Access and Inclusion
Summary of Ofcom research on internet access, use and attitudes

March 2009

Contents

Overview

- This slide pack pulls together Ofcom consumer research and Communications Consumer Panel consumer research from a range of published reports in order to:
  - Measure who has internet/broadband at home and who does not in the UK
  - Profile those people who do not have internet at home
  - Understand their reasons for/ not subscribing to the internet at home

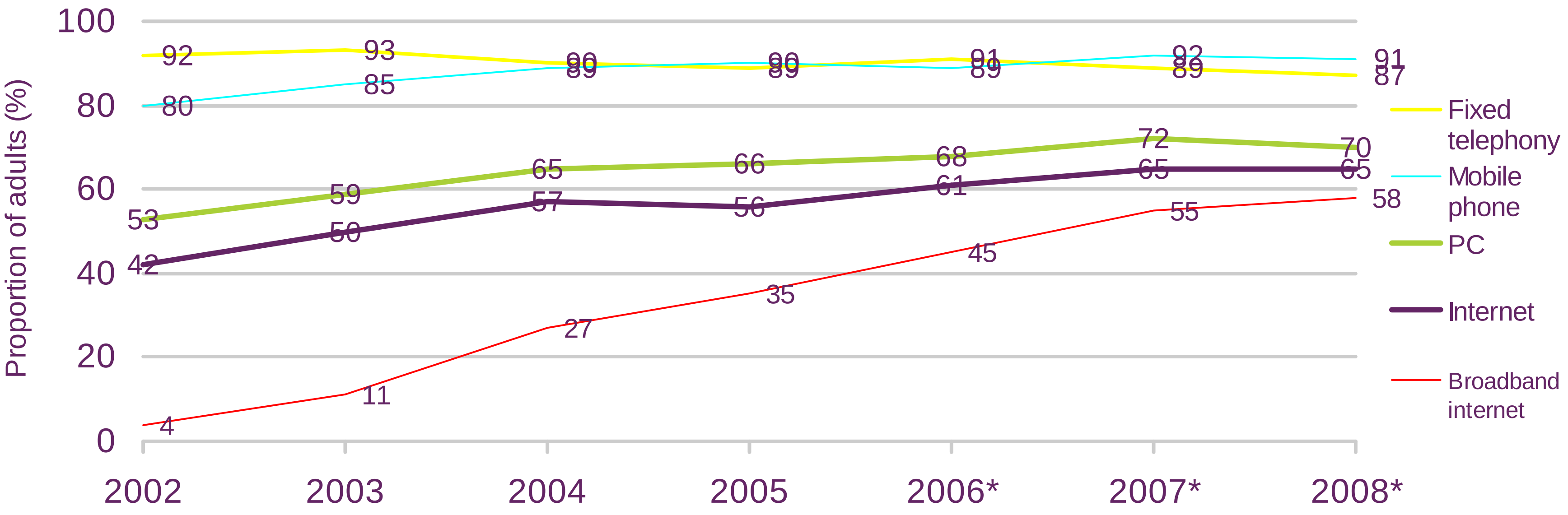
- The main sources of information are the following Ofcom publications:
  - Nations and regions report (2008)
  - Consumer experience report (2008)
  - Media literacy audit among children (2008)
  - Media literacy audit among adults (2008)
  - Communications market report (2008)
  - International communications market report (2008)
  - Children’s media tracker (2008)
  - Qualitative research on attitudes towards communications services among people with hearing impairments (2007), visual impairments (2007), learning difficulties (2008) and people in low income households (2007)
  - Communications consumer panel qualitative research on older people’s attitudes towards communications technologies (2006) and families in low income households (2007)

- Where there are overlaps in consumer research areas covered by individual surveys, the most up-to-date source is presented

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

This chart shows the proportion of adults aged 15+ living in households with fixed line, mobile phone, PC, internet and broadband connections.

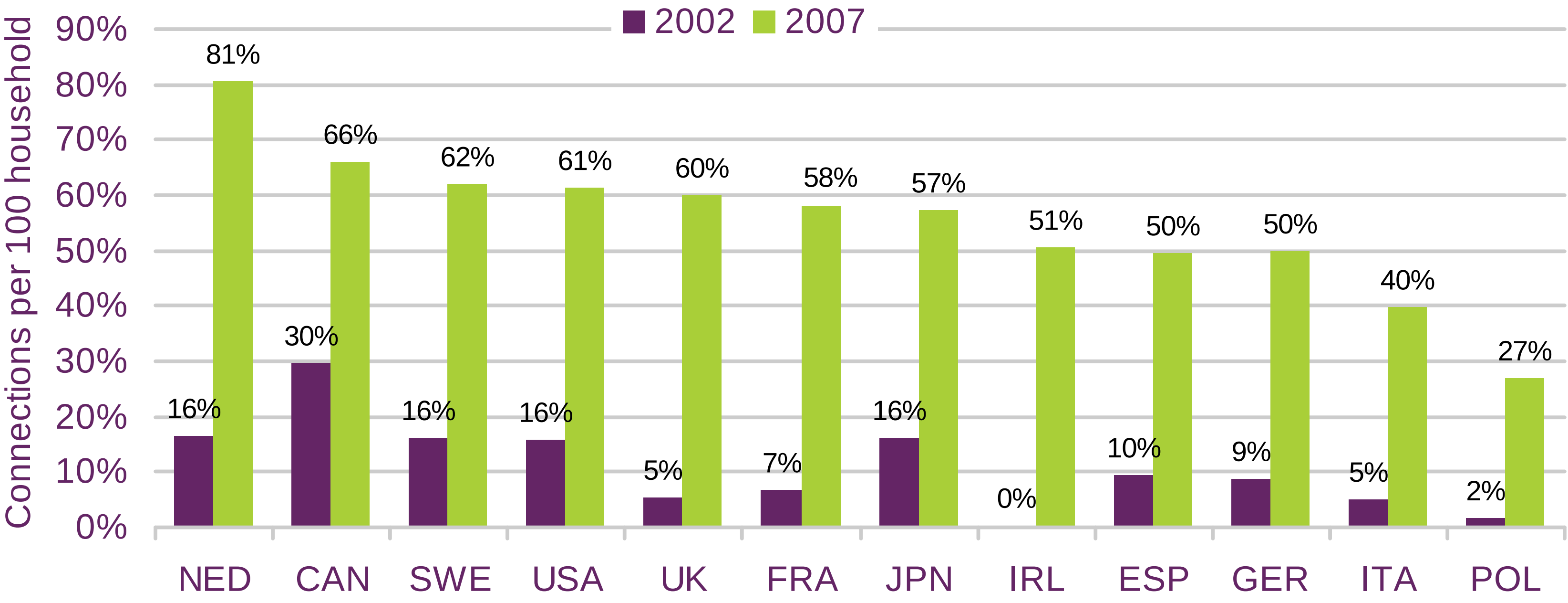
65% of adults live in a home with internet access, with 58% of all households having a broadband connection. The increase in take-up of broadband has been rapid – in the last 6 years it has increased from 4% to 58%, but is now beginning to slow.



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. 72% vs 70% ownership for pc in 2007 and 2008 is not statistically significant.
*Data for 2006-2008 based on Q2 data, all other data based on Q4.

Take up of broadband – international comparisons

There are differences in the levels of penetration of broadband across European countries, ranging from 81 connections per 100 household in the Netherlands to 27 in Poland in 2007. The UK had the third highest number of connections per household in Europe at 60 and is ahead of other large European countries in this comparison.



Source: Ofcom’s Consumer experience report 2008. OECD

Geographic location:
PC, Internet and Broadband take-up

Nations take up summary

This chart shows the proportion of adults 15+ who live in a household with a fixed line, mobile phone, PC, internet and broadband internet.

Summary of telecoms and internet take-up by nation, Q1 2008

		UK*	England	Scotland	Wales	N. Ireland	UK Urban	UK Rural
Individual								
Voice telephony	Fixed Line	**87%**	87%	87%	79%	88%	86%	93%
	Mobile	**84%**	85%	81%	82%	85%	84%	84%
Internet	PC	**69%**	70%	64%	60%	65%	68%	73%
	Total Internet	**65%**	66%	60%	55%	61%	64%	69%
	Broadband	**57%**	58%	53%	45%	52%	57%	59%

Source: Ofcom Nations and regions report. Ofcom communications tracking survey Q1 2008.

*UK figures here are based on Q1 2008 data. They will not match with other data in this slide pack which are from Q2 2008.

Nations profile of PC ownership

The proportion of people who live in a household which has a PC or laptop varies by nation, with ownership highest in England and lowest in Wales. Ownership is broadly similar in Northern Ireland and Scotland. PC ownership is significantly lower in Scotland, Northern Ireland and Wales than the UK average.

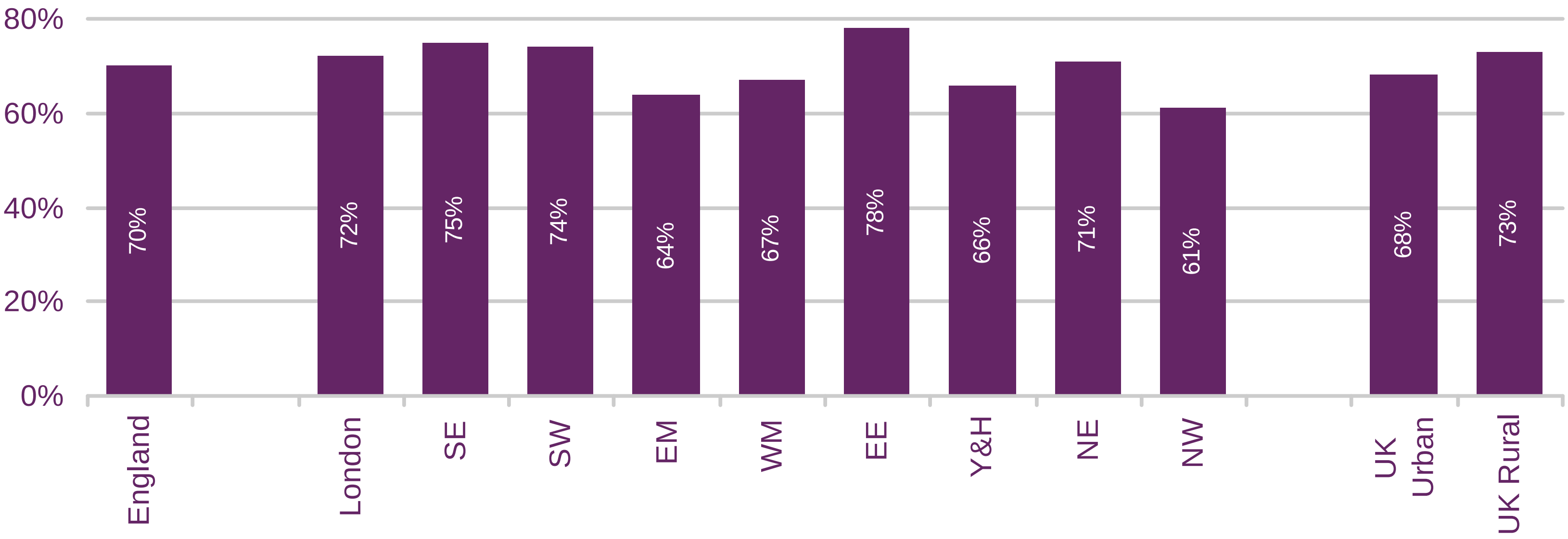
Do you or anyone in your household have a PC or laptop?

Source: Ofcom Consumer experience report 2008. Ofcom communications tracking survey (Q1 2008, Q1 2006, Q2/3 2005)
Base: All adults 15+

England regions profile of PC ownership

PC ownership in the home varies by English region, with penetration highest in the East of England and lowest in the North West.

Do you or anyone else in your household have a PC or laptop computer?



