Accessing the internet at home

A quantitative and qualitative study among people without the internet at home by Ipsos Mori

Research Document

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Publication of data

Ofcom has engaged Ipsos MORI to undertake an objective programme of research. It is important to protect everyone's interests by ensuring that the research findings are accurately reflected in any press release or publication.

As part of our standard terms and conditions, the publication of the findings of this report is therefore subject to the advance approval of Ipsos MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

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Ofcom Foreword

In March this year, Ofcom published its consultation, 'Access and Inclusion – Digital communications for all'. The consultation identified that in addition to ensuring widespread availability of broadband, it is necessary to ensure widespread take-up to deliver the fullest public policy benefits associated with the development of broadband internet services.

Ofcom's research has shown that even with a very high availability of a basic broadband service, take-up of broadband currently stands at just under 70% of homes in the UK. While existing research did provide some insights into the reasons so many were staying away from broadband, we felt there was insufficient research into the true obstacles to take up. Without this understanding, it is difficult for policy makers to develop options to improve take up.

So we have commissioned a major piece of research aimed precisely at securing a better understanding of the causes of non-participation in the market for broadband, and the possible drivers for change. This independent research, carried out by Ipsos MORI, is published today under this cover. The Ipsos MORI report will be considered as part of Ofcom's consultation on Access and Inclusion and will feed into the Government's Digital Britain report. The research will aid Ofcom and the Digital Britain team in determining where we need to focus our activities.

We have identified three main groups from the research:

- **Those intending to get the internet in the next six months:** Two in ten people currently without the internet said they were likely to get connected in the next six months. They are more likely to be younger, regular internet users outside of the home who are working and have children.

- **The self-excluded:** 42 per cent state lack of interest or need as their main reason for not wanting to take up the internet. The self-excluded tend to be older and retired and 61 per cent have never used a computer. This group shares a sense of indifference, with many struggling to come up with any reasons why they should have the internet at home.

- **The financially/resource excluded:** 30 per cent of people stated that the internet was too expensive or that they didn't have the knowledge or skills to use it. Three in ten respondents in this group said the cost of a computer was the main reason for not having an internet connection, while 37 per cent said it is too expensive.

As we detail in our Access and Inclusion consultation, the internet is increasingly becoming a service which is an essential tool for social and economic participation. The good news from the research is that the majority of those without the internet at home either intend to get it or would do so in response to financial or other help.

However, a significant minority state they have no interest in the medium regardless of cost; they would not have broadband at home even if it was free. If these people are to be attracted to the internet, more creative and personally relevant enticements are likely to be needed. Most crucially, the research suggests that the prospect of near 100% take up would be extremely challenging to achieve in the near term.

The Ipsos MORI report published today contains a wealth of data to help understand why so many still do not choose to take up the internet. This report forms part of Ofcom's submission to the Government's Digital Britain review. We will discuss the results with stakeholders in an effort to understand to full implications of the research, and will publish our thinking on the issues raised for broadband take up as part of our forthcoming Statement on Access and Inclusion. We hope the research will help assist an informed debate on the options available to society to help ensure that the social and economic benefits of the internet are spread as widely as possible.

Section 1

Executive summary

The inclusion of everyone into the digital world has emerged as an important principle in our society as, 'this is not simply a question of economic competitiveness, but also of fairness'.[1] The internet is a major digital medium, and has become an integral part of many people's lives. However, access to the internet at home is not universal, as seven in ten (70%) of those aged 15 or above living in the UK have an internet connection at home[2]. The majority have broadband (68%[3]) and the remainder (2%) narrowband.

This study focuses on those three in ten people without the internet at home. It aims to explore three key questions: 1) why do people not have the internet at home?; 2) at what price, if any, would they be willing to pay for it?; and 3) what can be done to encourage take-up?

We have used a mixture of quantitative and qualitative methodology in this study. This includes over 1,800 face-to-face interviews, twenty four extended depth interviews and 12 mini-groups with those without internet connection at home. Twenty semi-structured interviews were also undertaken among those who had taken up the internet at home in the last 12 months[4].

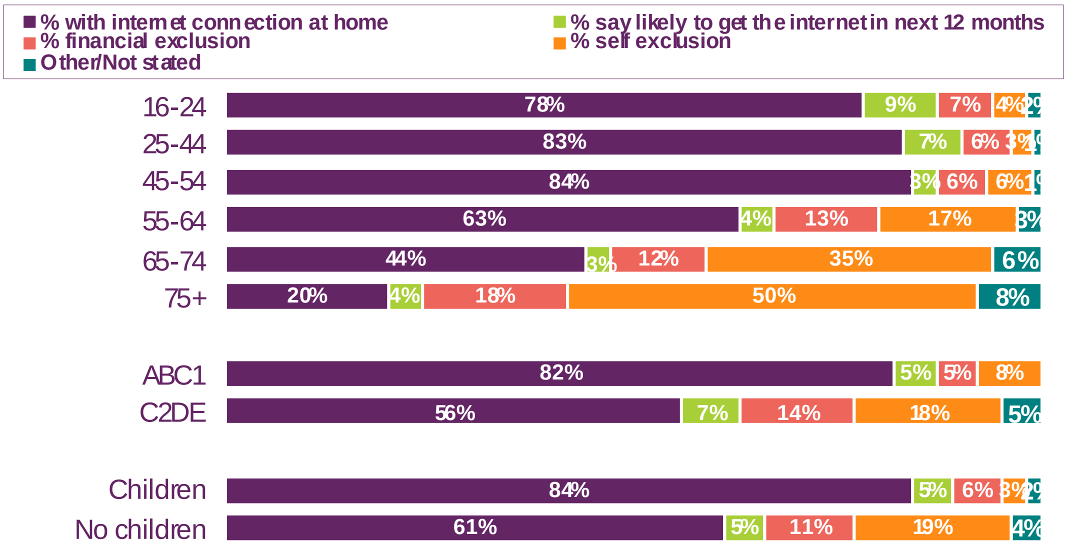
Current state of play in the UK

- Data from this study combined with those from the Ofcom Communications Tracking survey[5] show that 70% of adults in the UK have the internet at home, and five per cent say they intend to get it in the next 6 months. Just under one in ten (9%) say their main reason for not having the internet relates to finance/resources and 13% say it is because of a lack of interest or need (defined in this report as self-exclusion). The remainder (3%) provided other reasons or said they did not know.

- Figure A demonstrates variation by age, socio-economic group and presence of children. Younger people aged 16-24 are more likely than the UK adult population as a whole to have the internet at home (78%) or say they intend to get it (9%). In contrast, 75 year olds are less likely to have the internet (20%) or intend to get it (4%) and are more likely to provide self- exclusion reasons related to need/interest for not having it (50%).

[1] BERR and DCMS, *Digital Britain: The Interim Report* (2009), p. 13.
[2] Results from Ofcom Communications Tracking Survey, Q1 2009.
[3] This is comprised of 65% of adults with a fixed line broadband connection and an additional 3% who have mobile internet using a USB mobile dongle, but no fixed line broadband connection at home.
[4] Throughout the research, the term 'internet' was used instead of 'broadband internet' so it was clear and readily understandable to people who may have little experience of the internet. As those with a dial-up connection only constitute two per cent of UK households, we did not distinguish between a dial-up or broadband connection when discussing the internet, nor did we speak to people with a dial-up connection only.
[5] Any extrapolation of survey results to represent a larger population is subject to a margin or error so any deduction should be treated with caution. Please refer to annex 6 for more information on the margin of error for this survey.

Figure A: Internet take-up in the UK by age, socio-economic group and presence of children in the home



Base: All adults 15+ /16+
Source: Ofcom Communications Tracking Survey, Q1 2009 and Ofcom Accessing the Internet at Home Survey, February to April 2009. Results from the latter have been rebased to reflect the total population in the UK. Please note that 'other/not stated' contains a range of reasons that respondents gave for not having the internet at home that did not fall under either self - exclusion or financial exclusion categories.

The rest of the report focuses on the study undertaken by Ipsos Mori among those who do not have the internet at home. All percentages are based on this group of people.

Among people without the internet at home, awareness of the internet is high but internet and computer usage vary widely

- Awareness of the internet was widespread among those without access at home, with only three per cent of respondents saying they had never heard of the internet.

- Those aware of the internet were asked about their usage outside of the home, which varied widely. Around one third (32%) used the internet at least once or twice a year[6], whereas just over two thirds (67%) did not use the internet. This breaks down into 14% who have used it in the past and over half (53%) who said they had never used the internet.

- The research identified that some non-users[7] have proxy access[8] to the internet by asking other people such as friends or family to carry out tasks on the internet on their behalf. 36% of respondents were non-users with proxy access, whereas 31% were non-users without access either directly or by proxy.

- Detailed knowledge of the internet was low. Close to three quarters (73%) said they knew just a little or almost nothing about it.

- Use of computers also varied widely. Only one fifth (20%) had access to a computer at home. Three in ten (30%) said they were confident using a computer, 25% were not confident, whereas 45% had not used a computer before.

[6] Those who use the internet at least once a year are defined as 'internet users' in this report.
[7] Non-users are defined as those who have either not used the internet before, use it less often than once or twice a year or no longer use it (53%, 7% and 7% of respondents aware of the internet respectively).
[8] Proxy access is defined as asking someone else to access the internet on their behalf.

One fifth of respondents say they are likely to get the internet in the next 6 months

- Close to one in five (18%) respondents said they were likely to get the internet in the next six months[9]. Their reasons for getting it included for general information, communicating with friends and family, and because friends and family recommended it.

- This group was more likely to be younger, with two thirds (68%) under 44 years old. Compared with the overall sample, they were more likely to be working (53%), have children living in their household (39%) and have an annual household income of over £17,500 (22%).

- There is also evidence of a strong correlation between intention to get the internet and experience of it. Over seven in ten (72%) of this group were internet users, and half (50%) regular users[10].

- Another common feature across this group was their computer literacy. Seven in ten (70%) said they were confident using a computer, and over two fifths (45%) had access to a computer at home.

Eight in ten say they are unlikely to get the internet in the next 6 months

- 82% of the sample said they did not intend to get the internet at home in the next 6 months.

- Respondents were asked to name all their reasons for not having the internet and then select their main reason. Analysis of their main reasons provides two groups[11]:

  - Financial/resource exclusion (30% of the total sample): those whose main reason was financial or resource related, such as not having a computer.

  - Self-exclusion (42% of the total sample): those whose main reason was related to lack of interest or need.

  - The remaining 10% provided other reasons for not having it or did not know.

It is important to note that there is overlap between the self-exclusion and financial/resource groups when looking at all reasons given for not having the internet: four in ten (42%) people gave multiple reasons that fall under both financial and self-exclusion types.

Just under one third give finance or resource reasons as main barrier to take-up

- Within the financial exclusion group, two subgroups were identified:

- First, about one quarter (26% of the total sample) gave a main reason related to costs or equipment. They tended to spread over different age groups, and over one quarter (27%) had children living in the same household. Over half (55%) lived in DE

[9] It is important to note that intention to get may not lead to actual behavioural change and in-home take-up.
[10] Internet users defined in this report as those who use the internet at least once a year and regular users are those who use the internet at least once a week.
[11] These proportions are a summation of the main reason given by respondents. No multivariate cluster analysis has been carried out.

socio-economic groups, which is in line with the average sample. They were more likely to be unemployed (12% vs. 7% of the total sample). Access to technology tended to be low among this group; only 16% were regular internet users and the same proportion (16%) had a computer at home. About one third (32%) had cable or satellite television.

- Second, a much smaller proportion (4% of the total sample) named skills and knowledge as their main reason for not having the internet at home. They tended to be retired and over 45 years old with little or no experience of the internet or computers[12].

Just over two fifths say they are not interested in having the internet at home

- Within the self-exclusion group, two subgroups were identified:

- First, just over one third (37% of the total sample) said they were not interested. They tended to be older, with seven in ten (68%) over 65 years old[13] and retired (71%). The vast majority did not use the internet (95%) and seven in ten (70%) had never used a computer. However, just under half (48%) of non-users in this group did have proxy access to the internet.

- Though a lack of computer literacy might be prevalent amongst this group, it was not their defining feature. Rather, they tended to share a sense of indifference. Many struggled to come up with any reasons why they should have the internet at home (only 12% said they felt they missed out by not having the internet at home). The qualitative research found that there was a range of reasons underlying this lack of interest. Some resisted it, saying it was not for people their age; some said they preferred face-to-face, telephone and written communications and felt the internet did not fit in with their lifestyle; and some were simply not interested in the internet because they did not find its functions appealing.

- Knowledge of the internet was low, with 95% confessing a little or no knowledge of it. Yet, giving respondents information about the functions of the internet seemed to make little impact. Only 16% felt more positive and 9% said they were more likely to get the internet at home after watching the video that explained what the internet does.

- Second, a smaller proportion (5% of the total sample) said they did not need the internet at home. The main reason given was satisfaction with using it elsewhere. Almost all used the internet at least once a year (97%)[14].

Just over two fifths are willing to pay for the internet at home, but the same proportion does not want the internet even if it is free

- 42% of respondents were willing to pay something for an internet connection; 13% said they would get it if they could get free internet connection and computer. However, a further 43% said they were not interested even if both were free. This latter group tended to be older people aged over 65, those who were retired, or with a lower household income and also those without children living at home.

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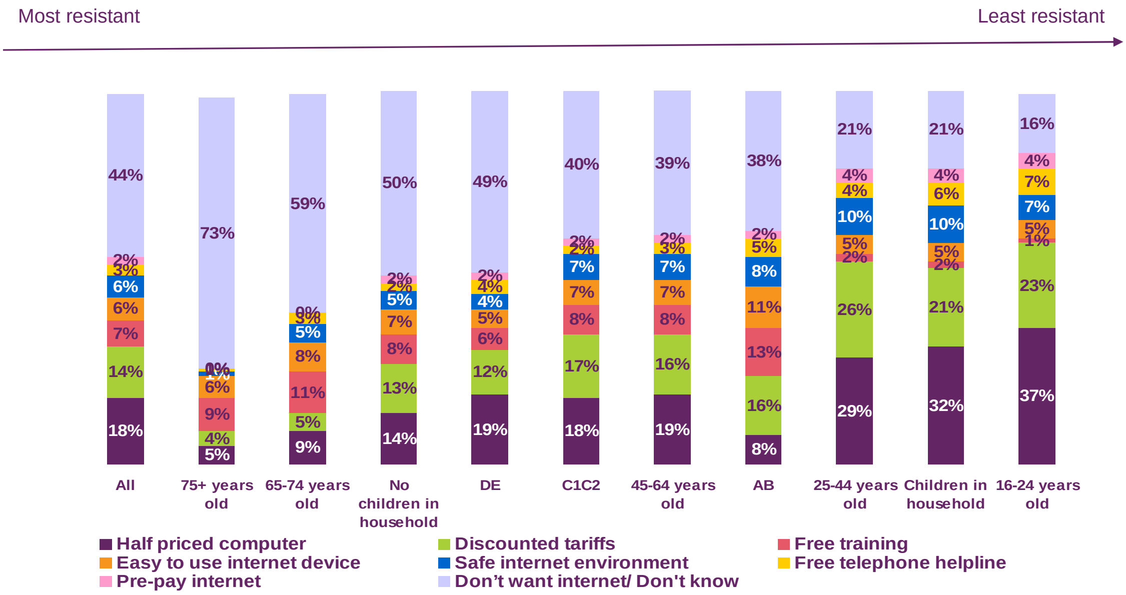
[12] This is based on a base size of 75 so results should be treated with caution.
[13] Four per cent are aged 16 to 34, 13% 35 to 54 and 16% 55 to 64.
[14] Base size of 87: results should be treated with caution.

We asked opinions about a number of ideas to encourage take-up

- A number of ideas to encourage take-up were explored in the research:
    - Half priced computers (described as £125 towards the cost of a new computer);
    - Discounted monthly internet tariff (£5 per month for a minimum 12 month period);
    - Pre-paid internet (£50 connection fee, £12 per month with no contract);
    - Safe internet environment (free to use but limited to only certified websites);
    - Easy-to-use internet device (a touch-screen device which allows users to access the internet but otherwise has limited functions);
    - Free telephone helpline (explored in the quantitative survey only);
    - Free training on how to use the internet (explored in the quantitative survey only).
- When asked which idea would be most important in helping them to get the internet at home, no idea stood out as the most popular. Different ideas were chosen by different groups depending on their barriers and level of interest in the internet.
- Respondents were more likely to cite options which reduced cost with half price computer chosen by 18% and discounted monthly tariff by 14%. Seven per cent chose free training, 6% easy-to-use internet device, 6% safe internet environment, 3% free telephone helpline and 2% pre-paid internet. However, two fifths did not find any ideas appealing, saying either that they did not want the internet at home (33%) or they were not sure which option was the most important, if any (11%).
- Financial incentives tended to appeal to those under 65 years old, those working or unemployed and those with children living in their households. Half-priced computers in particular appealed to those from socio-economic groups C2DE. Whereas for people aged 65 or above, few if any ideas appealed – two thirds said either they did not want the internet at home (53%) or were not sure what they want (13%).
- Figure B illustrates the varying levels of appeal of each idea by demographic. For example, 14% of those without any children living with them preferred half-price computers.

Figure B: Appeal of ideas by demographic



Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home survey, February to April 2009

Evaluation of ideas

- The qualitative study provided some insights into participants’ perceptions of the strengths and weaknesses of each idea. This is summarised in the table below. Overall we found that for any ideas to encourage take up to work, a genuine interest in the internet is a prerequisite. For those who were not interested, very few, if any ideas appealed.

Table A: Strengths and weaknesses of ideas to encourage take-up

Idea	Strengths	Weaknesses
Half-priced computers	Help overcome outlays for the hardware	Recipients will still need to pay the monthly payments
Discounted monthly tariffs	Reduce the monthly fee to a nominal outlay	Recipients will still be tied to a contract
Pre-paid internet	There is no need to sign a monthly contract and is flexible for users	Connection fee is too high
Safe internet environment	For some participants interested in the internet but with little technical knowledge, offered safe starting point. Generally nice to have feature to relieve fear of unknown	Not popular among users who find this idea too restricting
Easy-to use internet device	Some participants who did not use a computer thought it may be less scary than a computer and could act as a stepping stone to a fully functioning computer.	Not popular among users who prefer a fully functioning computer

Source: Ofcom Accessing the Internet at Home survey – Qualitative findings, February to April 2009

Core resistors

- The research study identified a group of respondents who could be called 'core resistors'. They represented just over two in ten (23%) respondents in the sample. They were people who said they had no intention to get the internet, did not use the internet anywhere, were not willing to pay anything for it, were not interested in any options and had no proxy access to the internet via friends or family.

- They tended to be older, retired or in DE socio-economic groups. Over seven in ten (72%) were over 65 years old[15] and the same proportion (72%) were retired. Two thirds (65%) lived in DE socio-economic groups.

- The qualitative research gives some indications of how take-up may be encouraged within this group. First of all, interest in the internet needs to be sparked. This could be done by showing what can be done and making the internet personally relevant. Second, giving people the opportunity to experience the internet personally may give them an opportunity to find out what the internet can do for them. It is, however, important to bear in mind that even if a spark of interest is generated there are likely to be other barriers to take-up including skills, resources and affordability.

[15] One per cent were aged 16 to 24, 7% 25 to 44 and 22% 45 to 64.

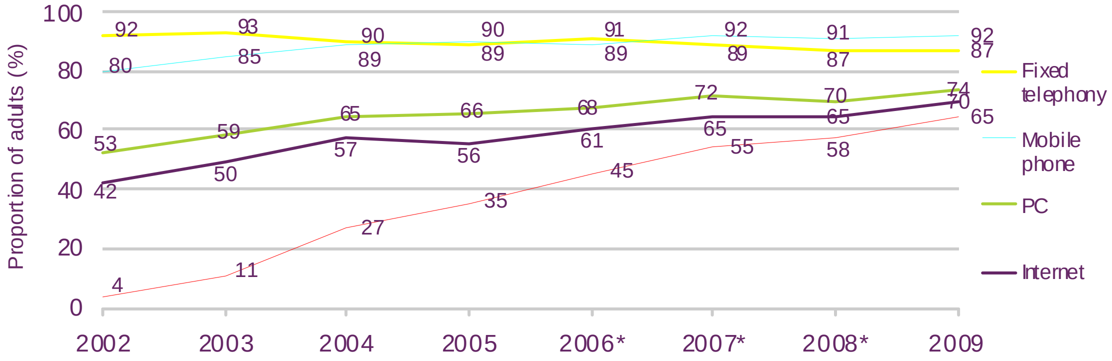
Section 2

Methodological approach

2.1 Background

The internet is a major digital medium, which has become an integral part of many people's lives. However, access to the internet at home is far from universal as only seven in ten (70%) of those aged 15 or above living in the UK have an internet connection at home, and 65% a fixed-line broadband connection, an additional 3% who have mobile internet using a USB mobile dongle, but no fixed line broadband connection at home (Ofcom Communications Tracking survey, Q1 2009).

Figure 1: Take up of fixed line, mobile phone, PC, internet and broadband



Source: Ofcom Communications Tracking Survey. Base: All adults 15+.
Note: Broadband access does not include access via mobile broadband or mobile phone or other high speed connection.
*Data for 2006-2008 based on Q2 data, 2009 data based on Q1, all other data based on Q4.
In 2009, an additional 3% have mobile broadband as their main means of connection, taking total broadband take-up to 68%.

One of the objectives outlined in the interim *Digital Britain* report is to ensure access for all through 'universal availability coupled with the skills and digital literacy to enable near-universal participation in the digital economy and digital society'.[16] To enable 'universal participation' in online services, it is crucial to understand who does not have an internet connection at home and why they do not.

2.2 Objectives

The overall objective of this research project is to understand the attitudes and motivation of those without access to an internet connection at home. Specifically, it aims to:

- understand their perceptions of and attitudes towards the internet and technology in general;
- find out what could motivate people to take up the internet;
- explore reasons that may stop them from taking up the internet;
- find out perceptions of start-up costs and attitudes towards pre-paid versus contract payment options, as well as different connection methods (fixed line or mobile dongle connection);

[16] BERR and DCMS, *Digital Britain: The Interim Report* (2009), p. 7

- understand how much, if at all, they are willing to pay to get connected; and
- test attitudes towards different ideas designed to encourage internet take-up.

2.3 Quantitative methodology

This research is challenging as it covers sensitive issues such as skills, knowledge and personal finances. We therefore used a range of methodologies to minimise bias, which included one-to-one qualitative and quantitative interviews. For example, in the quantitative research to help respondents talk about potentially difficult subjects, we employed unprompted, open questions, as well as showcards which included such questions as “some people have said this”, “please indicate which applies to you”.

The quantitative study involved face-to-face Computer Assisted Personal Interviewing (CAPI). In total, 1,841 interviews were undertaken with respondents aged 16 or above between 28 February and 5 April 2009 across the UK. These consisted of 1067 interviews in England, 301 in Scotland, 261 in Wales and 212 in Northern Ireland.

To qualify for the interview, respondents must not have internet access at home on a computer via a fixed line connection or a mobile dongle. One per cent of respondents actually had access to the internet through their mobile phone. They have been included in this research because this access was not via a computer.

Sample design

A non-broadband representative quota sample of UK households was contacted, using Output Areas (OAs)[17] as sampling points. The sample was stratified by the following variables:

- geographically, by region;
- cabled and non-cabled areas, to ensure that the sample is representative of homes which are passed by cable;
- rurality to ensure that both rural and urban areas are adequately represented;
- deprivation level - to ensure that high deprivation areas are adequately represented.

Since region had been used as the first sorting variable, regional distribution of OAs were more or less in proportion to the number of residential addresses in each region. Since we used the cable indicator as the second sorting variable within region, the proportions of interviews allocated for cable and non-cable households will vary between regions depending on the particular combination of OAs selected. At each progressive sampling stratification stage, the distributions of the second, third and fourth variables can become distorted.

The size of an OA is measured by the number of addresses it contains. The OAs were selected with a probability or proportionate to size. This ensured that all households within an OA have an equal chance of being selected, regardless of the size of the OA in which a household is situated.

[17] The 1991 Census Data was classified using Enumeration Districts (ED’s). The 2001 Census data has been classified using Output Areas (OAs). These areas are essentially the same, but with slightly different boundaries.

Quotas
The following quotas were set (within each OA) to represent the profile of adults without a broadband connection at home in the UK:

- age (16-24, 25-34, 35-54, 55+);
- gender;
- working status (full-time/part-time, not working).

These quotas were calculated from an Ipsos MORI technology tracker (omnibus), and cross-referenced with data from the Ofcom Communications Tracking survey.

Weighting

The survey data had been weighted by region, gender, work status and age to reflect the non-Broadband population profile nationally within each nation – England, Scotland, Wales and Northern Ireland. Weighting had also been applied on rurality within regions. This came from Ofcom's Communications Tracking survey and was representative of the overall population, and not the non-broadband population. Annex 1 compares the weighted profile with the unweighted one.

2.4 Qualitative methodology

To delve into people's reasons for not having the internet at home and understand what may encourage them to take up internet, a qualitative methodology was felt to be the most appropriate approach.

Depth interviews and mini-groups with those without an internet connection at home

The research included 24 face-to-face depth interviews (six were paired) and 12 mini-group discussions with people living in households without internet access.

The research started with a pilot of 3 depth interviews, 2 paired depth interviews and two mini-group discussions, which tested out the recruitment material, the discussion guide and stimulus materials. Following the pilot, some minor changes were made to the content and structure of the topic guide and its accompanying stimulus materials. The final version of all fieldwork documents have been appended at the end of this report.

Participants were recruited using face-to-face recruitment. To be eligible, participants needed to be aged 18 or over and have no access to the internet connection at home via a fixed line connection or a mobile dongle.

In addition, quotas were set on a number of variables to ensure a range of people were recruited. These variables are: age, gender, socio-economic group, regularity of internet use, whether or not they had a landline at home, and whether they lived in an urban or rural location. Please see the annex 9 for a full breakdown of the qualitative research sample.

Semi-structured telephone interviews with recent adopters

Twenty semi-structured telephone interviews were also carried with those who had taken up the internet at home in the last 18 months. These were semi qualitative interviews, and were not representative of the overall population of recent adopters. Participants were recruited using a combination of face-to-face and telephone recruitment.

Given the low incidence of this group in the population, no quotas were set. The final sample contained a spread of gender, age and socio-economic groups, though the age profile skews towards the young age groups, which is reflective of the profile of internet users in general. Please refer to annex 10 for a breakdown of the sample.

2.5 Definitions, presentation and interpretation of data

Interpreting quantitative data

When looking at results from the quantitative study, it should be remembered that a sample, and not the entire UK population, has been interviewed. As a consequence, all results are subject to sampling tolerances, which means that not all differences are statistically significant. A guide to statistical reliability is appended.

Differences between subgroups are significant at 95%. This means that for a question where 50% of the people in a sample of 1,841 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than two percentage points, plus or minus, from a complete coverage of the entire population using the same procedures. Please refer to annex 6 for more details.

Any statistically significant differences by the following subgroups[18] will be drawn out in this report: nation, age, working status, education level, presence of children in household, socio-economic group[19], household income and phone tenure.

When looking at the data broken down by income, it should be taken into account that 44% of respondents in the sample did not give an answer when asked about their annual household income. Any analysis by income groups throughout this report should be treated with caution because we are excluding a significant proportion of the total sample who declined to give an answer to this question.

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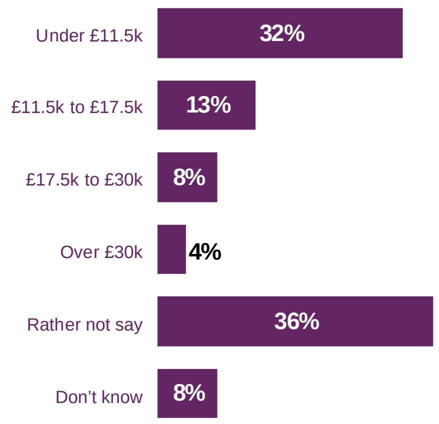
[18] Literacy levels may affect attitude towards the internet, as well as usage. However, we do not report by literacy in this study: as literacy level is a sensitive area, it is potentially open to high levels of refusal, and so we did not ask respondents about their literacy level.

[19] The Social Grade classification used by National Readership Survey was developed for the Survey over 50 years ago. Social Grade is determined by the occupation of the Chief Income Earner (CIE) in each household, the size of the organisation the CIE works for and the number and the number of people for which the CIE is responsible. The definitions for each social grade are as follows:

- A – Higher managerial, administrative or professional
- B – Intermediate managerial, administrative or professional
- C1 – Supervisory or clerical and junior managerial, administrative or professional
- C2 – Supervisory or clerical and junior managerial, administrative or professional
- D – Semi and unskilled manual workers
- E – Casual or lowest grade workers, pensioners and others

Figure 2: Household income



Base: All respondents (1,841)
Question: Could you please give me the letter from this card for the group in which you would place your total household income from all sources, before tax and other deductions? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Respondents with a household income of less than £11,500 were most likely to live in DE socio-economic groups, as demonstrated in Table 1.

Table 1: Household income by socio-economic groups

	Social Grade			
Annual household income	**AB**	**C1C2**	**DE**	**Total**
Up to £11,500	1%	9%	22%	32%
£11,500 to £17,500	2%	6%	6%	13%
Over £17,500	3%	6%	3%	11%
Don't know	4%	20%	35%	44%

Base: All respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Where percentages do not sum to 100, this is due to computer rounding, the exclusion of "don't know" categories, or multiple answers. Throughout the report, an asterisk (*) denotes any value less than half a percent but greater than zero.

Interpreting qualitative data

The qualitative research is designed to be illustrative. It is important to bear in mind that it utilises a small sample that was chosen specifically to ensure representation of a full range of views within the sample.

Throughout the report we have made use of verbatim comments and case studies to exemplify a particular viewpoint. It is important to be aware that the views expressed do not necessarily represent the views of all participants. Where verbatim comments and case studies have been used, some of the respondent's attributes are given (age, work status, geographical location, etc).

Section 3

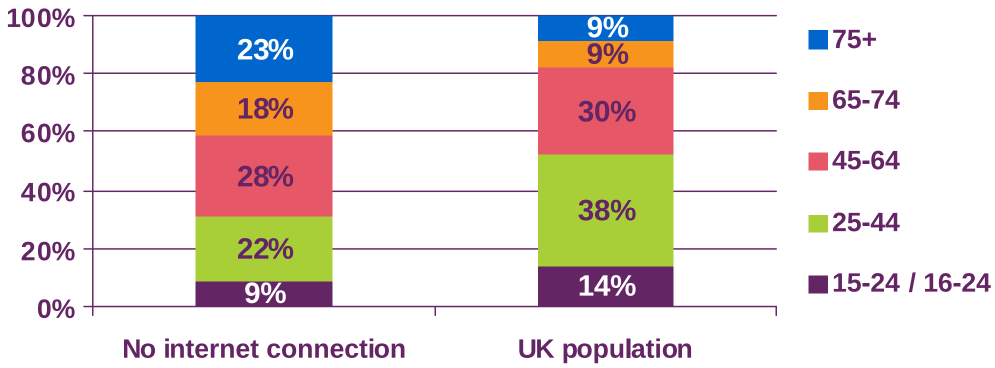
Profile of people without the internet at home

This chapter looks at the demographic profile of those without an internet connection at home and their access to different forms of technology. As will be apparent later in the report, these factors are often highly correlated to respondents' attitudes towards technology and their likelihood to take up the internet at home.

3.2 Demographic profile

Compared with the overall UK population, those without the internet at home were more likely to be older. Four in ten (41%) respondents were over 65 years old, compared with 18% of the overall UK adult population. Figure 3 shows a breakdown by age group compared to the UK population.

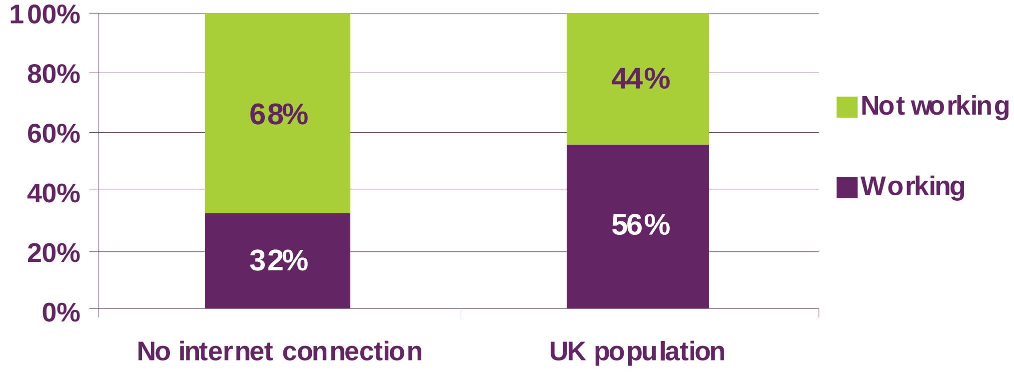
Figure 3: Age



Base: No internet connection = All respondents (1,841)
Source: UK population = ONS 2001 Census
No internet connection = Ofcom Accessing the Internet at Home Survey, February to April 2009

As demonstrated in Figure 4 below, those without the internet at home are also more likely to not be in work. Close to seven in ten (68%) respondents were not in employment, as opposed to 44% of the overall UK adult population. Breaking down the proportion of respondents who were not working: 44% were retired, 9% were looking after their home, 7% were unemployed, 5% were not working due to a disability and 2% were students. One quarter (24%) worked full-time and a further 7% part-time.

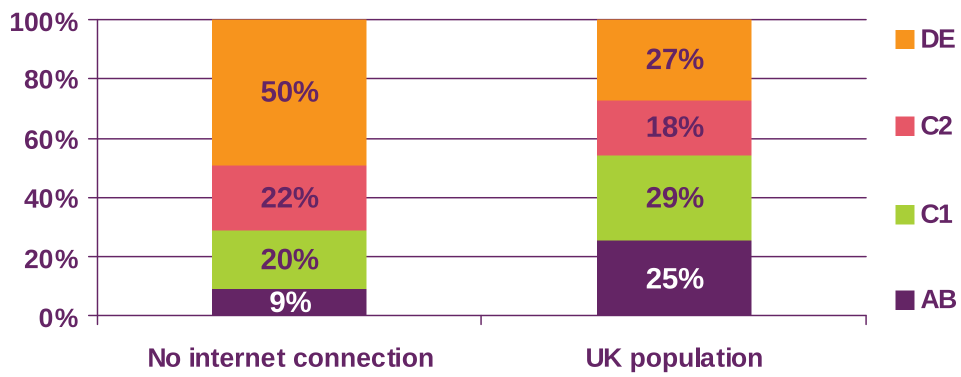
Figure 4: Working status



Base: No internet connection = All respondents (1,841)
Source: UK population = ONS 2001 Census
No internet connection = Ofcom Accessing the Internet at Home Survey, February to April 2009

Respondents without access to the internet at home were also more likely to come from C2DE socio-economic groups. As shown in Figure 5, half of respondents (50%) belonged to DE socio-economic groups, and only one in ten (9%) lived in AB socio-economic groups. As a comparison, 27% of the UK adult population live in DE socio-economic groups while one quarter (25%) live in AB socio-economic groups.

Figure 5: Socio-economic groups

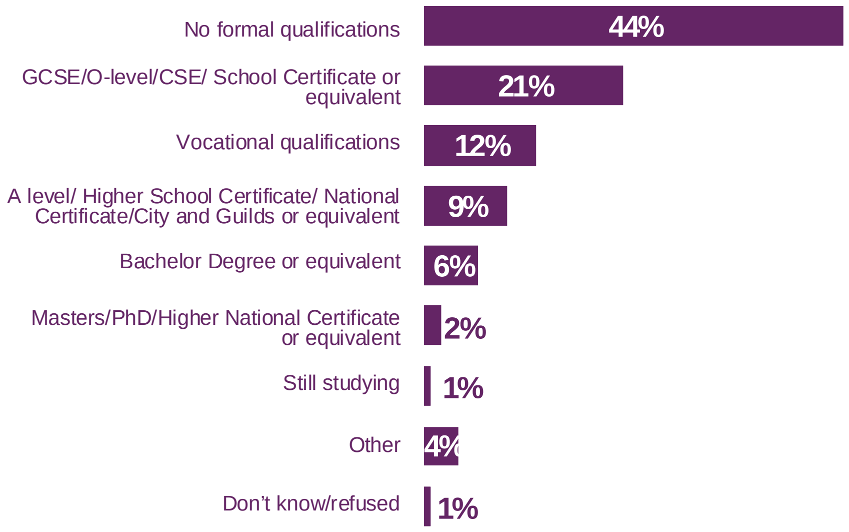


Base: No internet connection = All respondents (1,841)
Source: UK population = ONS 2001 Census
No internet connection = Ofcom Accessing the Internet at Home Survey, February to April 2009

Almost one third of the sample (32%) said they have an annual household income of less than £11,500, 13% an income between £11,500 to £17,500 and one in ten (11%) an income over £17,500. 44% of respondents in the sample did not give an answer when asked about their annual household income.

Figure 6 shows that over four in ten (44%) respondents did not have a formal educational qualification, while only 7% had a degree or above. (One third (33%) of those with no formal qualification were over 75, and only 16% under 44.)

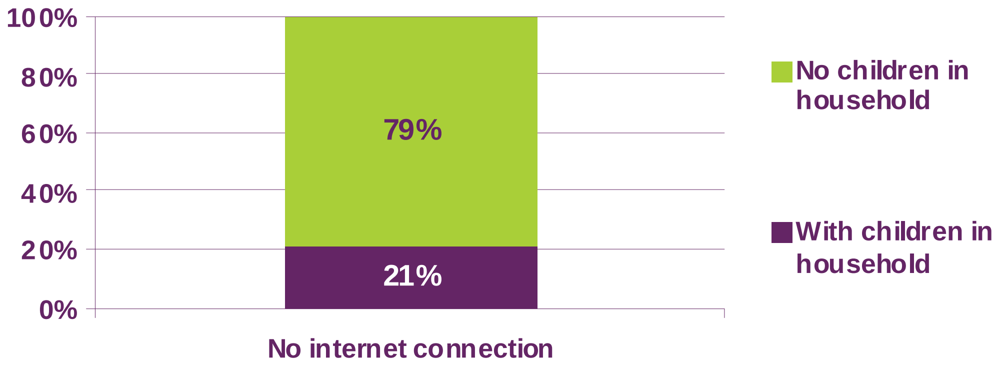
Figure 6: Educational qualifications



Base: All respondents (1,841)
Question: What is your highest educational qualification which you have obtained?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Twenty-one per cent of people without the internet at home have children in their home, whereas 79% do not (see Figure 7 below).

Figure 7: Presence of children in household



Base: All respondents (1,841)
Question: Do you have any children under the age of 18 living at home with you?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Overall, compared with the UK adult population, respondents without an internet connection at home were more likely to be older, retired, belong to DE socio-economic group, have no formal education qualification, and have a lower annual household income.

3.3 Access to different types of technology at home

In terms of access to different types of television, one quarter (23%) of respondents had terrestrial television only. Forty-six per cent had Freeview, 23% satellite and 10% cable television. The levels of take-up for digital television are low when compared to the UK population as a whole. Results from the Ofcom Communications Tracking survey show that 10% of adults live in a household with terrestrial television only. Over four in ten (43%) have Freeview, 38% satellite television and 16% cable television. (See Table 2 below.)

Table 2: Access to different types of television

	Respondents without the internet at home	UK population
Freeview TV	46%	43%
Satellite TV	23%	38%
Terrestrial TV only	23%	10%
Cable TV	10%	16%
None	2%	1%

Base: Respondents without the internet at home = All respondents (1,841)
UK population = All respondent (6,090)
Question: Which of the following, if any, types of television broadcasts does your household receive?
Source: Respondents without the internet at home = Ofcom Accessing the Internet at Home Survey, February to April 2009
UK population= Ofcom Communications Tracking survey, Q1 2009

Access to other forms of technology also tended to be low among people without the internet at home. As shown in Table 3, three-quarters (74%) of respondents had a fixed line phone at home (compared with 87% of the UK adult population) and the same proportion (74%) a mobile phone, compared with 92% of the UK adult population). Half have a television set with Teletext.

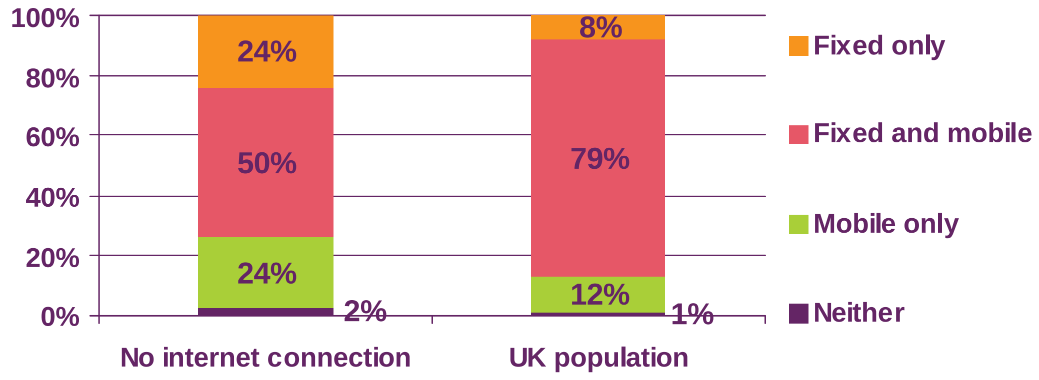
Table 3: Access to different types of technology in the home

	Respondents without the internet at home	UK population
Fixed-line phone	74%	87%
Mobile phone	74%	92%
Teletext TV set	50%	n/a
Video games consoles	16%	47%
MP3	11%	41%
None	1%	n/a
All items	1%	n/a

Base: Respondents without the internet at home = All respondents (1,841)
Question: Which of the following technologies, if any, do you personally have access to in your home at the moment?
Source: Respondents without the internet at home = Ofcom Accessing the Internet at Home Survey, February to April 2009
Base: UK population = All respondents (6,090)
Question: Which of the following do you, or does anyone in your household, have in your home at the moment?
Source: UK population = Ofcom Communications Tracking survey, Q1 2009

As demonstrated in Figure 8, people without the internet at home were more likely to live in mobile-only or fixed-line only households: 24% for each type, compared with only 12% of the overall population living in mobile-only and 8% in fixed-line only households. 50% of those without the internet at home are from households with both fixed line and mobile telephones, compared to 79% of the overall UK adult population.

