHOW SCREEN – MULTICHOICE

Q.4A You said that you have **not** accessed any local area news or information **online, on your computer, or laptop, mobile phone or your tablet** for the immediate local area you are in , that is a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting. For which of the following reasons, if any, do you not use these sources?
PROBE: Which others?

ANSWERS WILL BE INVERTED RANDOMLY

1: I do not have internet access
2: I do not have a smartphone or a tablet to run mobile apps
3: I am not interested in what is going on in my local area
4: I am not aware of these types of sites \ mobile apps
5: I do not have the time to use these services
6: The quality of these services is poor
7: These services are not very accurate
8: These services are not up-to-date
9: I do not want to pay for these services
10: These services are not reliable
11: The type of information that is on these sites is not useful to me
12: I already have enough information from other sources
13: I am worried about privacy when using online services
: Other reason (PEN WRITE IN)
DK (BUTTON) – USER DEFINED

Filter = All adults in the UK

SHOW SCREEN AND READ OUT STATEMENT

Now, talking about news or information sources for the immediate local area you are in (e.g. town, village or local neighbourhood), this could either be where you live, work, used to live but no longer live or are visiting:

Q.5 Using a scale of 1 to 10, where 1 is not at all important, and 10 is extremely important. How important are the following aspects to you personally in terms of choosing a news or information source for the immediate local area you are in? This could either be where you live, work, used to live but no longer live or are visiting.

SHOW SCREEN READ OUT STATEMENT

How important is it that your local news or information source is..

ANSWERS WILL BE INVERTED RANDOMLY

…accurate and reliable
…trustworthy
…impartial and unbiased
…comprehensive
…up to date

1: -1- Not at all important
2: -2-
3: -3-
4: -4-
5: -5-
6: -6-
7: -7-
8: -8-
9: -9-
10: -10- Extremely important
DK – (BUTTON) – USER DEFINED

IF CODES Q.4\1-4 GOTO Q.6, ELSE GOTO Q19

Filter = All who have accessed any local area news or information online and used any device mentioned in Q3 (hyperlocal media users with a named device)

Q.6 How frequently do you use each of the following devices to access news or information **online** about the immediate local area you are in, such as a town, village or local neighbourhood. This could be either where you live, work, used to live but no longer live or are visiting?

ASK FOR EACH DEVICE USED AT Q3

SHOW SCREEN AND READ OUT STATEMENT

How frequently do you use…

...a mobile phone that is a Smartphone such as an Apple iPhone, Blackberry, mobile phone with Android, mobile phone with Windows Mobile, other smartphone
…a mobile phone that is not a Smartphone
…a Desktop computer
…a Laptop or netbook computer
…a Tablet computer such as an iPad or Samsung Galaxy, Nexus 7, Kindle Fire, Microsoft Surface or other tablet computer

1: Every day
2: Not daily but at least weekly
3: Not weekly but at least monthly
4: Have used but less than monthly
5: Have never used
DK (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

SHOW SCREEN – MULTICHOICE

Q.7 Do you use any of the following sources of information to get news or information about the immediate area you are in, such as a town, village or local neighbourhood? This could either be where you live, work, used to live but no longer live or are visiting. Please read out the letter next to the relevant statement
PROBE: Which others?

ANSWERS WILL BE INVERTED RANDOMLY

1: A. The website or app of a local TV station (e.g. local news and information from bbc.co.uk, ITV.com, STV, UTV)
2: B. The website or app of a local radio station
3: C. The website or app of a community radio station
4: D. The website or app of a local newspaper or magazine (paid or free)
5: E. The website or app of a local business (e.g. local restaurant)
6: F. The website or app of a local directory (e.g. Yell.com, Thomson Local)
7: G. The website or app of your local authority (e.g. council, police or local health services)
8: H. The website or app of volunteers or people with an interest in the local area \ from the local area
9: I. An e-mail newsletter or information about your local area written by volunteers or people with an interest in the local area \ from the local area.
10: J. A person or organisation you follow on a social networking site
11: K. A person or organisation you follow on Twitter
12: L. A person or organisation you follow via a blog
13: M. The website or app of a UK or global directory or topic-led site filtered by local information (e.g. Craig's List, Mumsnet, Gumtree, Top Table)
14: N. An internet search for information on your local area such as Google or Bing
15: O. Some other website that is dedicated to your local community (TYPE IN)
N (BUTTON) – USER DEFINED
DK (BUTTON) – USER DEFINED

IF Q.7\1-15 GOTO Q.8, ELSE GOTO Q.11

Filter = All who have used any of the listed sources of information for news or information about their local area (hyperlocal media users who use one or more of the hyperlocal media sources listed)
SHOW SCREEN

Q. 8 Still thinking of the sources you have used and using a scale of 1 to 10 where 1 is extremely dissatisfied and 10 is extremely satisfied. Overall, how satisfied are you with these sources for news or information about the immediate area you are in (e.g. town, village or local neighbourhood)?