Source: Ofcom Nations and regions report, 2008. Ofcom communications tracking survey Q1 2008.
Base: Adults aged 15+/ aged 16+ in Northern Ireland

Nations profile of internet access at home

With the exception of Wales, internet ownership continued to rise across the UK and the gap between PC ownership and home internet take-up narrowed. Within England, the largest rises in home internet take-up were in the North East, East of England and London. In Wales internet access showed no significant growth over the figure reported in 2006, although broadband access grew from 43% to 45% over the period.

The differences in take-up between the nations and the English regions do not appear to be due to any single factor. The take-up figures were normalised separately for age, gender, working status, socio economic group and urban/rural split. This did not change the relative positions of the regions and nations which suggests it may be a combination of these factors and other softer aspects such as mix of employment types, education and attitudes that affect take-up.

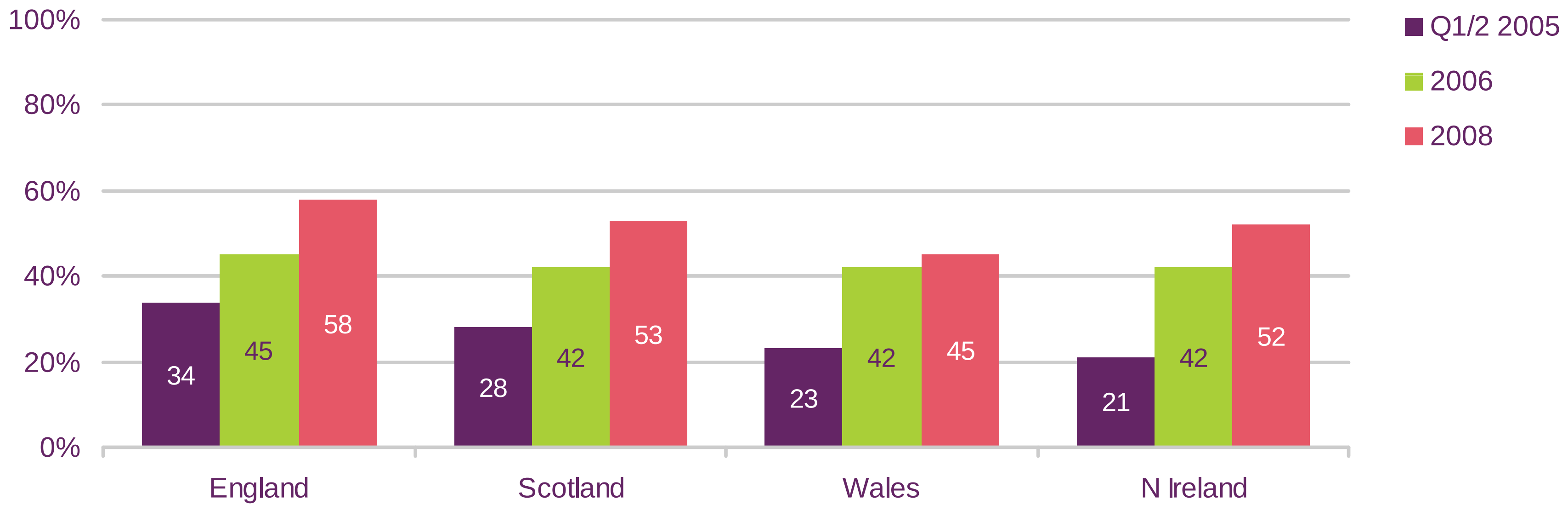
Do you or does anyone in your household have access to the internet at home?

Source: Ofcom Consumer experience report 2008. Ofcom communications tracking survey, Q1 2008, Q1 2006, Q2/3 2005
Base: All adults 15+

Nations profile of broadband access at home

Broadband take up in the home continues to increase. Since 2006, broadband take-up in England has risen by 13 percentage points to 58% of homes in January 2008. Broadband take-up in England is higher than in Scotland (53%), Wales (45%) and Northern Ireland (52%). The increase in take-up has been driven largely by consumers upgrading from narrowband dial-up connections.

Do you or anyone else in your household have broadband internet access at home?



Source: Ofcom Consumer experience report 2008. Ofcom communications tracking survey, (Q1 2008, n = 1566)
Base: All adults 15+

English regions broadband access at home

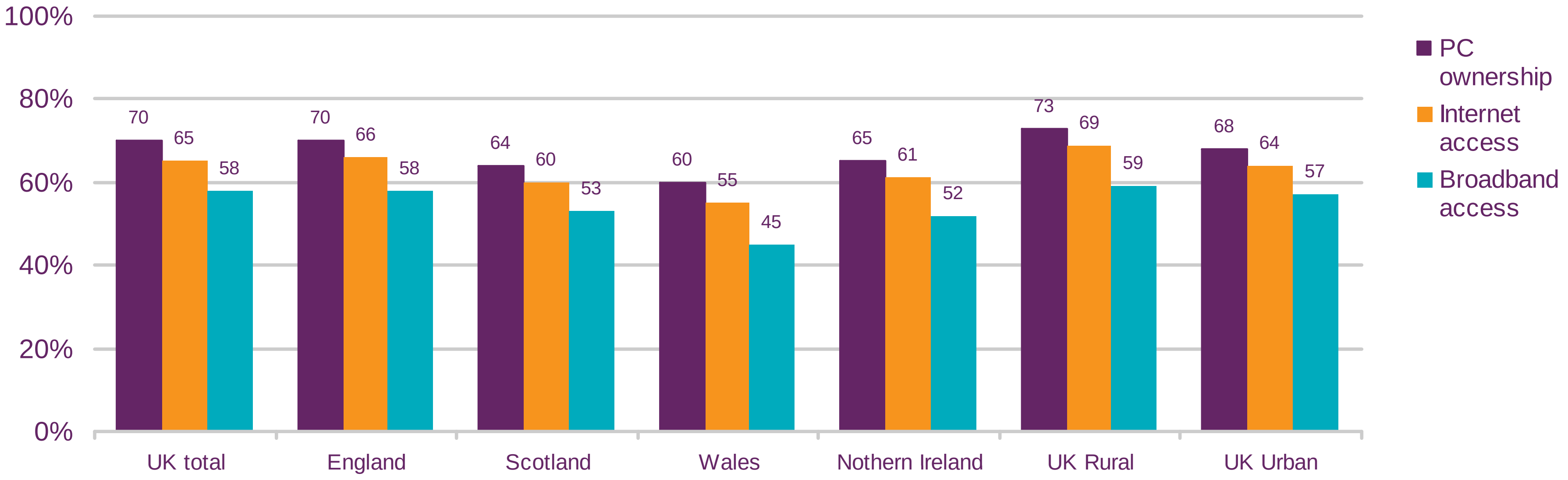
The largest increases in broadband access are in the East of England, where home take-up has grown by 20 percentage points to two-thirds of the population (67%). The pattern is reflected across England, with the exception of the East Midlands and North West, where take-up remains similar to 2006. Growth in take-up of broadband in UK as a whole has been particularly noticeable in rural areas, which, at 59% take-up, now matches urban areas (57%).

Do you or anyone else in your household have broadband internet access at home?

Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey Q1 2008.
Base: adults aged 15+/ Aged 16+ in Northern Ireland

PC ownership, internet and broadband access by nation

Do you or anyone else in your household have a PC or laptop computer?
Do you or does anyone in your household have access to the internet at home?
Do you or anyone else in your household have broadband internet access at home?



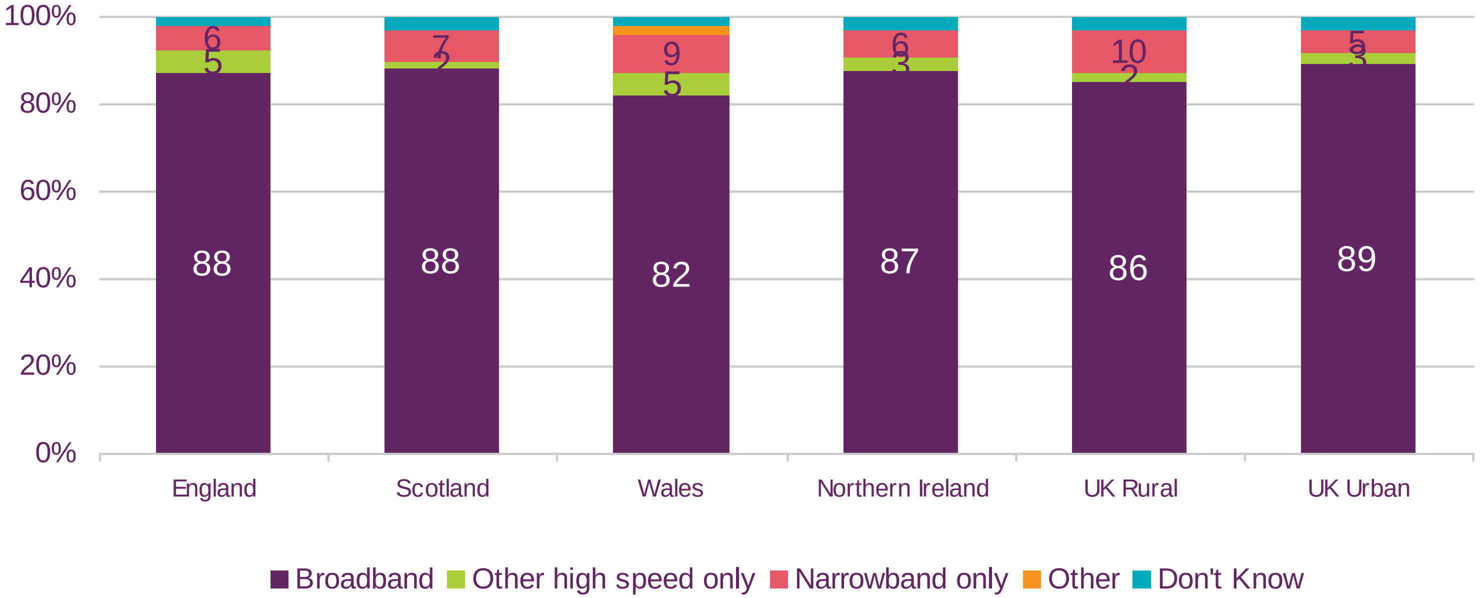
	PC ownership	Internet access	Broadband access
UK total	70	65	58
England	70	66	58
Scotland	64	60	53
Wales	60	55	45
Nothern Ireland	65	61	52
UK Rural	73	69	59
UK Urban	68	64	57

Source: Ofcom communications tracking survey, Q1 2008.
Base: All adults 15+.

Nations profile - internet access by type of connection

The majority of households in each nation now have a broadband connection.

What type of internet connection do you have in your household?

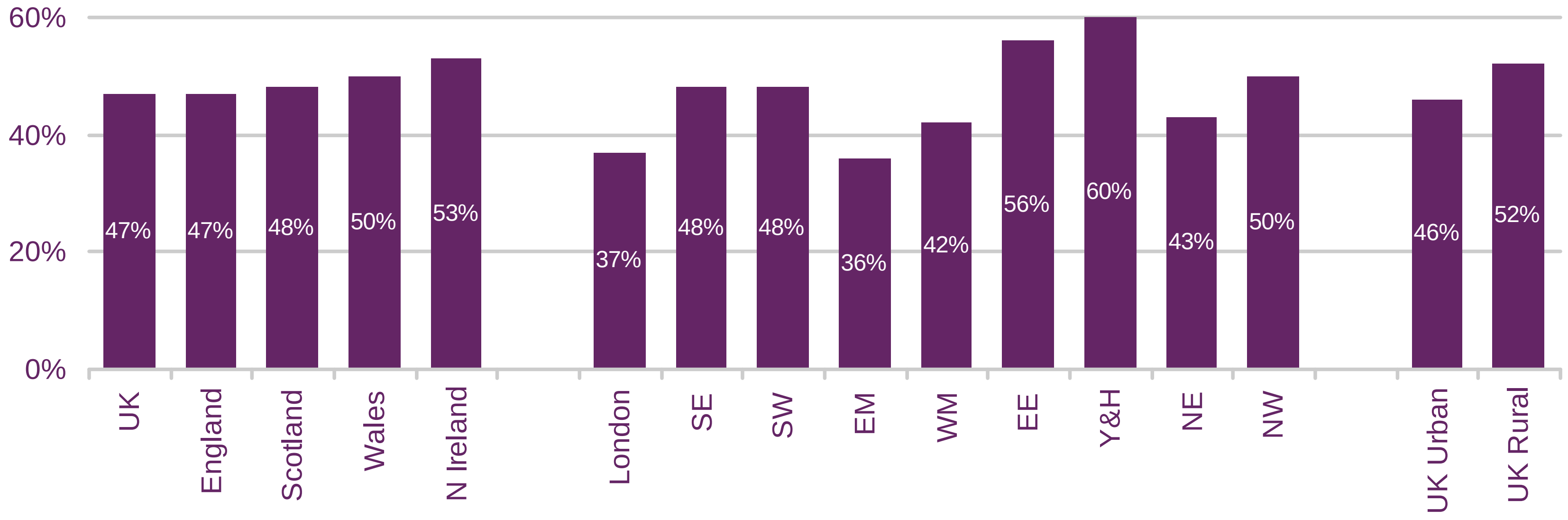


Source: Ofcom communications tracking survey, Q1 2008.
Base: All adults with internet access at home. Broadband access excludes mobile broadband, mobile phone or other high speed access.