Figure 8: Phone tenure



Base: No internet connection = All respondents (1,841)
UK population = All respondents (6,090)
Question: Which of the following technologies, if any, do you personally have access to in your home at the moment?
Source: No internet connection = Ofcom Accessing the Internet at Home Survey, February to April 2009
UK population = Ofcom Communications Tracking survey, Q1 2009

Respondents from mobile-only and fixed-line only households were mainly defined by their age. Close to nine in ten (87%) respondents from mobile-only households were under 55 years old, while nine in ten (90%) respondents from fixed-line only households were 55 years old or above.

Mobile only households

Looking at those from mobile-only households in greater details, they were more likely to be working (42% vs. 32% of the total sample), from DE socio-economic groups (64% vs. 50% of the total sample) and they were more likely to have a household income below £11,500 (38% compared to 31% overall). They tended to have children living with them (43% compared to 21% overall). Only one third (33%) had no formal qualification, compared to 44% of respondents overall.

Given their lower average age, it is perhaps not surprising that they tended to be more in touch with technology. They were more likely than average to have access to a computer at home (26% vs. 20% of the total sample), use it at least once a week (31% vs. 19% of the total sample) and feel confident with a computer (52% vs. 30% of the total sample). They also tended to claim a better knowledge of the internet: 43% said they knew a lot or a fair amount about it, when only one quarter (24%) of the total sample said so. Three in ten (30%) were regular users of the internet, compared with 17% of the total sample.

One percent of respondents had neither a fixed line, nor a mobile phone. They were more likely to be from Scotland or Northern Ireland (3% of both nations). Four per cent of those who have terrestrial television belonged to this group.

3.4 Computer access, usage and confidence

Although none of the respondents had access to the internet at home, one in five (20%) had access to a computer.

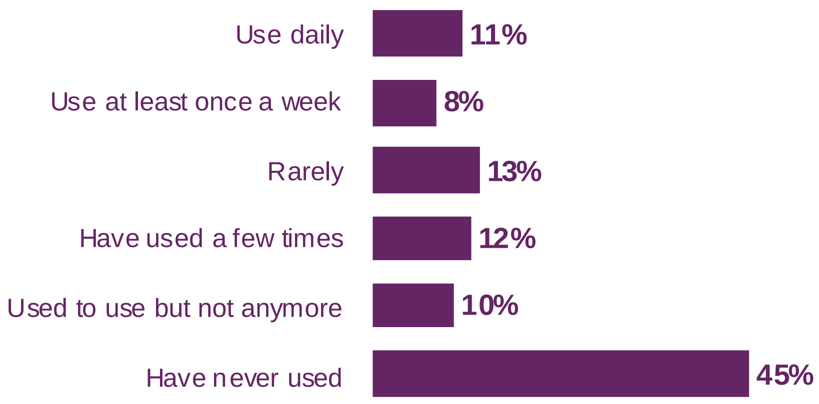
People with a computer at home were more likely to:

- be under 65 years old (26% vs. 10% of 65+);

- from socio-economic groups ABC1 (32% of respondents in ABC1 socio-economic groups vs. 15% of respondents in C2DE socio-economic groups);
- have children living in their household (31% vs. 17% without);
- have a degree of higher qualification (50%) compared to just under one in ten respondents (9%) without any formal qualification;
- be working (31%) compared to 11% retired;
- have a higher annual household income (42% of those with over £17,500) compared to 14% of those with less than £11,500.

All respondents were asked about their experience with using a computer in general, with results shown in Figure 9. Over half have used a computer before. Two in ten (19%) used a computer daily or weekly, while one third (35%) used a computer less often or no longer use one. However, 45% had never used a computer.

Figure 9: Experience of using a computer



Base: All respondents (1,841)
Question: Overall, how much experience do you have using a computer? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

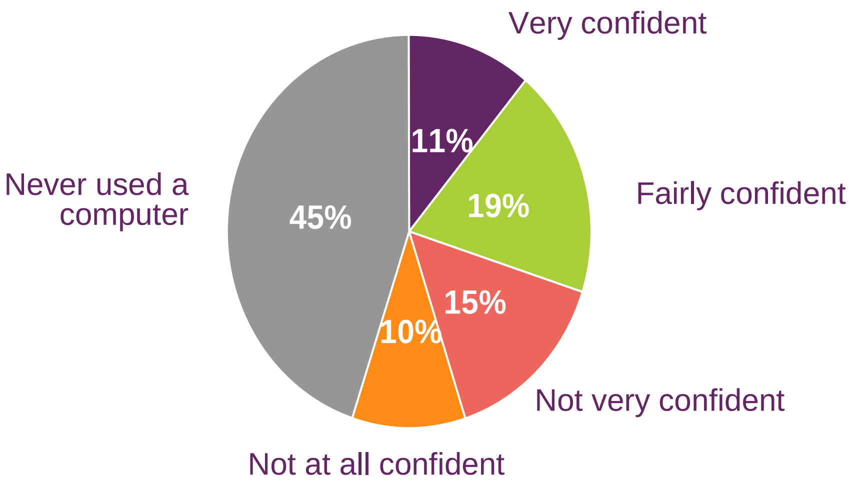
Overall, the proportion who had ever used a computer decreases with age; from over nine in ten (93%) of 16 to 24 year olds to two in ten (21%) of those aged 75 or above. Those living with children (81%) were also more likely to have used a computer (compared with 48% of those without children at home). Almost eight in ten (78%) mobile-only respondents have used a computer, which is probably related to the lower average age of this group.

Eight in ten (79%) of those working and three quarters (74%) of those unemployed had ever used a computer, as opposed to three in ten (30%) of those who had retired. Seven in ten (69%) of those in ABC1 socio-economic groups had used a computer compared with half (49%) of people in C2DE socio-economic groups. Only three in ten (30%) of those with no formal qualification had used a computer before, much lower than the proportion amongst those with at least a degree (88%) or GCSE/A-level qualification (77%). Those with an annual household income over £11,500 were more likely to have used one (75% compared to 49% of those with an income under £11,500).

Those living in Wales were less likely to have ever used a computer compared with the UK average (42% vs. 55% of the total sample). In other words, 58% of respondents in Wales said they had not used a computer before.

Figure 10 shows a breakdown of respondents' level of confidence in using a computer.

Figure 10: Confidence in using a computer



Base: All respondents (1,841)
Question: And how confident, if at all, would you say you are at using a computer? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Three in ten respondents (30%) said they were confident with using a computer. Those who were younger, in work, with higher annual household incomes or with children at home tended to be more confident in using a computer, as illustrated below:

- 77% of those under 24 and 55% of those aged between 25 and 44 were confident vs. 5% of those aged 75 or above;
- half (49%) of those with children living in their household vs. one quarter of those not living with children (25%);
- over half (54%) of those in work felt confident vs. four in ten (40%) unemployed and one in ten (10%) retired people;
- 56% of those with £17,500 annual household income were confident vs. 22% of under £11,500;
- those with school or higher education (46% and 62% respectively vs. 11% with no formal qualification); and
- mobile-only households were more likely to be confident (52%).

To summarise, one in five (20%) respondents had access to a computer at home, and three in ten (30%) felt confident using a computer. On the other hand, 45% of respondents said they had never used a computer before.

Section 4

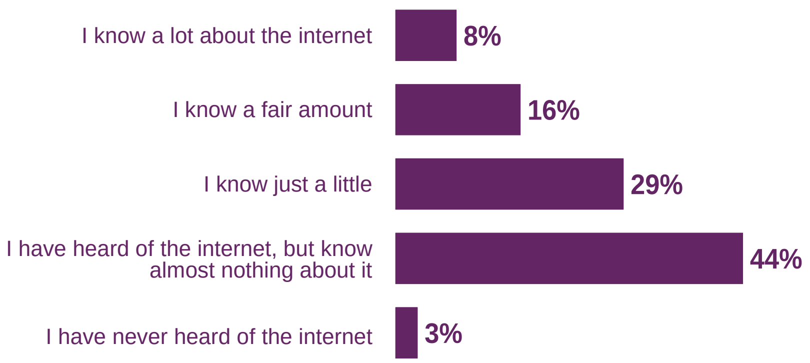
Internet knowledge, usage, benefits and attitudes

This chapter looks at respondents' knowledge of the internet, their usage, perceived benefits, and attitudes towards the internet and technology overall.

4.1 Knowledge of the internet

Overall awareness of the internet was high (97%), with only 3% saying they had never heard of the internet before. However, knowledge of the internet varied. Respondents tended to say they had a limited knowledge of the internet. Only one quarter (24%) felt they knew 'a lot' or 'a fair amount' about the internet. By contrast three in ten (29%) said they knew 'just a little' and over four in ten (44%) said they had heard of the internet but knew almost nothing about it (see Figure 11 below).

Figure 11: Knowledge of the internet



Base: all respondents (1,841)
Question: Using the categories on this card, can you tell me how much you feel you know about the internet (World Wide Web). Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Knowledge varied by demographic group. Those who were likely to say they knew 'a fair amount' or 'a lot' about the internet tended to have children at home, be from ABC socio-economic group, with higher educational levels, or working. This is illustrated below:

- 40% with children living in their household vs. 19% of those not living with children;
- 28% of respondents from ABC socio-economic groups vs. 18% in DE socio-economic groups;
- 43% of those in mobile-only homes;
- 44% of those in work;
- Those with school (35%) or higher education (55%) vs. 9% of those with no formal qualification; and

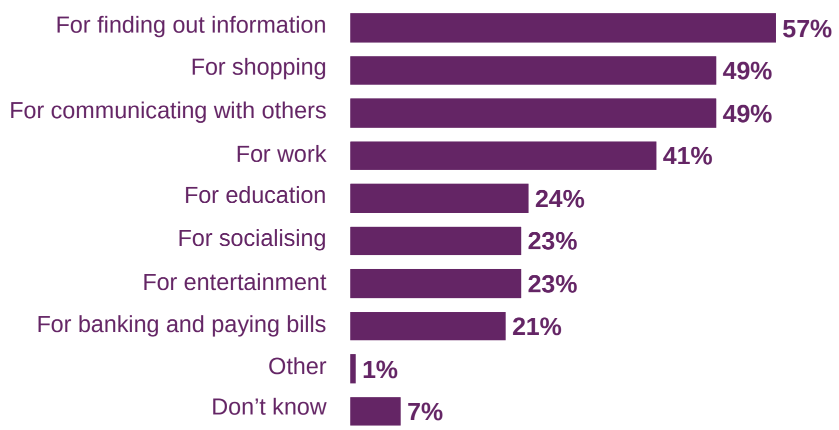
- 46% of those with an annual household income over £17,500.

People aged over 65 were more likely to say they had heard of the internet but knew almost nothing about it (68% of those aged between 65 and 74, and 74% of those over 75).

People in Wales and in Scotland were more likely to say they had heard of the internet but knew almost nothing about it (54% and 51% respectively) compared to the sample as a whole (44%).

Those who said they were aware of the internet (97% of the sample) were asked what they think people use the internet for, and their answers are detailed in Figure 12. The majority said people used it to find out information (57%). The other most cited activities were shopping and communication (49% each), followed by using it for work (41%). Almost all respondents indicated at least one activity, with only 7% saying they did not know.

Figure 12: Perceptions of what people use the internet for



Base: all aware of the internet (1,792)
Question: Overall, what would you say people use the internet for? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Experience of using the internet affected knowledge of the functions of the internet. Among the sample, one third (32%) used the internet outside of the home. Internet users were more likely to mention each of the functions of the internet. In the qualitative research, users tended to feel enthusiastic about the things they could do with the internet.

> It's a highway to information and a highway to knowledge and education. It's just amazing what you can learn off it.
>
> User, 50-64, London

While to a lesser extent, non-users of the internet also tended to be aware of the major functions of the internet. Just over half (52%) said it is a tool for looking up information and over four in ten said it was for online shopping (46%) or communicating with other people (42%) respectively. However, from the qualitative research findings, we know that their knowledge was often limited and vague.

> I don't know, some kind of media, some kind of communications tool really.
>
> Non-user, 35-49, London

Younger respondents and mobile-only respondents were more likely to mention communication (62% of 16-24s, 54% of mobile-only), socialising (42% and 33% respectively) and entertainment (33% and 29% respectively). Those with children in their household were more likely to mention socialising (30%) and entertainment (29%) compared with those without (21% for both).

Working respondents, those belonging to ABC1 socio-economic groups, and those with school or higher education were more likely to mention most activities. Respondents with an annual household income over £17,500 were more likely to mention each of the activities compared with those with a household income under £11,500.

Respondents in Northern Ireland were significantly more likely to mention shopping (60%), and respondents in Wales finding out information (68%) and banking/paying bills online (29%). Respondents in Scotland were less likely to mention each of the activities.

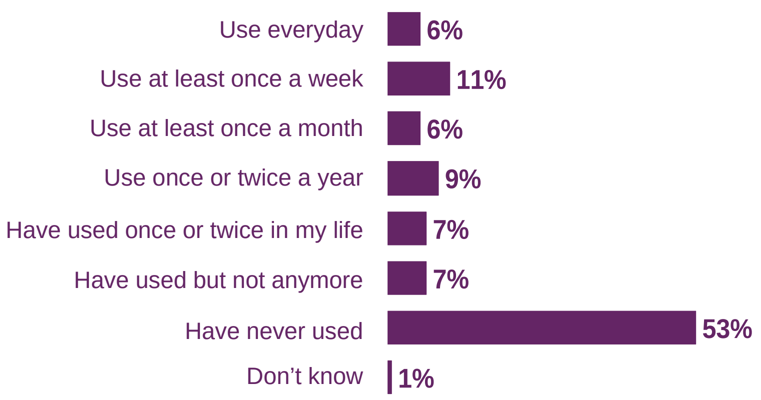
In short, the majority (73%) of those aware of the internet said they know 'little' or 'nothing' about it.

4.2 Usage of the internet

Respondents were asked about their internet usage. Two thirds (67%) of the sample did not use the internet. This can be broken down into over half (53%) who had never used the internet before, 7% who had used it once or twice and 7% who had used it before but no longer did so.

Three in ten (32%) used the internet at least once or twice a year[20]. Only 17% of the sample used the internet at least once a week (defined in this report as 'regular users').

Figure 13: Usage of the internet



Base: all aware of the internet (1,792)
Question: Which of the following statements describes your personal experiences with the internet? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

[20] Defined in this report as internet users.

The following looks at the characteristics of internet users overall, then regular users and non-users in turn.

4.3 Internet users

This section describes who the internet users are, where they access the internet and what they do online.

Users of the internet were more likely to:

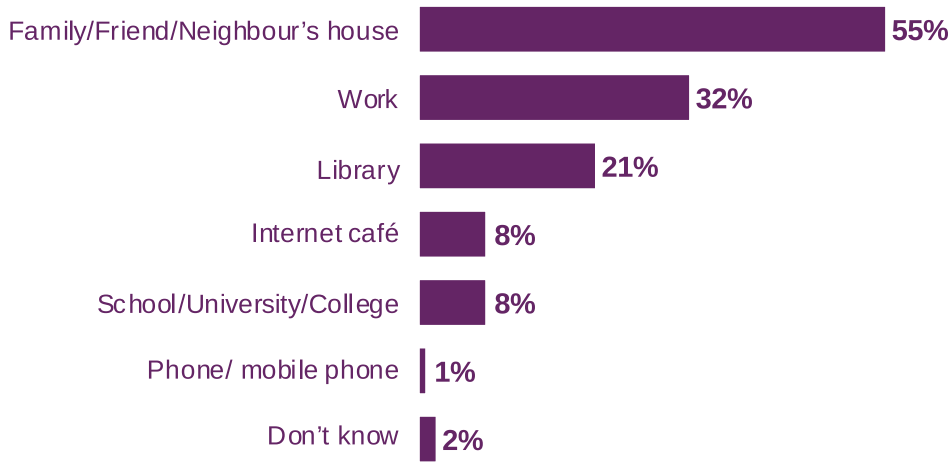
- be under 44 (83% of 16-24s and 65% of 24-44s vs. 28% of 45-64s and 4% of over 65s);
- be working or unemployed (62% of those working and 46% of those unemployed vs. 6% of those retired);
- have higher or school education (64% of those with higher education and 48% of those with school education vs. 12% of those with no formal qualification) ;
- have a child living in their household (59% vs. 25% of those without children);
- be living in ABC socio-economic groups (36% vs. 28% of respondents living in DE socio-economic groups);
- be living in higher income households (61% of over £17,500 and 41% of £11,500 to £17,500 vs. 26% of up to £11,500); and
- be living in a mobile-only household (55%).

People in Wales were less likely to be users compared to the sample average (23% vs. 32%).

Place of internet access

Internet users were asked about where they access the internet. Over half (55%) used it at someone else's house. Other common locations included their workplace (32%) and libraries (21%). This is demonstrated in Figure 14 below.

Figure 14: Places of internet access



Base: all who use the internet at least once or twice a year (543)
Question: Which places or types of places do you access the internet? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Not surprisingly, those under 24 were more likely to use the internet at school, university or college (18%) as well as at someone else's house (65%). Those between 45 and 64 were more likely to use it at work (44%).

As one may expect, those not working were more likely to use the internet at someone else's house (66%), at the library (29%) or at school, college or university (13%), while those in work were more likely to access it at work (49% of those working).

Respondents from C2DE socio-economic groups tended to use the internet at someone else's house (62% of respondents in DE socio-economic groups and 58% of respondents in C2 socio-economic groups vs. 46% of respondents in ABC1 socio-economic groups), while respondents from ABC1 socio-economic groups were more likely to access it at work (58% of respondents in ABC1 socio-economic groups vs. 26% of respondents in C2 socio-economic groups and 12% of respondents in DE socio-economic groups).

Those with an annual household income of under £11,500 were more likely to access the internet at someone else's house (67%), while those with an income over £17,500 were more likely to access it at work (58%).

A greater proportion of those with higher education accessed it at work (78%) and in an internet café (17%). Mobile-only respondents were less likely to access it at work (24%).

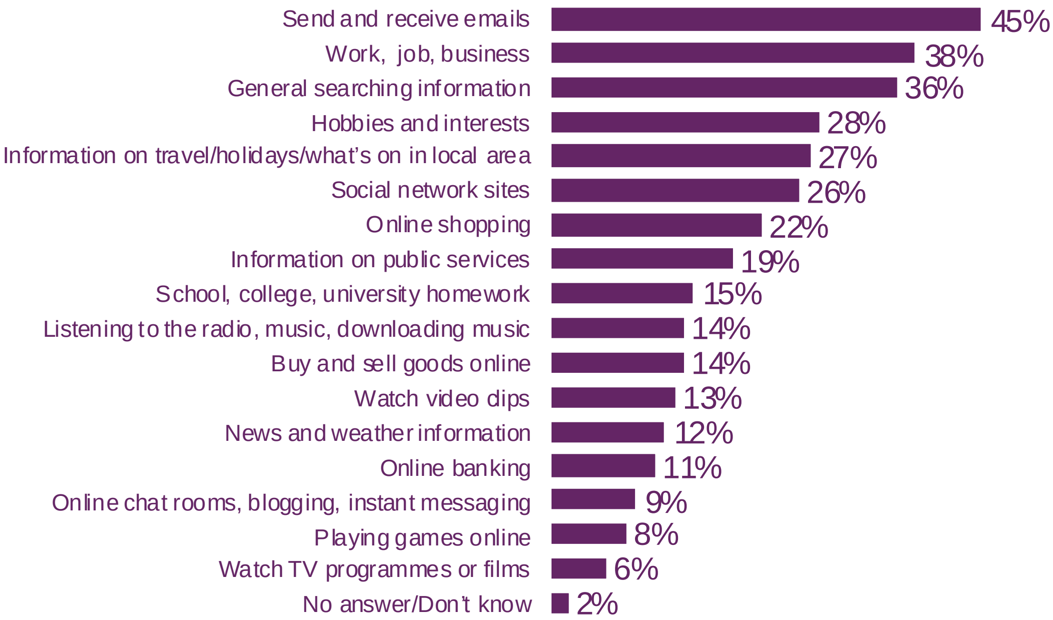
A greater proportion of those with children living in their household accessed the internet at someone else's house (65% v. 49% of those without), while those without children were more likely to access it at work (36%, v. 24% of those with children).

Respondents living in Scotland were less likely to access the internet at work (16%).

Internet activities

Internet users were asked what they use the internet for and their answers are shown in figure 15. They tended to use it to send and receive emails (45%), do their work (38%), and search for information (36%). Other popular functions include finding out information on their hobbies and interests (28%), social networking (26%) and searching for information on travel, holidays or about their local areas (27%).

Figure 15: Activities



Base: all who use the internet (543)
Question: And which of the following activities, if any, do you do when you use the Internet? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Respondents under 24 years old were more likely to use the internet for most activities compared with respondents overall, as were those living in ABC1 socio-economic groups.

Half of those in work (49%) used the internet for work. Those not in work were more likely than average to use it for their hobbies and interests (33%), for school/college/university homework (20%), for radio and music (18%) and for playing games online (11%).

Those with higher education were more likely to use the internet for work (77%), to send and receive emails (66%), and to find out information on public services (33%).

Those with children were more likely to use the internet to buy or sell goods online (18%), and those without were more likely to find out information on travel, holidays and activities in their local area (31%).

Those with lower household incomes were more likely than respondents overall to use social networking sites (38% of those with an income under £11.5k) and chatrooms, blogging and instant messaging (14%). A greater proportion of those with higher incomes used it for work (63% of those with an income over £17,500) and online banking (18%).

Mobile-only users were more likely to use social networking sites (39%), listen to music or the radio online (20%) and use chat rooms, blogging and instant messaging (14%).

Regular internet users

Regular internet users[21] have a similar demographic profile to all internet users. Regular users of the internet were more likely to:

21 Defined in this report as those who used the internet at least once a week.

- be under 44 (52% of 16-24s and 35% of 24-44s vs. 15% of 45-64s and 1% of over 65);
- be working or unemployed (36% of those working and 23% of those unemployed vs. 2% of those retired);
- have higher education (51% of those with higher education and 25% of those with school education vs. 3% of those with no formal qualification);
- have a child living in their household (25% vs. 15% of those without children);
- be living in ABC1 socio-economic groups (30% vs. 12% of respondents living in C2DE socio-economic groups);
- be living in higher income households (37% of over £17,500 vs. 19% of £11,500 to £17,500 and 12% of up to £11,500); and
- be living in mobile-only households (30%).

4.4 Non-internet users

This section describes who the non-internet users are.

Non-internet users[22] were more likely to:

- be older (90% of over 75s, 93% of 65-74s, 68% of 45-64s, 33% of 25-44s, and 17% of 16-24s);
- be retired (90% vs. 52% of those unemployed and 36% of those working);
- have no formal qualification (83% vs. 52% of those with school education and 35% of those with higher education);
- have no children at home (72% vs. 39% with children);
- be from C2 (68%) or DE (67%) socio-economic groups (compared with 59% from ABC1 socio-economic groups);
- have a lower household income (72% of those earning less than £11,500 compared to 39% of those earning over £17,500);
- be living in fixed-line only households (87% vs. 42% of those in mobile-only households and 66% of those with both a mobile and a fixed-line phone).

Respondents living in Wales were more likely to be non-users (75%).

A focus on those who have never used the internet tells a similar story. Those who have never used it are more likely to:

- be older (88% of over 75s vs. 7% of 16-44s);
- be retired (83%);

22 Defined in this report as those who used the internet less often than once a year, who used it before but no longer did or who had never used it.

- be from C2DE socio-economic groups (57% vs. 44% ABC1 socio-economic groups);
- have no formal qualification (76% vs. 33% of those with school or higher education);
- be from lower household income (63% of those earning less than £11,500, vs. 22% of those earning over £17,500);
- be living in fixed-line only households (85% vs. 26% of those living in mobile-only households); and
- be not living with any children (61% vs. 23% with children).

Two thirds (66%) of the sample in Wales have never used the internet.

Non internet users: those who no longer used it

A minority of respondents (7%) used to use the internet but no longer did. These respondents were asked where they used to access the internet, and the most common answers given were their own home (40%), someone else's house (30%) or their workplace (22%).

When asked why they stopped using the internet, they were most likely to say it was too expensive (17%), though some felt it was not good value for money because they did not use it enough (10%). One in ten (11%) said they no longer had the internet because their computer broke down. On the other hand, some had exercised a digital choice – 14% said they were no longer connected because they did not like having the internet at home.

A change of circumstances might also be a factor, one in ten (10%) said it was because they moved house. Other said it was because they had retired (6%), left school (5%), lost their job (4%) or moved job (3%)

In short, among those aware of the internet, just over three in ten (32%) were internet users. Just over two thirds (67%) were non-users, which includes just over half (53%) who have never used it before.

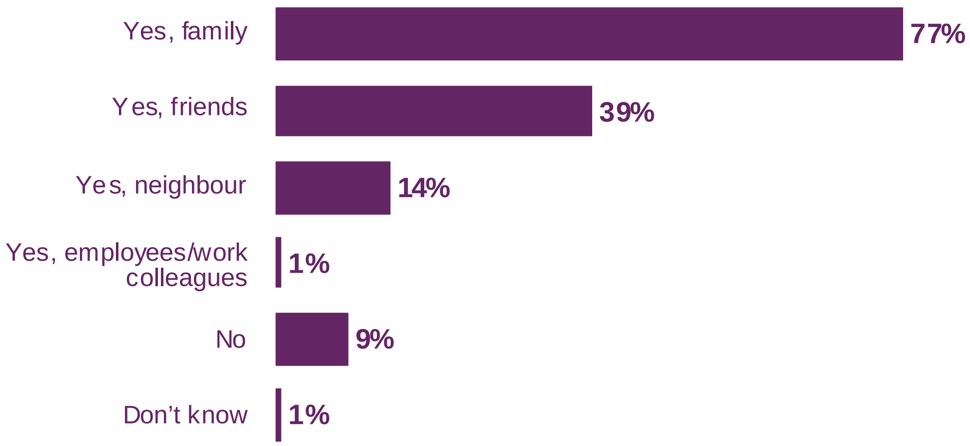
4.5 Proxy access to the internet

Although the majority of respondents did not have personal experience of using the internet, the majority did know other people who have regular access to it.

Just over two thirds (67%) of respondents were non-users of the internet[23]. As shown in Figure 16, nine in ten of this group (89%) knew someone who regularly accesses the internet. For over three quarters (77%), this was a member of their family, 39% a friend and 14% a neighbour. Under one in ten (9%) did not know anyone who access the internet regularly.

[23] Non-users is defined in this report as never used, used to use, or used once or twice in my life.

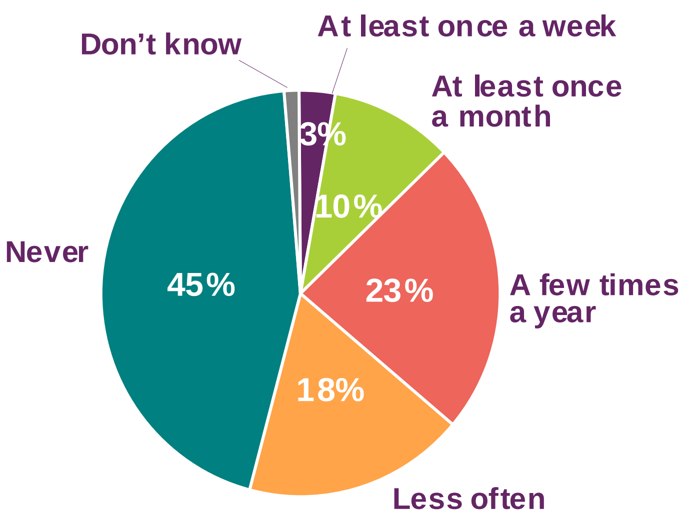
Figure 16: Know someone who accesses the internet



Base: all who do not use the internet (1,231)
Question: Do you know anyone, who regularly accesses the internet? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Non-users were also asked whether they have asked someone else to do something for them online, and their answers are detailed in Figure 17 on next page. Over one third (36%) have indirect access to the internet at least a few times a year, with 18% less often. Forty-five per cent (45%) of non-users have never asked other people to do things on the internet on their behalf.

Figure 17: Proxy access to the internet



Base: all who do not use the internet (1,231)
Question: How often, if at all, do you ask someone to do something or look for information on the internet for you?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Among non-users, those between 25 and 64 years old were more likely to have proxy access (60% of 25-64s vs. 50% of over 65), as were those working (65% vs. 52% of those not working) and those living in ABC1 socio-economic groups (68% vs. 49% of those living in C2DE socio-economic groups). Over four in ten (62%) of those with a mobile phone had proxy access, compared with less than one quarter (38%) respondents who have a fixed line only.

Proxy users were asked who they tended to ask to do things for them on the internet. Results showed they were most likely to turn to their children or grandchildren (49%), other members of their families (39%) or their friends (25%).

Not surprisingly, older respondents tended to ask their children or grandchildren (63% of those between 65 and 74 years old, and 69% of those over 75 did). On the other hand, respondents between 25 and 44 tended to ask other members of their family (59%) or their friends (41%). Those not in work were more likely to ask their children or grandchildren (54% vs. 36% of those working), and those who were working tended to ask a friend (39% vs. 20% of those not working).

In the qualitative research we asked participants what they tended to ask people to do on their behalf. The research showed that they tended to ask other people to help them look up information, compare prices, book tickets or do online shopping. Through accessing the internet indirectly, some people in this group became more aware of the efficiency savings that come with the internet and as a result were more inclined to taking up the internet.

> When I'm asking my family to do stuff, they do it so quickly and so efficiently, and I think this is crazy. I should have one really.
>
> Non-users, 50-64, London

In some cases, proxy users might be pressured by those they rely on to get the internet, as their reliance on the internet grew.

> My daughter's threatening me...She said if, by my birthday, I haven't sort of shown signs that I want to buy a laptop at least...she's going to stop doing it for me.
>
> Non-users, 50-64, London

However, proxy access may also create inertia, as non-users could rely on someone else to access the internet for them, there might be less motivation for them to learn how to use it themselves.

> I am a little long into the tooth for it…I can find friend or family who would do it for me.
>
> Non-user, over 75, Sheffield

Over half (54%) of non-internet users have proxy internet access, usually through their children or grandchildren. Proxy access looks to correlate with intention to take up: those with proxy access were more likely to say they intend to get the internet compared to those with no proxy access[24]. It is possible that this group is more aware of what the internet can do and therefore is more inclined to take up the internet themselves.

Overall, among those aware of the internet, three in ten (32%) were internet users, 36% had proxy access with other people doing things on the internet for them, and 31% had neither direct nor proxy access.

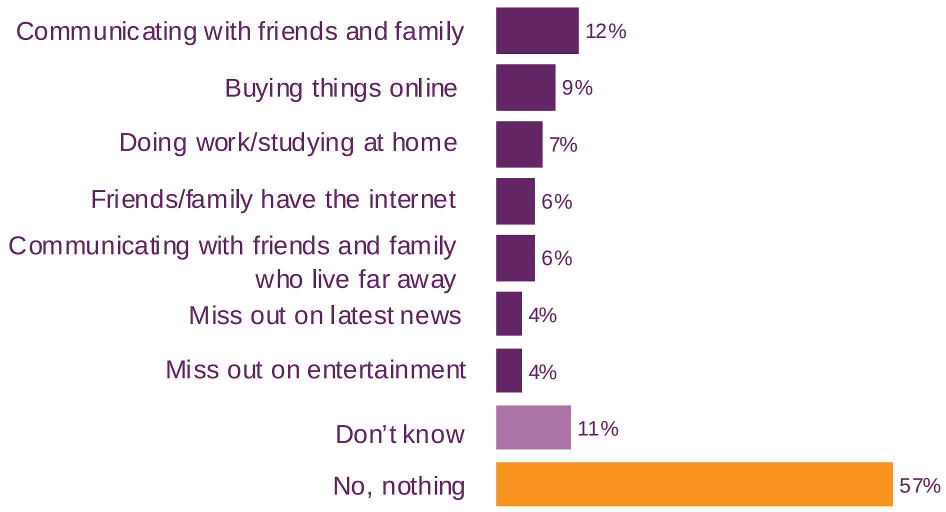
[24] See next section for a full profile of those who intend to get the internet in the next six months.

4.6 Perceived missed benefits as a result of not having the internet at home

Those who were aware of the internet (97% of the sample) were asked whether, as a result of not having the internet at home, they felt they were missing out on some benefits of the internet.

As shown in the following chart, close to six in ten (57%) thought they were not missing out on anything as a result of not having the internet at home. Close to two in ten (18%) said they missed out on at least one benefit, one in ten (9%) at least two benefits and 6% at least three benefits. Communication (12%) and shopping (9%) were the top things respondents felt they were missing out on.

Figure 18: Perceived missed benefits as a result of not having the internet at home



Base: all aware of internet (1,792)
Question: Overall, do you think you are missing any benefits because you do not have internet access at home? What are they? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

A greater proportion of internet users, compared to non-users, said they missed out on a variety of things, in particular communicating with friends and family (23% vs. 7%), working or studying at home (13% vs. 4%), buying things online (13% vs. 7%). In addition, respondents from ABC1 socio-economic groups were more likely to say they missed out on communicating with friends and family (18% vs. 10% of respondents in C2DE socio-economic groups).

Those with a higher education qualification were more likely to say they missed the ability to communicate with friends and family (29%), the convenience of working at home (15%) and the ability to do online banking (8%) compared to the average across all respondents.

Those who said they did not miss out on anything were more likely to:

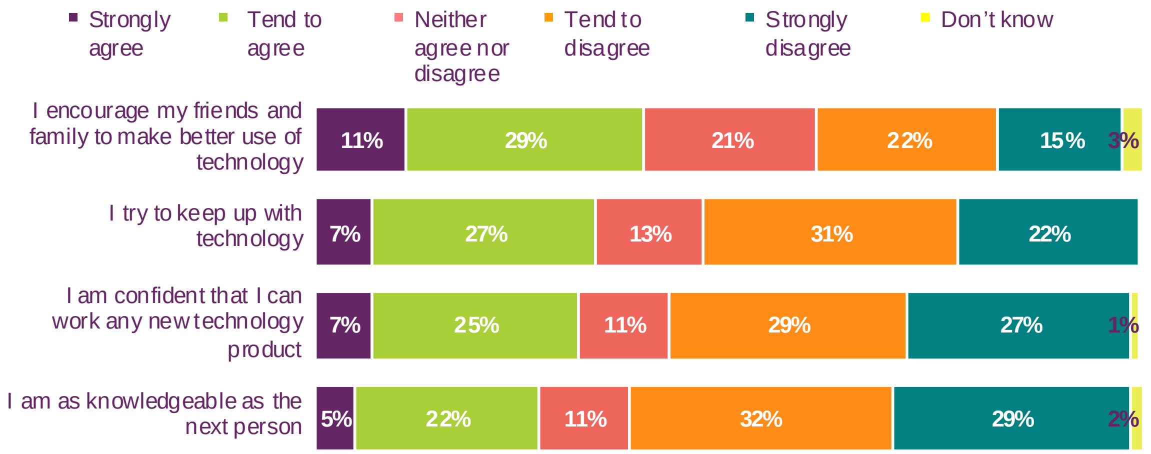
- be older (68% of those over 65, compared to 41% of those under 44);
- be retired (68% vs. 53% of unemployed and 47% of those in work);
- have no formal qualification (68%);

- have no children living in the household (60%) compared to 46% of those living with children;
- be living in a fixed-line only household (69% vs. 48% of mobile-only);
- have an annual household income of under £11,500 (60% vs. 45% of over £17,500); and
- be in DE socio-economic groups (60% vs. 47% of those in AB groups).

4.7 Attitudes towards internet and technology

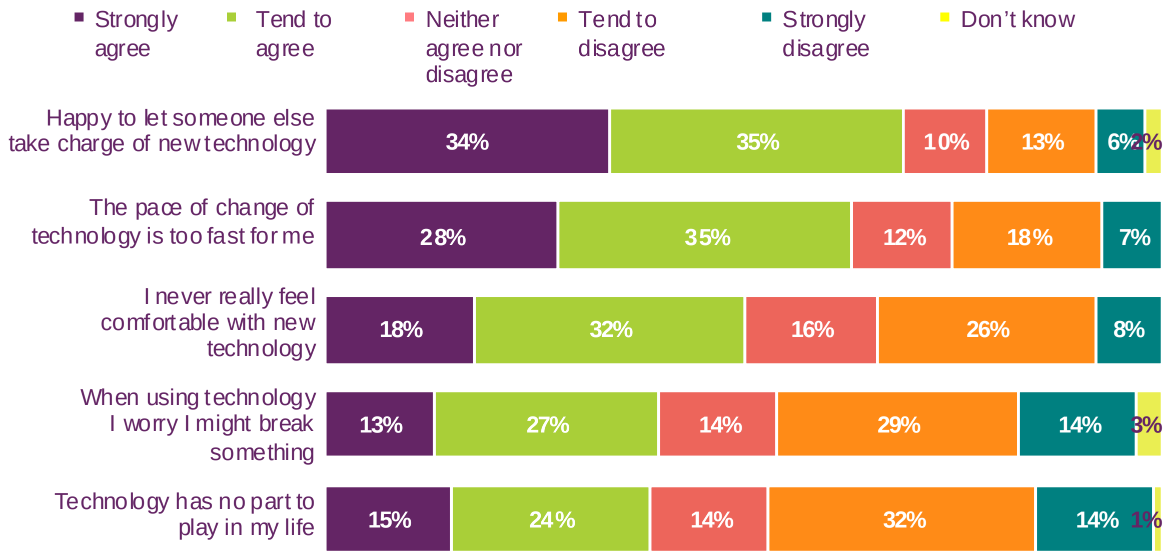
Respondents were asked how much they agree or disagree with a series of statements on technology. Results are shown in Figures 19 and 20 below.

Figure 19: Attitudes to technology – Positive statements



Base: all respondents (1,841)
Question: Here are a series of statements people have said about their attitudes to technology. To what extent do you agree or disagree with each? Prompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 20: Attitudes to technology – Negative statements



Base: all respondents (1,841)
Question: Here are a series of statements people have said about their attitudes to technology. To what extent do you agree or disagree with each? Prompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Respondents did not tend to be close followers of new technology. Over half (52%) disagreed with the statement 'I try to keep up with technology' and a similar proportion (56%) disagreed with the statement 'I am confident that I can work any new technology product'. In fact, half (50%) agreed with statement that they never really felt comfortable with new technology. Four in ten (40%) worried about breaking something when using new technology and just under four in ten (39%) saw no role for technology in their lives.

There was a feeling of being left out from the digital world. Over six in ten (62%) agreed with the statement that they felt the pace of technology was too fast for them. In particular, they felt that they were less technologically savvy compared with people round them, with six in ten (61%) disagreeing that they were as knowledgeable about technology as the next person. Respondents were unlikely to be active advocates of technology, as only four in ten (40%) agreed that they would encourage their friends and family to make better use of technology.

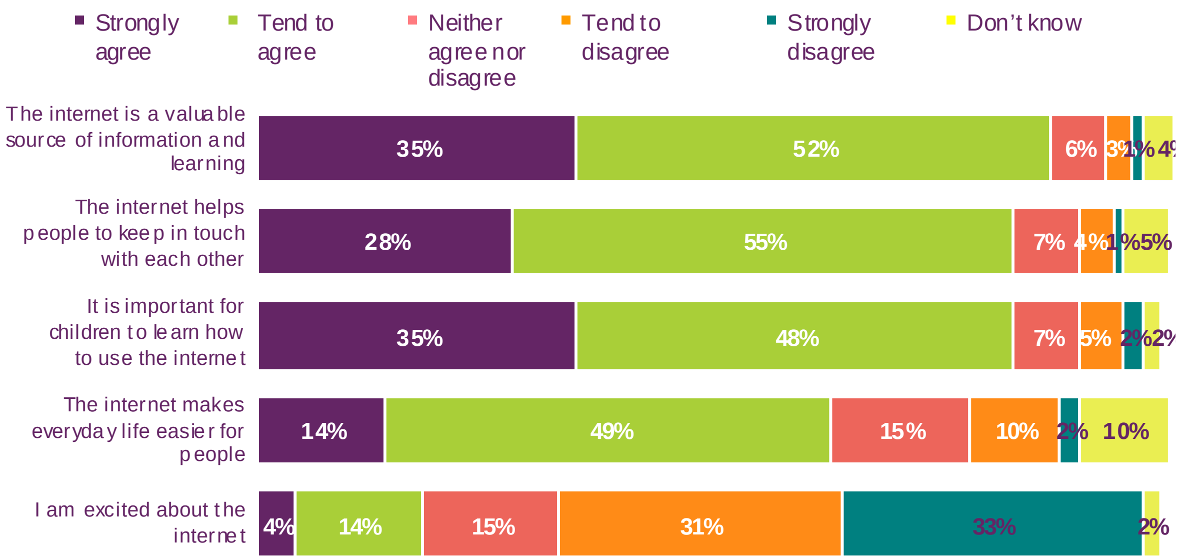
However, it does not necessarily mean that respondents do not see the relevance of technology in their lives, as just under half (47%) disagreed that technology had no part to play in their lives. One way of keeping up with technology would be to rely on the help of people around them. Indeed, just under seven in ten (69%) respondents agreed that they were happy to let someone else take charge of technology for them.