1: -1- Extremely dissatisfied
2: -2-
3: -3-
4: -4-
5: -5-
6: -6-
7: -7-
8: -8-

9: -9-
10: -10 – Extremely satisfied
DK (BUTTON) – USER DEFINED

Filter = All who have used any of the listed sources of information for news or information about their local area (hyperlocal media users who use one or more of the hyperlocal media sources listed)

Q.9 On average, how frequently do you use each of the following to get news or information about the immediate area you are in such as a town, village or local neighbourhood)? Again, this could either be where you live, work, used to live but no longer live or are visiting.

SHOW SCREEN AND READ OUT STATEMENT

…The website or app of a local TV station (e.g. local news and information from bbc.co.uk, ITV.com, STV, UTV)
…The website or app of a local radio station
…The website or app of a community radio station
…The website or app of a local newspaper or magazine (paid or free)
…The website or app of a local business (e.g. local restaurant)
…The website or app of a local directory (e.g. Yell.com, Thomson Local)
…The website or app of your local authority (e.g. council, police or local health services)
…The website or app of volunteers or people with an interest in the local area \ from the local area
…An e-mail newsletter or information about your local area written by volunteers or people with an interest in the local area \ from the local area.
…A person or organisation you follow on a social networking site
…A person or organisation you follow on Twitter
…A person or organisation you follow via a blog
…The website or app of a UK or global directory or topic-led site filtered by local information (e.g. Craig's List, Mumsnet, Gumtree, Top Table)
…An internet search for information on your local area such as Google or Bing
…Some other website that is dedicated to your local community, such as... (INSERT TYPE IN FROM Q7)

1: Every day
2: Not daily but at least weekly
3: Not weekly but at least monthly
4: Have used but less than monthly
5: Have never used
DK (BUTTON) – USER DEFINED

Filter = All who have used any of the listed sources of information for news or information about their local area (hyperlocal media users who use one or more of the hyperlocal media sources listed)

Q.10 For each of the sources you have mentioned, which specific area have you been seeking local area news or information on?

ASK FOR EACH ANSWER CODED AT Q7

SHOW SCREEN AND READ OUT STATEMENT – MULTICHOICE

…The website or app of a local TV station (e.g. local news and information from bbc.co.uk, ITV.com, STV, UTV)
…The website or app of a local radio station
…The website or app of a community radio station
…The website or app of a local newspaper or magazine (paid or free)
…The website or app of a local business (e.g. local restaurant)
…The website or app of a local directory (e.g. Yell.com, Thomson Local)
…The website or app of your local authority (e.g. council, police or local health services)
…The website or app of volunteers or people with an interest in the local area \ from the local area
…An e-mail newsletter or information about your local area written by volunteers or people with an interest in the local area \ from the local area.
…A person or organisation you follow on a social networking site
…A person or organisation you follow on Twitter
…A person or organisation you follow via a blog
…The website or app of a UK or global directory or topic-led site filtered by local information (e.g. Craig's List, Mumsnet, Gumtree, Top Table)
…An internet search for information on your local area such as Google or Bing
…Some other website that is dedicated to your local community, such as... (INSERT TYPE IN FROM Q7)

ANSWERS WILL BE INVERTED RANDOMLY

1: The immediate area in which you currently live
2: The area where you work (SCRIPTER: CODE 2 ONLY SHOWN IF QUOTA Q.13\1-3)
3: A place where you have previously lived but no longer live in
4: A place that you were visiting where you wanted to access specific local information
N (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

Q.11 Have you used a mobile phone app to access local news or information about the immediate area you are in, such as a town, village, or local neighbourhood. This could either be where you live, work, used to live but no longer live or are visiting?

1: Yes
2: No
DK\CR (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

SHOW SCREEN – MULTICHOICE

Q.12 Which of the following topic areas do you get information about? Here, we are referring to when you get news or information **online, on your computer or laptop, mobile phone or on your tablet** about the immediate local area you are in, such as a town, village or local neighbourhood. This could either be where you live, work, used to live but no longer live or are visiting.

PROBE: Which others?