Internet access via wireless routers

Just under half (47%) of people with broadband access at home have a wireless router.

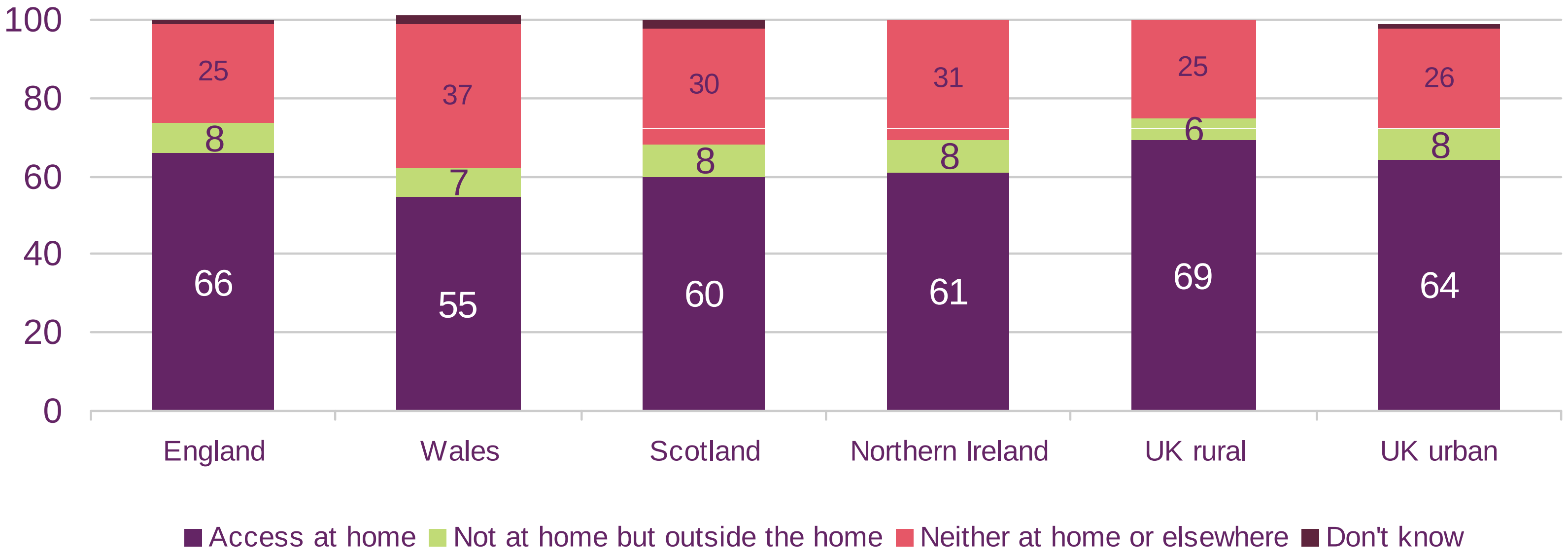
Use of wireless routers among people with broadband connection



Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey, Q1 2008
Base: Adults aged 15+/ aged 16+ in Northern Ireland with broadband connection at home

Who does not use the internet anywhere?

This chart shows the proportion of people who have access to the internet at home, those who do not have access at home but use elsewhere, and those who do not use anywhere. Around one quarter (26%) of people in the UK do not use the internet anywhere. This rises to over one third of people in Wales (37%), 30% in Scotland and 31% in Northern Ireland.

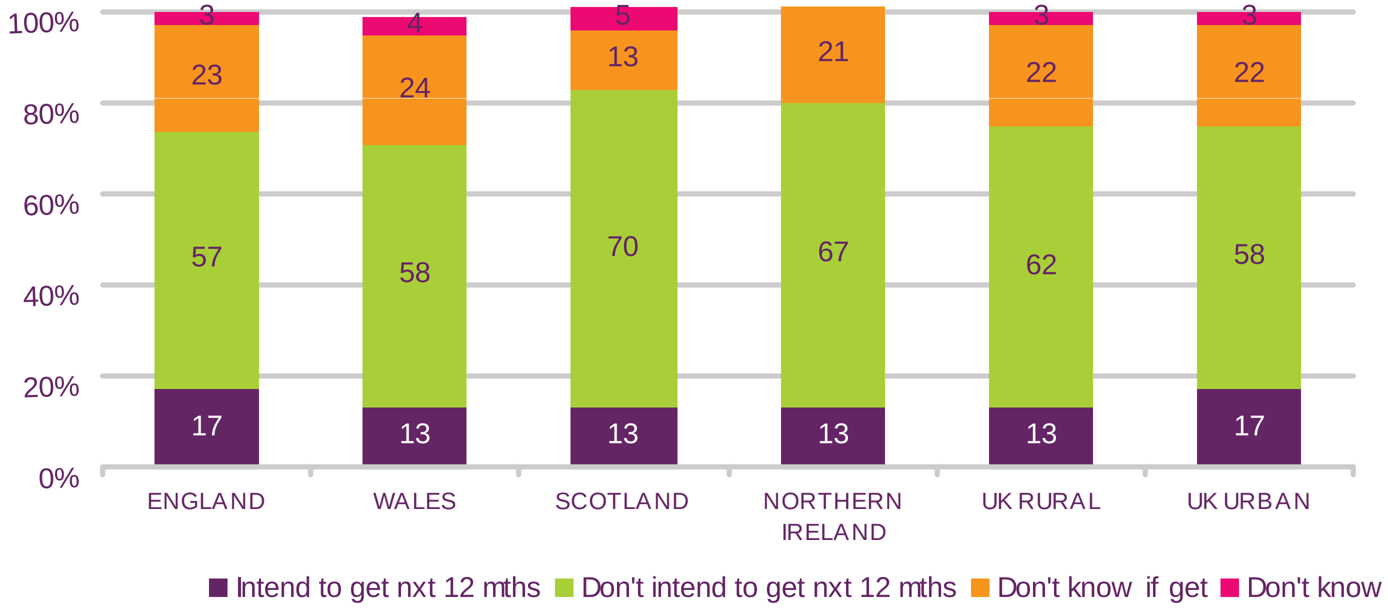


Source: Ofcom communications tracking survey, Q1 2008.
Note this question was asked Q1 2008 but not Q2 2008 – therefore access at home data may vary slightly versus other information in this pack.

Nations profile – intention to get the internet

Among people without the internet at home, a small proportion say they intend to get it in the next 12 months. Just under one fifth of people in England (17%) without internet access say they intend to get it at home in the next 12 months. 13% of people without the internet at home in Wales, Scotland and Northern Ireland say they intend to get it in the next 12 months.

Do you intend to get the internet at home in the next 12 months?



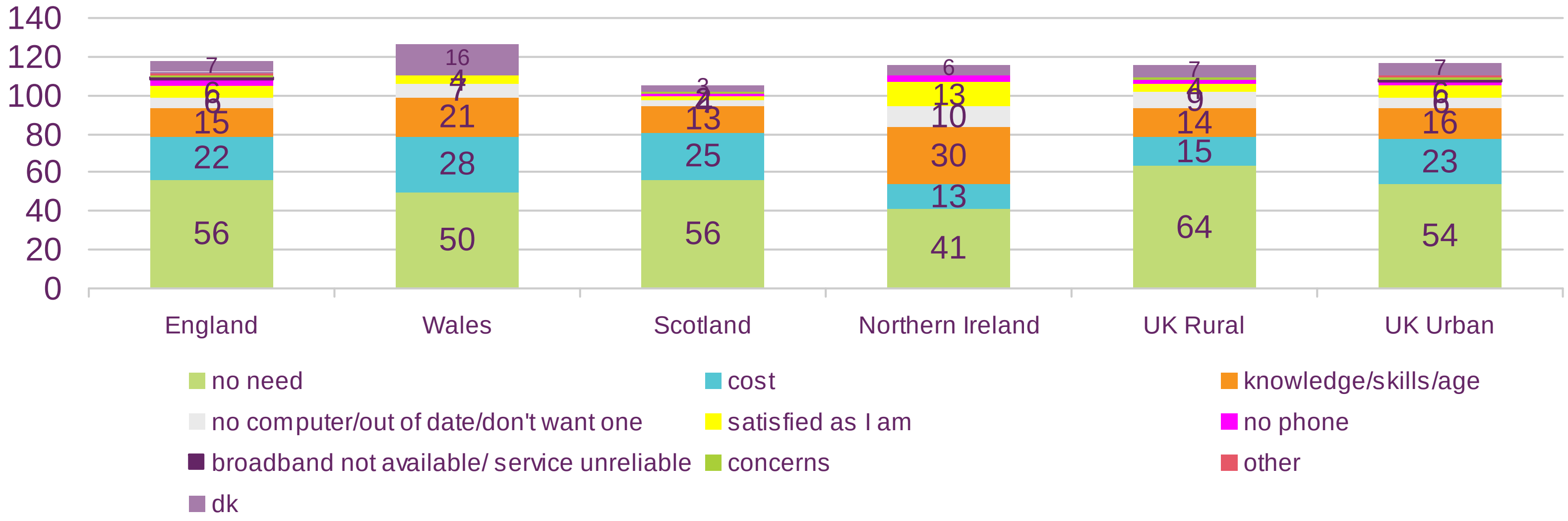
Source: Ofcom communications tracking survey, Q1 2008. Base: All adults without internet access at home.

Nations profile - reasons for not taking up internet

Of those people without the internet at home who do not intend to get it in the next 12 months, the main reason given for not getting it in each nation were ‘no need’. Cost was second most mentioned reason in England, Wales and Scotland, followed by ‘knowledge/skills/age’. Very few people mentioned concerns, or equipment or availability barriers.

People in Wales and Northern Ireland were more likely to mention ‘knowledge/skills/age’ (21% and 30% respectively) . People in rural areas were more likely to mention ‘no need’ compared to those in urban areas (64% and 54% respectively)

What are your reasons for not getting the internet in the next 12 months?