Those who were older, not living with children, retired or in fixed-line only households were less likely to feel comfortable with technology or feel able to keep up with it. This was also the case for those from C2DE socio-economic groups, those with a household income of under £11,500 and those with no formal qualification. People in Wales were also less likely to say they tried to keep up with technology or felt comfortable with it.

Attitudes towards the internet

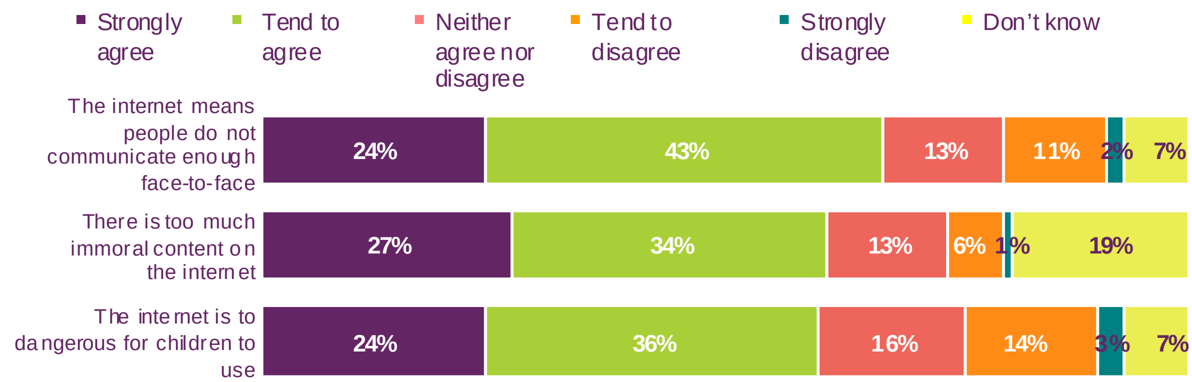
Respondents who were aware of the internet (97% of the sample) were asked how much they agree or disagree with a series of statements about the internet, and their responses are charted in Figures 21 and 22 below.

Figure 21: Attitudes to internet – Positive statements



Base: all aware of the internet (1,792)
Question: Here are a series of statements people have said about their attitudes to the internet. To what extent do you agree or disagree with each? Prompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 22: Attitudes to internet – Negative statements



Base: all aware of the internet (1,792)
Question: Here are a series of statements people have said about their attitudes to the internet. To what extent do you agree or disagree with each? Prompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Overall, there was a general acknowledgement of the benefits of the internet, as the vast majority agreed that it is a valuable source of information and learning (86% agreed with statement) and that it helps people keep in touch with each other (83% agreed with statement).

Younger respondents were more likely to be positive towards the internet, as were those intending to get the internet in the next six months, as illustrated below.

- 89% of 16-24s (compared with 79% of over 75s) and 94% of those likely to get the internet (vs. 80% of those who are not) agreed that the internet helps people keep in touch with each other.

- 93% of 16-24s and 90% of 25-44s (compared with 81% of over 75s) and 96% of those who said they were likely to get the internet (compared with 84% of those not) agreed that the internet is a valuable source of information and learning.

Although users tended to give a higher score (93% and 88% for both statements respectively) compared with non-users (84% and 81%), the majority of non-users also viewed these aspects of the internet positively.

Nonetheless, only 63% of the sample agreed that the internet makes everyday life easier, and this drops to 58% amongst non-users. This echoes the qualitative findings that while non-users tended to appreciate the general benefits of the internet, they found it hard to envisage how it would help people such as themselves.

Respondents were also unlikely to feel enthusiastic about the internet. Less than two in ten (18%) said they feel excited about it. There were some significant differences by demographic. As illustrated below internet users, those intending to get it at home, younger people, those working, and those living with children are all more likely to say they are excited about the internet:

- 39% of internet users vs. 8% of non-users agreed with this statement;
- Half (49%) of those likely to get the internet in the next six months agreed;
- 44% of 16-24s agreed vs. 3% of over 75s;
- 29% of those working or unemployed agreed v. 6% of retired; and
- 27% of those living with children vs. 15% of those not living with children.

People in Northern Ireland were also more likely to say they were excited about the internet (23%) and to agree it makes life easier (75%).

Despite a general acknowledgement of the benefits of the internet, respondents did have some concerns about it. Close to seven in ten (68%) agreed that the use of internet meant people are not communicating enough face-to-face. Six in ten (61%) said there was too much immoral content on the internet. However, as we found in the qualitative research, though these concerns were common, they did not tend to be the main factor that influenced decisions to get the internet. Those who wanted to get the internet would get it anyway despite these concerns, while those who did not want to get the internet tended to cite other reasons for not having it, such as they are not interested or do not need it. (See section 5 for more details.)

Over eight in ten (83%) felt it is important for children to learn how to use the internet, although six in ten (58%) of these people also agreed that the internet is too dangerous for children to use. Qualitative findings may shed some light on these seemingly contradictory findings; while the safety of children on the internet was a concern for some parents, none said it would make them prevent their child from using the internet as a result. There was a general consensus that as long as adequate safety precautions have been undertaken, this should not be an issue. Indeed, those living with children were no more likely to say the internet is too dangerous compared with those not living with children.

I have an eight year old son. I would monitor what he's accessing but I would worry about it. It wouldn't stop me from getting the internet though.

Users, 35-49, London

I would have to think of having child protection thing on it to see that he doesn't go in to certain sites

Users, 50-64, London

Link between experience and attitudes and likelihood to take up the internet

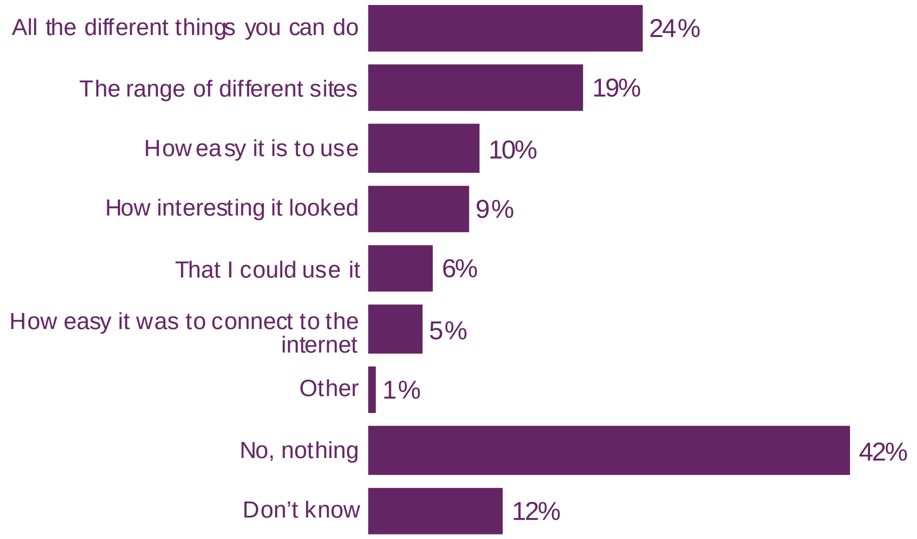
Findings from the research study suggest that there is a link between experience of the internet, attitudes towards it and intention to purchase. Those who use the internet at least once a year were more likely to have positive attitudes towards technology and the internet. For example, six in ten (61%) internet users agreed they try to keep up with technology, while only two in ten (21%) non-users did. Four in ten internet users (39%) said they were excited about the internet, a much higher proportion than among non-users (8%). Only 16% of users agreed technology has no part to play in their lives, compared to half (50%) of non-users. Experience also correlates with likelihood to get the internet: over four in ten users (42%) said they were likely to get the internet at home in the next six months, when only under one in ten (8%) of non-users were.

4.8 Reactions towards information on what the internet can do

As part of the research, respondents in both the qualitative and quantitative studies were shown a short video clip of what the internet could do. As the majority of the sample were likely to have a limited knowledge of the functions of the internet, it was felt that a video on the functions of the internet could help respondents make a more informed judgement about their interest in getting it at home.

After watching the video, almost half (46%) said they had learnt something new. One quarter (24%) said they learnt the different things they could do online, and two in ten (19%) about the range of different sites available online. However, just over four in ten (42%) said they did not learn anything new from the video (see Figure 23 below).

Figure 23: Things learnt from the video



Base: all respondents (1,841)
Question: What did you learn that was new to you, if anything, about Internet? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

As perhaps to be expected, half (51%) of those who knew a lot or a fair amount about the internet before the interview said they learnt nothing new from the video. What is more surprising, however, is that just under four in ten (39%) of those who had heard of the internet before but knew only a little or nothing about it, also said they learnt nothing new.

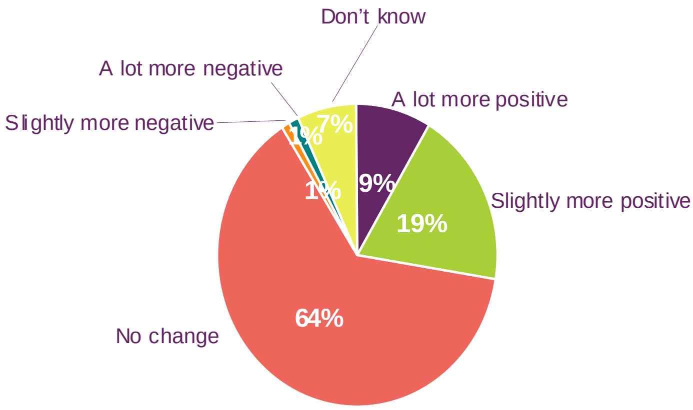
From the qualitative research, those who were not interested in the internet were less likely to pay attention to the content of the video. Some dismissed it with expressions like 'it's nothing I don't already know'. This was not because they already knew a lot about the internet. Rather, they knew about the general functions of the internet, but had no desire to find out more about it.

The level of interest might also be related to the perceived ease of using the internet. Those who thought the video had showed them how easy it is to use the internet were more likely to be enthusiastic about it.

> Seeing how easy it was, especially when he was saying about booking your train tickets … just seems a wee bit quicker and easier.
>
> Non-users, 35-49, Glasgow

Respondents were asked whether their views towards the internet had changed after watching the video clip (see Figure 24 below). Just under three in ten (27%) respondents had a more positive impression about the internet after watching the video, rising to 45% among those who learnt something new from the video. However, two thirds (64%) said their views have not changed. This should also be seen in the context that the majority, whether they were users or non-users, had already demonstrated a positive attitude towards the internet before watching the video, as discussed above.

Figure 24: Change of impression about the internet after watching the video



Base: all respondents (1,841)
Question: Overall, did the video give you a more positive or negative impression about the internet, or did it not change your views about the internet? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Those under 44 years old (33%), those living with children (34%), those with school or higher education (32%) and those from mobile-only households (33%) were more likely to have a better impression ('slightly more' or 'a lot more' positive) of the internet after watching the video compared to the average across all respondents. As discussed above, these groups were already more likely to agree that the internet was a useful source of information, helped people communicate with each other and made everyday living easier, and the video seemed to have reinforced their views. In other words, the video was more likely to have an impact on those who were already inclined to feel positive towards the internet.

This was supported by findings from the qualitative research. Those who were not users currently but expressed an interest in the internet were more likely to feel more positive about the internet having watched the video.

> I'm interested in everything. It's even stuff I didn't think of.

Non-users, 35-49, London

> Seeing it all at once …it's amazing to know what is on there and what you could do.

Non-users, 65-74, Glasgow

However, the video tended not to change the mind of those who said they were unlikely to get the internet in the next 6 months. While 44% of those who said they are likely to get the internet felt more positive, only 24% of those unlikely to get it felt the same way. In the qualitative research, some participants treated the video as a vindication of their existing views that the internet is not necessary to their wellbeing because they could do each of the things demonstrated on the video face-to-face, in writing or via the telephone.

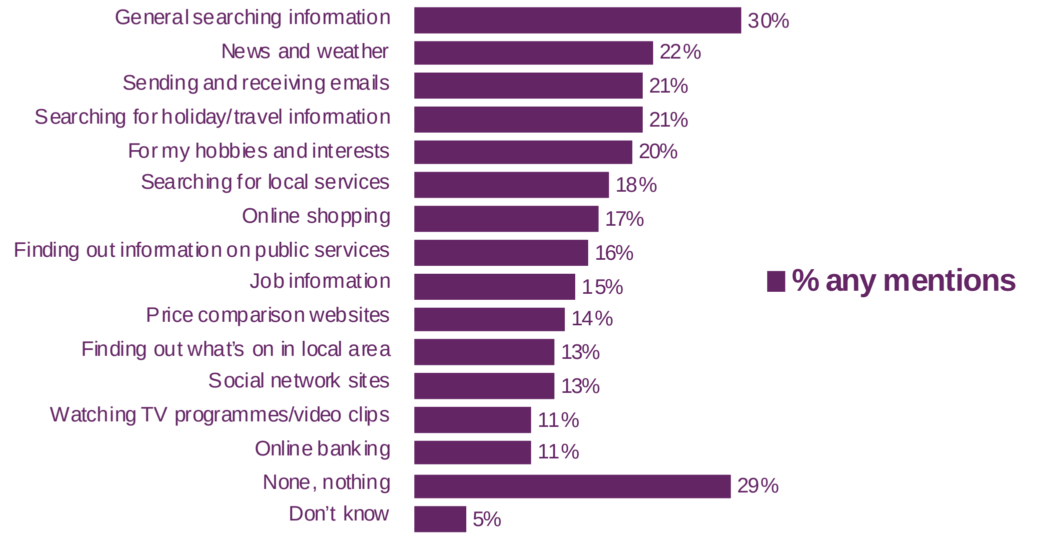
> I can manage really doing everything he's talking about without having to own one, you know what I mean. If I want to find different prices for insurances well you just ring up don't you?

Non-user, over 75, Sheffield

Those in Wales (34%) and Northern Ireland (46%) were more likely than respondents overall to say they were more positive after watching the video.

Respondents were asked which activities in the video were of interest to them (see Figure 25 below). The top activity of interest was general search for information, mentioned by three in ten (30%) respondents. Just over two in ten respondents mentioned news and weather (22%), emails (21%), searching for holiday or travel information (21%) and their hobbies and interest (20%). Two thirds (66%) mentioned at least one activity of interest. However, about three in ten (29%) respondents said nothing was of interest to them.

Figure 25: Activities in the video that respondents were interested in



Base: all respondents (1,841)
Question: Which activities and types of websites covered in the video, if any, are of interest to you? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Younger respondents were more likely to say they were interested in the activities on the video: nine in ten (90%) respondents aged 16 to 24 said at least one activity or type of website was of interest to them (this decreases with age, with 43% of those aged 75 or above naming at least one activity).

Those with children in their household were more likely to find something of interest (79%), than those without (62%). They were also more likely to be interested in all the different activities measured, such as looking for job information (29% of those with children vs. 11% of those without) and social networking (25% of those with children vs. 9% of those without). Respondents in work (77%) and those with an income over £17,500 (82%) were more likely to find something of interest as well as be interested in each of the activities.

Eight in ten (80%) respondents in mobile-only households were interested in at least one activity, compared to only 43% of those with only a fixed line. Respondents with school or higher education tended to be more interested than respondents overall (77% of both groups).

Respondents living in Northern Ireland (73%) were more likely to be interested in something compared with those living in Scotland (60%) and also England (65%). Those living in Scotland were more likely to find nothing of interest compared with the overall average (36% and 29% respectively). There were no differences in Wales compared to the sample as a whole.

Those who said nothing was of interest to them were likely to:

- be older (42% of those between 65-74 and 49% of over 75s compared to 8% of those under 24 and 13% of those between 25 and 44);
- be retired (44% vs. 16% of those unemployed and 17% of those in work);
- have no formal qualification (41% vs. 19% of those with a qualification);
- have no children living in their household (32% vs. 17% with children);
- be living in Scotland (36% vs. 26% of those in Northern Ireland, 28% of those in Wales and 29% of those in England);
- be living in fixed-line only households (50% vs. 15% of those in mobile-only households); and
- be from lower income households (27% of those with an income under £17.500 vs. 12% of those over).

Respondents were also asked about whether they were likely to get the internet before and after the video. For most respondents who intended to get the internet in the next 6 months, their views did not change after the video. However for some, their intention to purchase did change. Please refer to annex 11 for more details.

Section 5

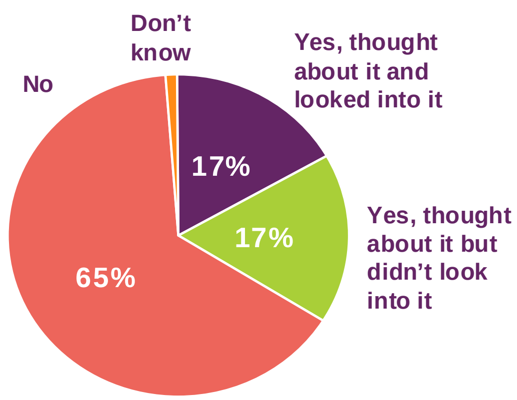
Who intends to get the internet and who does not

This chapter firstly looks at whether respondents had considered getting the internet in the last 12 months, then turns to their intention to get the internet in the next six months. It then considers those who say they do not intend to get the internet and their reasons for not having it.

5.1 Whether considered getting the internet in the last 12 months

Among those aware of the internet (97% of the total sample) respondents were asked whether they had considered getting it in the last 12 months (see Figure 26 below). Just over one third (34%) of respondents had considered getting the internet at home in the last 12 months, whereas just under two thirds (65%) had not considered getting the internet in the last 12 months.

Figure 26: Whether considered getting the internet in the last 12 months



Base: all aware of the internet (1,792)
Question: In the last 12 months, have you considered or thought about getting the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

The proportion who had considered getting the internet increases with internet usage, from 19% of non-users, to 72% of regular users). The majority of those under 44 (65% of 16-24s and 63% of 25-44s) had also considered getting the internet, compared to three in ten (30%) respondents aged 45-64 and one in ten (11%) respondents aged 75 or above.

The following groups are also more likely to have considered getting the internet at home:

- Those working (49% vs. 27% of those not working);
- Those with children in household (61% vs. 27% of those without);
- Those living in ABC1 socio-economic groups (39% vs. 32% of those in C2DE socio-economic groups);

- Those with a household income over £17,500 (50% vs. 34% of those with a household income under £17,500);
- Those with school or higher education (48% vs. 18% of those without any formal qualification);
- Those from mobile-only households (55%).

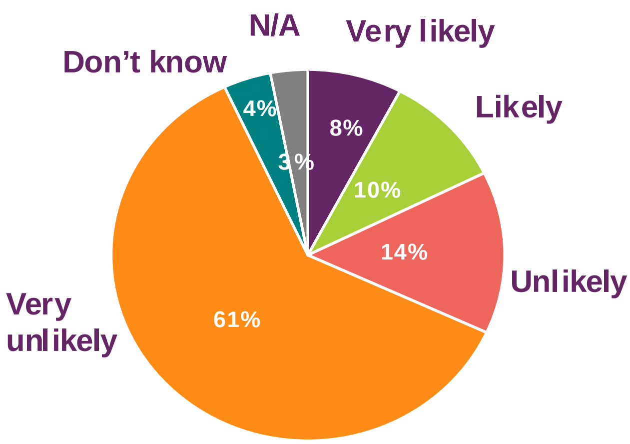
Those who have not considered getting the internet at home were more likely to:

- be older (87% of those over 65, and 68% of those between 45-64, compared to only 35% of those under 44);
- be retired (86% vs. 49% working and 49% unemployed);
- have no formal qualification (81% vs. 51% of those with school or higher education)
- not to have children living with them (72% vs. 37% of those with children);
- be in C2DE socio-economic groups (67% vs. 60% of those in ABC1 socio-economic groups);
- have a household income under £17,500 (65% vs. 48% of those with an income over £17,500); and
- be living in fixed-line only households (88% vs. 44% of those in mobile-only households).

5.2 Those who said they intend to get the internet in the next six months

Respondents were asked about their intention to get the internet in the next six months (see Figure 27). Close to two in ten (18%) said they were likely to get the internet in the next six months, and eight per cent said they are very likely to do so[25].

Figure 27: Likelihood of getting the internet in the next six months (before video)



Base: all respondents (1,841). This question was asked of all aware of the internet. Results were rebased here on all respondents.
Question: Overall, how likely, if at all, are you to get the internet at home in the next six months? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

[25] See annex 11 for respondents' intention to purchase pre and post watching the video.

Two thirds (68%) of those who said they intend to get the internet were under 45 years old. Compared with the overall sample, they were more likely to be working (53%), and have at least one child living in their household (39%). They were also more likely to have Freeview television (51%) or cable/satellite (39%). Just over four in ten (42%) belonged to mobile-only households. (See the end of this chapter for a full demographic breakdown.)

There is a strong correlation between experience of the internet and intention to get it at home. Over seven in ten (72%) of those who said they were likely to get the internet were users, and half (50%) regular users.

The qualitative research showed that these people tended to start using the internet at work, at their friend's or family's or at their local library. As time went by, they discovered more and more things they could do online. The tipping point for them came when they felt the benefits of having the internet in the privacy and comfort of their own home 24/7 outweighed the costs involved in getting the internet at home.

> I'm getting more interested in it and always messing around with one somewhere.
>
> User, 35-49, London

Another common feature that this group shared was their computer literacy. They were generally comfortable with using a computer and felt that surfing on the internet was something 'intuitive' and easy to learn. Seven in ten (70%) were confident using a computer, and over four in ten (45%) had access to a computer at home.

Close to three in ten (27%) respondents intending to get the internet were non-users currently. Among this group of non-users who intended to get the internet, six in ten (59%) had indirect access to the internet. This suggests that there was also some correlation between indirect access to the internet and intention to get it. This is supported by qualitative findings. Non-users who intended to get the internet tended to regularly rely on their family members or friends to look up information, shop or book something for them.

Among this group of non-users, there was often the feeling of inevitability. There was a sense that everything was being conducted digitally nowadays and they would need to learn how to use the internet in order not to be left out.

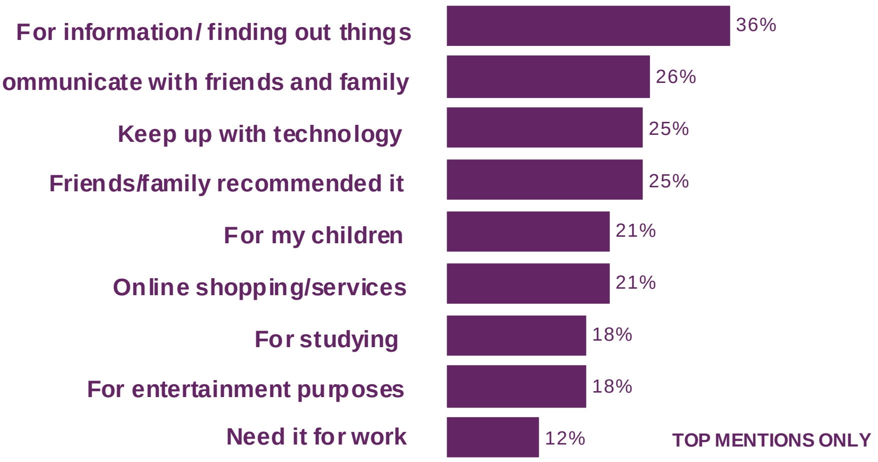
> No matter how much we want to resist it… I know that I have got to get on with it.
>
> Non-users, 50-64, London

On the other hand, some also saw a window of opportunity – for them to do things more efficiently or be connected to the world.

> I have to do it because otherwise I am going to run around all over London to get a visa.
>
> Non-users, 50-64, London

Those who said they were likely to get the internet in the next six months were asked why they planned to do so, and their answers are shown in Figure 28 below.

Figure 28: Reasons for getting the internet



Base: all likely to get the internet in the next 6 months (324)
Question: What are the main reasons why you are planning on getting the internet in the next six months? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Respondents were most likely to mention functions of the internet that were relevant to their day-to-day lives, such as looking for information (36%), communicating with friends and family (26%), shopping or using online services (21%) or doing online banking or paying bills (10%). For close to two in ten, it was for entertainment (18%). The same proportion (18%) said it was for their study while 12% said it was for work. One quarter (25%) said it was to keep up with new technology and 25% as family or friends recommended it.

Two in ten (21%), respondents said they were planning to get the internet for their children. As found in the qualitative research, children's needs tended to be a very strong tipping point.

> All that research and information for my daughter, because it's really important for her to have that.
>
> Non-users, 35-49, Glasgow

Overall, those who said they intend to get the internet in the next six months tended to be current users of the internet and computers, and felt excited about what the internet can do.

Who are the recent adopters?

Twenty structured interviews over the telephone were also conducted with those who had taken up broadband internet at home in the last 18 months in order to explore what made them take it up.

The vast majority had subscribed to an internet connection via a fixed phone. When choosing their internet connection package, recommendations from their friends and family were the key source of information for this group, though some had also got their information from the internet and TV advertising.

They tended to know a lot or a fair amount about the internet, and were regular users of the internet either at work, at someone else's home or at the library, before getting it at home. Only a very small proportion said they first started to use the internet when they installed it at home.

When asked why they did not get the internet earlier, some said it was because they had not got round to it, while others said they did not need it at home before. One quarter of respondents said nothing prevented them from getting the internet earlier.

However, the key 'barrier' to earlier take-up seemed to be hardware-related. Around half of the recent adopters we spoke to said it was because they did not have a computer, could not afford one or needed a better one. (In the main qualitative research stage, those without the internet tended to say 'overall costs' of getting the internet and the fear of getting into debt, rather than specifically the costs of getting a computer as barriers to getting the internet at home.)

Monthly payments were also a barrier. It seems that for those who want the internet at home, participants need to be confident that they can afford the monthly payments. This is supported by the fact that many recent adopters and those intending to get the internet at home in the near future mentioned the recent fall in the prices of monthly tariffs as one of their tipping points. Moreover, there was a group of people at the main qualitative stage that had a computer at home, but chose not to get connected because they feared they would not be able to afford the monthly payments.

Attitudes towards the internet and technology

The majority said they tried to keep up with technology, and they tended to feel quite positive towards the internet. For example, most agreed that the internet helped people keep in touch with each other and that it was important for children to learn how to use it. In addition, all agreed strongly that the internet had made everyday life easier for them.

> Quicker than going to the bank and also there is easy availability to information.
>
> Users before getting it at home, 18-24

> Accessibility - the information being there whenever it is needed – anything from maps to Google – having everything there at the touch of your fingertips.
>
> Users before getting it at home, 35-44

This group did voice some downsides and concerns about having the internet, such as the time they spent on the internet, a lack of personal interaction and safety for children.

> You spend so much time, you neglect other things, if you are in the middle of a job and you go to the Internet, procrastination, distraction.
>
> Users before getting it at home, 25-34

> You miss out playing games with the kids, it stops you from doing other things.
>
> Non-users before getting it at home, 35-44

> You have to be careful what the kids are looking at, online security is an issue.
>
> Users before getting it at home, 25-34

However, these did not seem to detract them from the overall positive experience of having the internet at home.

Reasons for getting the internet

The research found that the key reason that drove this group to take up the internet was a widespread perception that the internet had now become a necessity – an integral part of their lives. Though they tended to have access to it somewhere else, they would now like to use it more often in the comforts and privacy of their own home. Some said they primarily installed it for work (because they wanted to be able to work from home or because they set up their business at home) or for their children, though they also liked to use it themselves for pleasure.

> I started my business so I needed to access it, plus I wanted to use it personally.
>
> Users before getting it at home, 25-34

> For the children as they always have research to do for their schoolwork. I have limited access at work – can't access all sites, and can only do so at lunchtime.
>
> Users before getting it at home, 35-44

Respondents also appreciated the cost savings that might come with having an internet connection. For instance, emailing someone is cheaper than calling someone. It also benefited them as a customer because they can compare prices on the internet easily and get the cheapest deals.

> Be constantly aware on a customer level, get cheap things, book cheap flights, get cheap tickets to things.
>
> Users before getting it at home, 25-34

In the only case where the respondent was over 65 years old, pressure from family members and the need to keep in touch with technology had driven him to take up the internet, even though he had never used the internet before he had installed it at home.

> Because my son has pressured me into getting it. Secondly the need to get into the 21st century.
>
> Non-users before getting it at home, 65-74

The monthly payments of internet connection were also a major consideration for this group. All thought that the price they paid for the internet was good if not very good. Some also cited the drop in prices of the internet recently as something that eventually made them install the internet at home.

> Virgin media were doing a packaged deal and was a bargain so went for it.
>
> Users before getting it at home, 25-34

Problems encountered when getting the internet at home

Some found the process of choosing the best computer package confusing, as there were so many different deals on the market.

> There is so much to choose from, you don't know which offer is best.
>
> Users before getting it at home, 25-34

Some were also baffled when they had to make decisions on a range of technical issues. A minority had encountered problems with connection or set-up.

> It wasn't a huge problem, but dealing with the 'unknown' – not knowing whether to go with wireless or not, setting up emails – just generally dealing with things that we don't normally.
>
> Users before getting it at home, 35-44

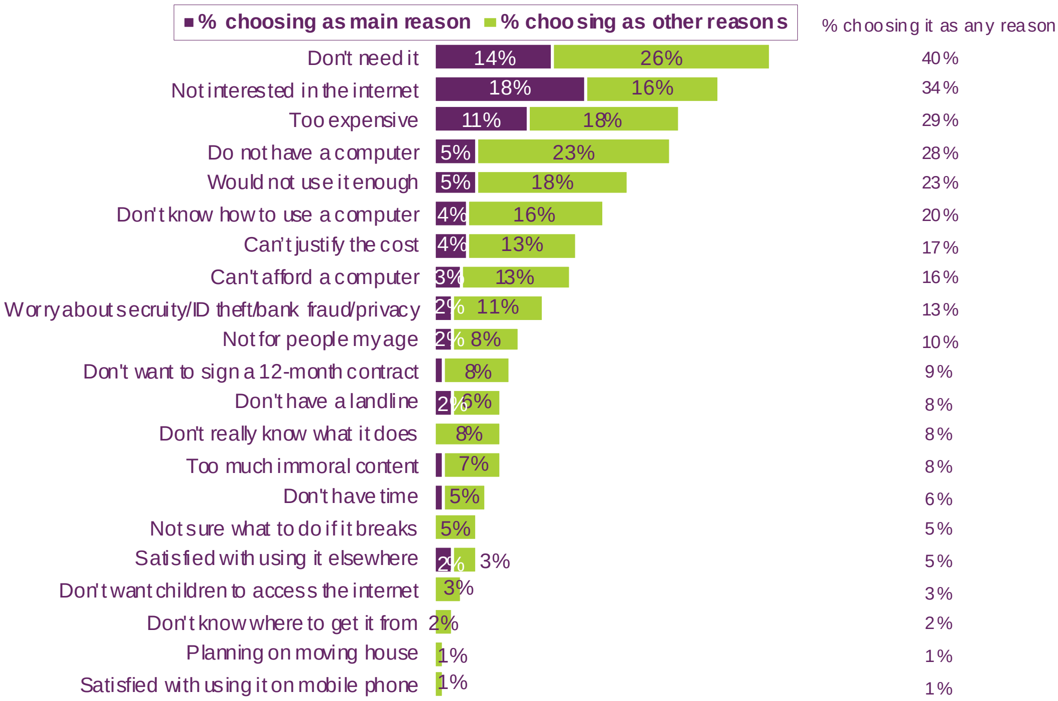
It is important to bear in mind that the vast majority of recent adopters were already regular users of the internet and were fairly computer literate before they installed it at home.

5.3 Those who do not intend to get the internet in the next 6 months

As shown earlier, 18% of respondents said they intend to get the internet in the next 6 months. This leaves just over 80% who do not. This section examines in detail this group of respondents who said they do not intend to get the internet. It explores their reasons for not having the internet and first considers any reason given, and then focuses on respondents' main reasons.

Respondents aware of the internet were asked their reasons for not having it at home, both spontaneously and with a prompted list26. They were then asked to choose the main reason that stopped them from having the internet at home. Responses given by those who said they did not intend to get the internet in the next six months are shown in Figure 29.

Figure 29: Reasons for not having the internet at home



Base: all respondent (1,841). This question was asked of all aware of the internet. Answers among those who said they did not intend to get the internet in the next six months are presented here. Results have been rebased on all respondents.
Question: Why do you not currently have the internet at home? (unprompted, then showcard) And which is the MAIN reason why you do not have the internet at home.
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Looking at all reasons given, respondents were most likely to say that they did not need the internet (40%),were not interested in it (34%) or that it was too expensive (29%) and these also tended to be their main reason (14%, 18% and 11% respectively). Close to one quarter (23%) said they would not use it enough and 17% said they could not justify the costs – 5% and 4% chose each of these factors as their main reason respectively.

Not having a computer (28%), not knowing how to operate it (20%) and not being able to afford one (16%) were also mentioned by a significant minority of respondents, though only 5%, 4% and 3% chose these as their main reason respectively.

Thirteen per cent mentioned issues related to security, fraud and privacy, though only two per cent chose this as their main reason.

Factors such as the internet was not suitable for people their age (10%), not wanting to sign up to a 12-month contract (9%) and not having a landline (8%) were each mentioned by around one in ten respondents, though none was chosen by more than two per cent as their main factor.

[26] The list was developed based on findings from the pilot depth interviews and mini-focus groups.

5.4 Segments based on main reason for not having the internet at home

Based on their main reason for not having the internet at home, these respondents have been divided into two main groups[27]:

- 'Financial/resource exclusion' (30% of total sample);
- 'Self-exclusion' (42% of total sample).

(The remaining 10% of the total sample is made up of people not aware of the internet (3%), did not know what their main reason was (2%) or gave another reason (5%). These other reasons given include: planning on moving house (1%), worrying about security/ID theft/bank fraud/privacy issues (2%), too much immoral content on the internet (1%) and don't want children access the internet (*).)

It is important to note that these two groups of self-exclusion and financial/resource exclusion are based on respondents' main reason for not having the internet, but there is overlap between the groups when we look at all the reasons given, with four in ten (42%) people giving multiple reasons that fall under both types of exclusion.

The financial and self-exclusion groups can in turn be split into two subgroups, which are:

- Financial/resource exclusion: 'It's too expensive' (26% of total sample) and 'I don't have the knowledge or skills' (4% of total sample);
- Self-exclusion: 'It's not for me' (37% of total sample) and 'I don't need it at home' (5% of total sample).

The following sections describe each of these subgroups in more detail.

5.5 Financial/resource exclusion – "It's too expensive"

This group comprises 26% of the total sample. This breaks down into people who said:

- it is simply too expensive to get the internet (11%);
- not having a computer (5%);
- not being able to afford a computer (3%);
- not having a landline (2%);
- not wanting to sign up to a 12-month contract (1%); and
- could not justify the cost of getting online (4%).

This group tended to spread over different age groups, and over one quarter (27%) had children living in the same household. Over half (55%) lived in DE socio-economic groups. Access to technology tended to be low among this group. Only 16% were regular users of the internet, three in ten (30%) felt confident with using a computer and 16% had a computer at home. One third (32%) had cable or satellite television, 17% terrestrial only, and 51%

[27] Please note that these figures are summations of the main reason respondents gave for not having the internet at home. Multivariate cluster analysis has not been carried out.

Freeview television. More breakdowns by major demographic subgroups can be found later in this chapter.

Around three in ten respondents in this group felt that not having or being able to afford a computer was a main barrier for them. From the qualitative research, it seemed that the majority were thinking about the costs of getting the internet as a whole – both the costs of the hardware and the costs of monthly payments. Those more computer literate also mentioned other costs such as the set-up fee charged by the internet service provider, the cost of reactivating a phone line and the cost of anti-virus software.

At the qualitative research stage, there was a widespread fear of getting into debt among those on a limited income, such as jobseekers' allowance and state pensions, those with an unstable income and those who worried about their job security in the current economic climate. These people were anxious about being bound to a contract because they were uncertain whether they would be able to afford the monthly payments throughout the whole contractual period. It was felt that with a contract, they might run up a large bill because they would not be able to monitor the usage of the internet or the fixed phone line that came with it.

The perception of whether the internet was 'too expensive' also related to how much usage they thought they could get out of it. For those who thought they would not use it enough, it was felt that it would be a waste of money.

> If you've not got time when you've got the internet, you're just throwing money down drain.

Users, 25-34, Sheffield

At the qualitative stage, even among those who said they might have some spare cash after they have paid for their daily necessities, there was often a sense that the internet was an 'expensive luxury', not a necessity. It was seen as another form of 'entertainment' rather than a means to save money or a tool that would make their lives easier. As a result, it was often not high on the list of priorities.

> If I need to choose between a computer and a carpet, I would choose a new carpet.

Non-users, 50-64, Sheffield

It is possible that some might have been unaware of the actual costs of getting the internet before the interview. Indeed, at the qualitative research stage, some expressed surprise when being prompted with the lowest prices they might get on the market.

> It's not really out of our price range at all…[the cost] would be negligible. That's why so many people have all this stuff.

Non-users, 35-49, London

While some were tempted by the lower prices, the majority in this group tended to find that even the lower prices were too much for them. Some also expressed scepticism of whether the actual market prices would be that low.

> [The price] of all these contracts suddenly goes right through the roof.
>
> Non-users, 50-64, Mid Wales

Some also felt that they wanted ‘value for money’. Often, it did not mean getting whatever was the cheapest on the market. Rather, they felt that if they were to pay ‘something’ for a computer and an internet connection, they would rather pay more to ensure that they would have a reliable machine and a stable connection.

> I would go up to £500, if I was going to buy a computer…and I make a good investment.
>
> Non-users, 35-49, Mid Wales

To summarise, though members of this group did not tend to be regular users of the internet currently, they were generally not averse to having the internet at home *if they could afford it.* The costs of getting a computer and monthly payments were the two big stumbling blocks for them. In addition, the need to sign up to a 12-month contract generated anxiety among some who felt this may get them into debt.

5.6 Financial/resource exclusion – “I don’t have the knowledge or skills”

This group constituted 4% of the total sample. It was mainly made up of those who said they did not know how to use a computer (4%). A small number also said they did not know what the internet did, how to get it or what to do if it broke down. The vast majority were over 45 years old (91%) and over half (52%) had retired.

Exposure to technology tended to be low amongst respondents in this group. Eight in ten (78%) disagreed that they would like to keep up with technology and two thirds (65%) did not feel comfortable with new technology. Eight in ten (81%) had never used the internet before and seven in ten (70%) had never used a computer. Close to four in ten (37%) had a fixed phone line only, over half (53%) had both a mobile phone and a fixed line and one in ten (10%) had a mobile phone only. One third (32%) had cable or satellite pay television, 22% terrestrial only, and 47% Freeview television. Please refer to the breakdown by major demographic groups at the end of this chapter to see how this group compares with other segment groups.

The qualitative research showed that this group tended to struggle to master basic technology in their day-to-day lives, and found the thought of having to learn how to operate a computer slightly daunting.

> I would like to get a bit more computer literate, but even my mobile phone confuses me.
>
> Non-user, 50-64, London

> I’ve got visions of me tapping on and getting lost in pages, and end up logging onto something and thinking …where am I? What am I doing? How do I get out of it? And then I‘d have to switch the thing off.
>
> Non-user, 35-49, Mid Wales

In short, low exposure to technology tended to be widespread among this group. Many could not even handle basic technology, so the thought of have to master a computer could put them off from taking up the internet.

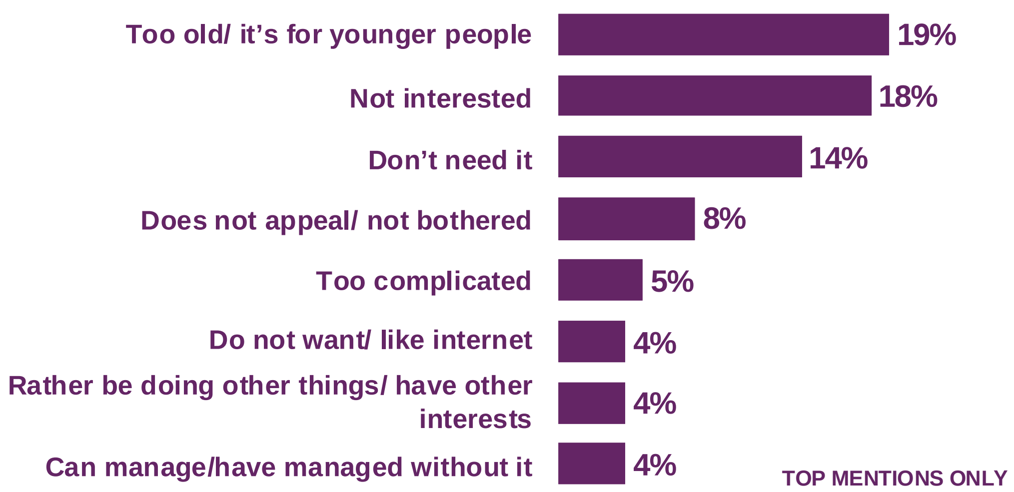
5.7 Self-exclusion – "It's not for me"

This group represents 37% of the total sample and is the largest of the groups identified in this research. Respondents within this group were most likely to give their main reason as they are not interested in the internet (18% of the total sample). This group was also comprised of non-users of the internet who either felt they do not need it (13%), or will not use it enough (3%), or do not have time to use it (1%). Two per cent said the internet is not something for people their age.