ANSWERS WILL BE INVERTED RANDOMLY
ON THE INVERTED VERSION PLEASE SHOW CODE 2 AFTER CODE 1, CODE 8 AFTER 7 AND CODE 19 AFTER CODE 18

1: A. Local breaking news
2: B. Other local (non-breaking) news
3: C. Business news
4: D. Local sports
5: E. Local weather
6: F. Items for sale \ classified ads
7: G. Local restaurants, clubs or bars
8: H. Other local businesses
9: I. Local entertainment \ what's on (e.g. local cinema listings, local events)
10: J. Local arts and cultural events, such as concerts, plays and museum exhibits
11: L. Local property for sale or rent
12: M. Local job openings
13: N. Local travel information
14: O. Local planning, building and development
15: P. Local social services that provide assistance with things like housing, food, health care and child care
16: Q. Local crime
17: R. Local schools and education
18: S. Local politics, campaigns and elections
19: T. Other local government activity, such as council meetings, hearings or local trials
20: U. Community events
21: V. Other topic (TYPE IN)
N (BUTTON) – USER DEFINED
DK(BUTTON) – USER DEFINED

ASK Q12A IF CODES 1-21 AT Q12 ELSE SEE Q13

Filter = All who get information about any of the topic areas listed (hyperlocal media users who get information about any of the topic areas listed)

SHOW SCREEN

Q.12a On average, how frequently do you get information on each of the following topic areas **online, on your computer or laptop, mobile phone or on your tablet** for the immediate area you are in, such as a town, village or local neighbourhood? This could either be where you live, work, used to live but no longer live or are visiting?

(ONLY SHOW STATEMENTS CODED AT Q.12 BUT REMOVING THE LETTERS – RANDOMISE ORDER. FOR STATEMENT 21 “OTHER TOPIC” PLEASE SHOW AS: Other topic - <INSERT FROM Q.12>)

1: Every day
2: Not daily but at least weekly
3: Not weekly but at least monthly
4: Have used but less than monthly
DK (BUTTON) – USER DEFINED

Filter = All who get information about any of the topic areas listed (hyperlocal media users who get information about any of the topic areas listed)

SHOW SCREEN – MULTICHOICE

Q.12B And which **THREE** are the most important to you personally? INTERVIEWER: PLEASE RECORD IN ORDER OF MENTION

ANSWERS WILL BE INVERTED RANDOMLY

RECORD FIRST, 2^{ND} AND THIRD MENTION. MAX OF 3 ANSWERS

LIST AS ANSWERS CODED AT Q.12 PLUS DK BUTTON – USER DEFINED. FOR CODE 21 “OTHER TOPIC” PLEASE SHOW AS: Other topic - <INSERT FROM Q.12>

Filter = All who have accessed any local area news or information online (hyperlocal media users)

SHOW SCREEN - MULTICHOICE

Q.13 Thinking about when you seek news or information **online, on your computer or laptop, mobile phone or on your tablet** about the immediate local area you are in, such as a town, village or local neighbourhood, either where you live, work, used to live but no longer love or are visiting, for which of the following reasons, if any, do you turn to this source of information in particular? PROBE: Any other reason?

ANSWERS WILL BE DISPLAYED IN RANDOM ORDER

1: A. The information is free
2: B. The information is more accurate and reliable than other sources of local information
3: C. The information is more comprehensive than other sources of local information
4: D. The information is more up to date than other sources of local information
5: E. The information is focused on the area in which I live
6: F. The information gives me a sense of belonging to a community
7: G. The information inspires me to get involved in my local area
8: H. I am interested in what is going on in my local area
9: I. It is convenient
10: J. Other reason (PEN WRITE IN)
DK (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

SHOW SCREEN – MULTICHOICE

Q.14 Thinking about when you seek news or information **online, on your computer or laptop, mobile phone or on your tablet** about the immediate local area you are in, such as a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting, which of the following reasons, if any, would limit your use of these sources?

ANSWERS WILL BE DISPLAYED IN RANDOM ORDER
1: A. I have to pay for the service
2: B. The information is not more accurate and reliable than other sources of local information
3: C. The information is not more comprehensive than other sources of local information
4: D. The information is not more up to date than other sources of local information
5: E. The information is not focused on the area in which I live
6: F. The information does not give me a sense of belonging to a community
7: G. The information does not inspire me to get involved in my local area
8: H. It is not convenient
9: I. Other reason (PEN WRITE IN)
DK (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

SHOW SCREEN

Q.15 Which of the following statements would you say, is most relevant to you about your use of local websites and\or mobile or tablet applications for local news or information about the immediate local area you are in. This could be a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting?