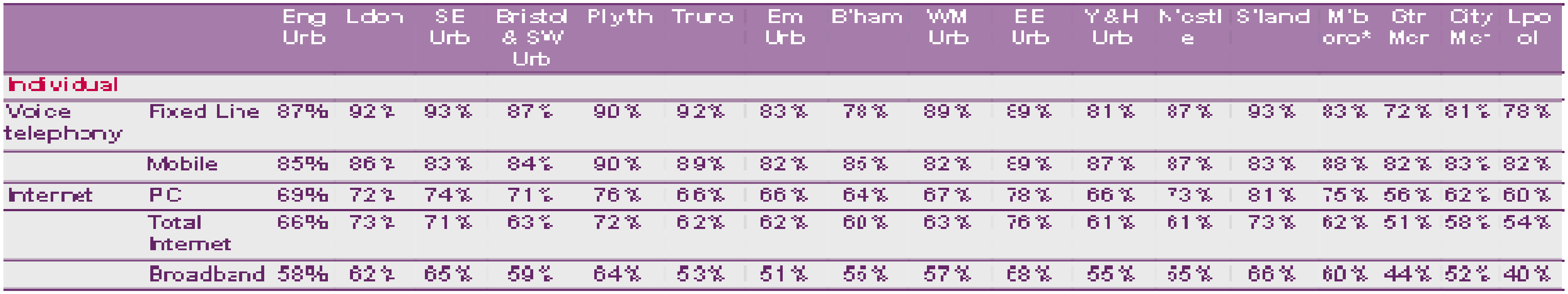


Source: Ofcom communications tracking survey, Q1 2008. Base: Among people without internet access and say unlikely to take up in next 12 months, multiple answers possible, spontaneous. ‘No need’ category includes people who say ‘don’t use internet enough’.

England communications service summary

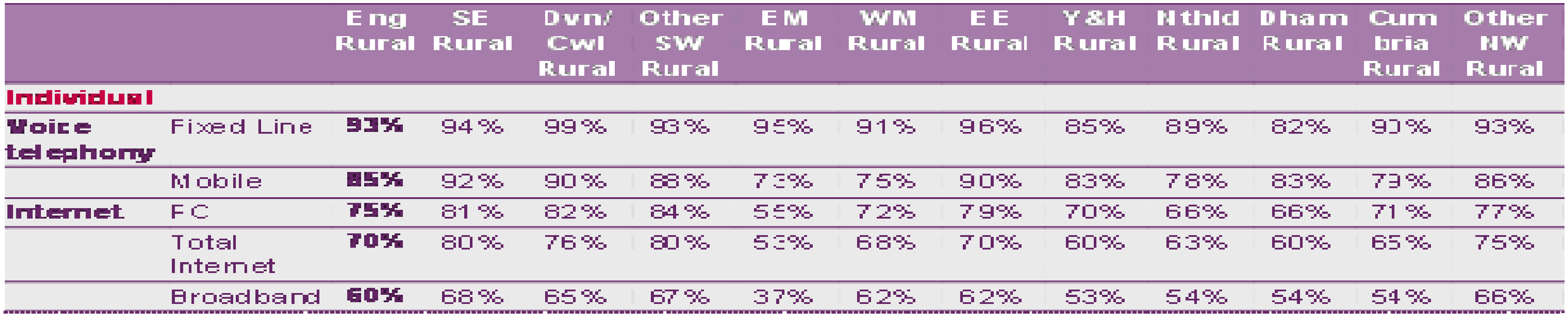
A regional comparison in England indicated that Greater Manchester had the lowest levels of PC (56%), internet (51%) and broadband (44%) take up across urban England, and adults in this area were also the least likely to have a landline at home. Lower internet take-up in Greater Manchester may be linked to lower landline penetration.

Take up of communications services 2008 - urban England



		Eng Urb	Ldon	SE Urb	Bristol & SW Urb	Plyth	Truro	Em Urb	B'ham	WM Urb	EE Urb	Y&H Urb	N'cstle	S'land	M'boro*	Gtr Mcr	City Mcr	Lpool
Individual																		
Voice telephony	Fixed Line	87%	92%	93%	87%	90%	92%	83%	78%	89%	69%	81%	87%	93%	83%	72%	81%	78%
	Mobile	85%	86%	83%	84%	90%	89%	82%	85%	82%	69%	87%	87%	83%	88%	82%	83%	82%
Internet	PC	69%	72%	74%	71%	76%	66%	66%	64%	67%	78%	66%	73%	81%	75%	56%	62%	60%
	Total Internet	66%	73%	71%	63%	72%	62%	62%	60%	63%	76%	61%	61%	73%	62%	51%	58%	54%
	Broadband	58%	62%	65%	59%	64%	53%	51%	55%	57%	68%	55%	55%	66%	60%	44%	52%	40%

Take up of communications services 2008 - rural England



		Eng Rural	SE Rural	Dvn/ Cwl Rural	Other SW Rural	EM Rural	WM Rural	EE Rural	Y&H Rural	Nthld Rural	Dham Rural	Cumbria Rural	Other NW Rural
Individual													
Voice telephony	Fixed Line	**93%**	94%	99%	93%	95%	91%	96%	85%	89%	82%	90%	93%
	Mobile	**85%**	92%	90%	88%	73%	75%	90%	83%	78%	83%	73%	86%
Internet	PC	**75%**	81%	82%	84%	55%	72%	79%	70%	66%	66%	71%	77%
	Total Internet	**70%**	80%	76%	80%	53%	68%	70%	60%	63%	60%	65%	75%
	Broadband	**60%**	68%	65%	67%	37%	62%	62%	53%	54%	54%	54%	66%

Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey Q1 2008. Base: adults aged 15+

Scotland communications service summary

Broadband take-up in Scotland is below UK average, but has risen since 2006 by 11 percentage points to 53% of homes. However, in Q1 2008 there was considerable variation across the country; Aberdeen (64%), Dundee, Edinburgh and Highlands & Islands (all 62%) were substantially ahead of the UK average. In Glasgow penetration was 32%, constrained by low PC ownership in the city (44%, vs Scottish average 64%) and probably also by low average household incomes. Broadband take-up was higher in Scotland's rural areas (59%) vs urban (52%).

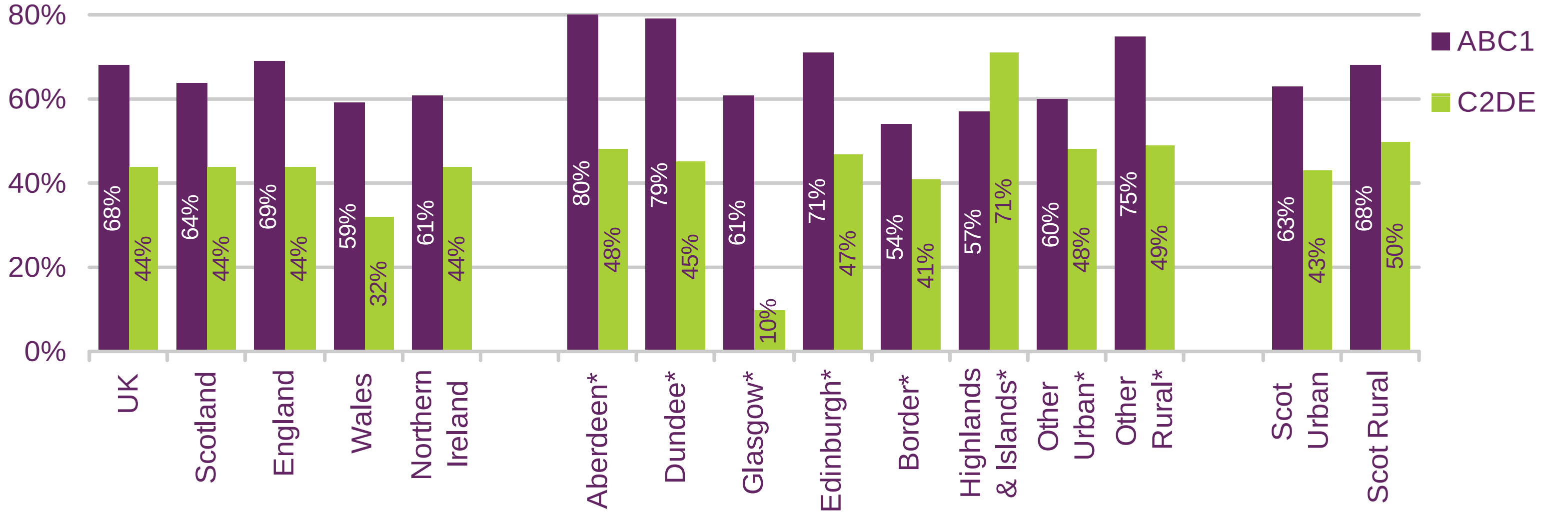
Take up of communications services 2008 by Scotland region

		UK	Scot	A'deen	D'dee	G'gow	Eb'gh	B'rder	H'lds & I'lds	Other Urban	Other Rural*	Scot Urban	Scot Rural
Individual													
Voice telephony	Fixed Line	**87%**	87%	92%	77%	78%	90%	84%	97%	86%	90%	86%	91%
	Mobile	**84%**	81%	85%	91%	84%	88%	70%	82%	78%	85%	80%	84%
Internet	PC	**69%**	64%	75%	72%	44%	75%	64%	73%	63%	64%	63%	67%
	Total Internet	**65%**	60%	68%	65%	36%	71%	54%	70%	61%	65%	59%	66%
	Broadband	**57%**	53%	64%	62%	32%	62%	47%	62%	53%	61%	52%	59%

Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey, Q1 2008.
Note: * Sample size less than 100. Apply caution and treat as indicative only.

Scotland broadband take-up by socio-economic group

In Glasgow broadband penetration was 32%, constrained by low PC ownership in the city (44%, vs Scottish average 64%) and probably also by low average household incomes. The relatively low PC and broadband take-up in Glasgow is linked to low income. In Glasgow, a significant majority of C2DEs in Glasgow did not have a broadband connection at home, although ABC1s in Glasgow also tended to be less likely than ABC1s in other cities to have a broadband connection.



Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey, Q1 2008.
Base: Adults aged 15+. * Sample size less than 100. Apply caution and treat as indicative only.

Wales communications services summary

Broadband take up in Wales is significantly lower than UK average; grown by 2 percentage points since 2006 to 45% in 2008. The rate of increase has slowed vs 2005-2006. In 2008, take-up of broadband was highest in the main population centres with little difference between Cardiff (58%), Swansea (56%) and Newport (62%). It is lowest in smaller urban areas in the south (34%) and Wrexham and other urban areas in the north (44%).

By demographic Wales has lower take up vs UK among under 45s (52% vs 64%), over 45+ (42% vs 53%), people in ABC1 (59% vs 68%) and C2DE homes (32% vs 44%). Lower than average take up in Wales is likely to be related to lower than UK average household income levels.

Take up of communications services 2008 by Wales region

		Wales	Cardiff	Nport	Sw'sea	Wxam	Other Urban Sth	Mid Wales*	Coastal North*	Rural Nth	Rural Sth	Wales Urban	Wales Rral
Individual													
Voice telephony	Fixed Line	79%	81%	80%	84%	77%	74%	85%	78%	88%	86%	77%	88%
	Mobile	82%	89%	85%	85%	84%	82%	74%	77%	74%	76%	84%	74%
Internet	PC	60%	72%	67%	66%	71%	43%	69%	64%	67%	65%	59%	67%
	Total Internet	55%	69%	62%	64%	58%	40%	65%	56%	62%	57%	53%	61%
	Broadband	45%	58%	62%	56%	44%	34%	46%	49%	52%	49%	43%	51%

Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey, Q1 2008.
Note: * Sample size less than 100. Apply caution and treat as indicative only.

Northern Ireland communications service summary

Broadband take-up is lower in N. Ireland (52%) than the UK average (58%). It is highest in Northern Ireland's eastern rural areas (59%). This is consistent with higher take up in rural areas in the UK as a whole.