This group tended to be older. Seven in ten (68%) were over 65 years old, and retired (71%). They also had limited contact with technology; just under four in ten (39%) had a fixed phone line only and no mobile phone, and 60% a mobile phone. Almost all (95%) were non-users of the internet, and 83% had never used the internet before. Only just under one in ten (9%) felt confident about using a computer and less than one in ten (8%) had access to a computer at home. One in three (28%) had cable or satellite television, 31% terrestrial only, and 42% Freeview.

Those who cited a lack of interest in the internet as their main reason for not having the internet at home were asked why they were not interested. The answers that came up top were that the internet is for younger people (19%) and that they were simply not interested (18%), as shown in Figure 31.

Figure 31: Reasons for not being interested in the internet



Base: all who say they are not interested in the internet (239)
Question: Why do you say that you are not interested? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

The qualitative research showed that many in this group struggled to come up with *any* reasons why they should have the internet at home, even though the majority did recognise the internet as a useful tool for communicating with friends and family and looking for information. The main issue for them was that they did not see how these benefits were relevant to them personally. This sense of irrelevance was in part driven by a range of factors, such as a perception that the internet was not a necessity, a preference for other forms of communication and a feeling that it was for younger and working people only.

It is important to bear in mind that the majority (93%) of people in this group had never considered getting the internet before the interview. The interview was possibly the first time they had been asked to weigh up the pros and cons of getting the internet and explain why they did not have it at home.

Indeed, knowledge of the internet was low amongst this group. Ninety-five per cent confessed a little or no knowledge of it. Yet, giving respondents information about the functions of the internet seemed to have made little impact; only 16% felt more positive and 9% said they were more likely to get the internet at home after watching the video.

They were generally happy with face-to-face, telephone and written communications and other forms of media such as the television. As a result, there was a widespread perception that the internet is a 'luxury', not a 'necessity', which might have led to a lack of motivation to take up the internet.

> I don't see a need for it because as a retired individual, the telephone communication is good enough.

Non-users, over 75, Sheffield

Many in this group said they did not mind being excluded from the digital world. Some regarded going out of their home to do their shopping or speaking to someone over the phone as activities that connect them to the world. Moreover, it was felt that the internet was something 'for the younger generation', and they often did not mind not being part of it.

> The young ones have grown up with it and they know what they're doing. I'm quite happy with that.

Non-users, over 75, Sheffield

If the balance between online and offline services continues to shift to the former, it is possible that this group will increasingly perceive the internet as more of a necessity than a form of 'entertainment' or 'luxury', and be more encouraged to take it up. However, there is the danger that this trend may antagonise some non-users and make them feel more ostracised. Some of our participants expressed annoyance that many services nowadays seemed to only cater for those with access to the internet. For instance, at the end of many TV advertisements, the audience would be asked to go to a website to get more information. It was felt that technology had stripped off the voice of those without access to the internet.

> They say to you, go on such web and blah, blah, blah … if you want information … I think that's one of the things about technology that it actually is cutting you off.

Non-users, 50-64, London

To summarise, this group tended to be over 65 and retired. Similar to those who said they did not have the knowledge and skills, they had limited experience with technology and the internet. However, what makes this group stand out is their lack of interest in the internet. It was felt that the internet was not relevant to them and they were very unlikely to consider getting it at home. As will be discussed in chapter 7 of this report, explaining the internet in terms of personal relevance may spark interest in the internet in this group and thus stimulate interest in getting it at home.

5.8 Self-exclusion – "I don't need it at home"

This group constitutes five per cent of the total sample. These tended to be users of the internet who said they would not use the internet enough (2%) or did not need it (1%) at home, or who were satisfied with using it at work or elsewhere (2%).

The majority were under 55 years old (70%) and working (65%). Over half (53%) belonged to socio-economic groups C1 and C2. Two in five (39%) had cable or satellite pay TV, 54% Freeview and 15% terrestrial only. Please refer to the next section for more information on how they compare with other segment groups.

Internet and computer literacy amongst this group was high - almost all (97%) were users of the internet and four in ten (39%) were regular users; two thirds (64%) felt confident with using a computer. Unlike those who thought that the internet was not for them, this group tended to be aware of the personal benefits of the internet and knew where to access the internet if they want. In this sense, this group was exercising an 'informed' choice.

> I know I will need it and I have to have it and I will. It's not that I'm against it but at the moment I don't think it's much use to me [at home].
>
> Users, 35-49, London

Compared with those who were intending to get the internet, however, their usage level was often not high enough for them to justify the costs and hassle of having it at home. Moreover, having instant access to the internet tended to be less of a priority.

> I can use it at work, don't think there's anything that can't wait to do it next day at work.
>
> Users, 35-49, London

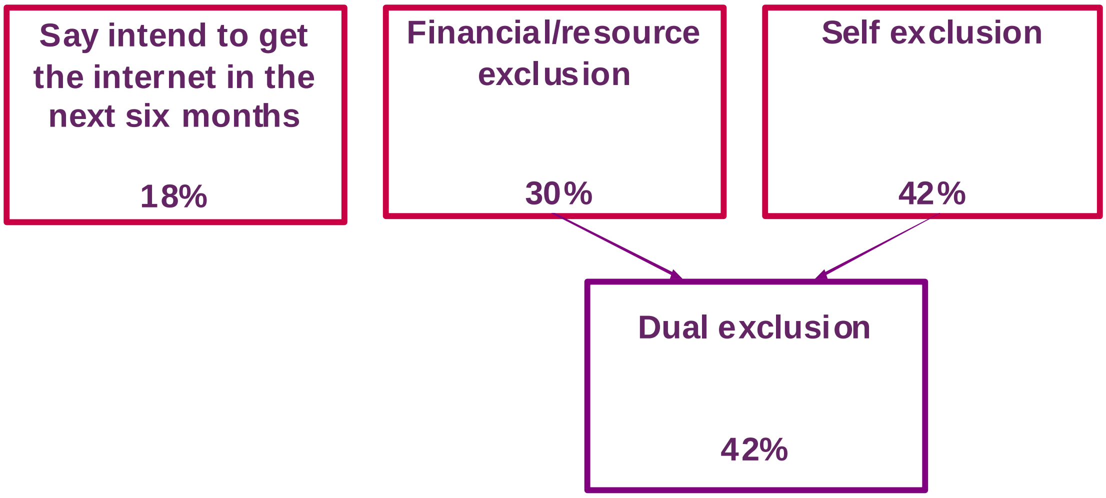
Overall, this group tended to have access to the internet regularly elsewhere, and did not see the need of having it at home. Compared with those who intended to get the internet in the next six months, they did not feel their usage justified the costs of installing it at home.

5.9 Comparison of all segment groups

This research identified three groups of people: those who say they intend to get the internet (18% of total sample), those who say their main reason for not having it is for financial/resource reasons (30% of total sample) and those who say it is because of lack of interest or need (42% of total sample). The remaining 10% of the total sample either gave other reasons for not having the internet that did not fall under financial or self-exclusion categories or they did not know.

Figure 30 below provides an overview of these three groups. The overlap between the financial and self-exclusion groups based on all reasons for not having the internet is also indicated, with 42% of the total sample giving both financial/resource and self-exclusion reasons for not having the internet at home.

Figure 30: Key segment groups



Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Table 5 provides a profile of each of these three groups by demographics. For instance, the first column shows that 20% of those who said they were likely to get the internet were 16 to 24 years old and 48% were 25 to 34 years old.

Table 5: Profile of segment groups

		Likely to get the internet in the next six months	Financial/ resource exclusion: It's too expensive	Financial/ resource exclusion: I don't have the knowledge or skills	Self exclusion: It's not for me	Self exclusion: I don't need it at home
	Base	*324*	*499*	*75**	*684*	*87**
	Average age	40	51	64	68	44
Age	16-24	20%	12%	0%	2%	18%
	25-44	48%	29%	10%	6%	26%
	45-64	21%	32%	41%	25%	43%
	65-74	5%	12%	20%	29%	8%
	75+	6%	15%	30%	39%	3%
Working status	Working	53%	35%	28%	16%	65%
	Retired	12%	31%	52%	71%	20%
	Unemployed	10%	12%	3%	3%	5%
	Not working other	25%	23%	18%	10%	10%
Social grade	ABC1	39%	24%	27%	27%	38%
	C2DE	61%	76%	73%	73%	62%
Annual income	Up to 11.5k	25%	39%	36%	34%	21%
	11.5k to 17.5k	15%	16%	9%	11%	15%
	17.5k +	22%	8%	9%	6%	27%
	Not given	37%	37%	46%	49%	37%
Presence of children	With children	39%	27%	11%	7%	23%
	Without children	61%	73%	90%	93%	77%
Phone tenure	Mobile only households	42%	33%	10%	11%	31%
	Mobile and fixed	52%	49%	53%	48%	59%
	Fixed only households	4%	15%	37%	39%	7%
	None	1%	3%	0%	1%	3%
Internet usage	Internet users	72%	37%	9%	3%	97%
	Non-users	27%	63%	91%	95%	3%
Confidence with computer	Confident	70%	34%	4%	9%	64%
	Not confident	24%	29%	27%	21%	32%
	Never used	6%	37%	70%	70%	4%
Access to computer at home	With access	45%	16%	19%	8%	32%
	Without access	55%	84%	81%	92%	68%

Source: Ofcom Accessing the Internet at Home Survey, February to April 2009
*Base sizes are small so please treat results with caution

5.10 Major demographic groups by segment groups

It is useful to also consider different demographic groups in terms of whether they intend to get the internet and if not their main reason for not getting it. Table 6 provides this breakdown. For example, looking at the first row, 42% of 16 to 24 year olds said they were likely to get internet in the next six months', 34% said it was too expensive, whereas only 7% said it was not for them and 11% did not need it at home.

Table 6: Demographic groups by segment groups[28]

		Likely to get the internet in the next six months	Financial/ resource exclusion:		Self exclusion:	
			It's too expensive	I don't have the knowledge or skills	It's not for me	I don't need it at home
Age	16-24 (Base: 179)	42%	34%	-	7%	11%
	25-44 (Base: 416)	39%	34%	2%	9%	6%
	45-64 (Base: 489)	14%	29%	6%	33%	8%
	65-74 (Base: 336)	5%	18%	5%	60%	3%
	75+ (Base: 420)	5%	17%	6%	62%	1%
Working status	Working (Base: 441)	30%	28%	4%	18%	11%
	Retired (Base: 825)	5%	18%	5%	60%	2%
	Unemployed (Base: 160)	26%	46%	2%	14%	4%
	Not working other (Base: 414)	25%	32%	4%	21%	3%
Social grade	ABC1 (Base: 475)	25%	22%	4%	35%	7%
	C2DE (Base: 1366)	15%	27%	4%	37%	5%
Phone tenure	Mobile only households (Base: 485)	32%	35%	2%	17%	7%
	Mobile and fixed (Base: 858)	19%	25%	4%	35%	6%
	Fixed only households (Base: 460)	3%	16%	7%	61%	2%
Internet usage	Internet users (Base: 543)	42%	30%	1%	4%	17%
	Non-users (Base: 1231)	8%	25%	6%	54%	-
Access to computer at home	With access (Base: 352)	41%	21%	4%	15%	9%
	Without access (Base: 1489)	13%	27%	4%	42%	5%
Nation	England (Base: 1067)	19%	25%	4%	37%	6%
	Scotland (Base: 301)	17%	31%	6%	36%	3%
	Wales (Base: 261)	14%	30%	5%	39%	3%
	Northern Ireland (Base: 212)	22%	23%	2%	35%	10%

Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

28 The rows do not add up to 100% due to some respondents falling into the 10% who were not aware of the internet, did not give or reason or gave another reason as their main reason.

Section 6

Perceptions of costs and affordability

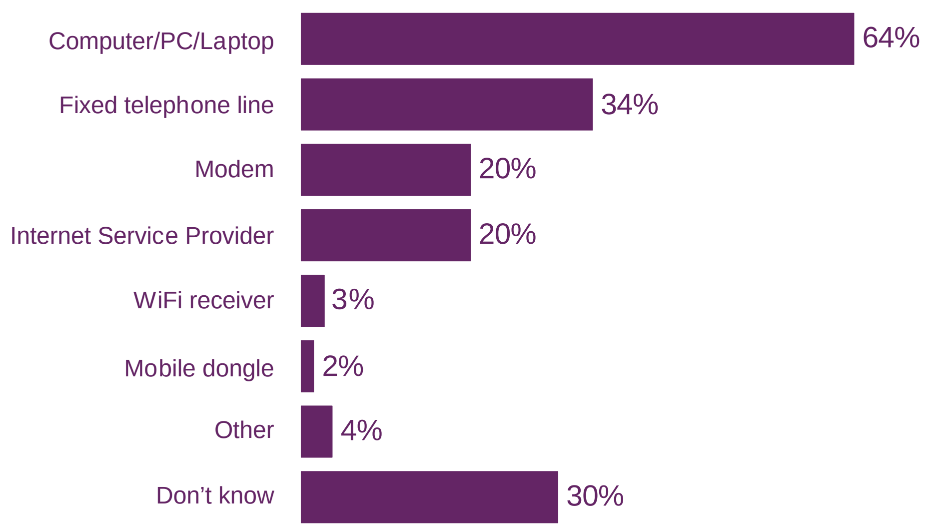
6.1 Introduction

This chapter explores perceptions of the cost of obtaining the internet and how much people were willing to pay for a computer and internet service. The financial implications of obtaining the internet are spread over two phases; the upfront cost towards the necessary equipment for accessing the internet, as well as the longer term monthly costs of continued internet access and services. This chapter analyses what role costs and affordability have on the decision making process for getting the internet at home, in order to understand what role financial factors have on internet take-up at home. It also explores preferences for contract versus 'pay as you go' (PAYG) payment options, as well as fixed line versus mobile dongle[29].

6.2 Understanding of equipment needed to get the internet

Respondents were asked about the equipment needed to get the internet at home. Two-thirds (64%) of respondents indicated that a computer/PC/laptop was needed to access the internet at home[30], while one third (34%) stated they would need a fixed telephone line. Other elements highlighted as important to accessing the internet at home were a modem and also an internet service provider (both 20% respectively). In contrast, three in ten respondents (30%) said they did not know what equipment they would need in order to access the internet at home. Figure 32 shows what they thought would be needed.

Figure 32: Perception of what equipment will be needed



Base: all aware of the internet (1,792)
Question: If you were to get the internet at home tomorrow, can you tell me all the things (e.g. equipment/services) you think you would need to achieve this? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

The proportion of respondents who were unsure what equipment was necessary for them to access the internet increases with age, with respondents aged 55 years or over more likely

[29] A broadband mobile dongle connects a computer to the internet by plugging into the USB port of laptop or desktop computer.
[30] This includes the fifth of respondents who already have a computer/laptop at home.

than 25 to 44 year olds to say they 'don't know' what equipments was needed (43% vs. 13% respectively).

Perceived knowledge of the necessary equipment needed to set up the internet at home was also impacted by the presence of children. Respondents who had no children living in their home were more likely to say they 'don't know' what equipment was required compared to those who did have children living at home (34% without children vs. 16% with children).

As household income increased, so did knowledge of the different equipment required. One third of those with a household income of up to £11,500 (34%) did not know what equipment they would need to connect to the internet at home, compared to only 14% of those with a household income over of £17,500.

Respondents in Scotland (39%) were more likely than average to say they did not know what equipment was needed, as were those retired (45%), those with no formal qualification (44%), those living in C2DE socio-economic groups (32%), and those with a fixed-line only (55%).

Respondents were asked where they would go if they wanted advice on getting the internet at home. The majority said they would ask their friends or family31 for advice on this. While only nine per cent of people said they would not know who to ask.

As one may expect, older people were more likely to ask their children or grandchildren for advice on getting the internet (51% of those aged 55 and over), while younger people were more likely to ask their friends (44% of 16 to 24 year olds).

In the qualitative element of the study, participants seemed to have a broad understanding of the equipment that they would need to access the internet at home, including the need for a computer/ laptop and also an internet service provider (ISP). When discussing how to get the internet, participants mentioned that they would contact computer stores or internet providers directly, while others would also use the experience and knowledge of friends and family to make sure they got the right equipment and deal.

> I think you'd need to go to somebody that has already got one (a computer) to get information and advice, but its how much you can afford in the first place that's important.
>
> User, 65-74, Glasgow

6.3 Connecting to the internet: fixed phone line versus mobile dongle

Respondents were informed that there were two ways of connecting to the internet, both via a computer:

- Through a fixed phone line which you connect to your computer. This method offers a stable and fast internet connection. Or
- Through a mobile device that you plug into your computer, so you do not need a fixed telephone line. This device allows you to access the internet on your computer (mainly for a laptop) at home and outside your home, as long as there is a

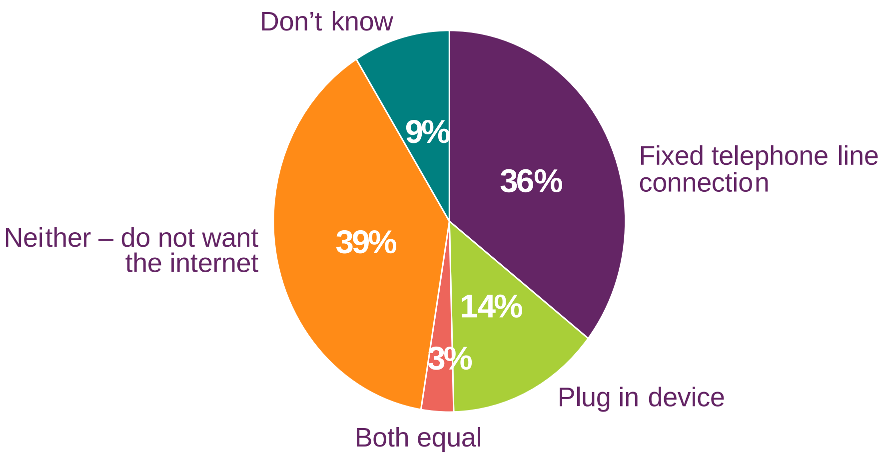
[31] This includes other family members (37%), their children or grandchildren (34%) or their friends (25%).

connection/signal. However, the connection is often slower than and also not as stable as the fixed phone line option.

As shown in Figure 33, with regards to the preferred route for connecting to the internet, just over one third of all respondents (36%) indicated that the fixed phone line connection was most appealing for them, compared to just over one in ten (14%) that said a mobile dongle was the more appealing. A further three per cent felt that both methods were equally appealing.

However, two out of five respondents (39%) indicated that they did not want the internet, while a further nine per cent did not know which method they preferred. As stated throughout this section, around two in five of all respondents consistently stated that they did not want the internet at home – predominantly saying this was due to lack of interest or need, but with some giving financial reasons. See section 6.6 of this chapter for in-depth analysis of these two groups.

Figure 33: Appeal of fixed phone line and mobile dongle connections



Base: all respondents (1,841)
Question: Which method, if any, is most appealing to you? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

There were some differences in preference for either fixed line or mobile dongle by subgroup. The proportion of people interested in the fixed phone line connection varied by urban/rural geographical location. Respondents based in rural areas were more likely than urban respondents to find the fixed phone line connection more appealing (47% vs. 34% respectively).

In addition, younger respondents were more likely to find the mobile dongle more appealing, with just over one third of respondents aged 16-24 years old (35%) finding the mobile dongle the most appealing, compared to 19% of 25-54s and around one in ten respondents aged over 55 years (8%).

Furthermore, those who live in a council owned property are slightly less likely to prefer the fixed phone line connection (31% vs. 36% overall), while those living in private rented accommodation are slightly more likely to prefer the mobile dongle (21% vs. 14% overall).

While the type of telephone(s) each respondent had did not seem to affect the overall preferred internet connection method, it did have a bearing on the proportions in each case:

Among those living in mobile only households32 one third (33%) found the fixed phone line connection more appealing versus three in ten (30%) a mobile dongle, while 27% stated they did not want the internet. Among those with a fixed telephone line only[33], one in five (22%) found the fixed line connection more appealing versus only 4% for the mobile dongle, however, three in five (60%) stated they did not want the internet. Looking at households with both a mobile and a fixed line phone, 44% found the fixed phone line connection more appealing versus 10% for the mobile dongle. But one third (33%) still stated that they did not want the internet at home.

A greater proportion of respondents in Northern Ireland thought the mobile dongle was more appealing (25%).

Respondents in ABC1 socio-economic groups (46%) and in households with an income over £17,500 (50%) were more likely to find the fixed phone line connection more appealing than those in C2DE socio-economic groups (32%) or in households earning under £17,500 (36%), this is probably related to the fact that those in lower socio-economic group or with a lower income were less likely to want the internet at home. Those in work (46%), those living with children (45%) and those with school or higher education (44%) were more likely than average to prefer the fixed phone line connection, and less likely not to have a preference or not to want the internet.

Main reasons given for preferences

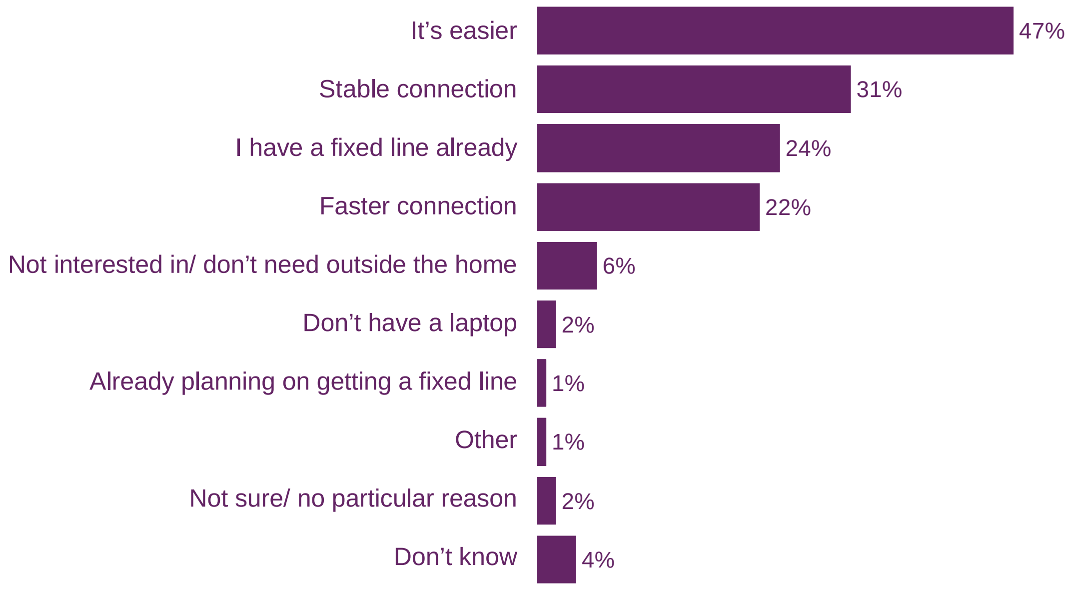
Figures 34 and 35 show respondents' reasons for preferences among those who preferred a fixed phone line or mobile dongle.

Fixed phone line

The key top-of-mind reasons for preferring the fixed phone line connection were focussed on its ease of use (47%) and stable connection (31%). Around one quarter of respondents highlighted the fact that they preferred the fixed phone line as they already had one in place in their home (24%) and that the internet connection would be faster than the mobile dongle (22%).

[32] See section 2, for profile details of people living in mobile only households. Mobile only made up 26% of total sample. They tended to be younger people – 70% were under 44.
[33] Fixed line only made up 25% of total sample. These tend to be older people – 90% over 55.

Figure 34: Reasons for preferring a fixed phone line connection



Base: all respondents preferring a fixed telephone line connection (638)
Question: Why do you think you would prefer the fixed telephone line internet connection? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Experience and knowledge of the internet overall appears to influence respondents' reasons for preferring the fixed phone line connection. Respondents that know 'a lot', or 'a fair amount' about the internet were more likely to say they prefer the fixed phone line connection because it has a stable connection (37% vs. 31% overall) and a faster connection (32% vs. 22% overall). In fact, half of all daily users of the internet stated they preferred the fixed phone line connection as it has more stable connection (50%).

The speed of connection was a particularly key reason for younger respondents. Two in five respondents aged 16-24 (40%) stated that the faster connection with the fixed phone line option was a key reason why this method was more appealing to them, compared to only one in ten respondents aged 65-74 years old (10%).

In the qualitative research, when discussing participants' preferred internet connection method, those who preferred the fixed phone line saw its key benefits as its accessibility, its enhanced speed and having a secure internet connection as well as stronger internet coverage. They did not see the mobility benefits of the mobile dongle applying to them as they did not see themselves using the internet outside of their homes. They thought the mobile dongle was aimed more specifically at working people, so they could access the internet on the move.

> It could be for (plug in device) people who probably do their work out and about, like I see students, people who probably are in finance and, or people who work for themselves.

Users, 50-64, London

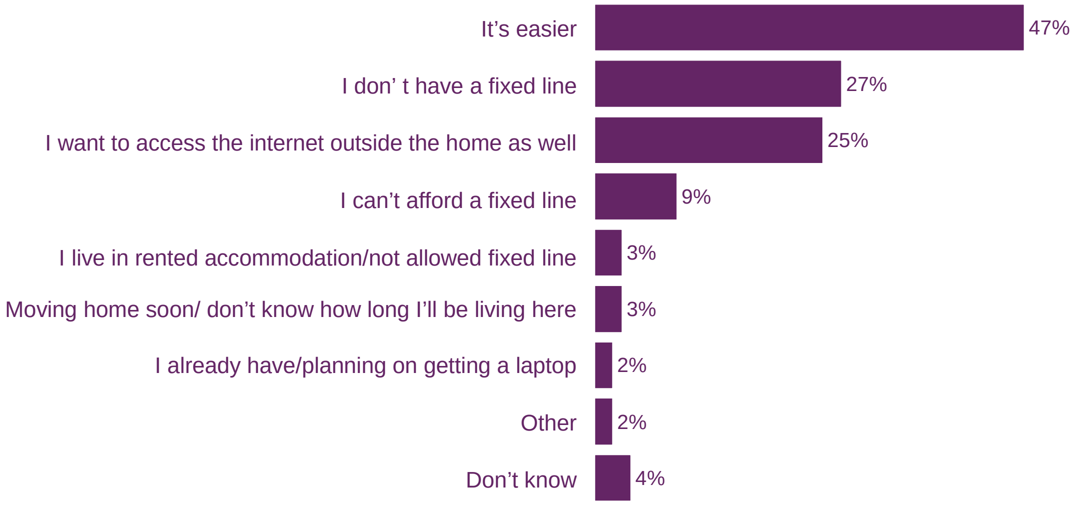
Also, within the qualitative phase of the research, both older participants and participants based in rural areas did indicate concerns with the mobile dongle due to connection issues and signs of trepidation for using the plug in device technology instead of standard fixed telephone line connection.

> I think they are for somebody else (plug in devices)... but certainly in the rural areas it isn't covered, you cannot do this, you have to have a line.
>
> Non-user, 65-74, Glasgow

Mobile dongle

Among those who preferred a mobile dongle, just under half thought that this connection was more appropriate for them as it was easy to use (47%). Other key reasons given for preference towards the mobile dongle were linked to accessibility, as around a quarter stated they preferred the immobile dongle as they did not have a fixed line in their house (27%) and that they also wanted to access the internet outside of their house (25%).

Figure 35: Reasons for preferring a mobile dongle



Base: all respondents preferring a mobile dongle (281)
Question: Why do you think you would prefer the mobile plug in device internet connection? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Reasons vary across the different subgroups. Younger respondents (16 to 24 years) were particularly likely to mention that they preferred the mobile dongle option as they did not have a fixed phone line at home (47% vs. 27% overall). Younger respondents were also more likely to mention that they wanted to access the internet outside of their home (33% vs. 25% overall). Respondents in Northern Ireland were more likely to prefer the mobile dongle because they did not have a fixed phone line (41%) or were living in rented accommodation (8%). Those living with children were more likely to say they did not have a fixed phone line (45%) and those without children to say this connection was easier (53%).

In the qualitative research, participants who preferred the mobile dongle focussed on its mobility features as well as its accessibility without having to access via a fixed phone line. Some participants found the mobile dongle more appealing as it allowed further freedom to access the internet, allowing them to essentially just 'plug in and go'.

The ability to access the internet without a fixed phone line was also important as many participants who preferred the mobile dongle lived in mobile-only homes and did not want to get a fixed phone line at their home. They saw it as an extra expense for a service they would not use as they already had telephone access through their mobile phone.

It's simpler to set up and you need to get less extra things, that is why, less equipment. It's for people maybe that travel from home to home, or selling something, you just plug it and you use it because you're not at home all the time to use the telephone. I think I would actually consider that.

User, 16-24, Sheffield

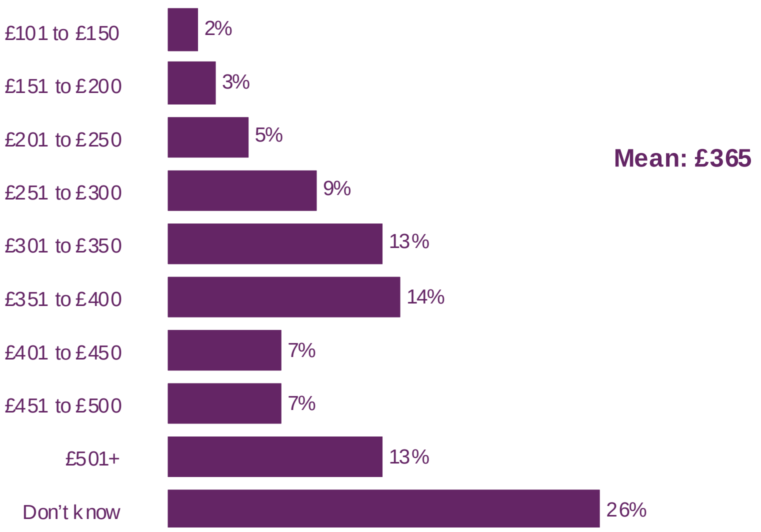
6.4 Perceived costs

Cost of a computer

In the total sample 20% had a computer at home. Respondents without a computer at home were asked to estimate how much it would cost to buy a new computer. These respondents gave a wide spread of suggestions for the cost of a standard new computer/ laptop. Just over one quarter (27%) thought a computer would cost between £300 and £400, while around one in ten (13%) thought a new computer would cost over £500. Additionally, one quarter (26%) did not know how much a new computer would cost when asked.

Overall, as shown in Figure 36, the mean price given by respondents who gave a cost was £365. This was over £100 above the actual cost of £250 estimated at the time of doing the research[34].

Figure 36: Equipment – cost of computer



Base: all aware of the internet but do not have a computer at home (1,444)
Question: If you were to buy a computer or laptop tomorrow for your home, how much do you think one would cost. Please think about a standard computer/laptop only? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Older respondents were more likely to be unsure of the cost of a new computer, with over one third of respondents aged 55 years or older (35%) saying they did not know how much a computer would cost, compared to one in ten of respondents aged 16-24 (10%). Respondents who are retired were also slightly more likely not to know the cost of a new computer (37%).

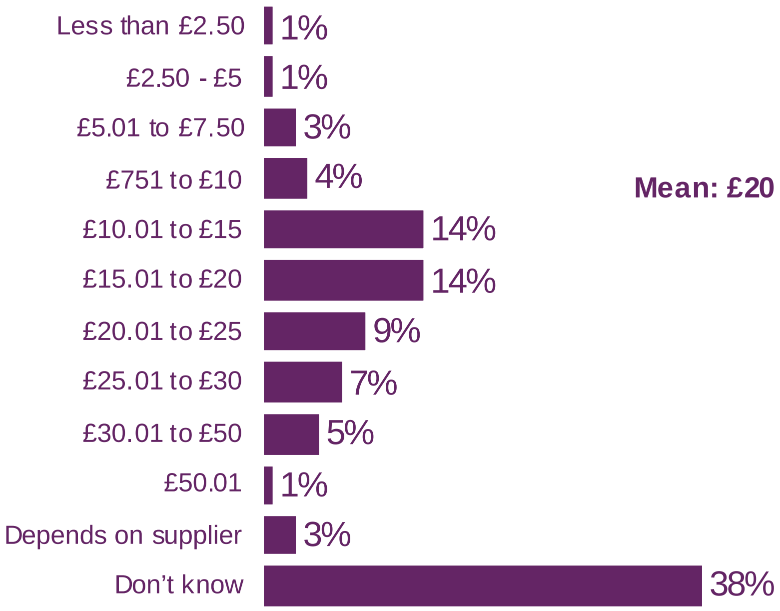
[34] In the research we asked respondents about their willingness to pay for a £250 computer. This price was an estimate provided by Ofcom based on market prices at the time of the research.

Monthly internet subscription costs

Respondents were also asked how much they thought the monthly internet subscription would cost (from an ISP). Overall, a large proportion of respondents were unsure of the monthly price required for the internet, with around two in five respondents (38%) not knowing the cost of the internet subscription.

Around one in ten thought it would cost between £10 and £15 (14%), with the same proportion thinking it would cost between £15 and £20 (14%). Overall, the mean price given by all respondents who chose a cost was £20 per month. This was double the actual cost presented within the research (£10)[35]. These are shown in Figure 37 below.

Figure 37: Equipment – cost of the subscription



Base: all aware of the internet (1,792)
Question: And how much do you think the Internet costs per month i.e. the monthly subscription charge? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

From the qualitative research, for those with some knowledge of the cost of a monthly subscription, this was in the large part driven by awareness of internet supplier deals and advertisements. In some cases, participants already had a relationship with these suppliers due to satellite television and mobile phone services and so had a slightly better idea of associated costs.

This knowledge of internet service providers, as well as some understanding of the offers they could provide, was a key reason for their predicted costs for a monthly internet subscription.

> Well, you see adverts on telly, don't you? Sky, Virgin, and there's a lot for Virgin.
>
> User, 20-34, London

[35] In the research we asked respondents about their willingness to pay for a monthly internet subscription of £10 per month on a 12 month contract basis. This price was an estimate provided by Ofcom based on market prices at the time of the research.

Another key source of knowledge was the experiences of friends or family who had already got the internet, as in some cases this made the participants more aware of the associated monthly internet costs. Also of note, however, is that some participants were slightly confused on 'package' deals that included television, internet, phone etc, which meant they were unsure exactly how much it costs just for the internet service.

> BT Internet and stuff, they were offering deals for £10 or £11, but you have to have a landline on top of it with BT which is another £11 or £12. So basically if you put that together it's about £20 plus.
>
> Non-user, 50-64, London

Overall the research study found that there was a lack of knowledge relating to cost, both in terms of equipment and monthly subscription fees. Among those who named a price, respondents on average thought a computer would cost £365, which was £115 above the actual cost presented in the research. Respondents thought the internet would cost on average £20 per month which was £10 per month above the actual cost presented in the research. In addition, some respondents said they did not know how much a new computer or a monthly internet subscription would cost, 26% and 38% respectively.

6.5 Contract versus PAYG internet preferences

All respondents were presented with an explanation of two options for getting the internet at home. These were a contract and PAYG payment methods, including monthly and any set-up costs[36]:

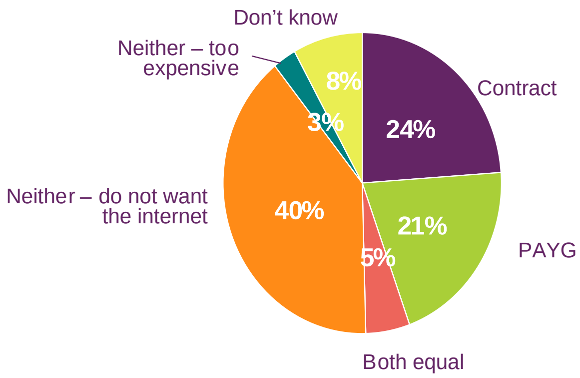
- Contract: 12 month contract option: £10 per month;
- PAYG: Pre-pay £12 at the start of each month for that month's usage, plus a one-off internet connection fee of £50, no contract.

Overall, looking at the full sample, respondents were split over the type of internet connection that appealed to them. Just under a quarter preferred the contract option (24%), while a similar proportion preferred the PAYG option (21%). In addition, five per cent thought that both options were equally as appealing.

However, it is worth noting that two in five respondents (40%) did not want the internet at all, three per cent thought that both were too expensive, while a further eight per cent did not know which option they would opt for. This represents 51% in total of the full sample. These are illustrated in Figure 38.

[36] These costs were provided by Ofcom, based on estimates using market prices at the time of the research.

Figure 38: Appeal of contract versus PAYG options



Base: all respondents (1,841)
Question: Which of these methods, if any, is most appealing to you? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

There was some variation by subgroup. The type of payment method that is preferred is closely linked to the working status of the respondent. Respondents that are working were more likely to find the contract option more appealing (36% vs. 19% not working, half of which are retired). Importantly, around a half of those not working stated that they did not want the internet at home (46%), split into 79% retired, 5% unemployed and 15% other not working.

In addition, those with a household income over £17,500 were more likely to prefer the contract option compared to those with an income below £11,500 (46% vs. 21%). The same is evident among those with children (36% vs. 21% among those without children), and among those living in ABC1 socio-economic groups (29% vs. 22% among those in C2DE socio-economic groups)

On the other hand, younger respondents were more likely to prefer the PAYG option (37% of 16 to 24 years olds v. 14% of those aged 55 of over vs. 21% of the full sample). In addition, only 15% of retired respondents preferred the PAYG option compared to 27% of those unemployed and 30% of those not working for other reasons.

(As depicted in Figure 38 above, there was a small group of respondents who initially said that they either thought both options were too expensive (3% of the total sample) or that they did not know which option they preferred (8% of the total sample). They were questioned further about the two different options by being asked their preference if they both cost the same price. Even so, these respondents were still undecided over the most appealing approach. Around two in five of this group still did not know which option was the most appealing for them. Overall, PAYG was slightly more popular with respondents in this group compared to the contract option. However, around one third of respondents in this group made the choice that they did not want the internet at home, even if the contract and PAYG options were the same price.)

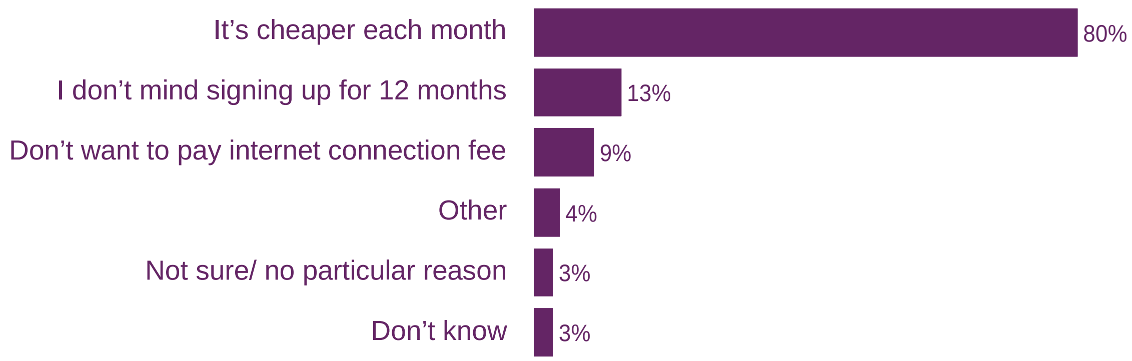
Reasons for preferences – Contract versus PAYG

<u>Contract</u>

As outlined above 24% of the total sample preferred the contract option.

The key reason why this group preferred the contract payment option was due to monetary factors, as overall it is cheaper than the PAYG option. This was given as a key reason by four out of five of these respondents (80%). In addition, around one in ten respondents preferred the contract option as they did not mind signing up for a 12 month contract (13%) and they also did not want to pay the connection fee associated with the PAYG option (9%). Figure 39 shows their reasons for preferring the contract option.

Figure 39: Reason for preferring contract



Base: all respondents who preferred contract (448)
Question: Why do you think you would prefer the contract option for connecting to the internet? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Within the qualitative research, participants who preferred the contract payment method concentrated on the monthly cost being cheaper for them and also not having to pay a connection fee.

Personal circumstances also impacted on the preferred payment method, with some participants indicating that their uncertain financial circumstances and employment uncertainties would play a part in their decision in preferring the PAYG option.

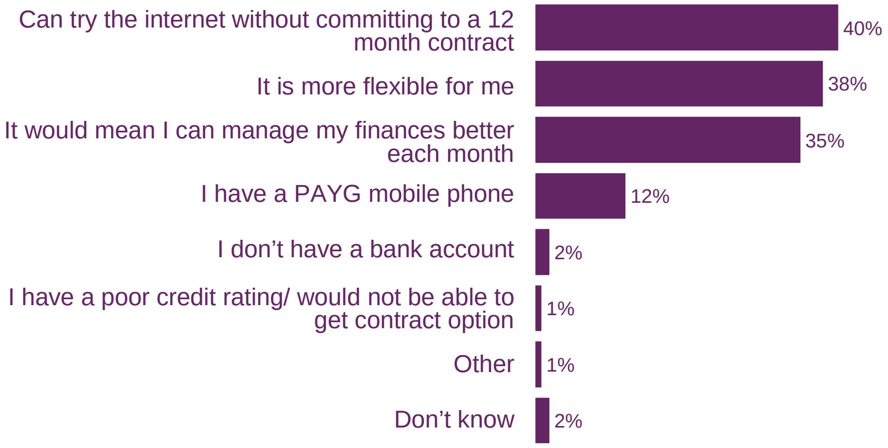
> I know at certain points I wouldn't be able to afford it because my incomings and outgoings are different all the time, so I wouldn't be able to say, yes, I can definitely do this.

User, 35-49, London

PAYG

Among the 21% of the total sample who preferred the PAYG option, a range of reasons were given for this choice which mainly relate to accessibility and cost control benefits. The majority said that the key appeal was the lack of 12 month contract (40%), its flexibility for the user (38%) and the fact that it allows the user to arrange their finances on a monthly basis (35%) to cover the cost of the internet connection. Around one in ten respondents (12%) also liked the PAYG option as they also use a similar approach for their mobile phone payments. Figure 40 shows their reasons for preferring the PAYG option.