ANSWERS WILL BE INVERTED RANDOMLY

1: I use them more than I did two years ago
2: I use them about the same amount as I did two years ago
3: I use them less than I did two years ago
DK (BUTTON) – USER DEFINED

IF Q.15\1 GO TO Q.15A, ELSE GOTO Q.16

Filter = All who use local websites on mobile or tablet for local news or information more than 2 years ago (hyperlocal media users who use hyperlocal media more than they did two years ago)

Q.15A Do you use these more **NOW** because you have a Smartphone and \or tablet whereas you did not have one previously?

1: Yes
2: No
DK (BUTTON) – USER DEFINED

ASK Q16 IF CODE 1 AT Q4 ELSE SEE Q17

Filter = All who have accessed any local area news or information online and have accessed in the immediate area in which they currently live (code 1 at Q4) (hyperlocal media users who use hyperlocal media in the immediate area in which they currently live)

Q. 16 Now thinking just about news or information about the immediate area in which you **currently live , by immediate area, we mean your town, village or local neighbourhood**, how much you agree or disagree with each of the following statements. Please answer on a scale of 1 to 10, where 1 is completely disagree and 10 is completely agree.

SHOW SCREEN AND READ OUT STATEMENT

ANSWERS WILL BE INVERTED RANDOMLY

...The use of local websites and \or mobile apps strengthens my sense of belonging to the immediate area in which I currently live
...The use of local websites and\or mobile apps means I can have an influence over decisions made in the immediate area in which I currently live
...The use of local websites and \ or mobile apps helps me to participate in local organisations and groups
...I have made friends with people who live in the same area as me as a result of using websites and \ or mobile apps
...I feel more informed about my neighbourhood as a result of using local websites and \ or mobile apps
...I value the opportunity to contribute to discussions about my local area via a website and \ or mobile app
...The use of local websites and \ or mobile apps makes me more likely to support the local economy through my purchasing decisions.

1: -1- Completely disagree
2: -2-
3: -3-
4: -4-
5: -5-
6: -6-
7: -7-
8: -8-
9: -9-
10: -10- Completely agree
DK (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

Q. 17 Have you ever posted a comment or thread or uploaded a photo or other content to a website, mobile app or social network related to your local area? (by local area we mean the immediate area you are in, such as a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting).

1: Yes
2: No
DK (BUTTON) – USER DEFINED

Filter = All who have accessed any local area news or information online (hyperlocal media users)

Q.18 Have you ever written something from scratch, for example, written an article or developed a blog, for a website, mobile app or social network for your local area? (by local area we mean the immediate area you are in, such as a town, village or local neighbourhood, either where you live, work, used to live but no longer live or are visiting).

1: Yes
2: No
DK (BUTTON) – USER DEFINED

Filter = All adults in the UK

Q.19 Using a scale of 1 to 10 , where 1 is not at all and 10 is completely, to what extent do you think the following statements apply to the local news or information sources you use for the immediate local area you are in.

SHOW SCREEN AND READ OUT STATEMENT

My local news and information sources are…

ANSWERS WILL BE INVERTED RANDOMLY

...Accurate and reliable
...Trustworthy
...Impartial and unbiased
...Comprehensive
...Up to date

1: -1- Not at all
2: -2-
3: -3-
4: -4-
5: -5-
6: -6-
7: -7-
8: -8-
9: -9-
10: -10- Completely
DK (BUTTON) – USER DEFINED

Filter = All adults in the UK

SHOW SCREEN

Q. 20 Thinking about **ALL** of the local news or information sources you use for the immediate local area you are in. How well do these sources give you the information you need?

Would you say they cover...

DO NOT INVERT

1: ALL of the information that matters to you
2: SOME of the information that matters to you
3: NOT MUCH of the information that matters to you
4: NONE of the information that matters to you
DK(BUTTON) – USER DEFINED
R(BUTTON)- USER DEFINED

Filter = All adults in the UK

Q.21 Which of the following newspapers, if any, do you read nowadays? Which others? Any others?

MULTICHOICE

ANSWERS WILL BE INVERTED RANDOMLY

1: The Daily Telegraph
2: The Times
3: The Guardian
4: The Financial Times
5: The Independent
6: The Daily Mail
7: The Daily Express
8: The Sun
9: The Mirror
10: The People
11: The Daily Star
12: The Daily Record
13: The Sunday Telegraph
14: The Sunday Times
15: The Observer
16: The Independent on Sunday
17: The Mail on Sunday
18: The Sunday Express
19: The Sun on Sunday
20: The Sunday Mirror
21: The Sunday People
22: The Sunday Sport
23: Local newspaper
24: Other newspaper - write in
25: N – button – USER DEFINED
26: DK – button – USER DEFINED

END

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