Take up of communication services 2008 by Northern Ireland region

		NI	West	East	West Urban	East Urban	West Rural*	East Rural*	Bfast	L'derry/ Derry	Small towns	Brder	Urban	Rural
Individual														
Voice telephony	Fixed Line	**88%**	89%	88%	80%	87%	97%	90%	76%	72%	89%	85%	85%	94%
	Mobile	**85%**	81%	88%	85%	87%	79%	89%	84%	88%	86%	86%	86%	84%
Internet	PC	**65%**	60%	68%	62%	67%	59%	68%	61%	74%	56%	70%	66%	63%
	Total Internet	**61%**	57%	62%	56%	61%	59%	67%	50%	67%	53%	66%	60%	62%
	Broadband	**52%**	50%	54%	51%	52%	49%	59%	47%	60%	45%	59%	52%	54%

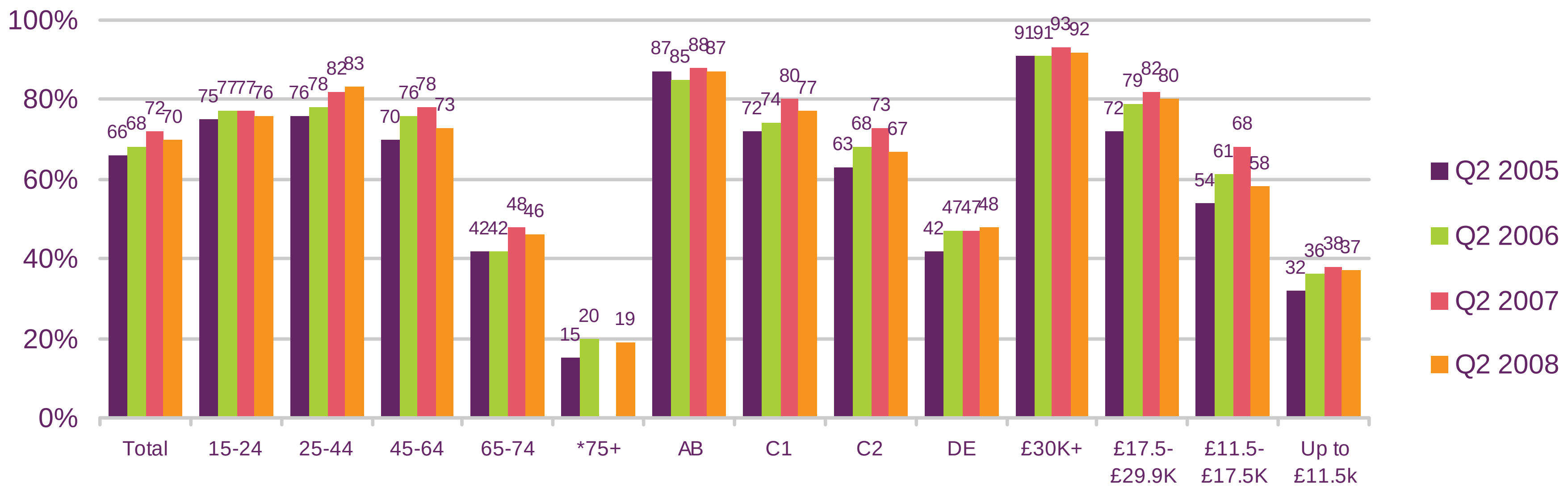
Source: Ofcom Nations and regions report 2008. Ofcom communications tracking survey Q1 2008.

* Sample size less than 100. Apply caution and treat as indicative only.

Demographics
PC, Internet and Broadband take-up

PC ownership by age, socio-economic, HH income

This chart shows the growth in PC ownership since 2005 by age, socio economic group and household income. In each demographic ownership appears to plateau in 2007 and 2008.



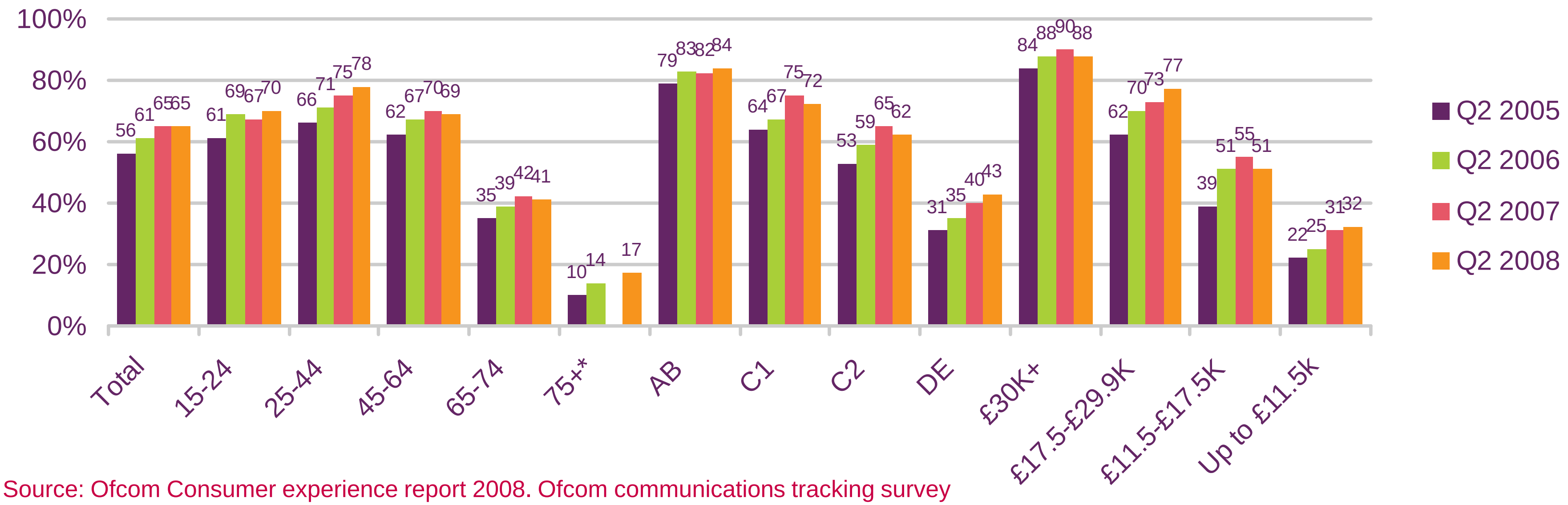
Does your household have a PC or laptop computer?

Source: Ofcom Consumer experience report 2008. Ofcom communications tracking survey.
Base: All adults 15+ (Q2 2005, 2206) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109). * Small base size; treat as indicative only. Data from 2007 has been removed as base was too small.

Internet access at home by age, socio-economic group and household income

This chart shows the growth in internet access at home since 2005 by age, socio economic group and household income. Internet access plateaus at 65% from 2007 to 2008 among all adults 15+ in the UK.

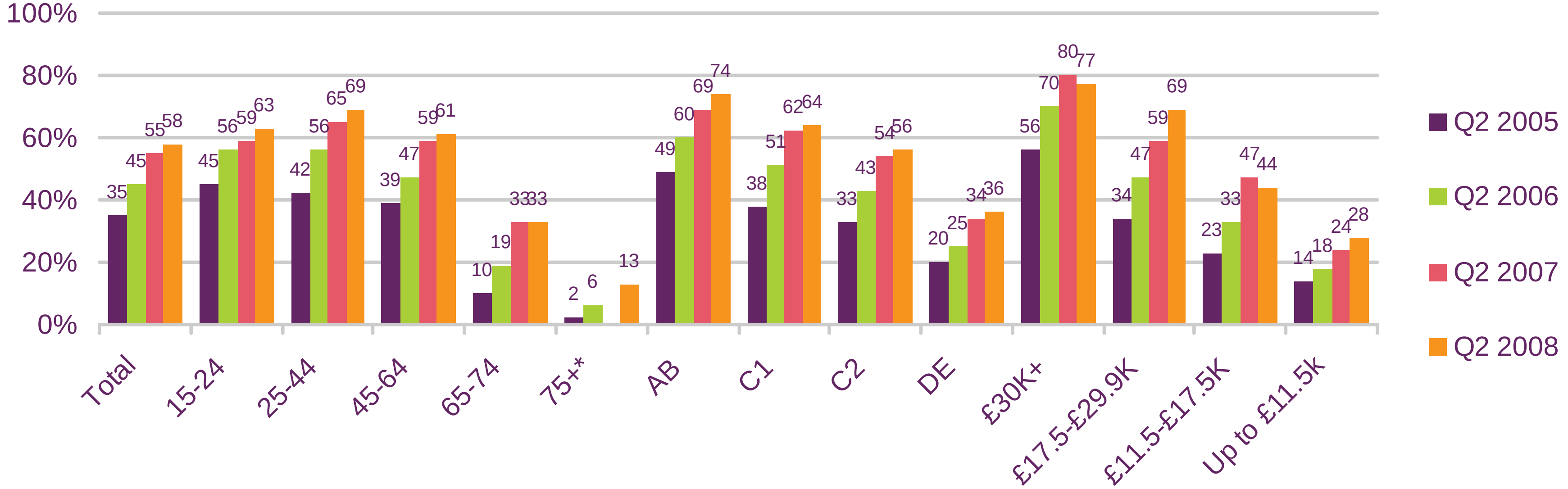
Do you or does anyone in your household have access to the internet at home?



Source: Ofcom Consumer experience report 2008. Ofcom communications tracking survey
Base: All adults 15+ (Q2 2005, 2206) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109). * Small base size; treat as indicative only. Data from 2007 has been removed as base was too small.

Broadband access at home by age, socio-economic group and household income

This chart shows the growth in broadband access at home since 2005 by age, socio economic group and household income. Broadband take up grew rapidly from 2005 to 2007 but the rate of growth has decreased from 2007 to 2008, increasing from 55% to 58% of households.



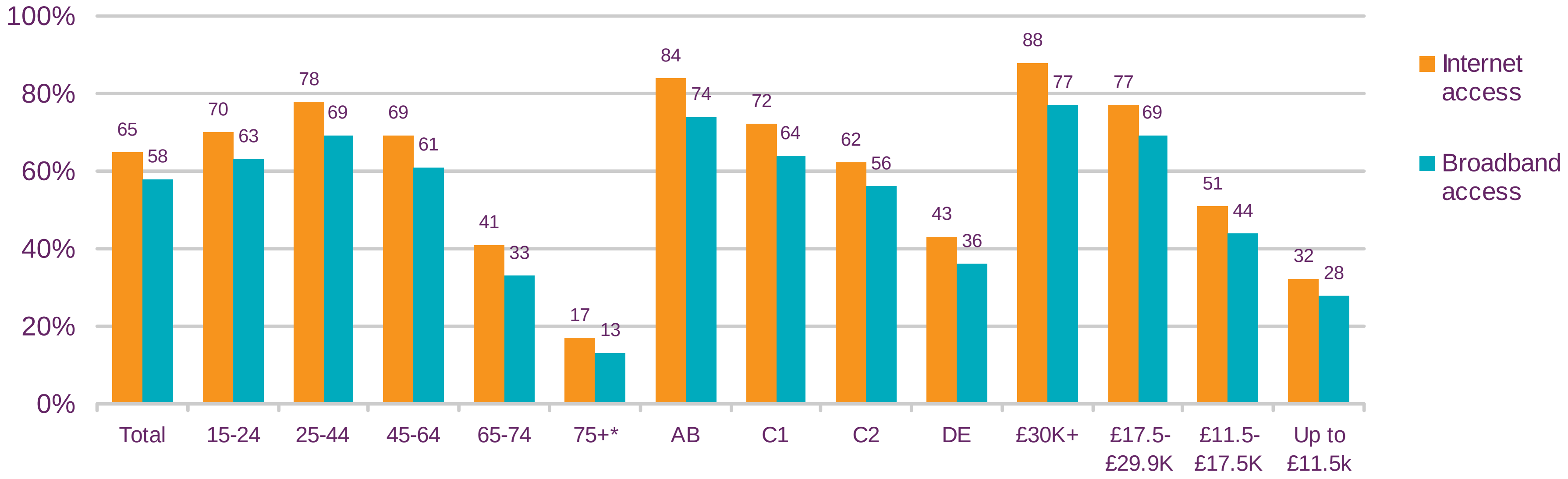
Source: Ofcom Consumer experience report. Ofcom communications tracking survey. Note: broadband excludes access via ‘other’ high speed method, mobile dongle or mobile phone. Base: All adults 15+ (Q2 2005, 2206) (Q2 2006, 2439) (Q2 2007, 2265) (Q2 2008, 2109). * Small base size; treat as indicative only. Data from 2007 has been removed as base was too small.