Figure 40: Reason for preferring PAYG



Base: all respondents who preferred PAYG (399)
Question: Why do you think you would prefer the pre-pay/pay as you go option for connecting to the internet? Unprompted
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Within the qualitative research, the absence of a contract was a key reason why some preferred the PAYG option, as they did not feel happy signing up to the contract for a 12 month period, with some respondents saying a shorter period (e.g. 6 months) would be more attractive to them. The control the PAYG option gave participants over their finances was a key benefit to this payment method, as it was felt that it would allow them to manage how much they were spending on the internet, as well as the option to stop spending if they needed to cut the costs of the internet from their monthly expenditure.

However, when the PAYG option was discussed in more detail, concerns were raised with regards to the £50 connection fee, which a number of respondents thought was too high for this service and detracted from the initial preference towards this option.

6.6 Willingness to pay for the internet at home

The research explored how much people were willing to pay in order to get the internet at home.

Overall, just over two in five of all respondents (42%)37 were willing to pay a monthly fee to have the internet at home. This breaks down into 31% willing to pay the full monthly price presented[38] and 11% a fee less than the full cost. Over half of respondents (57%) would not pay a monthly internet fee, with 42% stating they were not interested in the internet, six per cent stating they could not afford it and 10% did not know (see Table 7 below).

[37] Included within this group overall are respondents who initially said they did not want/can't afford the internet, but then went on to give a price they would pay to have the internet at home when questioned further.
[38] Based on either £10 per month for the contract option or £12 per month for the PAYG option.

Table 7: Willingness to pay monthly fee under either the contract or PAYG option

Contract or PAYG	
Willing to pay full price	31%
Willing to pay something	11%
Nothing – don't want the internet	42%
Nothing – Can't afford it	6%
Don't know	10%

Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

There were differences in overall willingness to pay by subgroup. Those who were more likely to be willing to pay anything were younger people aged 16-24 and those aged 25-44, This was also the case for those working or unemployed, those with school or higher education, with children, and those from ABC1 socio-economic groups, and internet users. People from Northern Ireland were also more likely to pay anything to get the internet at home. People from Scotland were less likely to be willing to pay anything (33% vs. 42% of respondents overall) and more likely to say they can't afford it (9% vs. 6% of respondents overall).

Those willing to pay a monthly fee

As shown in Table 8, among those respondents who were willing to pay a monthly fee to have the internet at home (42%[39] of the total sample), the contract payment option was more appealing than the PAYG option. This equates to 20% of the full sample who would opt for the contract option versus 15% for the PAYG option.

Table 8: Preference for contract or PAYG options among those willing to pay something for the internet

	% of those willing to pay	% of full sample
Contract	47%	20%
Pay as you go	35%	15%
Both	8%	4%
Initially answered 'Neither – do not want the internet' but went on to pay	3%	1%
Initially answered 'Neither – both too expensive' but went on to pay	1%	1%
Initially answered don't know but went on to pay	6%	2%

Base: willing to pay monthly internet fee (770) vs. percentage against full sample (1,841)
Question: Which of these methods, if any, is most appealing to you?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

[39] Included within this group are respondents who initially said they did not want or could not afford the internet, but then went on to give a price they would pay to have the internet at home when probed further.

Among those who would pay a monthly fee, there are some differences in preferences between subgroups. Younger respondents (16 to 24 year olds) and also 45 to 64 year olds, along with those with a lower household income (up to £11,500) are those who were slightly more likely to find the PAYG option more appealing.

On the other hand, those who are working, 25 to 44 year olds, those with an annual household income over £17,500, people from ABC1 households, and those who live in a privately owned property, were those particularly likely to find the contract payment option more appealing.

Table 9: Profile of those who prefer the contract or PAYG options[40]

	Preferred internet option	Contract – 20% of sample	PAYG – 15% of sample
Age	16-24s (Base: 118)	41%	46%
	25-44s (Base: 277)	52%	32%
	45-64s (Base: 229)	42%	37%
	65-74s (Base: 87)	50%	30%
	75+ (Base: 70)	43%	32%
Social grade	ABC1 (Base: 256)	49%	29%
	C2DE (Base: 524)	45%	38%
Presence of children	With children (Base: 243)	47%	36%
	Without children (Base: 539)	46%	35%
Working status	Working (Base: 341)	50%	32%
	Retired (Base: 177)	50%	32%
	Unemployed (Base: 75)	45%	36%
	Not working other (Base: 187)	37%	44%
Internet usage	Regular internet users (Base: 253)	54%	31%
	Internet users (Base: 413)	50%	32%
	Non users (Base: 361)	43%	38%
Household income	Up to £11.5k (Base: 238)	40%	46%
	£11.5k - £17.5k (Base: 139)	48%	33%
	£17.5k+ (Base: 140)	57%	26%
Type of property	Private owned (Base: 297)	51%	25%
	Private rented (Base: 180)	45%	38%
	Council property (Base: 281)	42%	44%

Base: willing to pay monthly internet fee (772)
Question: Which of these methods, if any, is most appealing to you?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

[40] The figures do not add up to 100% as some respondents who were willing to pay something for the internet said they found both options equally appealing, they did not have any preference, or they did not know.

Willingness to pay – PAYG monthly fee[41]

Respondents were asked how much they would be willing to pay each month for the internet. Table 10 shows that among those respondents who would pay a monthly fee for the PAYG option, seven in ten (70%) would pay the full £12 monthly fee presented, which equates to 13% of the full sample. Three in ten (30%) would pay a fee, but less than the £12, which equates to 6% of the full sample. This proportion of respondents is fairly evenly split between up to £2.50 and up to £10.01 - £12. This equates to an overall average of £10.43 among those who would pay a monthly fee for the PAYG option.

Table 10: Willingness to pay for monthly fee under PAYG option

PAYG OPTION	All who would pay something	% of full sample
£12	70%	13%
£10.01 - £12	8%	2%
£7.51 - £10	6%	1%
£5.01 - £7.50	3%	1%
£2.51- £5	9%	2%
Up to £2.50	3%	1%
MEAN AMOUNT	£10.43	£2.01

Base: All willing to pay some monthly fee for PAYG (361) versus all respondents (1,841)
Questions: And how likely would you be to pay £12 a month for the pre-pay / pay as you go option to have the internet at your home? How much, if anything, would you be willing to pay each month for pre-pay / pay as you go internet?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Willingness to pay – PAYG connection fee

The respondents who were willing to pay for the monthly PAYG option were also asked about paying for a one-off internet connection fee of £50. Overall, among those who were willing to pay a monthly fee for the PAYG option, only half (48%) were likely to pay the £50 connection fee. In addition, just under one third (32%) would pay up to £25 for the connection fee, while 4% would pay between £25 and £50.

It is worth noting that this still leaves 17% of those who would pay a monthly fee for the PAYG option, but who would not commit to paying the £50 connection fee. This group stated either that they did not want the internet (6%), they could not afford it (5%) or they did not know if they would pay the £50 connection fee (6%).

Table 11 shows the breakdown of those willing to pay for the PAYG connection fee among those who were willing to pay the full £12 monthly fee, those willing to pay up to £12 and then an overview of all those willing to pay something for the PAYG monthly fee.

[41] Respondents who found both the contract and the PAYG payment options appealing, were asked about their willingness to pay for each options individually.

Table 11: Willingness to pay for PAYG connection fee

Pay £50 connection fee	Pay £12	Pay £1 - £12	Total Pay something
Likely to pay £50	57%	27%	48%
Pay up to £25	26%	44%	32%
Pay £25 to £50	3%	5%	4%
Nothing – I don't want the internet	3%	14%	6%
Nothing – I can't afford it	4%	7%	5%
Don't know	8%	2%	6%

Base: All willing to pay monthly fee for PAYG (361)
Questions: And how likely would you be to pay the £50 one-off internet connection fee for the pre-pay / pay as you go option to have the internet at your home? How much, if anything, would you be willing to pay for the one-off internet connection fee for pre-pay / pay as you go internet?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Willingness to pay – Contract monthly fee[42]

Among those respondents who would pay a monthly fee for the contract option, three-quarters (76%) would pay the full £10. This equates to 20% of the full sample.

The proportions of respondents who would pay a fee, but less than the full £10 (24% of those willing to pay / 6% of the full sample), is fairly evenly split between up to £2.50 and up to £7.50 - £10. This equates to an overall average of £8.83 among those who would pay a monthly fee for the contract option. These are shown in Table 12 below.

Table 12: Willingness to pay for monthly fee under contract option

CONTRACT OPTION	All who would pay something	% of full sample
£10	76%	20%
£7.51 - £10	7%	2%
£5.01 - £7.50	4%	1%
£2.51- £5	8%	2%
Up to £2.50	5%	1%
MEAN AMOUNT	£8.83	£2.30

Base: All willing to pay some monthly fee for Contract option (479) versus all respondents (1,841)
Question: And how likely would you be to pay £10 a month for the contract option to have the internet at your home? How much, if anything, would you be willing to pay each month for a contract internet connection?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

[42] Respondents who found both the Contract and the PAYG payment options appealing, were asked about their willingness to pay for both options individually.

Those not willing to pay monthly cost for the internet

As previously stated, 57% of the total sample were not willing to pay a monthly fee to have the internet at home. This comprised of 42% who said they were not interested, 6% said that they could not afford it, while 10% did not know if they would pay to have it.

Looking at those who said they were not interested, these respondents were more likely to:

- be over 45 years old (68% of over 75 and 58% of 65-74s vs. 40% of 45-64s, 17% of 25-44s and 14% of 16-24s);
- be retired (63% vs. 27% of those working and 21% of those unemployed);
- have no formal qualification (57% vs. 30% of those with school or higher education);
- have a fixed-line only (69% vs. 23% of those with a mobile only);
- have no children at home (48% vs. 20% of those with children);
- be living in C2DE socio-economic groups (43% vs. 39% of those living in ABC1 socio-economic groups);
- have a household income less than £11,500 (43% vs. 22% of those with household income above £17,500).

Those living in Northern Ireland were less likely to say they were not interested compared with the average (28% vs. 42%).

Looking specifically at those who said they can't afford it (6% of the total sample), these people were more likely to come from Scotland (9%) or be unemployed (10%).

As for those who did not know if they would pay for it (10% of the total sample), there are no statistically significant differences within this group across the different key subgroups.

6.7 Willingness to pay for a computer

As outlined previously in this report, the research study found that the upfront cost of a computer is an important and real barrier to accessing the internet for some. The initial financial outlay for the computer can have critical cost implications that can impact on people's accessibility towards the internet.

As stated, one in five respondents (20%) already had a computer at home. The remainder were asked whether they were willing to pay £250 for a computer. As shown in Table 13, just under a third were prepared to pay something, 20% were prepared to pay the £250 price presented, while 11% would pay between £1 and £250. However, it is worth noting that 70% were not prepared to pay anything. This breaks down into half (51%) who said they did not want to pay anything as they were not interested in the internet, nine per cent said they could not afford it and nine per cent did not know.

Table 13: Willingness to pay for a computer among those without one at home

Computer	
Willing to pay £250	20%
Willing to pay less than £250 (average £162)	11%
Nothing – don't want the internet	51%
Nothing – Can't afford it	9%
Don't know	9%

Base: All who do not have access to computer (1,489)
Questions: You can currently buy a new computer/laptop for £250. How likely would you be to buy a computer/laptop for your home at this price? How much, if anything, would you be willing to pay for a new computer/laptop?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Those likely to pay £250 for a new computer include:

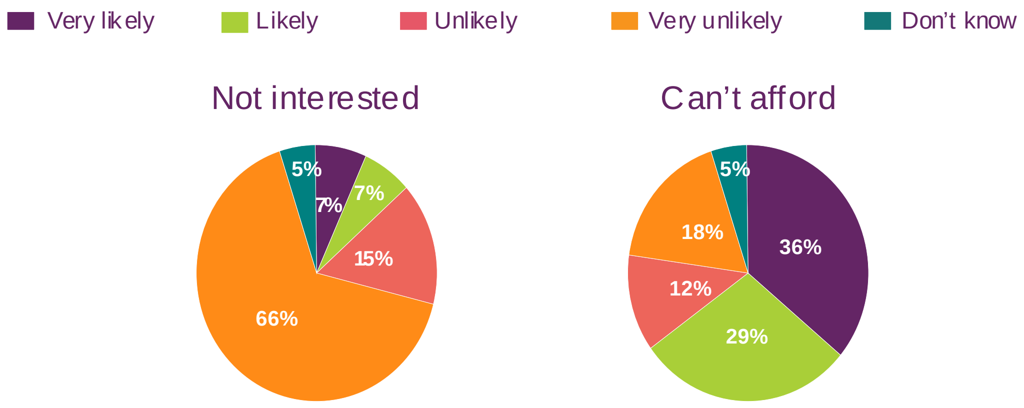
- Regular internet users (47%);
- 16 to 24 year olds (45%); and 25 to 44 year olds (37%);
- Those who were confident using a computer (43%);
- Those who knew a lot or a fair amount about the internet (43%);
- Those with children at home (41%);
- Those with a household income above £17,500 (40%);
- Those living in Northern Ireland (37%);
- Those in work (30%);
- Those with school or higher education (31%);
- Those living in mobile-only households (34%).

Getting the internet and a computer for free

Just under three fifths (58%) of the sample said they were unwilling to pay for the internet and/or a computer. Among this group, most respondents gave the reason that they were not interested (81%) whereas one fifth (19%) said they could not afford it.

This group was then asked whether they would be willing to get the internet if both were provided for free. Figure 41 shows the breakdown for the likelihood to get the internet if it were provided for free among those who earlier said they were not interested and those who said they could not afford it.

Figure 41: Likelihood to get the internet if it was free – Not interested/ can't afford



Base: all respondents who mention they are not interested (898) or cost (214) when asked their willingness to pay for the internet or a computer.
Question: How likely would you be to get the internet at home if you could get a computer and internet access for free?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Among the group 'not interested' in paying for the internet and/or a computer, when asked if they would get it if the internet and a computer were provided for free, 81% answered unlikely (66% very unlikely and 15% unlikely). However, 14% said they were likely. There were a number of subgroups who were particularly **very unlikely** to get the internet at home, even if it was free. These include:

- Those over the age of 65 (77%);
- Those who are retired (75%);
- Without children in the home: 69% vs. 42% among those with children;
- Those living in Wales (85%).

In contrast, looking at those who said the internet and or a computer was too expensive for them, 65% said they were likely to get the internet if it was free, and 30% said unlikely (18% very unlikely, 12% unlikely).

Again, among this group there were some subgroups that were particularly very unlikely to get the internet at home, even if it was free. These include:

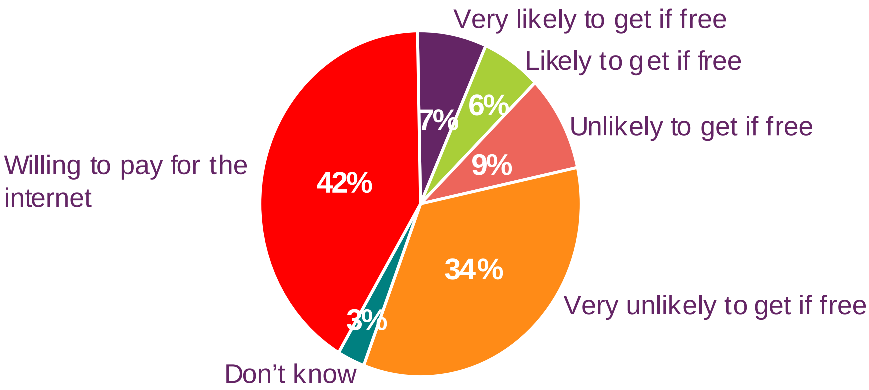
- Those who are retired (34%);
- Over the age of 65 (31%);
- Without children (22% vs. 7% among those with children);
- Those within DE socio-economic groups (23% vs. 0% among ABs).

In addition, the qualitative research indicated that for those who thought the internet was too expensive, some resisted getting it for free as they thought there could be ongoing costs that they did not want to embark on.

As detailed within this report, cost is not always a barrier to getting the internet at home; many respondents said they did not want the internet at home for various reasons.

In conclusion, among the total sample 42% were willing to pay something for the internet and/or a computer and 13% said they were likely to get it if the internet and a computer were provided for free. However, 43% said they would not, even if a computer and the internet were provided for free. The majority of this group are made up of respondents who had previously said they were not interested in paying for the internet (92%), and the remainder saying it was too expensive (see Figure 42 below).

Figure 42: Overview of willingness to pay something for the internet and likelihood to get if free



Base: all respondents (1,841)
Question: How likely would you be to get the internet at home if you could get a computer and internet access for free?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Section 7

Ideas to encourage internet take-up

The research explored respondents' attitudes towards a range of ideas to encourage take-up of the internet at home. These ideas[43] are:

- Half priced computers – up to a maximum of £125 would be paid towards the cost of a new computer;
- Discounted monthly internet tariff – £5 per month for a minimum of 12 months;
- Pre-paid internet – consisted of a £50 connection fee and £12 monthly fee. There is no contract. Users can choose whether to pay for a month's usage at the beginning of each month;
- Safe internet environment – users are given free access to a limited number of certified websites;
- Easy-to-use internet device – a touch-screen device which allows users to access the internet but otherwise has limited functions;
- Free telephone helpline;
- Free training on how to use the internet.

7.1 Reactions towards ideas to encourage take-up

Respondents were asked initially how important each option would be in helping them to get the internet using a scale of one to ten. Those who gave a score of seven to ten were coded as 'important', a score of four to six 'average' and a score of one to three 'not important', in Figure 43 below.

There was very little difference in respondents' scores for most of the ideas. A free telephone helpline (42%) and a discount on a monthly tariff (40%) were the options most likely to be seen as important for helping people get the internet at home. They were followed by the safe internet environment (38%), half-priced computer (35%), free training (35%) and easy-to-use internet device (34%) options[44].

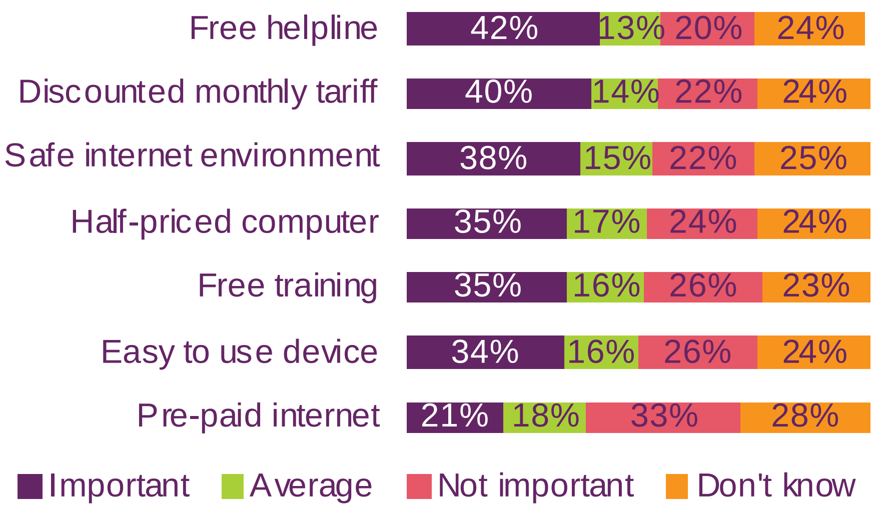
The only exception was the pre-paid internet option (21%), which was given the lowest level of importance, and was the only idea which respondents were more likely to consider 'not important' than 'important'. (See section 7.2 which provides further details on participants' reactions to this option. The qualitative research suggests that the upfront £50 connection fee reduced the overall appeal of this idea.) Respondents under 65 were more likely to deem this idea as important (31% of those under 44, and 26% of those between 45 and 64), as were those working (30%) or unemployed (33%) and those from mobile-only households (31%). Those living in Council owned properties (27%) were more likely to find it important than those living in private owned properties (15%). Respondents in C1C2 socio-economic

[43] These ideas were developed by Ofcom to test what may encourage people to take up the internet at home.
[44] The level of 'Don't knows' is high, at around one quarter of respondents (between 23% and 28%) for each idea. This may be related to respondents' levels of interest in getting the internet: this specific question did not offer the option of choosing I am not interested in the internet.'

groups (25%) and respondents with an income over £11,500 (28%) were also more likely to see this idea as important.

It is important to bear in mind that around one quarter said they do not know the answer or have no opinion for each option.

Figure 43: Importance of each idea



Base: all respondents (1,841)
Question: Here is a list of options which could help people get the internet. For each option, could you tell me how important it is in helping you get the internet at home? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

The following groups were more likely to say each of the ideas presented were important: internet users, those under 65, not retired, with children in their household, with a higher household income of over £17,500, with school education, with a mobile phone, and from C1 and C2 socio-economic groups 45.

Respondents were also asked the top three most important options that would help them get the internet. Figure 44 shows the proportion of respondents who chose each option as one of their top three, as well as the proportion who chose each option as the most important option.

When asked to prioritise, the order of importance changed for the options presented. Respondents were most likely to cite options which reduce costs – one third named half-priced computer (34%) and discount on the monthly tariff (35%) as one of their top three respectively. These were also most likely to be chosen as the top option, with 18% naming half-priced computer and 14% discount on monthly tariff.

These were followed by options designed to help people who have little or no experience of using the internet, such as free training (21% as top three and 7% as top), free telephone helpline (19% as top three and 3% as top), easy to use internet device (21% as top three and 6% as top) and a safe internet environment (20% and 6% as top).

The qualitative research findings may help explain the change in the order of importance. Ideas such as safe internet environment and easy-to-use device were considered 'nice to have' by most participants, whereas financial incentives, namely half-priced computers and

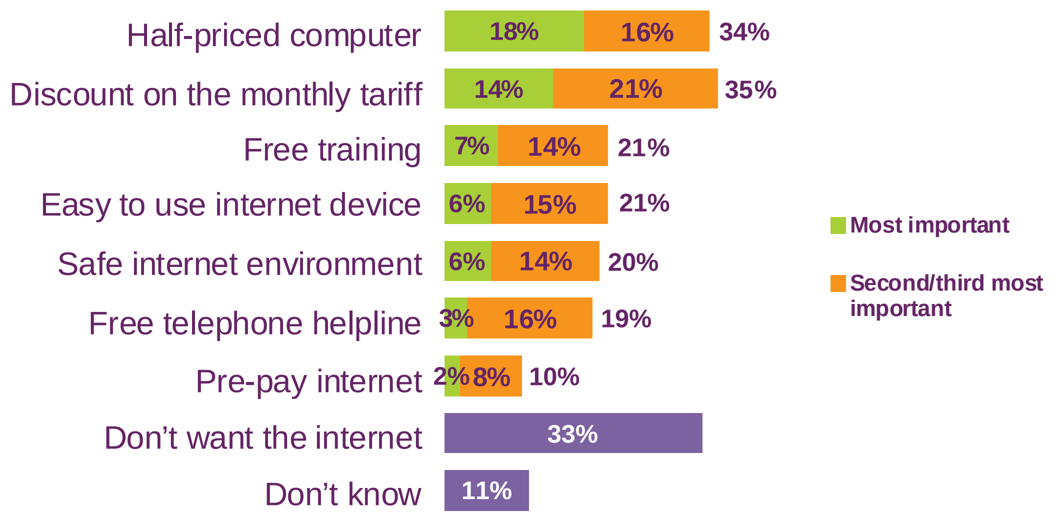
[45] Please refer to page 15 to see how annual household income relates to social grades in this study.

discounted tariffs, were perceived as key drivers that would probably encourage some to take up the internet.

Only one in ten (10%) chose the pre-paid option as one of their top three, and two per cent as their top option.

Over two fifths did not choose any ideas, as they either did not want the internet at home (33%) or they were not sure which option was the most important (11%). They were more likely to be older (58% of 65-74s and 73% of over 75s), retired (65%), with no formal qualification (60%), with no children at home (50%), living in DE socio-economic groups (49%) and having a fixed line only (74%).

Figure 44: Top three ideas to encourage internet take up



Base: all respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home? And the second most important?; And the third most important? Showcard
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Again, the groups who were more likely to get the internet in the next six months were also more likely to be interested in these ideas. They are current users of the internet, those belonging to younger age groups, those who are not retired, those with school or higher education, those living in ABC1 socio-economic groups, those with a mobile phone, those in Northern Ireland, those who live with children and those who have a higher household income.

As shown in Figure 44, respondents often chose more than one idea that would encourage them to take up internet. This suggests that a mixture of ideas, instead of one single idea, were important to them. Findings from the qualitative research lent support to this, as respondents often chose a number of ideas. However, qualitative findings also showed that respondents often gave different weights to those ideas: while some ideas were considered to be crucial in tipping them over to get the internet, others were considered as 'nice to have'. Whether an idea is a 'must' or 'nice to have' tended to depend on how much previous experience respondents had with the internet and computers.

Unless otherwise stated, the rest of this chapter refers to the top idea respondents chose, rather than their top three options. This is in order to focus on the *key* idea that may encourage them to take up the internet.

7.2 Perceived strengths and weaknesses of each option

Table 14 looks at respondents' reactions towards each of these ideas at the qualitative stage of the research, and how these ideas appealed to different groups of respondents in the survey. Please note that the free telephone helpline and the free training options were not tested at this stage46.

Overall we found that for any ideas to encourage take up to work, a genuine interest in the internet is a prerequisite. For those who were not interested, very few, if any of the ideas appealed.

Table 14: Who does each idea appeal to

Idea	Strengths	Weaknesses	Who does it appeal to
Half-priced computers	Help overcome outlays for the hardware	Recipients will still need to pay the monthly payments	Those under 44, those living with children and working people (each chosen by at least 25%)
Discounted monthly tariffs	Reduce the monthly fee to a nominal outlay	Recipients will still be tied to a contract	Those under 44, those living with children and working people (each chosen by at least 21%)
Pre-paid internet	There is no need to sign a monthly contract and is flexible for users	Connection fee is too high	Those under 24, those living with children, those with a household income of over £17,500 (each chosen by at least 4%)
Safe internet environment	For some participants interested in the internet but with little technical knowledge, offered safe starting point. Generally nice to have feature to relieve fear of unknown	Not popular among users who find this idea too restricting	Those aged 25-44, those living with children, those with an annual income over £17,500 (each chosen by at least 10%)
Easy-to use internet device	Some participants who did not use a computer thought it may be less scary than a computer and could act as a stepping stone to a fully functioning computer.	Not popular among users who prefer a fully functioning computer	Those in AB homes, those with annual income between £11,500 and £17,500 (each chosen by at least 10%)

Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Half-priced computers

Given the big one-off cost savings of £125, this option was believed to be a 'big encouragement' for people to get connected. This was especially the case among younger participants (37% of those under 24 and 27% of those between 25 and 54 said this was the most important idea, compared to 18% of respondents overall). Some said they were definitely interested in taking up this offer should it become available, as this would help them overcome the big outlays of getting the hardware.

> It is far more appealing to anything I've heard and …because of the outlay and because of the fact that the government recognises the

[46] These two options were not explored in the qualitative research due to time constraints.

> necessity, irrespective of someone's circumstances, that a computer is an essential piece of equipment.
>
> Non-users, 50-64, London

However, some felt that they would need help with monthly payments as well, as they might not be able to afford to pay the bills even if they had a computer at home.

> They need to deal with the financial side of the actual internet and telephone charge… this half price computer one deals with just the outset of the computer.
>
> Users, 20-34, London

There were also some concerns about the quality of computers associated with this option. As discussed earlier in chapter 6, for those on a tight budget, getting 'value for money' was often more important than getting the cheapest version. They tended to prefer to pay something more for a better quality product.

Moreover, some felt sceptical about this suggestion as it was felt that the government 'would not give out something for nothing'.

> The government don't help me normally, so why do they want to help me buy a computer?
>
> Non-users, 20-35, Mid Wales

The appeal of half-priced computers sometimes diminished when people started to think through the process, such as what the eligibility criteria are and how much this would cost the Government. It was felt that in practice, there would be stringent eligibility criteria, and only those who could prove that they need it and cannot afford it would be eligible.

> It would have to go to someone who's really shown that they're using it and the purpose they're using it for.
>
> User, 50-64, London

Those who felt they would not be eligible tended to lose interest in this option, and regarded it as something that is not relevant to them.

There were also some strong arguments against this option. Some felt it would be open to abuse by those 'undeserving' while others queried the wisdom of subsidising internet use during a period of economic uncertainty.

> I think there are more troubles in this country than whether every household has got internet.
>
> User, 20-24, Sheffield

To summarise, the qualitative research indicated that this idea could play an important role in helping those who are interested in getting the internet. However, there was a perception this idea was unlikely to be available to most because there would be stringent eligibility criteria. For those whose main issue was the affordability of monthly payments, this idea had failed to alleviate their fear of getting into debt.

Discount on monthly internet tariffs

Together with the half-priced computer option, the discount on monthly tariffs option was the most popular option at the qualitative stage. To participants, the main attraction of the discounted tariff option was simply the perceived cost savings it could bring.

> That's an incentive for all of us...You are talking about saving £60 a year aren't you, so it's substantial isn't it?
>
> Non-users, 50-64, London

For those whose main barrier was the affordability of monthly payments, who tended to be those on benefits, state pensions or unstable incomes, it was felt that £5 a month was a nominal amount perceived to be ‘absolutely nothing’ and they would definitely be interested if this option were available.

Some preferred this over the half-priced computer option, which offered bigger cost savings, because it would actually alleviate their concerns about not being able to pay the monthly bills.

> I personally prefer the discount one because with this half-price computer, you'll still need to pay the monthly charge.
>
> Users, 35-64, London

However, some were sceptical about the hidden small prints, often saying things like ‘there's a catch’ or ‘not sure how long it will last’. As they would still be bound to a contract, they believed they would be liable for any price increases that come at a later stage.

Many participants regarded the half-priced computer option as something that *would and should* be available to a minority of people and the discounted tariffs as something that *would and should* be available to *everyone*. The reason for this difference could be how these two ideas are perceived. Many saw the half-priced computer idea as an offer of ‘free money’, and as such was unlikely to be available for those who did not need this help. On the other hand, the discounted tariff was seen more as a small incentive that encouraged people to take up the internet, and hence *would and should* be available to *everyone*.

Like the half-priced computer idea, the discounted tariff idea failed to persuade those who were not interested in the internet to take it up. As we have seen in the previous chapter, the majority of those who were not willing to pay for the internet would not take it up even if it was free.

In short, the discounted monthly tariff option appealed to people who were interested in the internet, as it reduced the monthly costs to a nominal amount. In particular, it helped to overcome the concerns of those from low income households who worried about not being able to pay the monthly bills.

Pre-paid internet

The pre-paid option consisted of an upfront £50 connection fee and then £12 monthly fee which could be paid at the start of each month, but with no need for a 12 month contract. When the pre-paid internet idea was presented as one of the payment options earlier in the discussion, some participants appreciated the benefits of not signing up to a 12-month contract. This was especially the case for those on limited or unstable incomes. However, the set-up cost of £50[47] was deemed too expensive.

> Give me the yearly one. I may be here a month, but it's going to be cheaper [than pre-pay].
>
> Users, 35-49, Mid-Wales

Moreover, it was felt that the Internet Service Providers could not justify charging such a high price for setting this up, as 'not much effort's required on the part of the supplier'.

When respondents were comparing the options, the popularity of the pre-paid option dropped even further. It is because the benefits of pre-paid internet, namely its flexibility, paled in comparison to the cost savings they could enjoy under the half-priced computer and discounted tariff. In addition, the discounted monthly tariff option had also helped overcome the burden of signing up to a 12-month contract because of the low price. This may explain the relatively low proportion of respondents choosing the pre-paid option.

However, given that the affordability of monthly payments was an issue for many of those who felt they could not afford the internet, the pre-paid internet does have the potential to become more popular, or even act as the tipping point that could encourage people to take up internet at home, as long as the connection fee can be reduced.

An additional attraction of a more competitively priced pre-paid option would be the 'value for money' it offers, as users will only be required to pay for what they need.

Safe internet environment

The safe internet environment tended to appeal to those who were interested in the internet but did not feel they know enough about technology to protect themselves or their family against the undesirable element on the internet. These people tended come from a range of age groups and socio-economic backgrounds, though the key attraction for most seemed to be the 'peace of mind' it offers.

> It would definitely appeal to me and my nephews because you feel that it's safe.
>
> User, 50-64, London

It was also seen by some as a good starting point for people with limited experience to learn how to use the internet in a safe environment.

However, for most current users of the internet, this option had limited appeal because they tended to feel that they were capable of protecting themselves from the undesirable elements on the internet, e.g. by installing anti-virus software or not shopping online, without the need for support. Moreover, some felt the main attraction of the internet is its size and diversity, and so any attempt to limit this, no matter how well meant, would be counterproductive.

It is also important to bear in mind that participants tended to have different takes on how 'limited' this safe internet environment was and who would be the judge of which websites to include. Their interpretation had a significant bearing on the individual appeal of this option.

[47] These costs were provided by Ofcom, representing estimates using market prices at the time of the research.

Those who interpreted this option as more restricting were more likely to feel negative towards it, as they felt that it is the government's attempt to 'limit their freedom'.

This option also failed to appeal to the vast majority of those who were simply not interested in the internet. As discussed in section 5 earlier, while there was a widespread awareness of security issues on the internet, it did not tend to be the key factor that stopped people from getting the internet. Hence, even if the threat has been removed, these people were likely to remain unconvinced, because fundamentally, they had no interest in the internet. Moreover, there was a feeling that this device is unnecessary, as they would be able to access information from other sources such as Teletext.

There was also widespread scepticism of how this would work, as 'even the Government cannot guarantee the safety of their own websites'.

Overall, this option appealed to some with specific concerns about safety on the internet. However, it had limited appeal to those who had no interest in the internet, as it was largely apathy or disinterest, rather than worry about safety that had stopped them from getting connected. The idea also had limited appeal among internet users who felt they were well-equipped to protect themselves.

Easy-to-use internet device

As one may expect, this option had limited appeal among current users of computers, who would prefer 'a proper computer' with full functionality. However, many of these people felt it could be useful for their parents or grandparents, who had no experience with computers and the internet and were thought to be generally technophobic.

When we spoke to the target audience of this idea to encourage take-up, i.e. those with limited or no experience with computers, the reception was mixed.

Some felt that it would encourage them to get on the internet because it is less 'scary' than a normal computer and would allow them to search for the information they needed without having to rely on other people.

> It's sounds something I might actually do.... particularly as I hardly use a computer, so this sounds as though it would be much easier.... the only time I ever, not that I use the internet, but I get my wife to do it, is because I want information. So I could actually do that.

Non-users, 60-74, London

These people tended to be current proxy users of the internet who were fairly interested in what it could do, but who did not feel very comfortable with technology. There was also the feeling that it could be a 'stepping stone' for them if they did decide to get a computer with full functionality at a later stage.

For the majority of non-users, however, this option had limited appeal because they are not interested in accessing the internet by any means. There was a feeling that the internet itself, rather than the technology that supported the internet, was not for them. Hence, even if the technology has been adapted to make the computer easier to use for them, they would still be uninterested in making use of this technology.

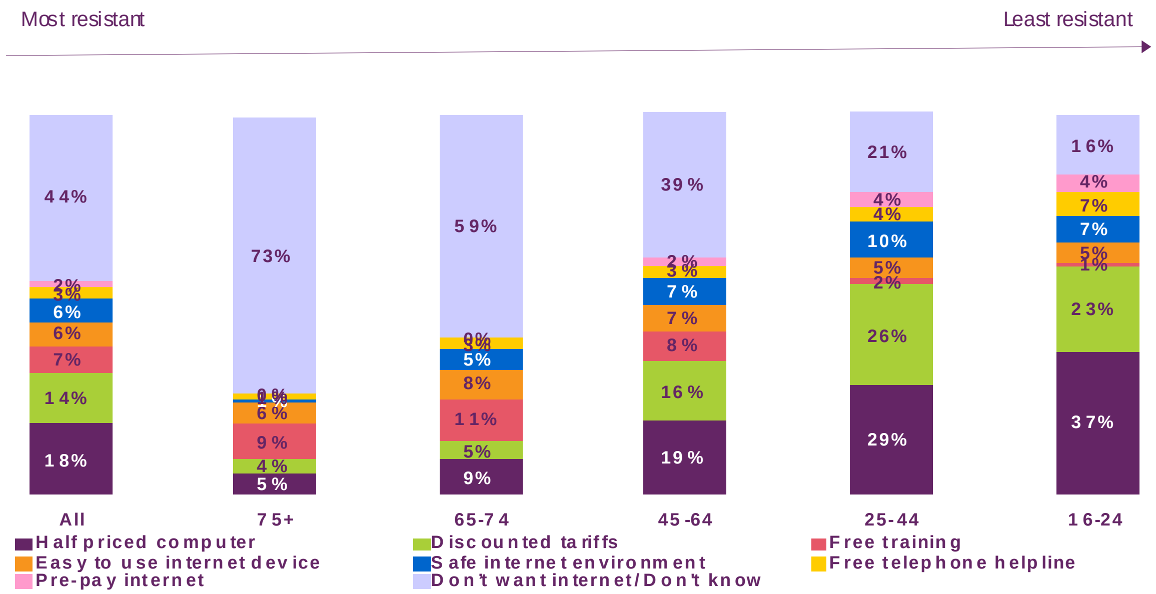
In short, this option could appeal to the small number of people who were interested in the internet but who did not feel comfortable with technology, though it had limited appeal to those with no interest in the internet.

7.4 How the ideas appeal to different demographic groups

Figures 45 to 49 break down major demographics by the top idea respondents in those groups have chosen. It demonstrates clearly which groups were the most resistant to any ideas and which ones are the least resistant.

Figure 45 shows that those aged 75 or above were most resistant to any ideas. Just under three quarters (73%) said they do not want the internet or do not know which option they prefer. Free training was the most popular option among this group, chosen by one in ten (9%). Those aged 16 to 24 were least resistant. 84% chose an option, with discounted tariffs (23%) and half-priced computers (37%) being the most popular ones.

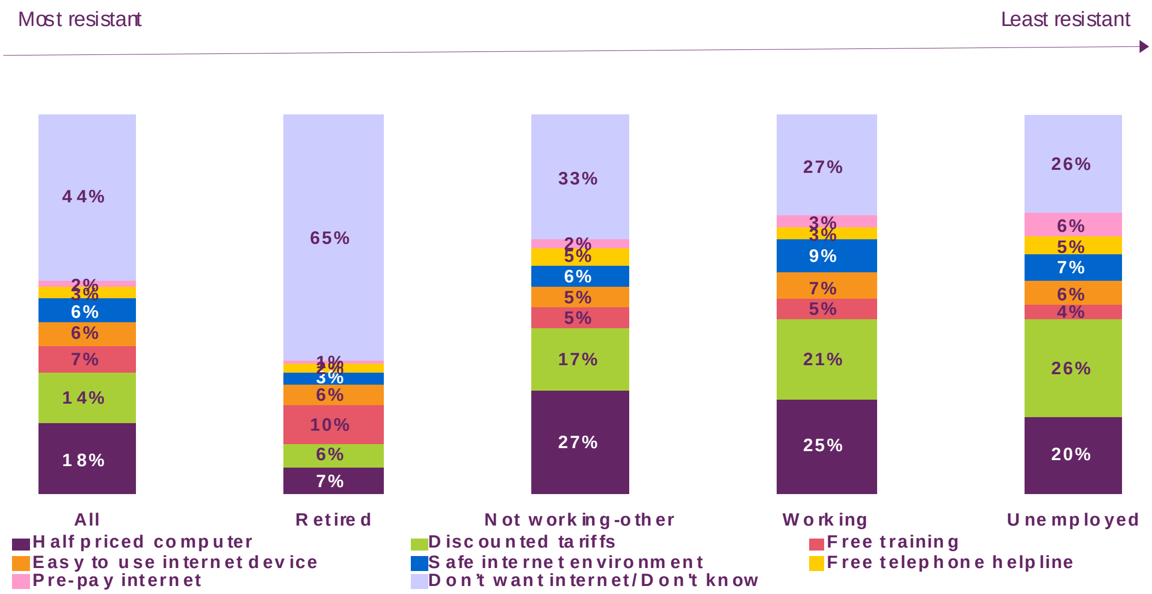
Figure 45: Most important idea by age



Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 46 shows that among those who are retired, the majority (65%) said they did not want the internet or did not know which option they preferred. Whereas among those not working, unemployed or working, the two most popular ideas were half priced computer and discounted monthly tariff.