Internet and broadband access by demographic

This chart provides a summary of internet and broadband access by age, socio economic group and household income in Q2 2008.

Note: There is a small percentage of people (approx. 2%) who live in a household with internet access, but do not use it.

Do you or does anyone in your household have access to the internet at home?
Do you or anyone else in your household have broadband internet access at home?



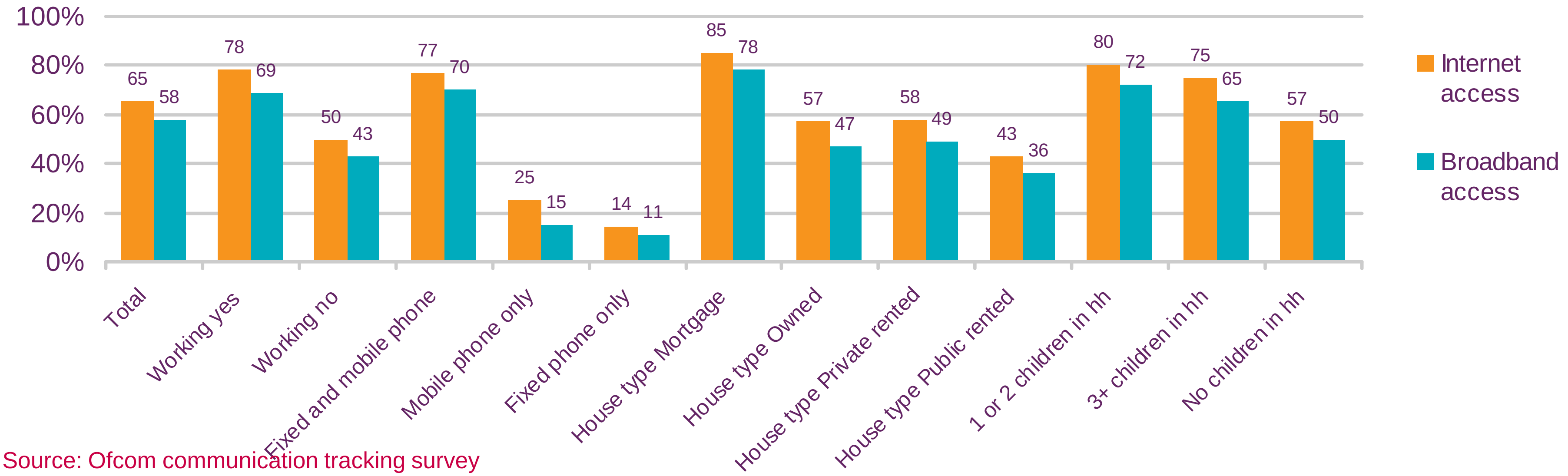
Source: Ofcom communications tracking survey
Base: All adults 15+ (Q2 2008, 2109). * Small base size; treat as indicative only. Data from 2007 has been removed as base was too small.

Internet and broadband access by demographic

This chart provides a summary of internet and broadband access by working status, phone type, household type and presence of children in household in Q2 2008.

Our communications tracking survey also provides an indication of internet take up levels among people with disabilities. However, sample sizes are small and data must be treated with caution as indicative only. In Q2 2008 48% of people with visual disabilities had the internet at home, 42% with broadband; 39% of people with hearing disabilities had the internet and 32% had broadband, whereas 39% of people with mobility disabilities had the internet and 36% broadband. See Annex 3, Ofcom *Consumer experience report* 2008 for further analysis.

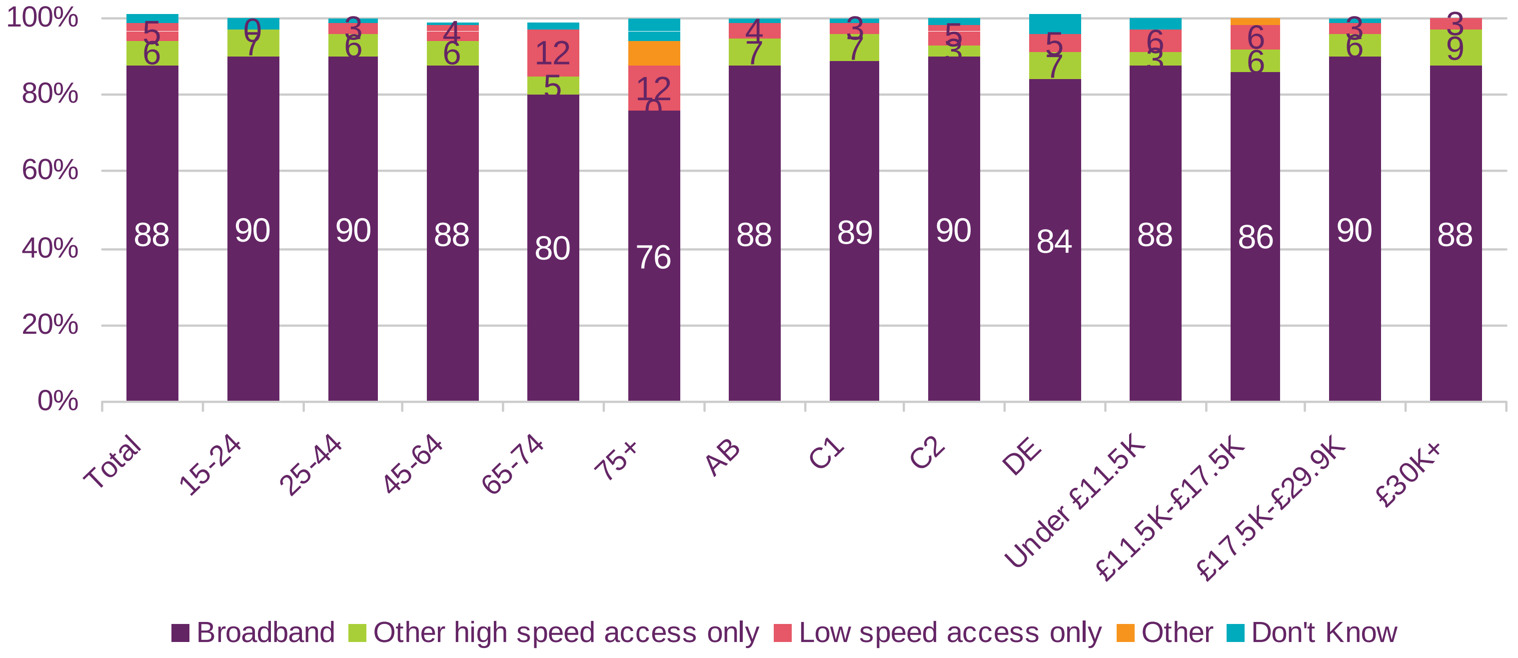
Do you or does anyone in your household have access to the internet at home?
Do you or anyone else in your household have broadband internet access at home?



Source: Ofcom communication tracking survey
Base: All adults 15+ (Q2 2008, 2109)

Profile of internet access by main type of connection

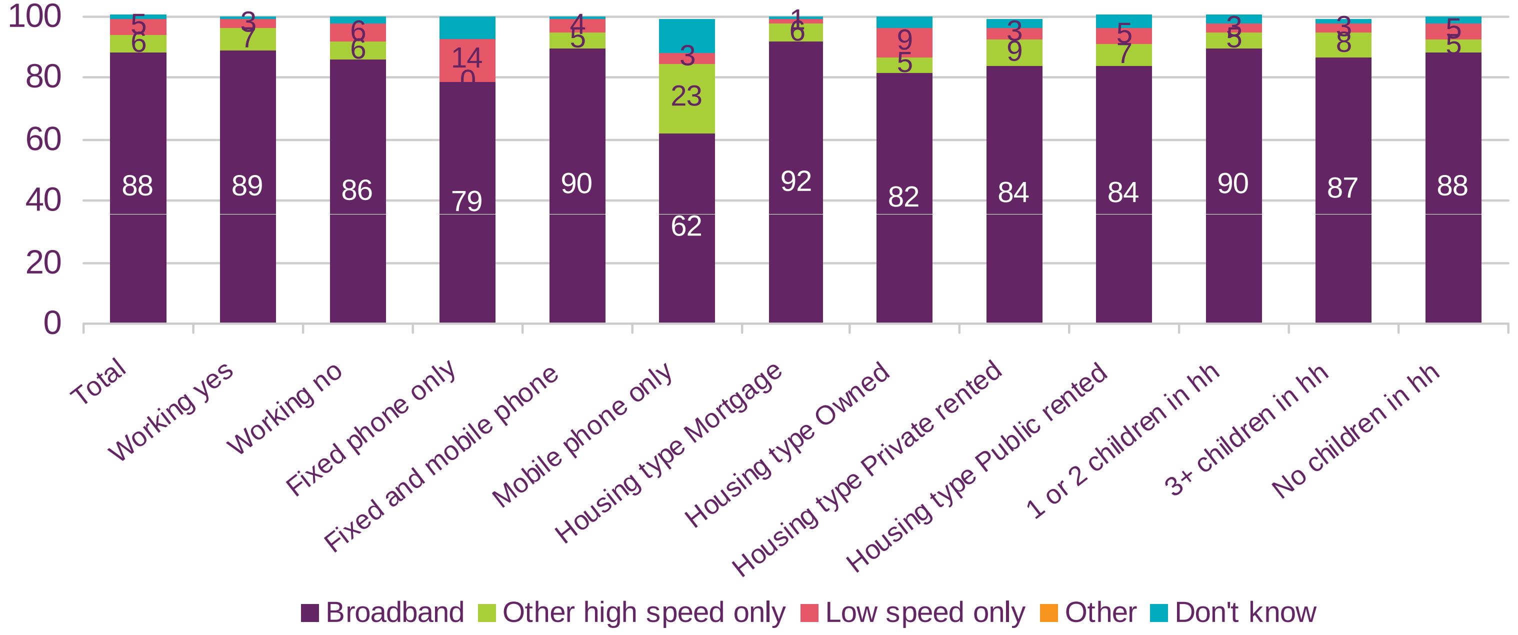
The most widely used means of home connection is broadband, with almost 90% of people with internet at home having a broadband connection. People over 65 are less likely to say they have a broadband connection and more likely to have narrowband.



Source: Ofcom communications tracking survey, Q2 2008. Note: Broadband access excludes mobile broadband, mobile phone or other high speed access. Base: All adults 15+ with internet access at home

Profile of internet access by main type of connection

- Almost 90% of people with internet at home have a broadband connection at home. People in fixed line phone only homes are less likely to have a broadband connection and more likely to have narrowband connection, as are people who own their own home.