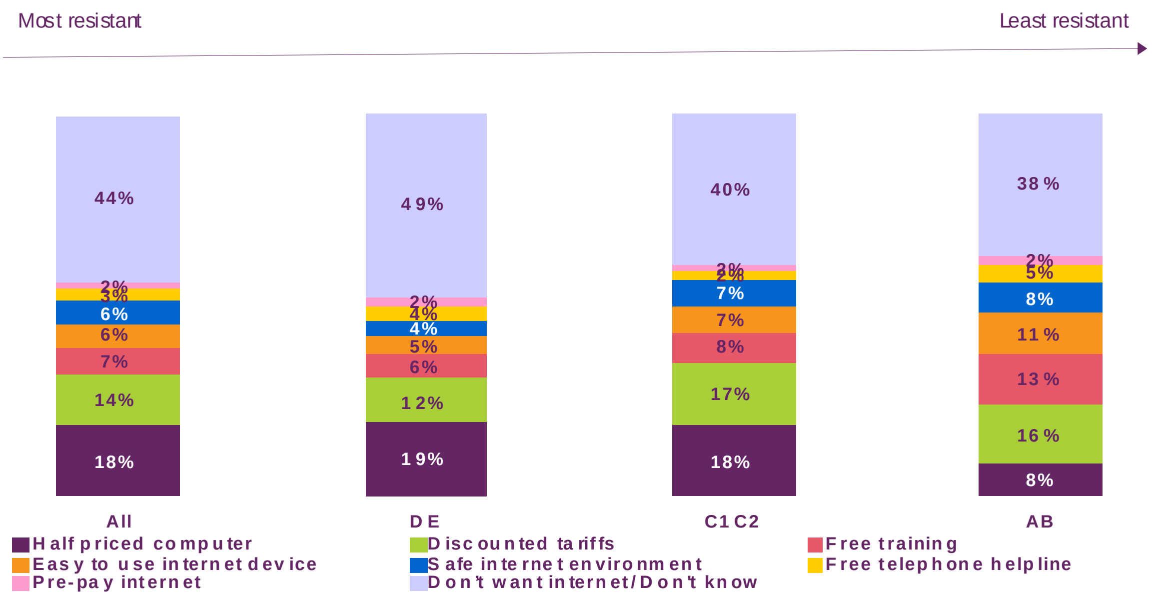
Figure 46: Most important idea by work status



Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 47 shows that half (49%) of those in DE socio-economic groups did not want the internet or did not know which option they preferred. The most popular option among DE and C1C2 groups was half-price computers (19% and 18% respectively), while a greater proportion of respondents in AB socio-economic groups preferred a discounted tariff (16%).

Figure 47: Most important idea by socio-economic group

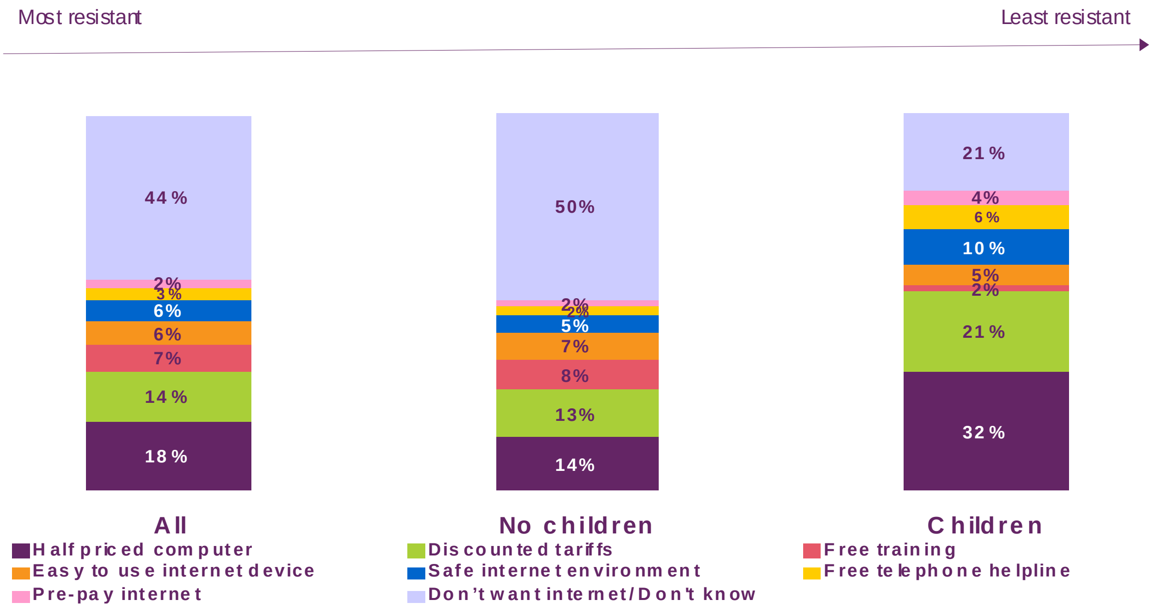


Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 48 shows that half (50%) of those without children in the household did not want the internet or did not know which option they preferred, as opposed to only two in ten (21%)

respondents living with children. Half-priced computers and discounted tariffs were the most popular options among both groups. One in ten respondents living with children preferred the safe internet environment.

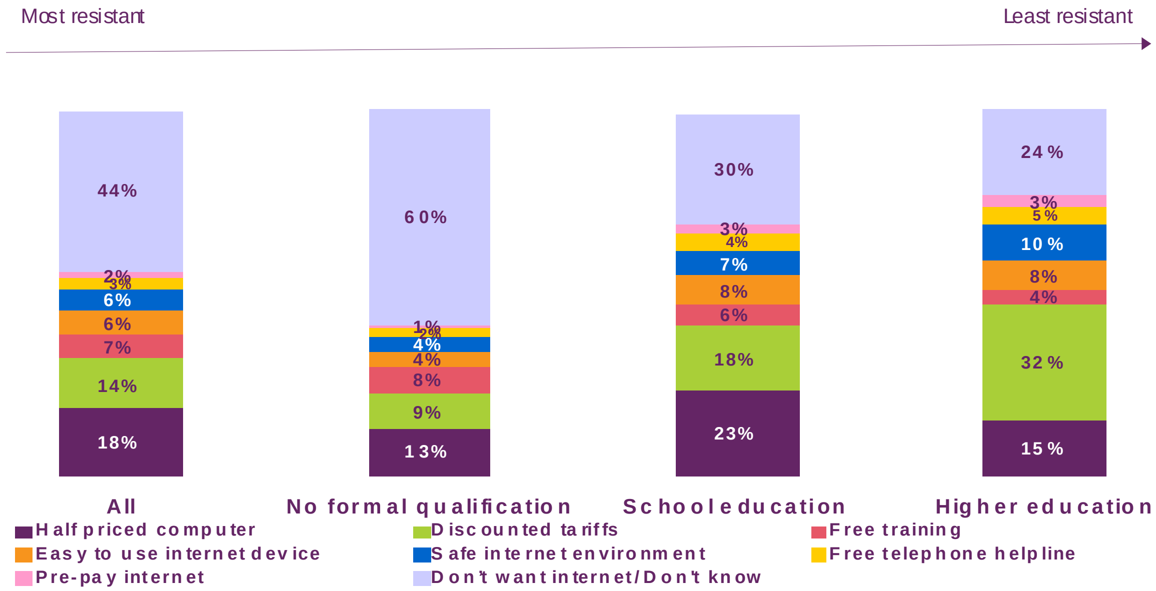
Figure 48: Most important idea by whether have children at home



Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 49 shows that six in ten (60%) respondents without any formal qualification did not want the internet or did not know which option they preferred. Those with no formal qualification or school education were most interested in half-price computers (13% and 23% respectively), while one third (32%) of those with higher education chose discounted tariffs as their preferred option.

Figure 49: Most important idea by education qualification

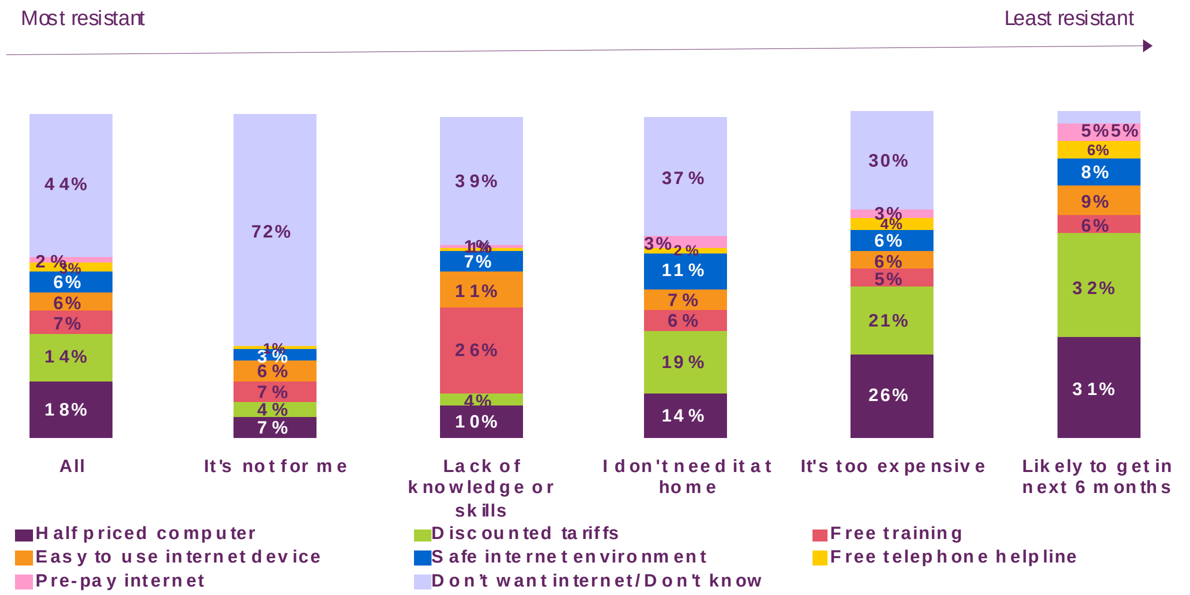


Base: All respondents (1,841)
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

7.5 How the ideas work for each segment group

Chapter 5 described five different segments based on respondents' intention to get the internet and their main reasons given for not having the internet at home. This section looks at how each of these segment groups perceived the options presented to encourage internet take up at home. Figure 50 shows the top idea chosen by respondents in each of those groups.

Figure 50: Most important idea by segment group



Base: The base size for each group varies. Please note small base sizes for the 'Financial/ resource exclusion – I don't' have the knowledge or skills' and 'Self exclusion – I don't need it at home' groups, so results should be treated with caution.
Question: Overall, which option would you say is the most important for helping you to get the internet at home?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Those who said they intend to get the internet in the next six months – Almost all (95%) of this group chose at least one idea to encourage take-up. Compared to other groups, they were most likely to choose all the options apart from the free training and safe environment options. This is unsurprising given the general sense of enthusiasm about the internet among this group. However, as this group were likely to get the internet even before these options were presented to them, these are more likely to be perceived as 'nice to have', instead of options that would act as 'tipping points' for them.

Financial/ resource exclusion: 'It's too expensive' – Seven in ten (70%) were interested in at least one option. Given that costs were the main issue for this group, it is not surprising that they were more likely than average to have chosen the half-priced computer (26%) and the discount on monthly tariffs (21%). Three in ten (30%) did not find any of these options appealing.

Financial/ resource exclusion: 'I don't have the knowledge or skills' – Six in ten (61%) respondents in this group chose at least one idea to encourage take-up, and they were more likely than average to welcome free training (26%). Four in ten did not choose any option.

Self-exclusion: 'It's not for me' – Only one quarter (27%) had chosen at least one option. The group was less likely than average to find each of the options appealing. Close to three quarters (72%) did not choose any option.

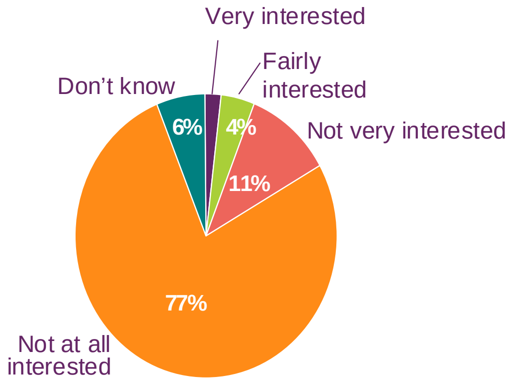
Self-exclusion: 'I don't need it at home' – Just under two thirds (63%) chose at least one option, and their preference of each option was in line with the average.

7.6 Other suggestions to encourage take-up

While over half (56%) the sample chose at least one idea, it is important to bear in mind that 44% said they were either not interested in any of the ideas presented to them or did not know which one to choose. These people were then asked whether anything could be done to encourage them to get the internet at home. Nine in ten (91%) said that nothing could be done. A small proportion suggested providing the internet for free or at an even lower price (3%) and providing free equipment or free support (2%). This is consistent with qualitative findings, which showed that those with no interest in the internet were simply unlikely to be persuaded by anything.

This group of people were also asked if they would be interested in accessing the internet anywhere else. Nine in ten (88%) were also not interested in accessing the internet anywhere else, with the majority saying not at all interested (see Figure 51 below).

Figure 51: Interest in accessing the internet outside of home



Base: all who do not want the internet at home/not sure about which option (799)
Question: You have said that you are not interested in getting the internet at home. But how interested, if at all, are you in using the internet at any other places/locations, such as an internet café, library, work, place of study, etc?
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

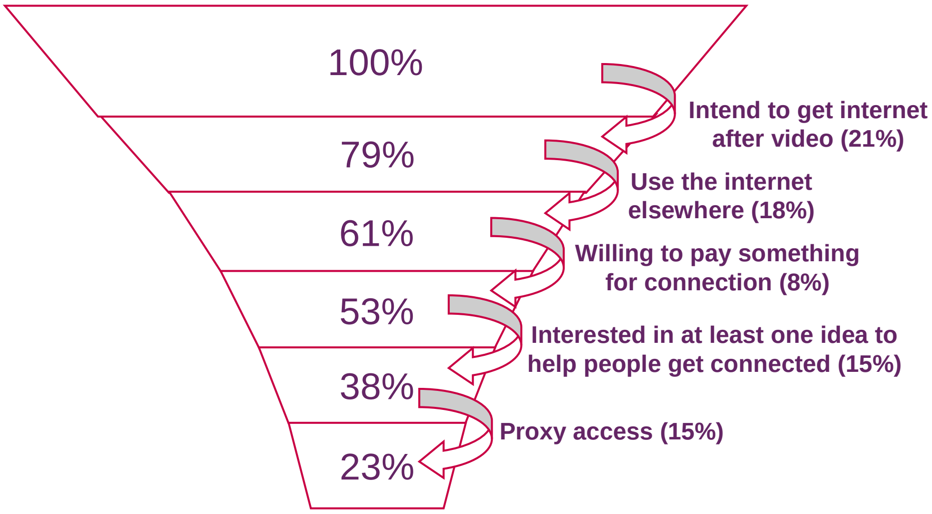
The implication of the above findings is that for any options to work among those who are currently not interested in the internet, awakening personal interest is a prerequisite. The research has shown that for those not interested in accessing content on the internet in the first place, any financial incentives or attempts to help them overcome any concerns about technology or make the internet safer would not appeal.

7.7 Core resistors

This research study identified about four in ten (44%) respondents who were not interested in any of the ideas to encourage take-up. About four in ten respondents (43%) also said they would not get the internet at home even if it was provided for free.

Further analysis was therefore undertaken in order to size the core resistors to the internet. Figure 52 illustrates the use of a funnel to filter off the proportion of respondents who did not intend to get the internet, did not use it, were not willing to pay for it, were not interested in any ideas and did not have proxy access to the internet via other people. The funnel identified 23% of the sample as core resistors. This equates to about 7% of the adult population.

Figure 52: Core resistors funnel



As one may expect, this group is very likely to be aged 65 or above (47% were over 75 years old, 25% were 65 to 74, 21% 45 to 64, 7% 25 to 44 and less than 1% 16 to 24). Over six in ten (65%) lived in DE households and over seven in ten (72%) were retired. Over half (52%) of core resistors had a fixed line only and close to four in ten (38%) had terrestrial television only. Nine in ten (92%) were not aware of the internet or had never used it before.

Two thirds (66%) of core resistors belonged to the ‘Self exclusion: It’s not for me’ group, 15% the ‘Financial exclusion: It’s too expensive’ group and 4% the ‘Financial exclusion: I don’t have the knowledge or skills’ group.

The qualitative research showed that making the internet personally relevant could awaken interest in this group. This is one area worth further exploration.

During the qualitative research stage, a small number of participants who were initially very resistant towards the internet ended up giving it some thought, or perhaps even deciding to have a go at finding out more about it.

> You’ve put it in my head today to have a look and find out a bit more when I perhaps go to the libraries.
>
> Non-users, over 75, Sheffield

It has to be borne in mind that the depth interview process involved more personal interaction, which might ‘warm-up’ some respondents as it allowed them to ask questions about the internet and find out more for themselves. This suggests that one way of generating interest among internet resistors is to take a more personal approach, by demonstrating the potential personal relevance of the internet in a person’s life.

The research showed that those who were resistant to the internet were also likely to be wary of new technologies in general. Indeed, some of the people we spoke to said that they initially resisted new technologies, such as mobile phones and DVD players, but they were eventually persuaded to take them on once they could see the benefits and relevance of these technologies to them. However, while mobile phones and DVD players can be seen as an extension of landline phones and VCR players, it is more difficult to position the internet, as its functions are much broader than any other existing forms of technology. Some participants suggested portraying the internet as an extension of a TV set or the Teletext, as these were things that those people were familiar with and could relate to. These findings suggest the need to perhaps present the internet as something you use everyday, like the telephone, and not as an exciting and amazing brand new technology.

It is, however, important to bear in mind that even if a spark of interest is generated, this group is likely to still lack the resources or skills to get connected. Indeed, as described in chapter 5, some four in ten (42%) respondents provided multiple reasons for not having the internet at home, saying they lacked both the interest and the finances or resources to get connected. Moreover, a significant proportion of those over 65 suffer from different disabilities including visual, mobility or hearing impairments. They are likely to require support in terms of training and using existing equipment, as well as technology that is adapted to their needs[48]. Those with a limited income are likely to require help with the costs of buying a computer and subsidies on monthly tariffs.

[48] See the following Ofcom reports for further research findings on communications usage among people with disabilities: *People with visual impairments and communications services*, 2008; *People with hearing impairments and communications services*, qualitative research report, 2007; *People with learning disabilities and communications services* qualitative research report, 2008. Ofcom is also currently undertaking research among people with mobility difficulties.

Section 8

Conclusions

Overall this study found that about one fifth of people without the internet at home say they are likely to get it in the next 6 months. A further 30% give financial/resource reasons as their main barrier to take-up, whereas 42% say they are not interested or do not need it at home.

Among those giving financial reasons as the main barrier, the financial ideas presented to encourage take up were popular with most respondents. However, most respondents who said they were not interested in the internet continued to say so, when offered the range of ideas to encourage take-up.

The study identified a group of core resistors (23% of the total sample) who did not intend to get the internet, did not use it, were not willing to pay for it, were not interested in any ideas and did not have proxy access to the internet via other people. This group equates to about 7% of the adult population. The research suggests that making the internet personally relevant may help encourage take-up for this group. It is, however, important to bear in mind that even if a spark of interest is generated, there may still be other barriers as this group is likely to lack the resources or skills to get connected.

Annex 1

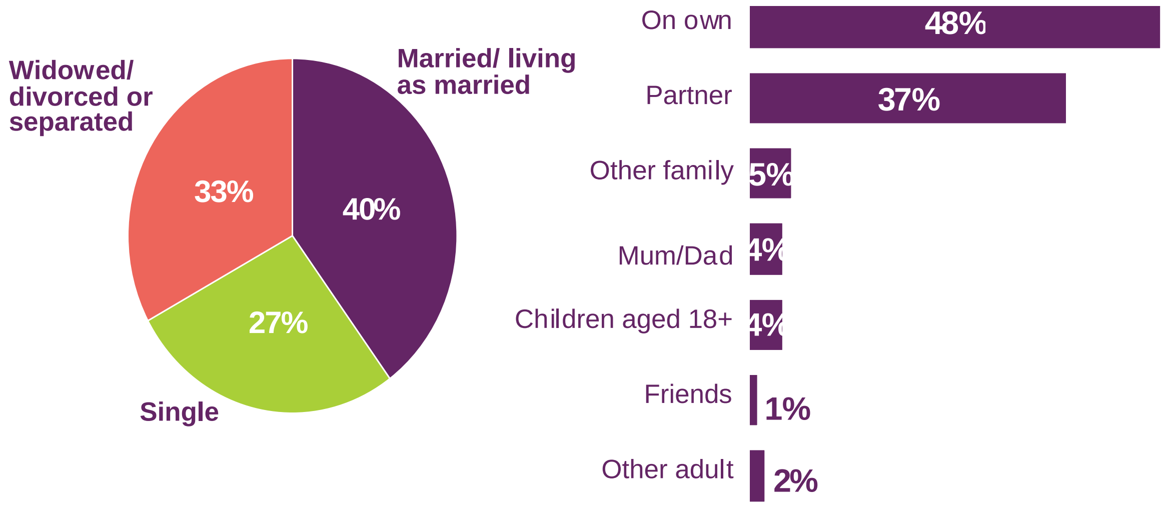
Weighted and unweighted demographic profiles

	% Weighted	% Unweighted
Gender – Male	39%	41%
Gender – Female	61%	59%
Age – 16-24	9%	10%
Age – 25-34	11%	12%
Age – 35-54	25%	23%
Age – 55+	55%	55%
Working Status – working full time	24%	16%
Working Status – working part time	7%	8%
Working Status – not working	69%	76%
East Midlands - rural	1%	1%
East Midlands - urban	7%	4%
Eastern - rural	1%	0%
Eastern - urban	6%	4%
London	11%	7%
North East - rural	0%	0%
North East - urban	4%	5%
North West - rural	1%	0%
North West - urban	13%	9%
Northern Ireland - rural	1%	4%
Northern Ireland - urban	2%	8%
Scotland - rural	2%	7%
Scotland - urban	8%	10%
South East - rural	1%	1%
South East - urban	9%	5%
South West - rural	2%	1%
South West - urban	6%	4%
Wales - rural	1%	5%
Wales - urban	5%	9%
West Midlands - rural	1%	0%
West Midlands - urban	8%	8%
Yorkshire and Humber - rural	1%	1%
Yorkshire and Humber - urban	8%	6%

Annex 2

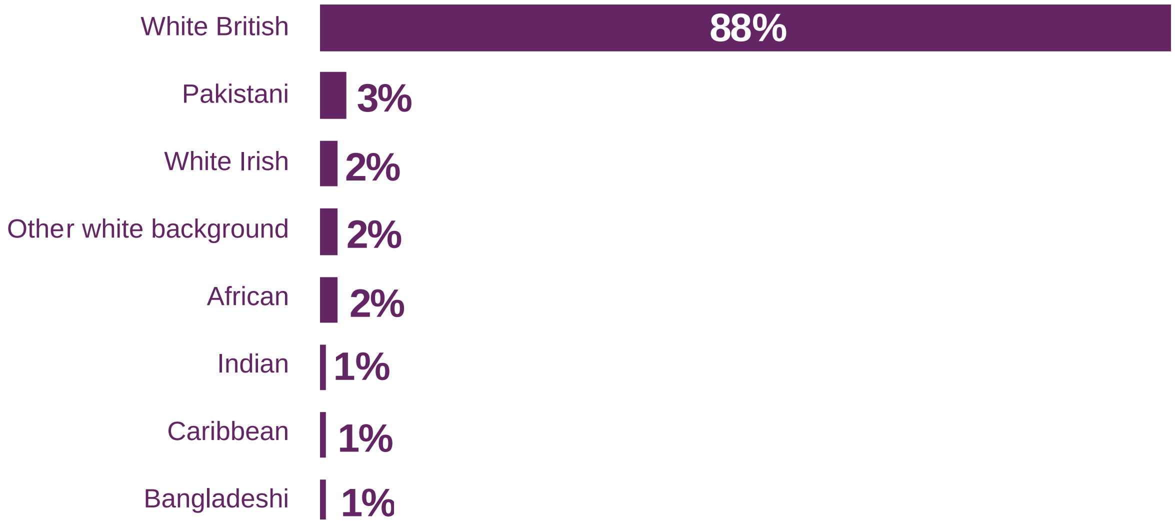
Demographics

Figure 57: Marital status and household composition



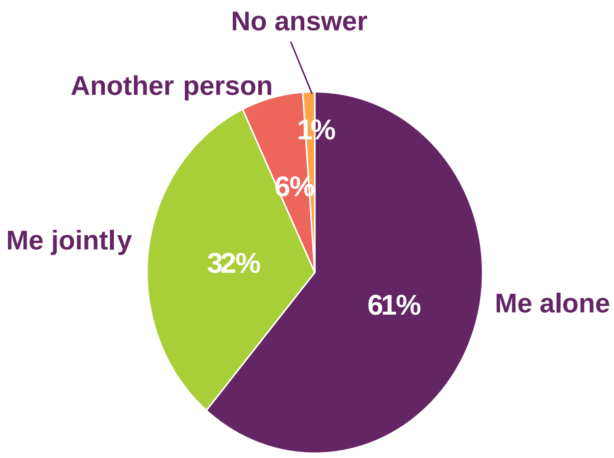
Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 58: Ethnicity



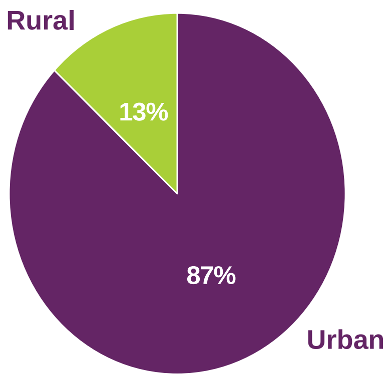
Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

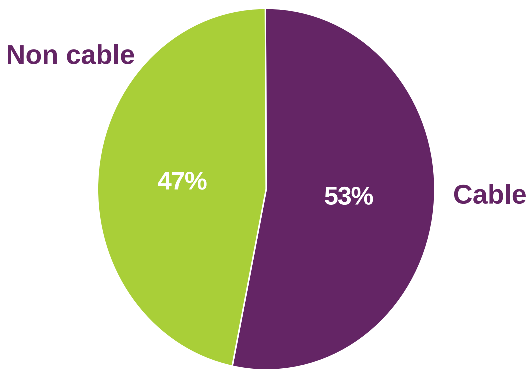
Figure 59: Decision-maker on household finances



Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

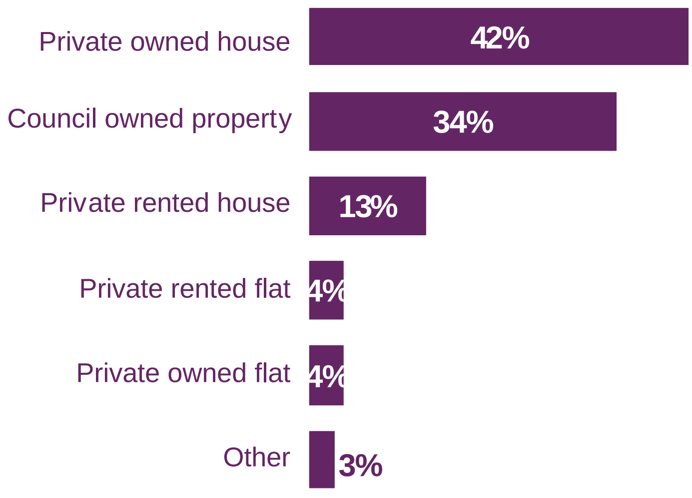
Figure 60: Urban/Rural-Non cable/Cable





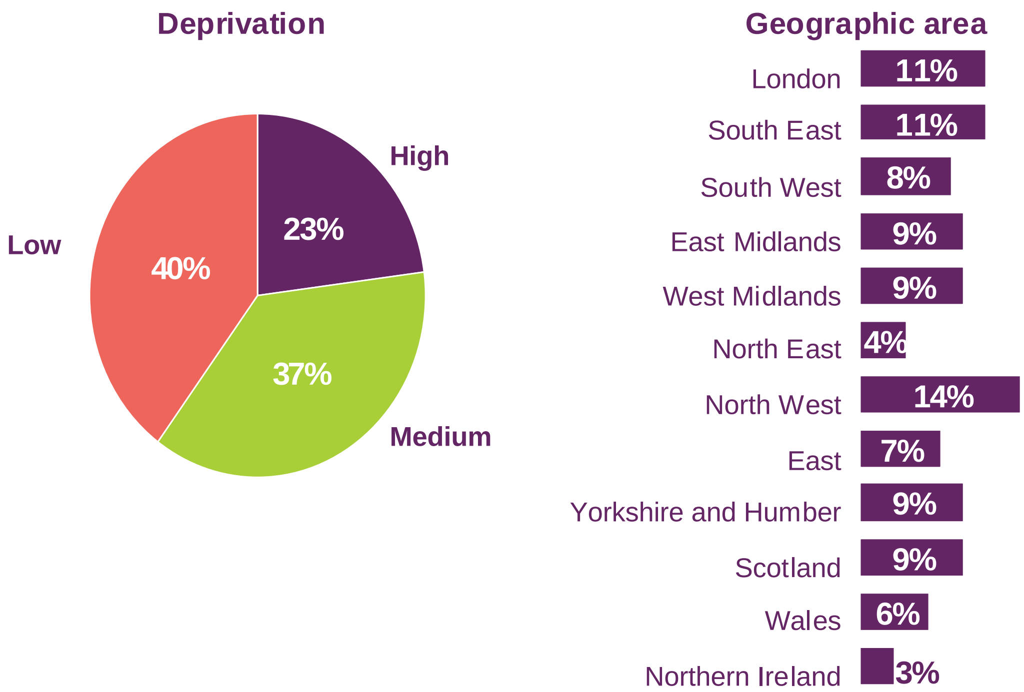
Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 61: Type of property



Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Figure 62: Deprivation/Geographic area



Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

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Annex 3

Questionnaire

Ipsos MORI/J35414 Questionnaire No: Serial No CARD 1
1-5 OUO (6-9)

Ofcom Non-Broadband Survey 2009
FINAL

Sample Point Number:
( ) ( ) ( )
Sample point name:

Sampling Point Summary:
CABLE (SINGLE CODE) OUO

Cable Coverage	1
Non Cable Coverage	2

URBAN/RURAL (SINGLE CODE) OUO

Cities/large towns – urban- GB	1
Medium Size towns – urban- GB	2
Small towns – urban- GB	3
Rural - GB	4
Urban - NI	5
Rural - NI	6

DEPRIVATION (SINGLE CODE)

Low Deprivation OUO	1
Medium Deprivation OUO	2
High Deprivation OUO	3

GEOGRAPHIC AREA (Government Region) (SINGLE CODE)

London	1
South East	2
South West	3
East Midlands	4
West Midlands	5
North East	6
North West	7
East of England	8
Yorkshire & Humber	9
Scotland	0
Wales	X
Northern Ireland	Y

Gender

Male	1
Female	2

WRITE IN & CODE EXACT AGE

Exact Age [ ] [ ]

16-17	1
18-24	2
25-34	3
35-44	4
45-54	5
55-64	6
65-74	7
75+	8

Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature:..

Interviewer Name (CAPS):............................

....

Interviewer Number:

[ ] [ ] [ ] [ ] / [ ]

Day of Interview 1 2 3 4 5 6 7
(Mon) (Thur) (Sun)

Date of Interview: [ ] [ ] / [ ] [ ] /09

Length of Interview: [ ] [ ] (minutes)

Respondent is: SINGLE CODE

Working full time (30hrs/week+)	1
Working part time (8-29hrs/week)	2
Not working (i.e. under 8hrs/week) - retired	3
Not working (i.e. under 8hrs/week) - unemployed (registered/not registered but looking for work)	4
Not working (i.e. under 8hrs/week) - student	5
Not working (i.e. under 8hrs/week) - looking after home/family	6
Not working (i.e under 8hrs/week) - disabled	7
Not working (i.e. under 8hrs/week) - other	8
Don't know	9

- **Total number in household (including respondent and any children)**

Number of children in household (Under 18)

INTERVIEWER RECORD START TIME [ ][ ] Hours [ ][ ] Mins

Good morning/afternoon/evening. My name is … I am calling on behalf of Ipsos MORI, the market research company. We are conducting a special survey on behalf of Ofcom, the regulator for the UK communications industry. Ofcom is very interested in hearing your views on a variety of things including the internet. The interview will take about 30 minutes.

ASK ALL

Q1 - **Do you personally have ACCESS to the internet at HOME if you want it (via any device, e.g. PC, mobile phone etc)?** SINGLE CODE ONLY -

Yes – personally have access at home	1	
No personally do not have access at home	2	SKIP TO Q3
Don't know	3	SKIP TO Q3

ASK WHO HAVE ACCESS TO INTERNET AT HOME (CODE 1 AT Q1)

Q2 - **And how do you personally access the internet at home.** CODE AS APPROPRIATE. MULTI CODE OK -

Computer and fixed line phone/broadband/WiFi	1	CLOSE
Computer and a dial-up connection on a fixed line phone	2	
Computer and mobile dongle (plug in device) connection	3	
Through mobile phone ONLY	4	CONTINUE SINGLE CODE 4
Don't know	5	CLOSE

ASK ALL WHO DO NOT ACCESS THE INTERNET AT HOME (CODE 2 OR 3 AT Q1)

Q3 - **Does anyone in your household have access to the internet at HOME?** -

- SINGLE CODE ONLY

Yes	1
No	2
Don't know	3

ASK ALL

Q4 - SHOWCARD A (R) **Which of the following, if any, types of television broadcasts does your household receive?** MULTI CODE OK. -

Terrestrial TV only (Channels 1-4/1-5 only)	1
Cable TV (through Virgin Media – previously NTL and Telewest)	2
Satellite TV (Sky)	3
Freeview TV (through a set-top box or digital television set)	4
Other	5
None of these/No TV in household	6
Don't know	7

ASK ALL

Q5 SHOWCARD B (R) **Which of the following technologies, if any, do you personally have access to in your home at the moment?** MULTI CODE OK

A fixed-line phone	1
A mobile phone	2
A teletext TV set	3
Video games console such as Sega, Nintendo, Sony Playstation or Microsoft Xbox	4
An MP3 player/iPod	5
None of these	6
Has all items	7
Don't know	8

ASK ALL

Q6 - **Do you personally have access to a computer or laptop at home that works?** SINGLE CODE ONLY -

Yes	1
No	2
Don't know	3

ASK ALL

Q7 SHOWCARD C (R) **Overall, how much experience do you have using a computer?** SINGLE CODE ONLY

Use daily at work/place of study/home/elsewhere	1
Use at least once a week at work/place of study/home/elsewhere	2
Use rarely	3
I have used a computer a few times in my life	4
I used to use a computer but don't anymore	5
I have never used a computer	6
Don't know	7

ASK ALL WHO HAVE USED A COMPUTER (CODES 1 TO 5 AT Q7)
Q8 SHOWCARD D (R) **And how confident, if at all, would you say you are at using a computer?** SINGLE CODE ONLY

Very confident	1
Fairly confident	2
Not very confident	3
Not at all confident	4
Don't know	5

ASK ALL
Q9 1. .... SHOWCARD E (R) **Here are a series of statements people have said about their attitudes to technology. To what extent do you agree or disagree with each?** READ OUT. SINGLE CODE FOR EACH

	Strongly agree	Tend to agree	Neither nor	Tend to disagree	Strongly disagree	Don't know / No opinion
I try to keep up with technology	1	2	3	4	5	6
Technology has no part to play in my life	1	2	3	4	5	6
I never really feel comfortable with new technology products and services	1	2	3	4	5	6
I am confident that I can work any new technology product that comes along	1	2	3	4	5	6
I am quite happy to let someone else take charge of new technologies for me	1	2	3	4	5	6
When using technology I worry I might break something	1	2	3	4	5	6
The pace of change of technology is too fast for me	1	2	3	4	5	6
I am as knowledgeable about new technology as the next person	1	2	3	4	5	6
I encourage my friends and family to make better use of technology	1	2	3	4	5	6

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ASK ALL

Q10 SHOWCARD F (R) **Using the categories on this card, can you tell me how much you feel you know about the internet (World Wide Web).** SINGLE CODE ONLY

NOTE TO INTERVIEWER. IF CODE 5, PLEASE CLARIFY THAT SHOULD NOT BE CODE 4.

I know a lot about the internet	1	
I know a fair amount	2	
I know just a little	3	
I have heard of the internet, but know almost nothing about it	4	
I have never heard of the internet	5	SKIP TO VIDEO CLIP
Don't know	6	

ASK ALL AWARE OF THE INTERNET (CODES 1 TO 4 OR 6 AT Q10)

Q11 2. .... SHOWCARD G (R) **Here are a series of statements people have said about their attitudes to the internet. To what extent do you agree or disagree with each?** READ OUT. SINGLE CODE FOR EACH

	Strongly agree	Tend to agree	Neither nor	Tend to disagree	Strongly disagree	Don't know / No opinion
I am excited about the internet	1	2	3	4	5	6
The internet is too dangerous for children to use	1	2	3	4	5	6
It is important for children to learn how to use the internet	1	2	3	4	5	6
The internet helps people to keep in touch with each other	1	2	3	4	5	6
The internet is a valuable source of information and learning	1	2	3	4	5	6
The internet means people do not communicate enough face-to-face	1	2	3	4	5	6
The internet makes everyday life easier for people	1	2	3	4	5	6
There is too much immoral content on the internet	1	2	3	4	5	6

ASK ALL AWARE OF THE INTERNET (CODES 1 TO 4 OR 6 AT Q10)
Q12 **Overall, what would you say people use the internet for?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE

For work	1
For finding out information (e.g. travel, news, weather, general information, etc)	2
For communicating with others (e.g. email, chat rooms, blogs, instant messaging, VOIP, etc)	3
For entertainment (e.g. watching TV, videos, music, etc)	4
For shopping	5
For banking or paying bills	6
For socialising (dating, social network sites, etc)	7
For education	8
Other (PLEASE WRITE IN)	9
Don't know	10

ASK ALL AWARE OF THE INTERNET (CODES 1 TO 4 OR 6 AT Q10)
Q13 SHOWCARD H (R) **Which of the following statements describes your personal experiences with the internet?** SINGLE CODE ONLY

I use the internet everyday	1
I use the internet at least once a week	2
I use the internet at least once a month	3
I rarely use the internet – once or twice a year	4
I have only ever used the internet once or twice in my life	5
I have never used the internet	6
I have used the internet in the past, but I don't any more	7
Don't know	8

ASK ALL WHO USE THE INTERNET (CODES 1 TO 4 AT Q13)
Q14 **Which places or types of places do you access the internet?** MULTI CODE OK

Work	1
Family / Friend / Neighbour's house	2
Internet café	3
Library	4
School/University/College	5
Other (PLEASE WRITE IN)	6
Don't know	7

ASK ALL WHO USE THE INTERNET (CODES 1 TO 4 AT Q13)
Q15 3. .... SHOWCARD I (R) **And which of the following activities, if any, do you do when you use the Internet?** MULTI CODE OK. **Please just read out the letters which apply.** -

A	For work, job or business	1
B	For school, college, university homework etc	2
C	Sending and receiving email	3
D	News and Weather information	4
E	Finding out information on public services provided by national or local government	5
F	Online banking	6
G	Online shopping (anything)	7
H	Buy and sell goods online (e.g. ebay)	8
I	Using online chat rooms, blogging, instant messaging, etc	9
J	Using social network sites (e.g. facebook, MySpace, etc)	10
K	For my hobbies and interests	11
L	Finding out information on travel/holidays/what's on in local area	12
M	Watching TV programmes or films (e.g. BBC i-player, 4 on demand, etc	13
N	Watching video clips (e.g. You Tube, etc)	14
O	Listening to the radio/music/down-loading music	15
P	General searching information (e.g. surfing)	16
Q	Playing games online	17
	Other (PLEASE WRITE IN)	18
	None of these	19
	Don't know	20

ASK ALL WHO NO LONGER USE THE INTERNET (CODE 7 AT Q13)
Q16 **You said you no longer use the internet. Which places or types of places did you use to access the internet?** MULTI CODE OK

Work	1
Home	2
Family / Friend / Neighbour's house	3
Internet café	4
Library	5
School/University/College	6
Other (PLEASE WRITE IN)	7
Don't know	8

ASK ALL WHO NO LONGER USE THE INTERNET (CODE 7 AT Q13)
Q17 **And why do you no longer use the internet?** MULTI CODE OK. PROBE FULLY. CODE - AS APPROPRIATE

It was too expensive	1
I have moved job	2
I have retired	3
I have lost my job	4
I have left school/university/college	5
I've moved house	6
My computer/PC broke	7
My connection at home was cut off	8
I didn't like it	9
I didn't use it enough at home	10
Other	11
Don't know	12

ASK ALL WHO DO NOT USE THE INTERNET (CODES 4 TO 7 AT Q13)
Q18 **Do you know anyone, who regularly accesses the internet?** MULTI CODE OK

Yes, family	1
Yes, friends	2
Yes, neighbour	3
Yes, other (PLEASE WRITE IN)	4
No	5
Don't know	6

ASK ALL WHO DO NOT USE THE INTERNET (CODES 4 TO 7 AT Q13)
Q19 **How often, if at all, do you ask someone to do something or look for information on the internet for you?** SINGLE CODE ONLY

At least once a week	1
At least once a month	2
A few times a year	3
Less often	4
Never	5
Don't know	6

ASK ALL WHO ASK PEOPLE TO DO THINGS ON THE INTERNET FOR THEM (Q19 CODES 1 TO 4)
Q20 **And who do you ask to do things on the internet for you?** MULTI CODE OK

Children/Grandchildren	1
Other family	2
Friends	3
Neighbours	4
Work colleagues	5
People at the Library	6
People at internet café(s)	7
Other (PLEASE WRITE IN)	8
Don't know	9

ASK ALL
Q21 **Why do you not currently have the internet at home?**
MULTI CODE OK. PROBE FULLY – **'What else'.** CODE AS APPROPRIATE

COST	
It is too expensive	1
I can't justify the cost of it / I need other things more	2
I don't want to sign a 12 month contract	3
I do not have a computer	4
I can't afford a computer	5
ACCESS	
I don't have a landline telephone	6
I am planning on moving house	7
I am satisfied with using the internet at work/elsewhere	8
I am satisfied with using the internet on my mobile phone	9
I am not sure if it is available in my area	10
I don't want the children to access the internet	11
INTEREST & USAGE	
I am not interested in the internet	12
I would not use it enough	13
I don't need it	14
I don't have time to use it/I'm too busy	15
It's not for people of my age	16
KNOWLEDGE/CONCERNS	
I don't really know what it does	17
I don't know where to get it from	18
I don't know how to use a computer	19
I'm not sure what I would do if it breaks	20
I am worried about security / ID theft / Bank fraud/privacy issues	21
There is too much immoral content on the internet	22
OTHER	
Other (PLEASE WRITE IN)	23
Don't know	24