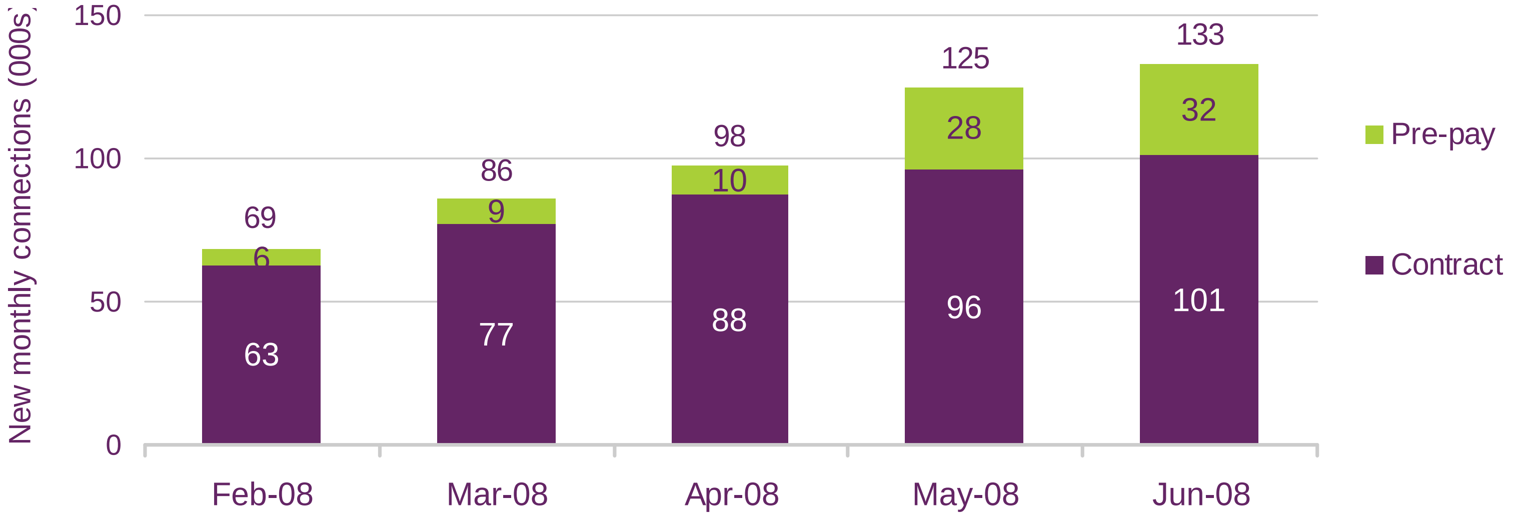


Source: Ofcom communications tracking survey, Q2 2008. Broadband access excludes mobile broadband, mobile phone or other high speed access. Base: All adults 15+ with internet access at home. Note people in mobile phone only homes using broadband or narrowband connections are likely to not have a phone line that they use for voice telephony.

Mobile broadband

Mobile broadband connections

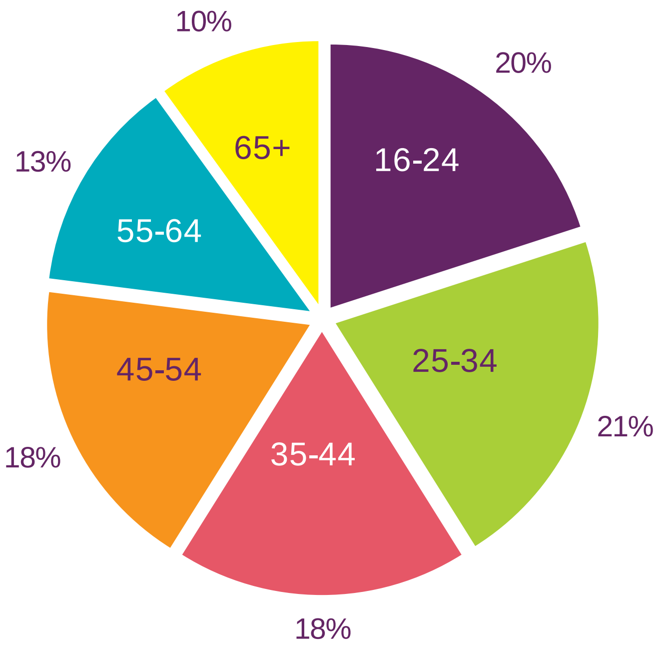
PCs and laptops that connect to the internet via 3g network using USB dongles, although still small, is growing. According to Gfk retail data, there were over 500,000 new connections to mobile broadband from February 2008 (first month data available for measurement) to June 2008. Monthly access fees under £20 make it a viable option either instead of fixed line access or as a complement. Pay as you go market is beginning to gain foothold, and represented 22% of new mobile broadband connections in May. As there is no requirement for a fixed line phone, and it cannot have multiple users, it is likely to be an individual rather than household purchase. Estimates for mobile broadband ownership vary. Ofcom's communications tracking survey (Q4 2008) indicates that around 10% of adults state that somebody in their household uses mobile broadband. This is consistent with estimates from Analysys Mason that there have been almost 2 million new mobile broadband subscriptions in the last two years with 2.2 million subscriptions at the end of 2008.



Source: Ofcom communications market report. GfK retail data (consumer channels only). Mobile broadband defined as internet access on a pc either through a mobile dongle or a 3G card

Age profile of mobile broadband users

The age distribution shows that it is widely used by all age groups.

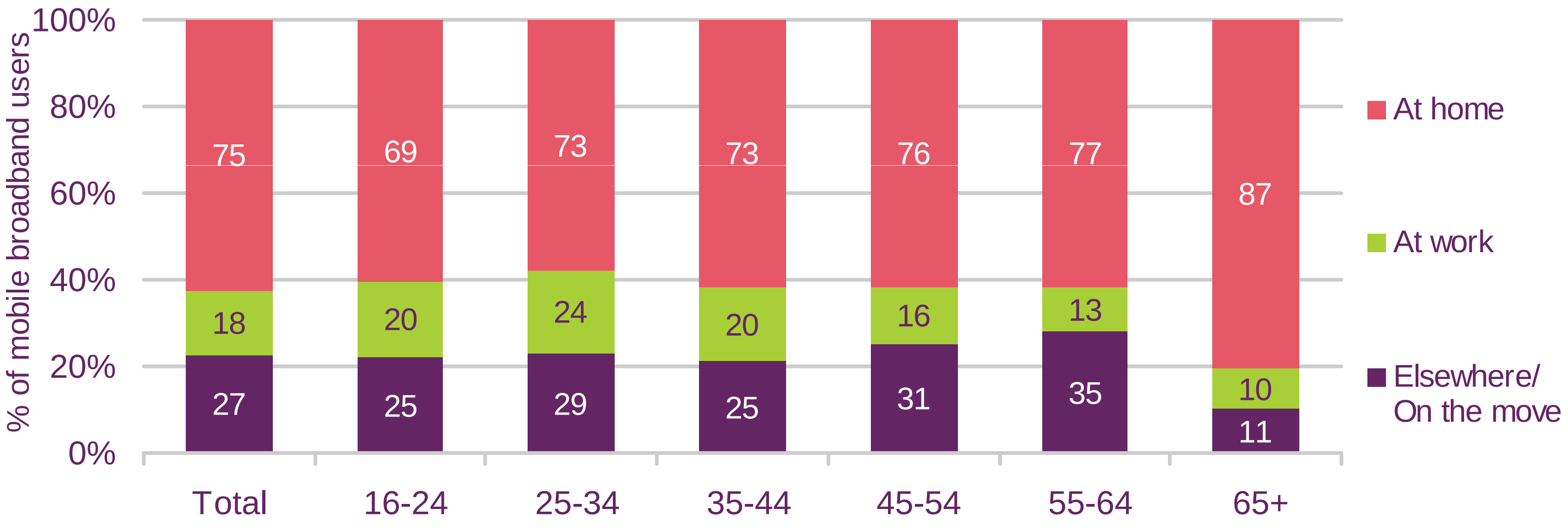


Source: Ofcom Communications market report 2008. GFK consumer panel, Q1 2008

Location of mobile broadband use

Research in 2008 found that only 27% of mobile broadband users connect away from work and home, while 75% use it inside the home.

Where do you use mobile broadband?

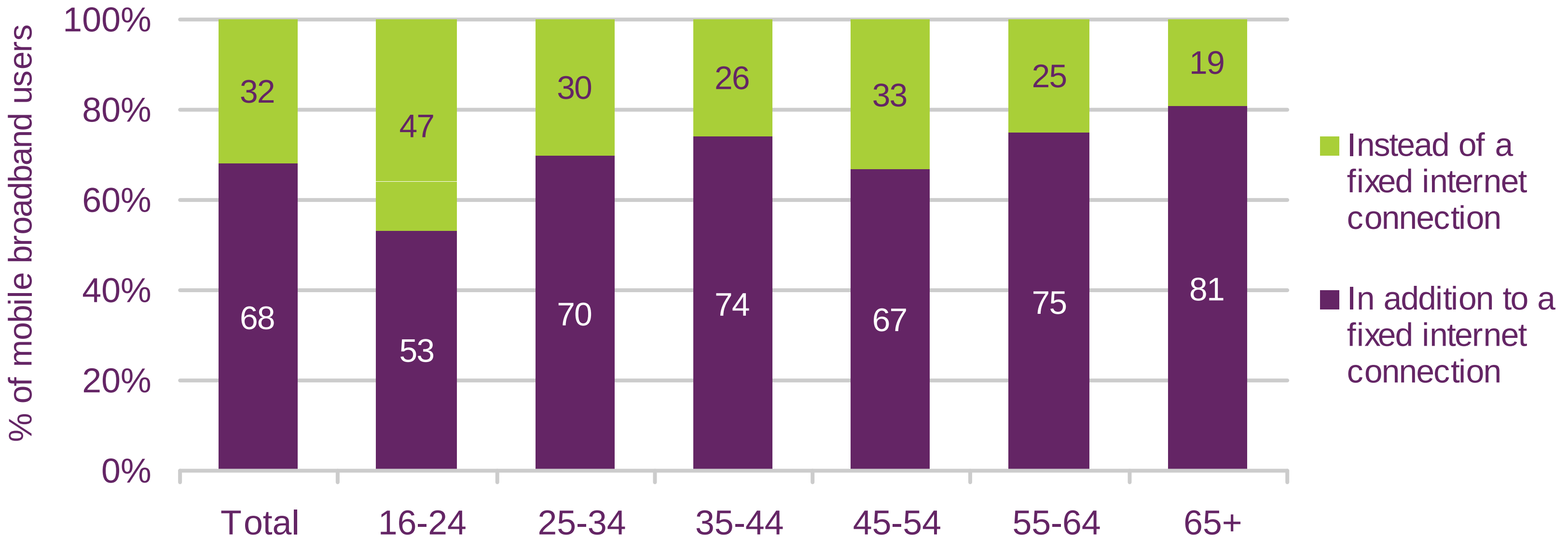


Source: Ofcom communications market report 2008. GFK consumer panel, Q1 2008.
Notes: multi-code question; Caution low sample for 16-24 and over 65 – use as a guide only. Note that figures for people over 65 will be influenced by the fact that many no longer work.

Use of mobile and fixed line broadband

68% of people say their mobile broadband connection is in addition to a fixed line connection, which suggests it is complementary to a fixed line (Q1, 2008).

Is your mobile broadband in addition or instead of a fixed connection?



Source: Ofcom communications market report 2008. GFK consumer panel, Q1 2008
Notes: multi-code question; Caution low sample for 16-24 and over 65 – use as a guide only

Narrowband

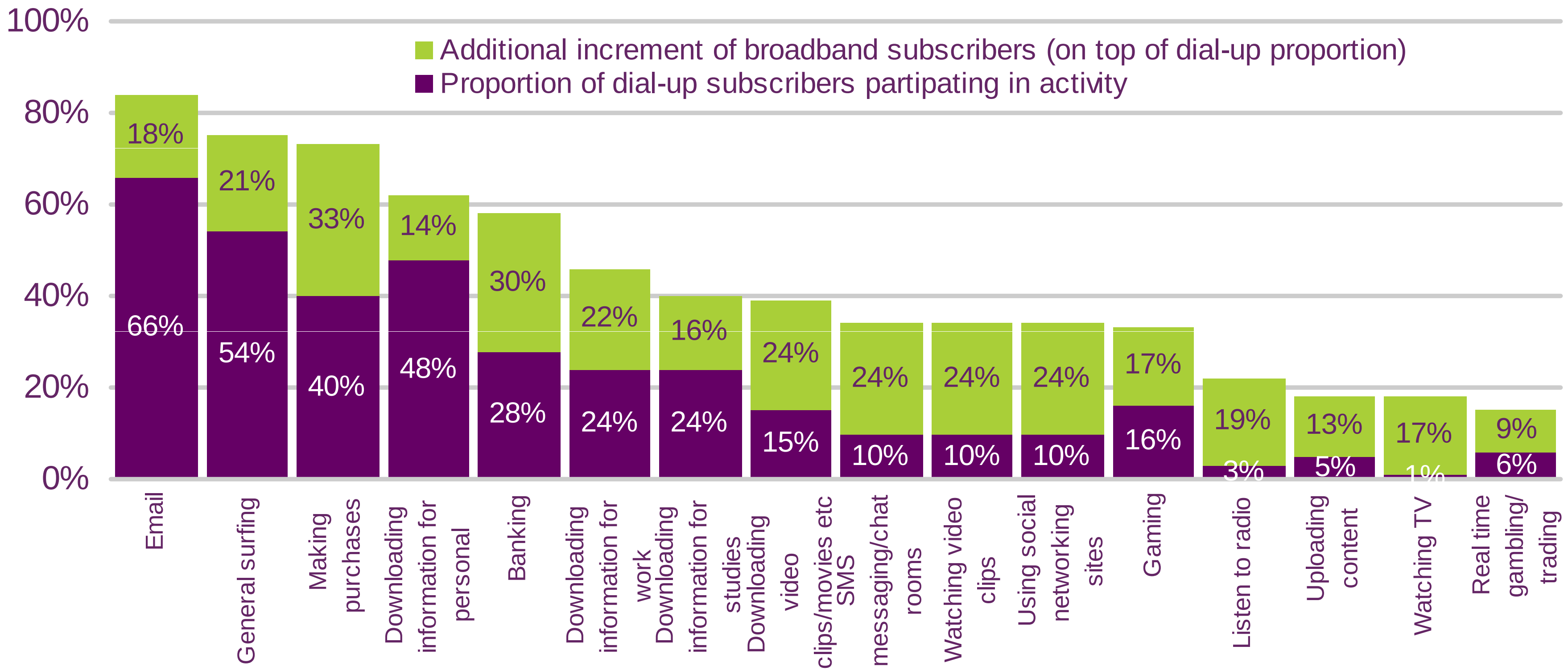
People with narrowband

Ofcom's communications tracking survey (Q2 2008) found that 3% of people live in a household with narrowband as their main means of internet access at home.