ASK ALL
Q22 SHOWCARD J (R) **Here are some reasons why people do not have the internet at home. Please tell me all the reasons which apply to you.** MULTI CODE OK. PROBE FULLY. **'What else'**. CODE AS APPROPRIATE. **Please just read out the letters which apply.**

COST		
	It is too expensive	1
	I can't justify the cost of it / I need other things more	2
	I don't want to sign a 12 month contract	3
	I do not have a computer	4
	I can't afford a computer	5
ACCESS		
	I don't have a landline telephone	6
	I am planning on moving house	7
	I am satisfied with using the internet at work/elsewhere	8
	I am satisfied with using the internet on my mobile phone	9
	I am not sure if it is available in my area	10
	I don't want the children to access the internet	11
INTEREST & USAGE		
	I am not interested in the internet	12
	I would not use it enough	13
	I don't need it	14
	I don't have time to use it/I'm too busy	15
	It's not for people of my age	16
KNOWLEDGE/CONCERNS		
	I don't really know what it does	17
	I don't know where to get it from	18
	I don't know how to use a computer	19
	I'm not sure what I would do if it breaks	20
	I am worried about security / ID theft / Bank fraud/privacy issues	21
	There is too much immoral content on the internet	22
OTHER		
	Other (PLEASE WRITE IN)	23
	Don't know	24

ASK ONLY IF Q22 IS MULTI CODED
Q23 SHOWCARD J (R) AGAIN **And which is the MAIN reason why you do not have the internet at home.** SINGLE CODE ONLY. **Please just read out the letters which apply.**

COST		
A	It is too expensive	1
B	I can't justify the cost of it / I need other things more	2
C	I don't want to sign a 12 month contract	3
D	I do not have a computer	4
E	I can't afford a computer	5
ACCESS		
F	I don't have a landline telephone	6
G	I am planning on moving house	7
H	I am satisfied with using the internet at work/elsewhere	8
I	I am satisfied with using the internet on my mobile phone	9
J	I am not sure if it is available in my area	10
K	I don't want the children to access the internet	11
INTEREST & USAGE		
L	I am not interested in the internet	12
M	I would not use it enough	13
N	I don't need it	14
O	I don't have time to use it/I'm too busy	15
P	It's not for people of my age	16
KNOWLEDGE/CONCERNS		
Q	I don't really know what it does	17
R	I don't know where to get it from	18
S	I don't know how to use a computer	19
T	I'm not sure what I would do if it breaks	20
U	I am worried about security / ID theft / Bank fraud/privacy issues	21
V	There is too much immoral content on the internet	22
OTHER		
	Other (PLEASE WRITE IN)	23
	Don't know	24

ASK ALL WHO CODE 12, 14 OR 16 AT Q23
Q24 - **Why do you say that?** WRITE IN AND PROBE FULLY -

ASK ALL
Q25 - **Overall, do you think you are missing any benefits because you do not have internet access at home? What are they?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE -

Convenience of doing work/study at home	1
Ability to communicate with friends and family	2
Ability to communicate with friends and family who live far away/overseas	3
Ability to buy things online	4
Ability to do online banking	5
Children are missing out on educational resource	6
Feel I miss out a lot as my friends/family have the internet	7
Miss out on latest news (international, national or local)	8
Miss out on live/up to date sports news/results	9
Can't join social network sites	10
Miss out on entertainment (e.g. watching TV, playing games online, downloading music, etc)	11
Other (PLEASE WRITE IN)	12
No – Nothing	**13**
Don't know	14

ASK ALL
Q26 - **In the last 12 months, have you considered or thought about getting the internet at home?** PROBE IF YES AND CODE AS APPROPRIATE. SINGLE CODE ONLY -

Yes – thought about and looked into it	1
Yes – thought about but did not look into it	2
No – have not thought about it	3
Don't know	4

ASK ALL
Q27 - SHOWCARD K (R) **Overall, how likely, if at all, are you to get the internet at home in the next six months?** SINGLE CODE ONLY -

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

ASK ALL LIKELY TO GET THE INTERNET IN NEXT SIX MONTHS (CODES 1 OR 2 AT Q27)
Q28 - **What are the main reasons why you are planning on getting the internet in the next six months?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE -

Want to keep up with technology/felt I was getting left behind	1
Friends/family recommended it	2
For my children	3
Need it for work	4
Need it for studying	5
Have it at work, now want it at home	6
For online shopping/services	7
For online banking/paying bills	8
To communicate with friends and family	9
For entertainment purposes	10
For information/finding out things	11
Used it for first time and liked it	12
I now have a computer	13
Now have a landline telephone	14
Have saved for it/Now have enough money	15
The internet is cheaper now	16
Have got a grant from local council/school/other	17
Other (PLEASE WRITE IN)	18
No particular reason	**19**
Don't know	20

ASK ALL LIKELY TO GET THE INTERNET IN NEXT SIX MONTHS (CODES 1 OR 2 AT Q27)
Q29 - **Do you have any remaining concerns about getting the internet? If so, what are they?** WRITE IN AND PROBE FULLY -

Yes (PLEASE WRITE IN)	1
No, none	2
Don't know	3

ASK ALL
Q30 **In your household, who generally makes the decisions about household finances or spending?** SINGLE CODE ONLY

Me alone	1
Me jointly	2
Another person	3
Don't know	4

ASK ALL
Q31 **Generally what influences you when making decisions about purchasing new products?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE

Word of mouth – friends and family	1
Word of mouth – workplace	2
Elders in your community	3
Internet	4
TV advertising	5
Radio advertising	6
Advertising you see in the streets	7
Information at local stores	8
Other	9
Don't know	10

ASK ALL
Q32 **If you wanted advice on getting the internet at home, who would you ask?** -
MULTI COKE OK

Children/Grandchildren	1
Other family members	2
Friends	3
Neighbours	4
Equipment manufacturers	5
Colleagues	6
Library	7
Other	8
Don't know	9

ASK ALL
Q33 4. .... **If you were to get the internet at home tomorrow, can you tell me all the things (e.g. equipment/services) you think you would need to achieve this?** MULTI CODE OK. PROBE FULLY -

Computer/PC / Laptop	1
Modem	2
Mobile dongle	3
WiFi receiver	4
Fixed telephone line	5
Internet Service Provider (ISP)	6
Other	7
Don't know / Not sure	8

I am now going to ask you about the cost of setting up the internet at home. Generally, some of the things you need are a computer, and a monthly subscription to an internet service provider.

ASK ALL WHO DO NOT HAVE A COMPUTER AT HOME (CODE 2 OR 3 AT Q6)
Q34 **If you were to buy a computer or laptop tomorrow for your home, how much do you think one would cost. Please think about a standard computer/laptop only?** SINGLE CODE ONLY

Less than £50	1
£50 - £100	2
£101 to £150	3
£151 to £200	4
£201 to £250	5
£251 to £300	6
£301 to £350	7
£351 to £400	8
£401 to £450	9
£451 to £500	10
£501+	11
Don't know	12

ASK ALL
Q35 **And how much do you think the Internet costs per month i.e. the monthly subscription charge?** SINGLE CODE ONLY -

Less than £2.50	1
£2.50 to £5	2
£5.01 to £7.50	3
£7.51 to £10	4
£10.01 to £15	5
£15.01 to £20	6
£20.01 to £25	7
£25.01 to £30	8
£30.01 to £50	9
£50.01+	10
Depends on supplier	11
Don't know / Not sure	12

SHOW INTERNET VIDEO CLIP

We are now going to show you a short video clip about the internet and what it can do. It will take about 3 to 4 minutes. We'd then like to ask you some more questions about the internet and what you saw.

ASK ALL
Q36 **What did you learn that was new to you, if anything, about Internet?** MULTI CODE OK. PROBE FULLY -

The range of different sites	1
All the different things that you can do	2
How easy it was to use	3
How interesting it looked	4
How easy it was to connect to the internet	5
That I could use it	6
Other (PLEASE WRITE IN)	7
No - Nothing	8
Don't know	9

ASK ALL
Q37 SHOWCARD L (R) **Overall, did the video give you a more positive or negative impression about the internet, or did it not change your views about the internet?** -

A lot more positive	1
Slightly more positive	2
No change	3
Slightly more negative	4
A lot more negative	5
Don't know	6

5. .... ASK ALL

Q38 SHOWCARD M (R) **Which activities and types of websites covered in the video, if any, are of interest to you?** MULTI CODE OK. **Please just read out the letters which apply.** -

A	News & Weather	1
B	General searching for information (e.g. surfing)	2
C	Searching for local services (e.g. yell.com)	3
D	Finding out information on public services from local or national government (e.g. NHS)	4
E	Job information	5
F	Finding out what's on in your local area (e.g. cinema listings)	6
G	Searching for holiday/travel information	7
H	Online shopping	8
I	Price comparison websites	9
J	Online banking	10
K	Sending and receiving emails	11
L	Social network sites (e.g. facebook)	12
M	Watching TV programmes/video clips	13
N	For my hobbies and interests	14
	None, nothing	15
	Don't know	16

ASK ALL

Q39 - SHOWCARD N (R) **You said previously that you would be** (insert answer from Q27) **to get the internet at home in the next six months. After seeing this clip, how likely would you now be to take up Internet in the next six months?** SINGLE CODE ONLY -

OR IF SKIPPED FROM Q10 OR DON'T KNOW AT Q27

- SHOWCARD N (R) **After seeing this clip, how likely would you now be to take up Internet in the next six months?** SINGLE CODE ONLY

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

We are now going to ask a few more questions about the equipment for getting the internet at home.

ASK ALL

Q40 - SHOWCARD O **Overall, there are two main ways for connecting to the internet. You need a computer for both of them. The two ways are either:** -

- **a) Through a fixed telephone line at your home, which you connect to your computer. This offers a stable and fast internet connection.** NOTE TO INTERVIEWER – IF NECESSARY REASSURE THAT YOU CAN STILL USE YOUR TELEPHONE LINE AT THE SAME TIME TO MAKE AND RECEIVE CALLS
- **or**
- **b) Through a device that you plug in to your computer. You do not need a fixed telephone line in your home. This device allows you to access the internet at home, but also outside the home as well, as long as there is connection/signal – a bit like a mobile phone. However, the connection is slower and not as stable as a fixed telephone line.**
- **Both methods are roughly the same price. Which method, if any, is most appealing to you?** SINGLE CODE ONLY

Fixed telephone line connection	1	ASK Q41
Plug in device (mobile connection)	2	ASK Q42
Both equal	3	SKIP TO Q43
Neither - do not want the internet at home	4	SKIP TO Q43
Don’t know	5	SKIP TO Q43

ASK ALL WHO PREFER FIXED TELEPHONE LINE INTERNET OPTION (CODE 1 AT Q40)

Q41 **Why do you think you would prefer the fixed telephone line internet connection?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE -

It’s easier	1
Stable connection	2
Faster connection	3
Not interested in / do not need internet connection outside the home	4
Don’t have a laptop computer	5
I have a fixed telephone line already	6
I’m already planning on getting a fixed telephone line	7
Other (PLEASE WRITE IN)	8
Not sure / No particular reason	**9**
Don’t know	10

ASK ALL WHO PREFER MOBILE PLUG IN INTERNET OPTION (CODE 2 AT Q40)
Q42 **Why do you think you would prefer the mobile plug in device internet connection?** -
MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE

It is easier	1
I live in rented accommodation/not allowed fixed telephone line	2
I don't have a fixed telephone line	3
I can't afford a fixed telephone line	4
I'm going to/planning on moving home soon/don't know how long I will be living here	5
I want to access the internet out side the home as well	6
I already have/planning on getting a laptop computer	7
Other (PLEASE WRITE IN)	8
Not sure / No particular reason	**9**
Don't know	10

ASK ALL
Q43 - SHOWCARD P **When getting the internet at home, you also have a choice of whether you sign up to a contract, usually for 12 months. Or there is a pre-pay/pay as you go option - just like there is with mobile phones.** -

-

- **Generally the contract option is cheaper per month at around £10 a month. The pre-pay/pay as you go option is generally more expensive at around £12 a month.**

-

- **With the pre-pay / pay as you go option you would also need to pay a one-off internet connection fee of around £50. But with this option you are not tied-in to a contract.**

- **Which of these methods, if any, is most appealing to you?** SINGLE CODE ONLY

Contract	1	ASK Q45
Pre-pay/pay as you go	2	ASK Q46
Both equal	3	SKIP TO Q47
Neither – do not want the internet at home	4	SKIP TO Q48
Neither – both too expensive	5	ASK Q44
Don't know	6	ASK Q44

ASK ALL WHO CODE 5 OR 6 AT Q43
Q44 - **If both internet options were the same price, which method, if any, is most appealing to you?** SINGLE CODE ONLY -

Contract	1	GO TO Q47
Pre-pay/pay as you go	2	GO TO Q49
Neither – do not want the internet at home	3	GO TO Q48
Don't know	4	GO TO Q47

ASK ALL WHO PREFER CONTRACT INTERNET OPTION (CODE 1 AT Q43)
Q45 **Why do you think you would prefer the contract option for connecting to the internet?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE -

It's cheaper each month	1
I don't mind signing up for 12 months	2
Don't want to pay internet connection fee	3
Other (PLEASE WRITE IN)	4
Not sure / No particular reason	5
Don't know	6

ASK ALL WHO PREFER PRE PAY/PAY AS YOU GO OPTION (CODE 2 AT Q43)
Q46 **Why do you think you would prefer the pre-pay/pay as you go option for connecting to the internet?** MULTI CODE OK. PROBE FULLY. CODE AS APPROPRIATE -

Can try the internet without committing to a 12 month contract	1
It would mean I can manage my finances better each month	2
It is more flexible for me	3
I have a pay as you go mobile phone	4
I have a poor credit rating / would not be able to get contract option	5
I don't have a bank account	6
Other (PLEASE WRITE IN)	7
Not sure / No particular reason	8
Don't know	9

ASK ALL WHO MENTION CONTRACT OPTION / DON'T KNOW (CODES 1 OR 3 AT Q43 OR CODES 1 OR 4 AT Q44)
Q47 SHOWCARD Q (R) **And how likely would you be to pay £10 a month for the contract option to have the internet at your home?** -

Please note that this would be on top of the cost of a fixed line telephone line which you also need.

SINGLE CODE ONLY

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

ASK ALL UNLIKELY PAY £10 A MONTH INTERNET FEE (CODES 3 TO 5 AT Q47 OR CODE 3 AT Q44 + code 4 at Q43)

Q48 **How much, if anything, would you be willing to pay each month for a contract internet connection?** SINGLE CODE ONLY

Nothing – I don't want the internet	1
Nothing - I can't afford it	2
Less than £2.50	3
£2.50 to £5	4
£5.01 to £7.50	5
£7.51 to £10	6
Don't know	7

ASK ALL WHO MENTION PRE-PAY / PAY AS YOU GO OPTION (CODES 2 OR 3 AT Q43 OR CODE 2 AT Q44)

Q49 SHOWCARD Q (R) AGAIN **And how likely would you be to pay £12 a month for the pre-pay / pay as you go option to have the internet at your home?** -
SINGLE CODE ONLY

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

ASK ALL UNLIKELY PAY £12 A MONTH INTERNET FEE (CODES 3 TO 5 AT Q49).

Q50 **How much, if anything, would you be willing to pay each month for pre-pay / pay as you go internet?** SINGLE CODE ONLY

Nothing – I don't want the internet	1
Nothing - I can't afford it	2
Less than £2.50	3
£2.50 to £5	4
£5.01 to £7.50	5
£7.51 to £10	6
£10.01 to £12	7
Don't know	8

ASK ALL WHO MENTION PRE-PAY / PAY AS YOU GO OPTION (CODES 2 OR 3 AT Q43 OR CODE 2 AT Q44)

Q51 SHOWCARD Q (R) AGAIN **And how likely would you be to pay the £50 one-off internet connection fee for the pre-pay / pay as you go option to have the internet at your home?** -
SINGLE CODE ONLY

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

ASK ALL UNLIKELY PAY £50 INTERNET CONNECTION FEE (CODES 3 TO 5 AT Q51).
Q52 **How much, if anything, would you be willing to pay for the one-off internet connection fee for pre-pay / pay as you go internet?** SINGLE CODE ONLY

Nothing – I don't want the internet	1
Nothing - I can't afford it	2
Less than £10	3
£10 to £15	4
£15.01 to £20	5
£20.01 to £25	6
£25.01 to £30	7
£30.01 to £35	8
£35.01 to £40	9
£40.01 to £45	10
£45.01 to £50	11
Don't know	12

ASK ALL WHO DO NOT HAVE ACCESS TO A PC/COMPUTER AT HOME (CODE 2 OR 3 AT Q6)
Q53 SHOWCARD Q (R) AGAIN **You can currently buy a new computer/laptop for £250. How likely would you be to buy a computer/laptop for your home at this price?** SINGLE CODE ONLY -

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

ASK ALL UNLIKELY TO BUY A COMPUTER FOR £250 (CODES 3 TO 5 AT Q53)
Q54 **How much, if anything, would you be willing to pay for a new computer/laptop?** SINGLE CODE ONLY

Nothing – I don't want a computer/internet	1
Nothing -I can't afford one	2
Less than £50	3
£50 - £75	4
£75.01 to £100	5
£100.01 to £125	6
£125.01 to £150	7
£150.01 to £175	8
£175.01 to £200	9
£200.01 to £225	10
£225.01 to £250	11
Don't know	12

ASK ALL WHO MENTION COST TO EXPENSIVE OR NOT INTERESTED (CODES 1 OR 2 AT ANY Q48, Q50, Q52 OR Q54)

Q55 SHOWCARD Q (R) AGAIN **How likely would you be to get the internet at home if you could get a computer and internet access for free?** SINGLE CODE ONLY -

Very likely	1
Likely	2
Unlikely	3
Very unlikely	4
Don't know	5

ASK ALL

Q56 SHOWCARD FOR EACH OPTION R TO X **Here is a list of options which could help people get the internet. For each option, could you tell me how important it is in helping you get the internet at home? Please use a score from 1 to 10, where 1 is not at all important and 10 is very important.** ROTATE ORDER. SINGLE CODE FOR EACH

	1-2	3-4	5-6	7-8	9-10	Don't know / No opinion
SHOWCARD R **Half price computer** You would get a half price voucher to help cover the cost of a £250 computer	1	2	3	4	5	6
SHOWCARD S **Discount on the monthly cost for the internet** Discounted to £5 monthly fee	1	2	3	4	5	6
SHOWCARD T **Pre-pay internet via a fixed telephone line** - No need to sign up to a contract - £50 one-off internet connection fee - £12 per month subscription for internet access - Each month you can stop or restart payments as you choose	1	2	3	4	5	6
SHOWCARD U **Easy to use internet device** - Instead of a computer, you could buy this device - It costs roughly the same as a computer - It has a touch screen and is easy to use - The internet opens up automatically when you switch it on - There is also a free telephone helpline	1	2	3	4	5	6
SHOWCARD V **Safe internet environment** - You get free access to a range of safe sites only - All sites are approved for safe suitable content for all ages	1	2	3	4	5	6

- But you do not get access to everything on the internet						
SHOWCARD W **Free training on how to use the internet**	1	2	3	4	5	6
SHOWCARD X **Free telephone helpline for technical support**	1	2	3	4	5	6

ASK ALL
Q57 SHOWCARD Y (R) -

a) **Overall, which option would you say is the most important for helping you to get the internet at home?**
b) **And the second most important**
c) **And the third most important**

SINGLE CODE FOR EACH

	FIRST	SECOND	THIRD
Half price computer	1	1	1
Discount on the monthly cost for the internet	2	2	2
Pre-pay internet via a fixed telephone line	3	3	3
Easy to use internet device	4	4	4
Safe internet environment	5	5	5
Free training on how to use the internet	6	6	6
Free telephone helpline for technical support	7	7	7
None – I do not want the internet at home	8	8	8
Don't know / Not sure	9	9	9

ASK ALL WHO DO NOT WANT THE INTERNET AT HOME (CODES 8 OR 9 AT Q57a)
Q58 - **What else, if anything, could be done to encourage you to get the internet at home?** WRITE IN AND PROBE FULLY -

____
____
____
____
____

Nothing – I do not want the internet at home	2

ASK ALL WHO DO NOT WANT THE INTERNET AT HOME (CODE 8 AT Q57a)
Q59 SHOWCARD Z (R) **You have said that you are not interested in getting the internet at home. But how interested, if at all, are you in using the internet at any other places/locations, such as an internet café, library, work, place of study, etc?** SINGLE CODE ONLY -

Very interested	1
Fairly interested	2
Not very interested	3
Not at all interested	4
Don't know	5

ASK ALL
Q60 SHOWCARD AA (R) **To what extent do you agree or disagree that everyone should have the internet at home if they want it?** SINGLE CODE ONLY -

Strongly agree	1
Tend to agree	2
Neither agree nor disagree	3
Tend to disagree	4
Strongly disagree	5
Don't know	6

Ipsos MORI

DEMOGRAPHICS

QA - SHOWCARD BB **Could you please take a look at the options shown on this card and let me know which applies to you?** SINGLE CODE ONLY -

Married/ living as married	1
Single	2
Widowed, divorced or separated	3
Refused	4

-
-
QB - **Who do you live with? Please only include adults over the age of 18** -

On own	1
Partner	2
Mum/Dad	3
Children aged 18+	4
Other family	5
Friends	6
Other students	7
Other adults	8
Other	9

-
-
QC - **Do you have any children under the age of 18 living at home with you?** -

Yes	1
No	2

-
-
- ASK IF CHILDREN IN HOUSEHOLD
QD **What ages are your children?**
MULTI CODE OK

0-4	1
5-7	2
8-10	3
11-14	4
15-16	5
17-18	6
Don't know	7

-
-
QE - **What type of property do you live in?** -

Private owned (including mortgage) house	1
Private owned (including mortgage) flat	2
Private rented house	3
Private rented flat	4
Council owned property	5
Student accommodation	6
Other	7

-

-

-

QF SHOWCARD CC **Which of the groups on this card do you consider you belong to?** SINGLE CODE ONLY

WHITE	
British	1
Irish	2
Any other white background (PLEASE WRITE IN)	3
MIXED	
White and Black Caribbean	4
White and Black African	5
White and Asian	6
Any other mixed background(PLEASE WRITE IN)	7
ASIAN OR ASIAN BRITISH	
Indian	8
Pakistani	9
Bangladeshi	10
Any other Asian background (PLEASE WRITE IN)	11
BLACK OR BLACK BRITISH	
Caribbean	12
African	13
Any other black background (PLEASE WRITE IN)	14
CHINESE	
Chinese	15
MIDDLE EASTERN	
Middle East, including Arabic	16
Iranian	17
Any other background (PLEASE WRITE IN)	18
Refused	19

-

-

QG SHOWCARD DD **What is your highest educational qualification which you have obtained?** SINGLE CODE ONLY

GCSE/O-level/CSE/ School Certificate or equivalent	1
Vocational qualifications (e.g. apprenticeship, NVQ, GNVQ etc)	2
A level/ Higher School Certificate/National Certificate/City and Guilds or equivalent	3
Bachelor Degree or equivalent	4
Masters/PhD/Higher National Certificate or equivalent	5
No formal qualifications	6
Still studying	7
Other	8
Don't know	9
Refused	0

-

-

Occupation of Chief Income Earner

Position/rank/grade

Industry/type of company

Quals/degree/apprenticeship

Number of staff responsible for

REMEMBER TO PROBE FULLY AND CODE FROM ABOVE

QH **Class**

A	1
B	2
C1	3
C2	4
D	5
E	6

-

-

QI SHOWCARD EE **Could you please give me the letter from this card for the group in which you would place your total household income from all sources, before tax and other deductions?** SINGLE CODE

	Per week	Per Year	
A	Up to £86	Under £4,500	1
B	£87 - £125	£4,500 - £6,499	2
C	£126 - £144	£6,500 - £7,499	3
D	£145 - £182	£7,500 - £9,499	4
E	£183 - £221	£9,500 - £11,499	5
F	£222 - £259	£11,500 - £13,499	6
G	£260 - £298	£13,500 - £15,499	7
H	£299 - £336	£15,500 - £17,499	8
I	£337 - £480	£17,500 - £24,999	9
J	£481 - £576	£25,000 - £29,999	0
K	£577 - £769	£30,000 - £39,999	X
L	£770 - £961	£40,000 - £49,999	Y
M	£962 - £1,441	£50,000 - £74,999	1
N	£1,442 - £1,922	£75,000 - £99,999	2
O	£1,923 or over	£100,000+	3
		Rather not say	4
		Don’t know	5

-

-

QJ - SHOWCARD FF **Which of these, if any, limit your daily activities or the work you can do? Just read out the letter or letters that apply?** MULTI CODE OK

A	Breathlessness or chest pains	1
B	Poor vision, partial sight or blindness	2
C	Difficulty in speaking or in communicating	3
D	Poor hearing, partial hearing or deafness	4
E	Cannot walk at all / use a wheelchair	5
F	Cannot walk far or manage stairs or can only do so with difficulty	6
G	Limited ability to reach	7
H	Mental health problems or difficulties	8
I	Dyslexia	9
J	Other illnesses or health problems which limit your daily activities or the work that you can do	10
	None	11
	Don’t know / refused	12

-

-

ASK ALL

QK **Any finally, Ofcom may wish to contact you in the future for research purposes. Would you be willing to be re-contacted?**

Yes	1
No	2

ASK ALL WILLING TO BE RE-CONTACTED (CODE 1 AT QK)

QL **Can you please tell me the telephone number which Ofcom can use to re-contact you for this purpose?**

WRITE IN Full tel. No	
No	1
Refused	2
Ex-directory	3

-
-
-

INTERVIEWER RECORD END TIME AFTER DEMOGRAPHICS

Hours		Mins	

THIS MUST BE THE LAST PAGE OF THE QUESTIONNAIRE AND MUST BE SINGLE SIDED

Ipsos MORI / J35414 Questionnaire No
1-5

Serial No
OUO (6-9)
CARD 1

Sample Point Number:

( ) ( ) ( )

Sample point name:

Interviewer Number:

( ) ( ) ( ) ( ) / ( )

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address:

Full Postcode

Do you have a fixed line telephone at home or a mobile phone, which you use for incoming and outgoing voice calls?

Yes WRITE IN Full tel. No	1
No	2
Refused	3
Ex-directory	4

Ipsos MORI

Annex 4

Crossbreaks

Overall heading	Column heading	Definitions
URBAN/RURAL	Urban	From sample
	Rural	
GEOGRAPHIC AREA	London	From sample
	South East	
	South West	
	East Midlands	
	West Midlands	
	North East	
	North West	
	East of England	
	Yorkshire & Humber	
	England	
	Scotland	
	Wales	
	Northern Ireland	
CABLE	Cable Coverage	From sample
	Non Cable Coverage	
DEPRIVATION	Low Deprivation	From sample
	Medium Deprivation	
	High Deprivation	
GENDER	Male	From quest
	Female	
AGE	16-24	From quest
	25-44	
	45-64	
	65-74	
	75+	
	25-34	
	35-44	
	45-54	
	55-64	
	Over 55+	
WORKING STATUS	Working - TOTAL	Code 1, 2
	Working Part Time	Code 2
	Not working - TOTAL	Codes 3, 4, 5, 6, 7, 8
	Retired	Code 3
	Unemployed	Code 4
	Not working - other	Codes 5, 6, 7, 8
EDUCATION LEVEL	School education	QG code 1 to 3
	Higher education	QG code 4 or 5

	Still studying	QG code 7
	No formal qualification	QG code 6
	Other	QG code 8
MARRIED/ SINGLE	Married/ living as married	QA Code 1
	Single	QA Code 2
	Widowed, divorced or separated	QA Code 3
ADULTS IN HOUSEHOLD	On own	QB Code 1
	With other adults	QB Codes 2 to 9
CHILDREN IN HOUSEHOLD	Yes	QC Code 1
	Yes young children ONLY (0 - 10 years)	QD codes 1 to 3 only
	Yes older children ONLY (11 - 18 years)	QD codes 4 to 6 only
	No	QC Code 2
TYPE OF PROPERTY	Council owned property	QE Code 5
	Private owned (including mortgage)	QE Codes 1+2
	Private rented	QE Codes 3+4
CLASS	AB	QH
	C1	
	C2	
	DE	
	ABC1	
	C2DE	
DISABILITIES	Yes	QJ CODES 1 to 10
	No	QJ CODE 11
ETHNICITY	White	QF CODE 1 to 3
	Non-white	QF CODES 4 to 18
HOUSEHOLD INCOME	Up to £11.5k	QI Codes 1 to 5
	£11.5k to £17.5k	QI Codes 6 to 8
	£17.5k+	QI Codes 9 to 15
INTERNET AWARENESS	A lot / a fair amount	Q10 Codes 1+2
	A little / heard of	Q10 Codes 3+4
	Never heard of	Q10 Code 5
INTERNET USAGE	Use daily	Q13 code 1
	At least once a week	Q13 code 2
	Less often	Q13 code 3/4
	Have used	Q13 code 5/7
	Non users (never/ once or twice in lives/ used in past)	Q13 code 5-7
	Users (at least once a year)	Q13 codes 1-4
	Regular users (use daily/at	Q13 Codes 1+2

	least once a week)	
REASONS WHY DON'T HAVE THE INTERNET - MAIN SEGMENT	Likely to purchase in next 6 months	Q27 codes 1-2
	It's too expensive (main)	(Q23 codes 1 to 6) and (Q27 codes 3-5)
	I don't have the knowledge or skills (main)	(Q23 code 17-20) and (Q27 codes 3-5)
	Financial exclusion (main)	It's too expensive or I don't have the knowledge or skills
	It's not for me (main)	((Q23 code 12, 16) or (Q23 code 13-15 and Q13 codes 5 to 8)) and (Q27 codes 3-5)
	I don't need it at home (main)	((Q23 codes 8-9) or (Q23 codes 13-15 and Q13 codes 1 to 4)) and (Q27 codes 3-5)
	Self exclusion (main)	It's not for me or I don't need it at home
	Other	Q23 codes 7, 10, 11, 21-23 and Q27 codes 3-5
REASONS WHY DON'T HAVE THE INTERNET - ANY	It's too expensive (any)	Q21/22 codes 1 to 6
	I don't have the knowledge or skills (any)	Q21/22 code 17-20
	Financial exclusion (any)	It's too expensive or I don't have the knowledge or skills
	It's not for me (any)	(Q21/22 code 12, 16) or (Q21/Q22 13-15 and codes 5 to 8 at Q13)
	I don't need it at home (any)	(Q21/22 codes 8-9) or (Q21/Q22 13-15 and codes 1 to 4 at Q13)
	Self exclusion (any)	It's not for me or I don't need it at home
	Other	Q21/22 codes 7, 10, 11, 21-23
HAVE CONSIDERED GETTING THE INTERNET	Yes – thought about and looked into it	Q26 Code 1
	Yes – thought about but did not look into it	Q26 Code 2
	No – have not thought about it	Q26 Code 3
TV ACCESS	Terrestrial only	Q4 Code 1 only
	Cable or Satellite	Q4 Codes 2 or 3
	Freeview/Other	Q4 Codes 4 or 5
	None/No TV	Q4 Code 6

FIXED/ MOBILE	Mobile only	Q5 Code 2, BUT NOT CODE 1
	Fixed + mobile	Q5 Code 1 + Code 2 + Code 7
	Fixed only	Q5 Code 1, BUT NOT CODE 2
	None	Q5 NOT CODE 1 OR 2 OR 7
PC AT HOME	Yes	Q6 Code 1
	No	Q6 Code 2
CONFIDENCE WITH A COMPUTER	Very/fairly confident	Q8 Codes 1+2
	Not very/not at all confident	Q8 Codes 3+4
PURCHASING DECISIONS	Respondent/Joint	Q30 Code 1 or 2
	Other	Q30 Code 3
LIKELIHOOD TO GET THE INTERNET IN NEXT 6 MONTHS	Yes	Q27 codes 1-2
	No	Q27 codes 3-5
LIKELIHOOD TO GET THE INTERNET - PRE VIDEO	Likely to get the Internet	Q27 codes 1/2
	Unlikely to get the Internet	Q27 codes 3/4
LIKELIHOOD TO GET THE INTERNET - POST VIDEO	Likely to get the Internet	Q39 codes 1/2
	Unlikely to get the Internet	Q39 codes 3/4
IMPACT OF VIDEO	More likely to get the internet	Q39 higher score than Q27
	Less likely to get the internet	Q39 lower score than Q27
	No change	Q39 same score as Q27
PROXY USERS	Non users with proxy access	Q13=5-8 and Q19 codes 1-4
	Non users without proxy access	Q13=5-8 and Q19 codes 5-6
WILLINGNESS TO PAY	Willing to pay full price	Q47 =1,2 OR Q49 1,2
	Willing to pay a lower price	Q48 = 3,4,5,6 OR Q50 = 3,4,5,6,7
	Not interested	Q48 = 1 AND Q50 = 1
	Can't afford it	Q48 = 2 AND Q50 = 2
	DK/ NA	Not any of the above
CORE RESISTORS	Yes	NOT ((q39 = 1 | q39 =

		2) & (q13 =1 | q13 =2 | q13 =3 | q13 =4) & ((((ANY(Q47,1,2)) | (ANY(Q48,3,4,5,6))) AND ((Q6 = 1) | (ANY(Q53,1,2)) | (ANY(Q54,3,4,5,6,7,8, 9,10,11)))) OR (((ANY(Q49,1,2)) | (ANY(Q50,3,4,5,6,7))) AND ((ANY(Q51,1,2)) | (ANY(Q52,3,4,5,6,7,8, 9,10,11))) AND ((Q6 = 1) | (ANY(Q53,1,2)) | (ANY(Q54,3,4,5,6,7,8, 9,10,11))))) & (Q57a = 1,2,3,4,5,6,7) & (Q19 = 1 | Q19 = 2 | Q19 = 3 | Q19 = 4))
	No	

Annex 5

Code frames

Q12: Overall, what would you say people use the internet for? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
For work
For finding out information (e.g. travel, news, weather, general information, etc)
For communicating with others (e.g. email, chat rooms, blogs, instant messaging, VOIP, etc)
For entertainment (e.g. watching TV, videos, music, etc)
For shopping
For banking or paying bills
For socialising (dating, social network sites, etc)
For education

XXX ADDED CODES XXX
Buying/selling
For booking holidays/travel
For family history/finding ancestors/family tree
For playing games
Hobbies/interests
Investing in/keeping up with new technology
Pornography/immoral content/perverts use/crime
Price comparison
Streamlining business practices/organisational efficiency
Refused
Other
Don't know
No answer

Q14: Which places or types of places do you access the internet? MULTICODE OK
Work
Family / Friend / Neighbour's house
Internet café
Library
School/University/College

XXX ADDED CODES XXX
Job centre
Phone/mobile phone
Other
Don't know

Q18 Do you know anyone, who regularly accesses the internet? MULTI CODE OK
Yes, other (PLEASE WRITE IN)
Yes, family
Yes, friends
Yes, neighbour

XXX ADDED CODES XXX
Social worker
Employee/work colleague
Schools/children at school
No answer

Don't know
Other

Q20: And who do you ask to do things on the internet for you? MULTICODE OK
Children/Grandchildren
Other family
Friends
Neighbours
Work colleagues
People at the Library
People at internet café(s)

XXX ADDED CODES XXX
Support worker/volunteer
No answer
Other
Don't know

Q21: Why do you not currently have the internet at home? PROBE FULLY: What else?
CODE AS APPROPRIATE. MULTICODE OK
It is too expensive
I can't justify the cost of it / I need other things more
I don't want to sign a 12 month contract
I do not have a computer
I can't afford a computer
I don't have a landline telephone
I am planning on moving house
I am satisfied with using the internet at work/elsewhere
I am satisfied with using the internet on my mobile phone
I am not sure if it is available in my area
I don't want the children to access the internet
I am not interested in the internet
I would not use it enough
I don't need it
I don't have time to use it / I 'm too busy
It's not for people of my age
I don't really know what it does
I don't know where to get it from
I don't know how to use a computer
I'm not sure what I would do if it breaks
I am worried about security/ID theft /Bank fraud/Privacy issues
There is too much immoral content on the internet

XXX ADDED CODES XXX
Partially sighted/poor eyesight
I'm dyslexic
Computer/too old/not up to it/needs updating
Health reasons
Have recently moved/house/to this country
Will be getting/in the process of getting the internet
Laziness/haven't got round to it/have only just got a computer
Undecided about which package to get
Not enough room for a computer/have enough clutter already
It's broken/it's not working/computer broken
I'm too young

Lack of confidence/anxiety
Unreliable broadband/slow download speed/lack of signal
Don't think I would enjoy/have never considered it
Causes marital problems/disruptive for couples
Does not want to use credit card
Nothing
Other
Don't know
No answer

Q24: Why do you say that? WRITE IN AND PROBE FULLY
Can ask friend/family for information
Can get information other ways/use someone else's internet/somewhere else
Can manage/have managed without it
Can use phone
Can shop locally/prefer to see things then buy
Cannot afford it/too expensive
Do not want/like internet
Don't need it
Don't want to sit in front of a computer/screen
Does not appeal/not bothered
Happy as I am
Have never had/tried/thought about it
Like reading
Might think about it in the future/for the children
Not interested
Other things to spend my money on/not a priority
Poor sight/cannot read
Prefer writing/letters
Prefer meeting people face to face/speaking directly to people
Rather be doing other things/have other interests
Satisfied with my technology i.e. TV and phone
Security issues
Too busy
Too complicated
Too old/not at my age/it's for younger people
Too time consuming/take too long to learn to use it/don't have the patience
Waste of time
We get more lazy
Would not use it/no use for it
Would not know how to start/how to use it/what it does
Nothing
Other
Don't know
No answer

Q25: Overall, do you think you are missing any benefits because you do not have internet access at home? What are they? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
Convenience of doing work/study at home
Ability to communicate with friends and family
Ability to communicate with friends and family who live far away/overseas
Ability to buy things online
Ability to do online banking
Children are missing out on educational resource

Feel I miss out a lot as my friends/family have the internet
Miss out on latest news (international, national or local)
Miss out on live/up to date sports news/results
Can't join social network sites
Miss out on entertainment (e.g. watching TV, playing games online, downloading music, etc)

XXX ADDED CODES XXX
Nothing
Accessing information/looking things up
Missing out on hobbies/interests
Cheap holidays/flights
Good deals/shopping bargains
Jobs/job applications
Paying bills/discounts for paying online
Other
Don't know
No answer

Q28: What are the main reasons why you are planning on getting the internet in the next six months? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
Want to keep up with technology/felt I was getting left behind
Friends/family recommended it
For my children
Need it for work
Need it for studying
Have it at work, now want it at home
For online shopping/services
For online banking/paying bills
To communicate with friends and family
For entertainment purposes
For information/finding out things
Used it for first time and liked it
I now have a computer
Now have a landline telephone
Have saved for it/Now have enough money
The internet is cheaper now
Have got a grant from local council/school/other

XXX ADDED CODES XXX
Convenience
Playing internet games/rather than Xbox/PS3 etc
Other
Don't know
No answer

Q29: Do you have any remaining concerns about getting the internet? If so, what are they? WRITE IN AND PROBE FULLY
Nothing
Can be a waste of time/can eat up time/using it too much
Computer crashing
Cost of bill/price/too expensive
Facebook
Legal concerns/legislation may limit its use
Not knowing how to work it/would have to learn how
Security/safety/theft of personal details/privacy

What children are doing/children’s access/child safety
Viruses/spam
Having phone line put in/put back
Signing into a contract/finding reliable supplier
Other
Don't know
No answer

Q36: What did you learn that was new to you, if anything, about Internet? PROBE FULLY. MULTICODE OK
The range of different sites
All the different things that you can do
How easy it was to use
How interesting it looked
How easy it was to connect to the internet
That I could use it

XXX ADDED CODES XXX
Nothing/knew it already
Not interested
About local area/range/availability of local services
Banking/keeping an eye on my accounts
Can watch TV/videos/programmes that I've missed
Shopping
It's helpful/an asset
The advice/information available
Other
Don't know
No answer

Q41: Why do you think you would prefer the fixed telephone line internet connection? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
It's easier
Stable connection
Faster connection
Not interested in / do not need internet connection outside the home
Don't have a laptop computer
I have a fixed telephone line already
I'm already planning on getting a fixed telephone line

XXX ADDED CODES XXX
Security
No answer
Other
Don't know

Q42: Why do you think you would prefer the mobile plug in device internet connection? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
It's easier
I live in rented accommodation/not allowed fixed telephone line
I don't have a fixed telephone line
I can't afford a fixed telephone line
I'm going to/planning on moving home soon/don't know how long I will be living here
I want to access the internet outside the home as well
I already have/planning on getting a laptop computer

XXX ADDED CODES XXX
Less restrictive/can use in any room/anywhere/can take it with you
Dial up doesn't allow incoming calls/to keep it separate from the phone
Other
Don't know
No answer

Q45: Why do you think you would prefer the contract option for connecting to the internet? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
It's cheaper each month
I don't mind signing up for 12 months
Don't want to pay internet connection fee

XXX ADDED CODES XXX
Convenience
Easier to manage/money taken automatically/regular payments
Itemised bill/can check on monthly outgoings
Don't know enough about pay as you go/haven't heard of prepay
Other
Don't know
No answer

Q46: Why do you think you would prefer the pre-pay/pay as you go option for connecting to the internet? PROBE FULLY. CODE AS APPROPRIATE. MULTICODE OK
Can try the internet without committing to a 12 month contract
It would mean I can manage my finances better each month
It is more flexible for me
I have a pay as you go mobile phone
I have a poor credit rating / would not be able to get contract option
I don't have a bank account

XXX ADDED CODES XXX
Wouldn't be on it that much/only pay for what you want
Prefer pre pay/dislike signing up to things
Other
Don't know
No answer

Q58: What else, if anything, could be done to encourage you to get the internet at home? WRITE IN AND PROBE FULLY
Nothing
Free equipment/free support
Free internet/very cheap
Got pension via internet
If I got paid
Was younger
Can't afford it/finances are difficult
If I had children in the house
If I was disabled/housebound/had no car
If I felt it was needed/if I would get enough out of it/impossible to manage without it
Other
Don't know
No answer

Annex 6

Guide to statistical reliability

It should be remembered that a sample, not all UK inhabitants without broadband, have been interviewed. Consequently, all results are subject to margins of error, which means that not all differences are statistically significant. In addition, care should be taken in interpreting the results because of the small number of respondents in some sub-groups.

Some examples of sample tolerances that apply to the percentage results in this report are given in the table 13 below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population of UK inhabitants without broadband, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results. Please note that all of these assume a perfect random sample; in actual fact there are likely to be design effects resulting from non-response bias which means the real sampling tolerances are likely to be wider.

Table 13: Margins of error by sample size

Size of sample on which survey result is based	10% or 90%	30% or 70%	50%
1,841 (i.e. all without Broadband)	+/- 1	+/- 2	+/- 2
1000 (i.e. respondents in England)	+/- 2	+/- 3	+/- 3
500 (i.e. respondents between 45 and 64 years old)	+/- 3	+/- 4	+/- 4
200 (i.e. respondents under 24)	+/- 4	+/- 6	+/- 7
100 (i.e. unemployed)	+/- 6	+/- 9	+/- 10

For example, on a question where 50% of the people in a sample of 1,841 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than two percentage points, plus or minus, from a complete coverage of the entire population using the same procedures. But on a question where 50% of the people in a sample of 200 respond with a particular answer, the chances are 95 in 100 that this result would not vary more than seven percentage points from the 'true' population value.

Tolerances are also involved in the **comparison of results** from different parts of the sample. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table 14 is a guide to the sampling tolerances applicable to comparisons.

Table 14: Margin of error by subgroups

Size of sample on which survey result is based	10% or 90%	30% or 70%	50%
1,841 and 1,841	+/- 2	+/- 3	+/- 3
1,000 and 1,000	+/- 3	+/- 4	+/- 4
500 and 500	+/- 4	+/- 6	+/- 6
200 and 200	+/- 6	+/- 9	+/- 10
100 and 100	+/- 8	+/- 13	+/- 14
50 and 50	+/- 12	+/- 18	+/- 20

Caution should be exercised when comparing small sub-groups to ensure that the findings are statistically significant.

Annex 7

Discussion guide

Objectives

- To understand how those without internet at home perceive internet
- To achieve a deeper understanding of the reasons behind UK consumers' voluntary or involuntary exclusion from the use of internet at home
- To find out what would encourage those currently without internet connection at home to get it

INTRODUCTION

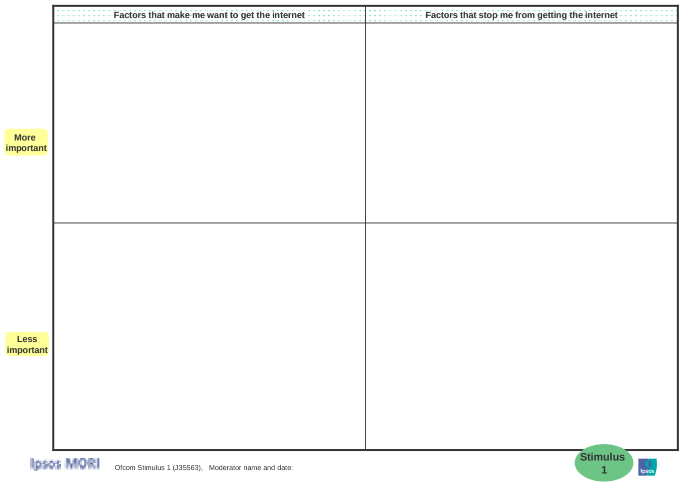
Approx timing	Key questions	Notes
5 min	▪ INTRODUCE SELF AND THANK PARTICIPANTS FOR TAKING PART ▪ EXPLAIN PURPOSE OF RESEARCH ▪ **Ofcom has commissioned Ipsos MORI, an independent research company, to speak to people across the UK about their use and knowledge of the internet. During this discussion we'll be talking about your own reasons for not having internet and looking at different options.** ▪ IF NECESSARY: **Ofcom is an independent watchdog that regulates the telecom industries.** ▪ EXPLAIN ANONYMITY AND ASK FOR PERMISSION TO RECORD ▪ **Please can you tell us:** o **First name** o **Where you live** o **Who you live with** o **What you do (employment status)** o **Whether or not you have a fixed telephone line at home.**	**Welcome:** orientates interviewees, gets them prepared to take part in the interview. **Introduction:** This provides contextual background information about the interviewee (which can then be used later in the discussion or in the analysis, such as household status and employment status).

SESSION ONE: CURRENT USE AND KNOWLEDGE OF THE INTERNET AND FACTORS UNDERPINNING DECISIONS ON WHETHER OR NOT TO GET THE INTERNET AT HOME

30 min	**<u>A) CURRENT USE AND KNOWLEDGE OF THE INTERNET (10 mins)</u>** ▪ **Have you heard of the internet? What do you think it is?** ▪ **What about the World Wide Web? What does it mean to you?** ▪ **Have any of you ever used the internet?** PROBE: **How did you access it? When? Where? How frequently? For what purpose?** MODERATOR - PLEASE TAKE NOTE OF THIS AS IT WILL HAVE AN IMPLICATION ON DISCUSSION. ▪ **<u>NON-USERS ONLY:</u> Have you ever asked someone else to look up information on the internet for you?** IF YES: **Who did you ask? What type of information did you ask for? Did they find what you were looking for?** ▪ **<u>NON-USERS ONLY:</u> What is a person who uses the internet often like?** PROBE: **If that person is coming into the room now, what does he or she look like? How old are they? What would he or she say to me?** ▪ **<u>NON-USERS ONLY:</u> What do you think the internet can do?** ▪ **<u>NON-USERS ONLY:</u> What do you think a person who uses the internet often tends to use it for?** PROBE FOR EXAMPLES. ▪ **Imagine you need to get internet connection at home tomorrow, can you talk me through how you would go about getting it?** PROBE **Who would you speak to? Why? Where would you look for information?**	It is important to focus on gauging the knowledge of participants and their perception at this stage so please do not introduce any information on the internet during session one. If participants ask you for information, please explain to them that information will be given to them at the next session. Proxy access Emotional projectives get beyond top of mind responses. At this stage, please try to get participants to focus on the <u>functions</u> (e.g. online shopping, video streaming, etc) rather than the benefits (e.g. better access to information, convenience, etc) of the internet.
	<u>B) FACTORS UNDERPINNING DECISIONS ON WHETHER OR NOT TO GET THE INTERNET AT HOME (25 mins)</u> ▪ **Have you considered getting the internet at home?** ▪ **Can you tell me why you say that?** PROBE FOR FACTORS **FOR** THEIR DECISION OR **AGAINST** IT. ▪ MODERATORS TO WRITE DOWN EACH	

FACTOR MENTIONED ON **PINK POST-IT NOTES**.

- PROBE ON EACH ONE MENTIONED
  - **Why do you think it is important?**
  - **Do you think it is something within your control? Why or why not?**
- MODERATOR TO SHOW PARTICIPANTS THE GRID (STIMULUS 1 ON FLIPCHART)
- **Now, we'd like to look at how important these factors are to you in making your decision. Could you tell me where they should go on the grid?**
- MODERATOR PLEASE ENCOURAGE RESPONDENT TO MAKE DECISION ON WHETHER FACTOR MAKES THEM MORE OR LESS LIKELY TO GET THE INTERNET. IF THEY HAVE DIFFICULTY OR FEEL IT COULD APPLY TO BOTH SCENARIOS, WRITE THE FACTOR OUT AGAIN SO IT CAN BE USED TWICE (RECORDING REASONS WHY ON THE POST-IT NOTES) OR PLACE IN THE MIDDLE WITH A NOTE EXPLAINING WHY.



- DISCUSS FOR EACH FACTOR ON GRID: **Why do you say this factor is more/less important? What makes you say it is more important than [ANOTHER FACTOR]?**
- **There are other factors that other people might say are important when they decide whether or not to get the internet, and I'd just like to see whether you think any of these might be important to you in making your decision.**

.

	Do not understand what the internet can do **Not interested** **Worried about what is on the internet (e.g. fraud, personal safety)** **Too expensive** **Do not want to sign up to a 12 month contract** **Do not have computer skills** **Do not have a computer** **Do not have a phone line** - MODERATOR TO WRITE DOWN THE FACTORS PARTICIPANTS THINK ARE IMPORTANT ON **BLUE POST-IN NOTES** (TO DIFFERENTIATE THEM FROM THE TOP OF MIND FACTORS) AND PUT ON GRID. **IF ENOUGH TIME: Thinking about other people you know – perhaps your family, friends and work colleagues – are there any other factors we haven't talked about that you think might make a difference to their decision on whether or not to get internet?** IF YES: **Which ones? How important do you think these decisions would be in their decision? Are these factors important to you?**	

SESSION TWO: WILLINGNESS TO PAY – WITH FIXED TELEPHONE LINE AT HOME

35 mins	**During the next exercise, I'd like to you let me know what you think are needed to access the internet.** **A) WILLINGNESS TO PAY (15 mins)** **First of all, thinking about all the equipment someone would need to access the internet at home, could you tell me what they are?** **What other things do you think will be needed?** PROBE FOR SUBCRIPTION MODERATOR TO GIVE PARTICIPANTS STIMULUS 2A	Previous research shows that some people may be reluctant to take up broadband even if it is completely free. If this arises at any point, please probe further.

Internet via fixed phone line

Computer

OR

12 month contract with internet service provider (e.g. BT, Virgin) → **Monthly fee**

Stimulus 2A

Ipsos MORI Ofcom Stimulus 2 (J35563)

- **You can access the internet via a fixed phone line (landline). To do this, you would need a computer (or a laptop). You'll also need to have a contract with an internet service provider (like BT or Virgin). In general, you will pay a fixed fee every month. <u>You will be able to use the internet and the telephone at the same time. It does not affect your phone line.</u>**
- **If you do not already have a landline, you'll also need to sign up for one as well.**
- **What do you feel about this type of internet connection?**
- **Now, I would like you to think about how much it will cost to access the internet.**

FOR EACH COMPONENT ON STIMULUS 2A (computer, monthly internet fee)

- **How much do you think this will cost?**
- **Would you be willing to pay for it?** IF YES: **Why have you chosen to buy it?** IF

NO: **Why not?**

MODERATOR TO GIVE PARTICIPANTS STIMULUS 4A

Internet via fixed phone line

Stimulus 4A

Computer

£250

OR

12 month contract with internet service provider → **Monthly fee** **£10**

This is on top of telephone line rental

Ipsos MORI Ofcom Stimulus 4 (J35563)

- **On this poster, you'll see some prices we have found for a computer and a monthly internet fee.**
- **What are your initial thoughts on these prices? Are they higher or lower than what you expected?**
- MODERATOR NOTE: MAKE SURE PARTICIPANTS UNDERSTAND THE MONTHLY INTERNET FEE IS IN ADDITION TO THEIR PHONE LINE RENTAL
- **Would you be <u>willing to pay</u> for a computer at this price? If not – what price would it need to be?**
- IF NOT WILLING: PROBE ON WHY NOT TO EXPLORE WHETHER IT IS BECAUSE THEY ARE NOT INTERESTED OR BECAUSE THEY CAN'T AFFORD IT AT

Participants who have experience of using the internet may dispute the different price plans. Please tell them that our prices are based on the **lowest** prices we could find on the internet recently.

	ALL – NEEDS TO BE FREE. ▪ **Would you be willing to pay the monthly internet fee at this price? If not – what price would you be prepared to pay?** ▪ IF NOT WILLING: PROBE ON WHY NOT TO EXPLORE WHETHER IT IS BECAUSE THEY ARE NOT INTERESTED OR BECAUSE THEY CAN'T AFFORD IT AT ALL. DOES IT NEED TO BE FREE?**If you do get the internet at home, would you need to cut back on other things to pay for it?** IF YES: **Which ones?** ▪ **Would you be willing to cut back on other things to pay for the internet? Why? Why not?** ▪ FOR THOSE NOT INTERESTED AT ALL OR WHO CAN'T AFFORD AT ALL: **if the internet were available for free – would you get it at home? Why? Why not?** ▪ ONLY ASK IF NECESSARY/POSSIBLE AND OLDER AGE GROUPS: **Now, I would like you to think back to 10 years ago, when most people did not have a mobile phone or digital or pay TV. I would like you to think about something you have now, but not 10 years ago. What do you think tipped you over into buying it? How did you feel you before and after you bought it?** **<u>B) CONTRACT VERSUS PRE-PAID (10 mins)</u>** ▪ **In general, if you want to get the internet at home, you need to sign up to a 12-month. How do you feel about this?** ▪ **If you can try out the internet without the need to sign up to 12 month contract – is this an attractive idea?** ▪ MODERATOR TO DISTRIBUTE AND GO THROUGH STIMULUS 3B	

Pre-pay option	Contract
Flexible – can stop and start payment each month No need to sign up to a 12 month contract	Cheaper: No connection fee, cost is £10 per month
More expensive: Connection fee £50, cost is £12 per month	Need to sign up to a 12 month contract

Ipsos MORI Ofcom Stimulus 3 (J35563)

Stimulus 3b

- **What do you think of the pre-paid option?**
- **Would it be something that appeals to you? Why? Why not?**
- **Would it make you want to get the internet? Why? Why not?**
- **Would it make a difference to your decision on whether to get the internet at home?**
- **What types of people do you think will find this idea attractive?**
- **If you were to improve this idea, what would you do?**

C) FIXED AND MOBILE INTERNET (10 mins)

MODERATOR TO GIVE PARTICIPANTS STIMULUS 2B

Internet with plug-in device

Computer

OR

12 month contract with mobile service provider (e.g. Vodafone, O2) → **Monthly fee**

Plug in device provided →

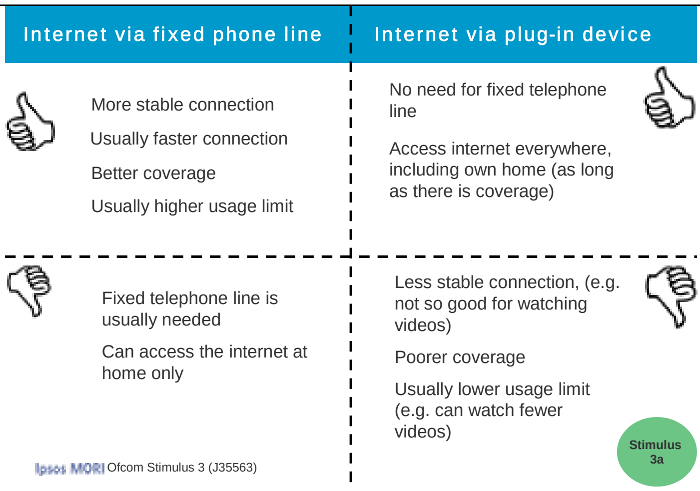
Stimulus 2B

Ipsos MORI Ofcom Stimulus 2 (J35563)

- **You can also access the internet on a computer at home with a plug-in device. Once you plug it into a socket on your computer, you'll be automatically connected to the internet. You do not need a telephone line for this. With this device, you'll be able to access the internet ANYWHERE, whether it is at home, in a park or in a café.**

MODERATOR TO GIVE PARTICIPANTS STIMULUS 3A

We are trying to get them to compare fixed and mobile broadband internet **in a broad sense** instead of debate the technical merits of each. Please steer them away from any such discussions.

	 ▪ **Now, I'd like to go through with you the pros and cons of accessing internet via a fixed phone line and via a plug-in device.** MODERATOR TO GO THROUGH STIMULUS 3a. ▪ **What do you feel about accessing the internet via a plug-in device? Why?** ▪ **What types of people would go for an internet connection using a plug in device? Why?** PROBE ON CIRCUMSTANCES OF THOSE PEOPLE, E.G. SOURCE OF INCOME, BANK ACCOUNT, LIKELIHOOD TO MOVE HOUSE, ETC. ▪ **Now, having heard about different types of internet connection and prices, would you prefer to go for a contract or pre-paid internet?** ▪ **Would you prefer to access the internet via a fixed phone line or a plug in device? Why?**	
5 mins	**Coffee break**	

<u>SESSION TWO: WILLINGNESS TO PAY – WITHOUT FIXED TELEPHONE LINE AT HOME</u>

35 mins	**During the next exercise, I'd like to you let me know what do you think are needed to access the internet, and how much do you think it costs.** **<u>A) WILLINGNESS TO PAY (15 mins)</u>** ▪ **If you want to access the internet at home, what do you think you'll need?** ▪ **What other things do you think will be needed?** PROBE FOR SUBSCRIPTION	Previous research shows that some people may be reluctant to take up broadband even if it is completely free. If this arises at any point, please probe further.

MODERATOR TO GIVE PARTICIPANTS STIMULUS 2B

Internet with plug-in device

Computer

OR

12 month contract with mobile service provider (e.g. Vodafone, O2) → **Monthly fee**

Plug in device provided →

Stimulus 2B

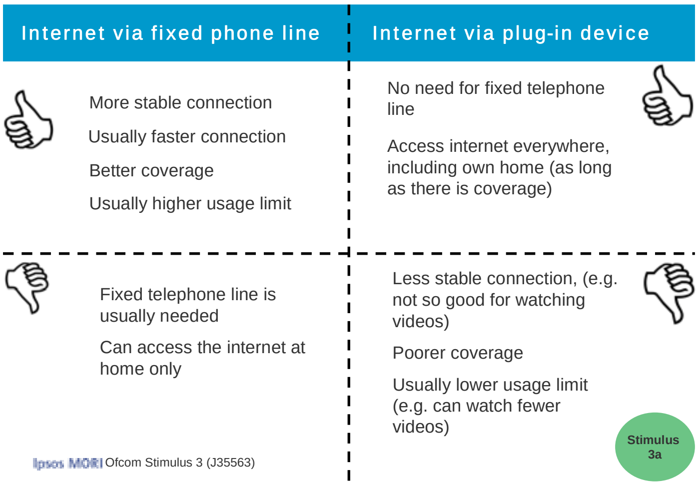
Ipsos MORI Ofcom Stimulus 2 (J35563)

- **Traditionally, people access the internet at home via their fixed telephone line. However, nowadays, you can also access the internet on a computer at home via a plug-in device. Once you plug it into a socket on your computer, you'll be automatically connected to the internet. You do not need a telephone line for this. With this device, you'll be able to access the internet ANYWHERE, whether it is at home, in a park or in a café.**
- **To get one of those plug-in devices, you'll need to contact a mobile service provider, such as Vodafone or O2.**
- **What do you feel about accessing the internet via a plug-in device? Why?**
- **What types of people would go for this type of connection? Why?** PROBE ON CIRCUMSTANCES OF THOSE PEOPLE,

E.G. NO STABLE SOURCE OF INCOME, NO BANK ACCOUNT, LIKELY TO MOVE HOUSE, ETC.

C) FIXED VERSUS MOBILE INTERNET (10 mins)

MODERATOR TO PASS AROUND STIMULUS 3a



- **Now, I'd like to go through with you the pros and cons of accessing internet via a fixed phone line and via a plug-in device.** MODERATOR TO GO THROUGH STIMULUS 3a.
- **What do you feel about accessing the internet via these two options?**
- **Which one do you prefer? Why?**
- **What types of people would go for a fixed line connection? Why?** PROBE ON CIRCUMSTANCES OF THOSE PEOPLE, E.G. SOURCE OF INCOME, BANK ACCOUNT, LIKELIHOOD TO MOVE HOUSE, ETC.
- **What about accessing the internet via a plug-in device, what types of people would go for it? Why?** PROBE ON CIRCUMSTANCES.

WILLINGNESS TO PAY FOR PLUG IN DEVICE

- **Going to discuss the costs of accessing the internet via a plug in device.**
- **There are two options: either a 12 month contract or pay as you go. How do you feel about signing up to a 12-month contract? Do you think it may be a problem for some people? Why?**

FOR EACH COMPONENT ON STIMULUS 4B

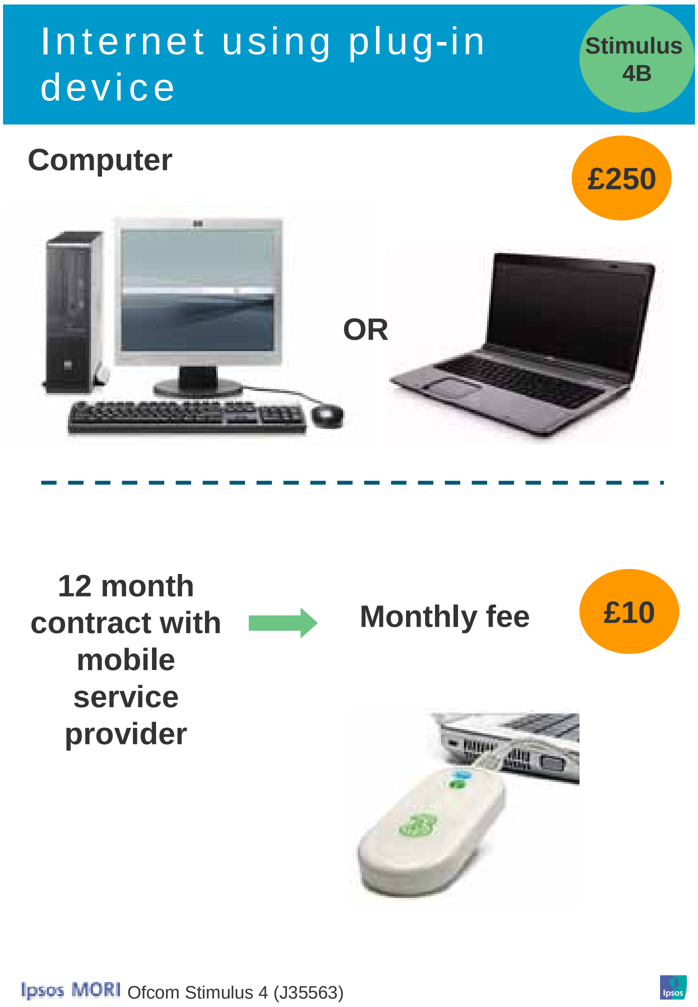
- **How much do you think a computer will**

Participants who have experience of using the internet may dispute the different price plans. Please tell them that our prices are based on the **lowest** prices we could find on the internet recently.

cost?

- **Would you be willing to pay for it?** IF YES: **Why?** IF NO: **Why have you chosen not to buy it?**

MODERATOR TO PASS AROUND STIMULUS 4B



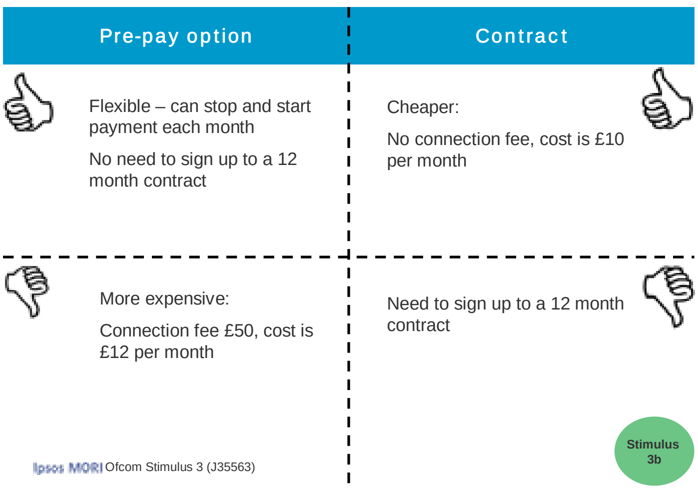
- **On this poster, you'll see some prices we have found for a computer and a 12 month contract .**
- **What are your initial thoughts on these prices? Are they higher or lower than what you expected?**
- **Would you be <u>willing to pay</u> for a computer at this price?** IF NO: **What price are you prepared to pay?**
- IF NOT WILLING: PROBE ON WHY NOT TO EXPLORE WHETHER IT IS BECAUSE THEY ARE NOT INTERESTED OR BECAUSE THEY CAN'T AFFORD IT AT ALL. DOES IT NEED TO BE FREE?**Would you be willing to pay for the monthly internet contract at this price?** IF NO:

What price are you prepared to pay?

- IF NOT WILLING: PROBE ON WHY NOT TO EXPLORE WHETHER IT IS BECAUSE THEY ARE NOT INTERESTED OR BECAUSE THEY CAN'T AFFORD IT AT ALL. DOES IT NEED TO BE FREE? **If you do get internet at home, would you need to cut back on other things to pay for it?** IF YES: **Which ones?**
- **Would you be willing to cut back on other things to pay for the internet? Why? Why not?**
- ONLY ASK IF NECESSARY/POSSIBLE AND IF OLDER AGE GROUPS: **Now, I would like you to think back to 10 years ago, when most people did not have a mobile phone or a DVD player. I would like you to think about something you have now, but not 10 years ago. What do you think tipped you over into buying it? How did you feel you before and after you bought it?**

B) CONTRACT VERSUS PRE-PAID (10 mins)

- **If you can try out the internet without the need to sign up to 12 month contract – is this an attractive idea?**
- MODERATOR TO DISTRIBUTE AND GO THROUGH STIMULUS 3B



- **What do you think of the pre-paid option?**
- **Would it be something that appeals to you? Why? Why not?**
- **Would it make you want to get the internet? Why? Why not?**

We are trying to get them to compare fixed and mobile

	▪ **Would it make a difference to your decision on whether to get the internet at home?** ▪ **What types of people do you think will find this idea attractive?** ▪ **If you were to improve this idea, what would you do?** ▪ **Now, having heard about different types of internet connection and prices, would you prefer to go for a contract or pre-paid internet?** ▪ **Would you prefer to access the internet via a fixed phone line or a plug in device? Why?** MODERATOR NOTE: PLEASE MAKE SURE PEOPLE WHO ARE NOT INTERESTED AT ALL GET AN OPPORTUNITY TO EXPLAIN WHY, INCLUDING HAPPY TO USE INTERNET ELSEWHERE OR HAPPY NOT TO USE INTERNET AT ALL	broadband internet **in a broad sense** instead of debate the technical merits of each. Please steer them away from any such discussions.
5 mins	**Coffee break**	

SESSION THREE: REACTIONS TOWARDS DIFFERENT POLICY IDEAS

25 min	**We'd now like to talk through some ideas that may help people who currently don't have the internet at home to get it. As we've talked**	These are just ideas and not real policies. Please explore in detail what participants think of them.

	about there are lots of different reasons for not having the internet at home (e.g. don't know how to use a computer, too expensive, don't know what it is) We would like to spend some time now talking through some ideas that may help people and hear your ideas. MODERATORS TO PASS ROUND POLICY IDEAS PACK (STIMULUS 5). PLEASE ROTATE IDEAS FOR DIFFERENT GROUPS TO MINIMISE ORDER EFFECT. - Pre-paid internet (5A) - Discounted on monthly internet tariff (5B) - Half price computers (5C) - Easy to use internet device (5D) - Safe internet environment (5E) FOR EACH IDEA: ▪ **What do you think of this idea?** ▪ **Would it be something that appeals to you? Why? Why not?** PROBE ON WHETHER FINANCIAL INCENTIVES HAVE MADE A DIFFERENCE ON TAKE UP. ▪ **Would it make you want to get the internet? Why? Why not?** ▪ **Would it make a difference to your decision on whether to get the internet at home? Is it essential? Nice to have?** ▪ **What types of people do you think will find this idea attractive?** ▪ **If you were to improve this idea, what would you do?** ▪ **Do you have any other ideas that would help you?** ▪ **Amongst all these ideas, which one do you think is the most important for you?** IF YES: **Which one? Why?** IF NO: **Why not?** ▪ **Do you find some of these ideas less appealing than others?** IF YES: **Which ones? Why?** ▪ GET PARTICPANTS TO CHOOSE THEIR PREFERRED IDEAS/COMBINATION OF IDEAS, WHICH COULD ACT AS A TIPPING POINT THAT ENCOURAGES THEM/TO TAKE UP INTERNET.	Establish whether participants actually need this, or whether this measure is simply a nice to have. Need to understand what is essential to encourage take up: Is it cost? Skills? Support? Understanding? Safe environment to try out? Easy to use device? Encourage participants to come up with their own ideas.

	▪ **If you can come up with your own ideas, what would they be? Why?** ▪ **Do you think there are people out there who will not get internet even if it is completely free?** IF YES: **Who do you think they are? What do you think is on their mind when they decide whether or not to get internet? Why?** ▪ **Is there anything anyone/ the Government could do to encourage those people to take up internet? What type of help or support, if any, do you think they'll need?**	

SESSION FOUR: REACTIONS TOWARDS BROADBAND VIDEO

15 min	**A) INTRODUCING "WHAT IS THE INTERNET?"** **I'm now going to show you a short film on the functions of the internet.** SHOW VIDEO CLIP "WHAT IS THE INTERNET". MODERATORS WILL BE PROVIDED WITH A LIST OF FAQ IN CASE OF ANY QUERIES FROM PARTICIPANTS. ALSO DISTRIBUTE POSTER (STIMULUS 6)	Play "What is the internet?" video on laptop.

- **What are your immediate reactions to the video?**
- **Has this video told you something you did not already know?** IF YES: **What are they?** IF NOT: **Do you think it will tell other people something they do not already know? Who are these people? What are the things they do not already know?**
- **Would it make you more likely to get the internet at home? What has changed your mind?**
- **Do you think this video would encourage some people to get the internet at home? Who do you think these people are? What would be the tipping point for them?**

B) REVISITING FACTORS UNDERPINNING DECISIONS ON WHETHER TO GET INTERNET

	MODERATORS TO INVITE PARTICIPANTS TO REVISIT THE GRID MADE DURING SESSION 1 (STIMULUS 1) ▪ ONLY THOSE WHO SAID THE VIDEO TOLD THEM SOMETHING NEW: **We talked about the factors that you consider when deciding whether or not to get the internet earlier. Now that you have been given more information, have your views on this changed?** IF YES: **In what ways? Why?** IF NO: **Why not?** ▪ ONLY THOSE WHO SAID THE VIDEO TOLD THEM SOMETHING NEW: **Would you like to make any changes to the grid?** IF YES: **How? Why?** IF NO: **Why not?** MODERATORS TO INVITE PARTICIPANTS TO REPRIORITISE THE BARRIERS BY MOVING THE POST-IN NOTES AROUND. ▪ ONLY THOSE WHO SAID THE VIDEO TOLD THEM SOMETHING NEW: **We have also talked about whether a factor is something that is within your control. Have the information you have just heard changed your views on this?** IF YES: **How? Why?** IF NO: **Why not?** ▪ ASK ALL: **Thinking about the people who know very little about the internet, do you think their views would change after watching this video? How?** **C) <u>REVISITING WTP AND DIFFERENT POLICY IDEAS</u>** MODERATORS TO INVITE PARTICIPANTS TO REVISIT THE PRICE THEY ARE WILLING TO PAY FOR THE INTERENT AND THEIR PREFERRED POLICY IDEAS (STIMULUS 4 AND 5). ▪ ONLY THOSE WHO SAID THE VIDEO TOLD THEM SOMETHING NEW: **Have your views on what you are willing to pay for internet changed?** PROBE IN WHAT WAYS, WHY AND WHETHER IT TIES IN WITH THE PERCEIVED BENEFITS OF INTERENT. ▪ IF NECESSARY: **Thinking about the people who know very little about the internet, do you think they would be more willing to pay more for it once they know what it can do?**	

	▪ ASK ALL: **You mentioned that this idea/a combination of these ideas would be effective in encouraging you/other people to take up internet at home, have your views changed following the information you have just seen?** PROBE IN WHAT WAYS **D) SUPPORT FOR GOVERNMENT INITIATIVE TO INCREASE BROADBAND COVERAGE** ▪ **Currently, around four in ten people in this country do not have access to the internet at home. Who do you think these people are? What do you think may stop them from taking up the internet?** PROBE FOR VOLUNTARY OR INVOLUNTARY BARRIERS. ▪ **One of the Government's initiatives is to help those people get the internet at home. How do you think the Government should help those people, if at all? Why?** ▪ **Do you think it would be fair for other people? Why?**	

CONCLUDING REMARKS

5 min	▪ **Finally, are there any relevant issues you feel we haven't covered tonight?** ▪ **What is your final advice on how to encourage people to get the internet at home?** MODERATOR: PLEASE CHECK YOU HAVE ALL THE INFORMATION YOU NEED TO COMPLETE THE FEEDBACK FORM	

Annex 8

Stimulus materials

Stimulus 1: Factors grid

	Factors that make me want to get the internet	Factors that stop me from getting the internet
More important		
Less important		

Ipsos MORI Ofcom Stimulus 1 (J35563), Moderator name and date:

Stimulus 1

Stimulus 2: Fixed or mobile broadband

Internet via fixed phone line

Computer

OR

12 month contract with internet service provider (e.g. BT, Virgin) → **Monthly fee**

Internet with plug-in device

Computer

OR

12 month contract with mobile service provider (e.g. Vodafone, O2) → **Monthly fee**

Plug in device provided →

Stimulus 3: Advantages of fixed and mobile broadband

Internet via fixed phone line	Internet via plug-in device
More stable connection Usually faster connection Better coverage Usually higher usage limit	No need for fixed telephone line Access internet everywhere, including own home (as long as there is coverage)
Fixed telephone line is usually needed Can access the internet at home only	Less stable connection, (e.g. not so good for watching videos) Poorer coverage Usually lower usage limit (e.g. can watch fewer videos)

Ipsos MORI Ofcom Stimulus 3 (J35563)

Stimulus 3a

Pre-pay option	Contract
Flexible – can stop and start payment each month No need to sign up to a 12 month contract	Cheaper: No connection fee, cost is £10 per month
More expensive: Connection fee £50, cost is £12 per month	Need to sign up to a 12 month contract

Ipsos MORI Ofcom Stimulus 3 (J35563)

Stimulus 3b

Stimulus 4: Costs of accessing the Internet

Internet via fixed phone line

Stimulus 4A

Computer

£250

OR

12 month contract with internet service provider → **Monthly fee** **£10**

This is on top of telephone line rental

Ipsos MORI Ofcom Stimulus 4 (J35563)

Internet using plug-in device

Stimulus 4B

Computer

£250

OR

12 month contract with mobile service provider → **Monthly fee**

£10

Ipsos MORI Ofcom Stimulus 4 (J35563)

Stimulus 5: Policy ideas

Pre-paid internet

5A

I went for…

I bought a computer.

I pay a one-off internet connection charge of £50

After that I pay £12 at the beginning of every month for a month's unlimited usage

I can stop my payment at or re-start it at any time.

What's in it for me?

- I can plan how much I want to spend
- No contract
- Flexible

However…

- The set-up cost and monthly fee are a little higher.

Discount on monthly internet tariff

5B

What is it?

I get a discount on my monthly internet tariff.
So I pay £5 each month.

What's in it for me?

- Monthly internet cost is cheaper than current deals on the market.

- It helps me afford to get the internet at home.

Half-price computers

5C

What is it?

I pay half of the price of a computer.
(The Government would pay up to £125)

What's in it for me?

- Upfront cost of getting a computer is reduced.
- A computer is now more affordable for me.

Easy-to-use internet device 5D

What is it?

A simple machine
that looks like a laptop computer.

It automatically connects to the internet
when I switch it on.

It has a touch screen.

There is also a free telephone helpline.

What's in it for me?

- It is easy to use.
- I can call the helpline if I need support.

However…

It is instead of a computer. It won't let me do other things that a computer can do.

Safe internet environment

5E

What is it?

I get access to a limited number of web sites.

All websites are checked. I know they are safe and suitable for all ages.

Access to this is free. I do not need to pay a monthly internet fee.

What's in it for me?

- I feel safe and free from internet fraud.
- I can try out the internet for free in a safe environment.

However…

-I can only access a limited number of web sites.

Stimulus 6: Things you can do with the internet

Annex 9

Sample structure - Qualitative

		Depth interviews	Mini groups
Location	London/SE	7	4
	Essex	1	0
	Glasgow	4	4
	Mid Wales	2	2
	Sheffield	11	2
Urban/rural	Urban	18	8
	Rural	3	2
	Suburban/rural	4	2
User/non-users	Users	5	2
	Non users	4	0
	Mixed	-	7
	Not regular users	16	3
Social grade	ABC1	4	3
	C2DE	21	9
Age	20-34	8	2
	35-64	13	7
	65-74	0	3
	75+	4	0
Total		**25**	**12**

Annex 10

Sample structure – Recent adopters

Working status	Working Full Time	16
	Working Part Time	3
	Not working- other	1
Gender	Male	4
	Female	16
Household income	Up to £11.5k	1
	£11.5 - 17.5k	3
	£17.5k+	12
	Not stated	4
Presence of children	With children	10
	Without children	10
Total		**20**

Annex 11

Likelihood to get the internet before and after video

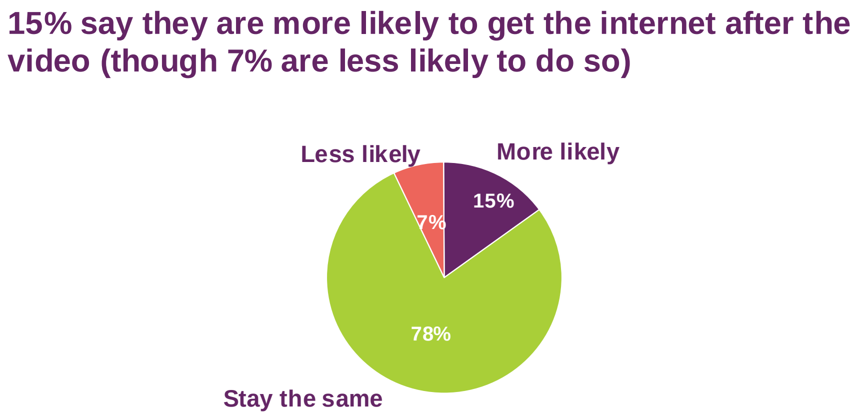
It is possible respondents may change their mind once they find out more about the benefits of using the internet. Hence, for the quantitative survey, we asked respondents their likelihood of getting the internet twice during the interview: once before the video on what the internet could do was shown and questions on their reasons for not having the internet at home and their perceptions of equipment needed and costs for getting connected were asked, and once after.

It is important to bear in mind that, given the nature of audience we were interviewing, the majority of our respondents had probably not given serious thoughts about whether or not they should get the internet at home before the interview. Some people might have become more interested in getting the internet having been given more information and more opportunity to think about it. Yet, this might have had the opposite effect on others, who having reflected upon it or considered the idea in more detail, might become less inclined to get the internet.

Answers given by those who were aware of the internet before the interview were compared to the one they gave earlier during the interview – for example, if they said they were 'unlikely' to get the internet before the video and 'likely' to get it afterwards, they would be coded as 'more likely', and vice versa. These are shown in Figure 59 below.

Fifteen per cent of respondents aware of the internet gave a more positive answer after the video. Overall, just under eight in ten (78%) gave an answer the same as before.

Figure 59: Intention to get internet after watching the video



Base: all respondents (1,841)
Source: Ofcom Accessing the Internet at Home Survey, February to April 2009

Those who said they had learnt something new from the video were more likely to give a more positive answer compared with average (22% v. 15%). This is consistent with findings from the qualitative research stage, where some of those who had found something of interest in the video expressed a desire to find out more about the internet.

> It enlightened me about some of the things you can access… I'd love to be able to access the internet now. I feel exempt from so much that goes on. I need to learn more about it.

Non-users, 65-74, London

In some cases, it may even act as a trigger point for them to try the internet themselves.

> When I go home it's made me want to ask my daughter if I can borrow her laptop for a weekend just to see if I would like it enough to want to do it.

Non-users, 50-64, London

Nonetheless, this has to be seen in the context that the vast majority of those who were more reluctant to get the internet were still not convinced by the introduction of more information about the internet.

Younger people said they were more likely to get the internet in the next six months after watching the video: 47% of those under 24 and 40% of those between 25 and 44 said they were likely to get it after watching the video. This decreased to 18% of the 45-64s, 9% of the 65 to 74, and 6% of the over 75s.

Annex 12

Glossary

Broadband a service or connection which is capable of supporting always-on services which provide the end-user with high data transfer speeds. Large-capacity service or connection allowing a considerable amount of information to be conveyed often used for transmitting bulk data or video or for rapid Internet access.

Fixed line broadband Broadband internet that is provided via a fixed telephone line.

Free to Air Television service which can be received in a given area without charge to the viewer. Some free-to-air services may be broadcast in scrambled form in order to limit access to viewers in a specific geographic area. Other free-to-air services may be broadcast in the clear - ie unscrambled.

Freeview Free digital service giving access to over 40 TV channels, over 20 radio stations plus a new whole world of interactive services.

Internet A global network of networks, using a common set of standards (e.g. the Internet Protocol), accessed by users with a computer via a service provider.

ISP Internet Service Provider.

Mobile dongle A broadband mobile dongle connects a computer to the internet by plugging into the USB port of laptop or desktop computer.

Narrowband A service or connection providing data speeds up to 128kbit/s, such as via an analogue telephone line, or via ISD

PC Personal computer.