This survey found that about two fifths of people with narrowband say that they intend to get broadband in the next 12 months.

Among those who say they do not intend to get broadband, our research indicates that the main reasons given are satisfied as I am (about two fifths), followed by no need (about one third) don't use enough (about one quarter), and cost (about one quarter). However, the base size is small and this data therefore needs to be treated with caution as indicative only.

Use of services among narrowband and broadband users



Source: Ofcom communications market report 2008. Ofcom communications tracking survey, Q1 2008.
Question “Which, if any, of these do you or members of your household use the Internet for while at home?”
Base: Adults with broadband (1297); adults with narrowband (116)
Note: The green bar denotes the additional proportion of respondents among broadband users over and above the proportion of dial-up users that claim to undertake each of the listed activities.

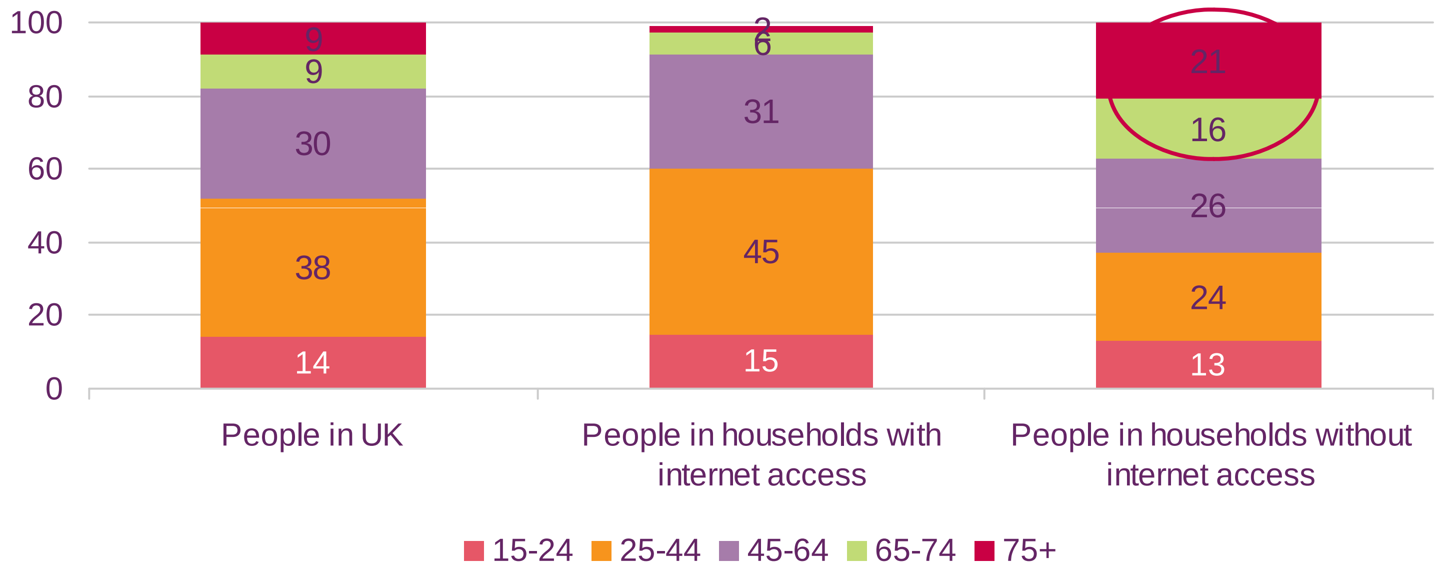
Non ownership of internet at home – demographic analysis

Non ownership of internet at home - overview

- Just over one third (35%) of people in the UK live in a household that does not have internet access (source: Ofcom communications tracking survey, Q2 2008)
- Compared to UK average, people without internet access at home are more likely to be:
  - over 65+
  - living in DE households
  - on household income below £11.5k
  - not working
  - in urban areas
  - in mobile phone only or fixed phone line only homes
  - without children in the home
  - living in rented accommodation
  - have visual, hearing or mobility disabilities*

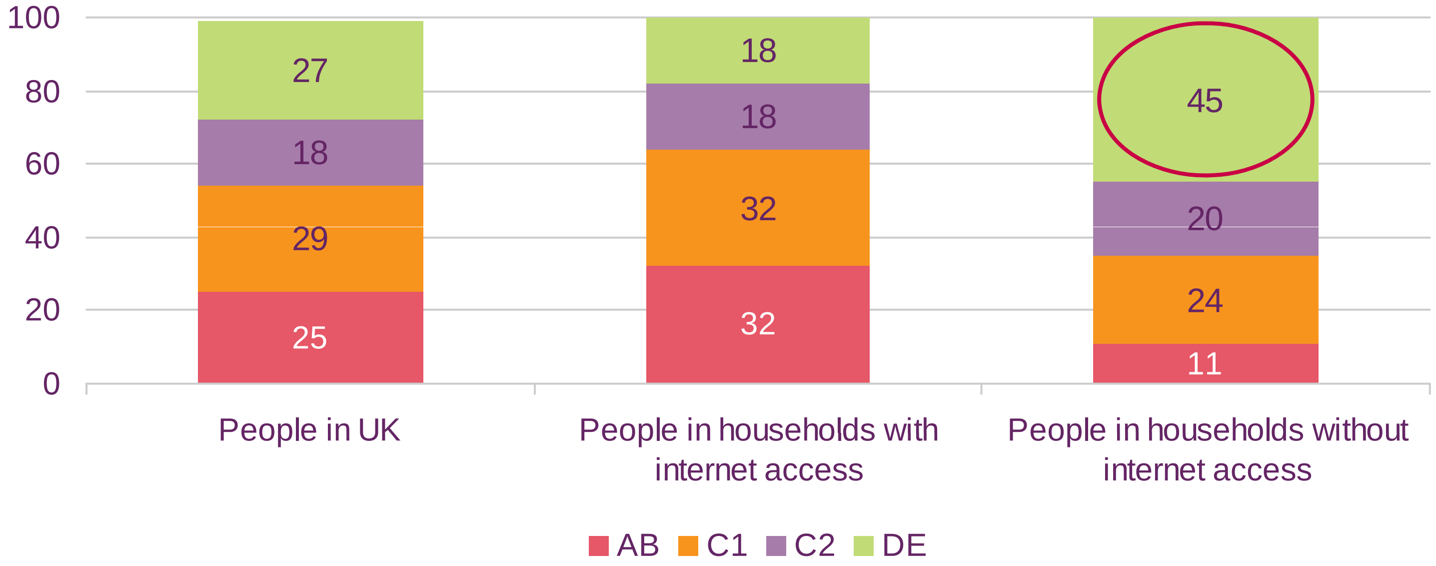
  *Sample sizes are small and data should be treated with caution as indicative only.
- There are overlaps between these demographics. E.g. around one third (33%) of people in DE households without internet access are over 65+, just over half (53%) of people not working are over 65+, and 42% of people in households under £11.5k are aged 65+.
- People without internet at home are also significantly less likely to have a computer in the home
- We applied a range of multivariate techniques (including hierarchical, principal component and regression analysis) among people without internet at home to identify key factors that differentiated this group from the wider population (Ofcom's communications tracking survey, Q1 and Q2 2008). These were found to be age, social economic status, access to landline, working status and type of household tenure and explain approximately two thirds of the variation of non-take up. The remaining variation may be driven by attitudinal differences such as engagement with technology. This section therefore focuses on these demographics.

One fifth of people without internet access at home are aged over 75+



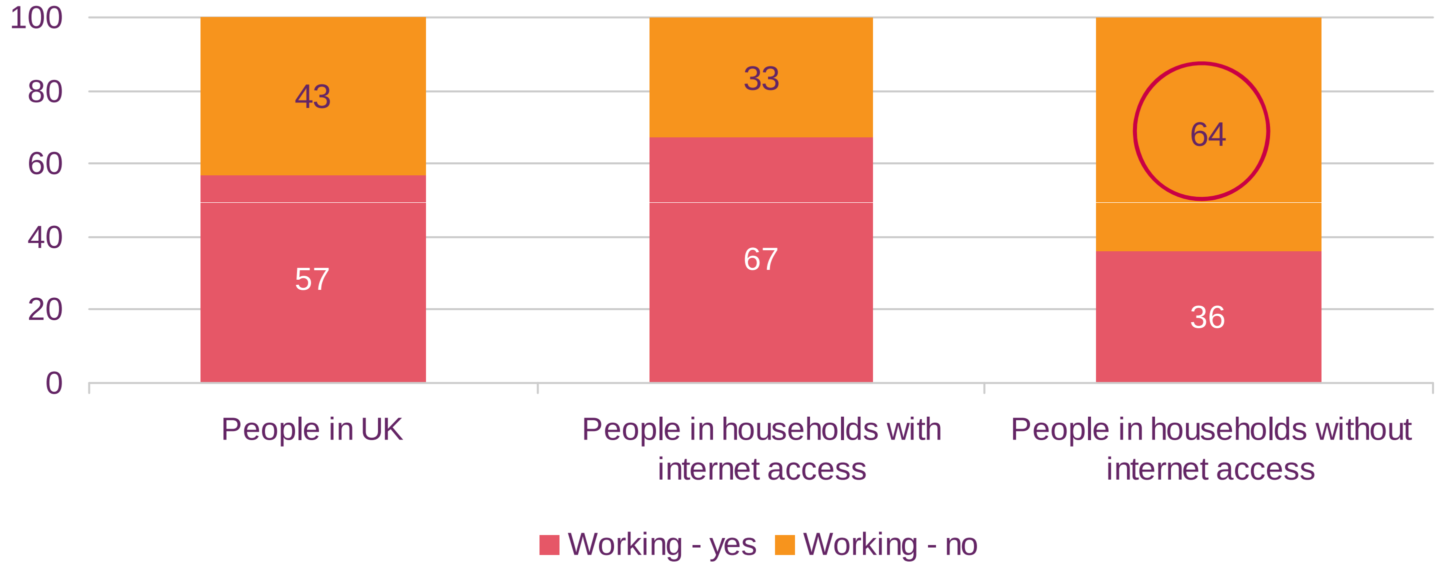
Source: Ofcom communications tracking survey, Q2 2008
Base: All adults 15+

45% of people without internet access are in DE households



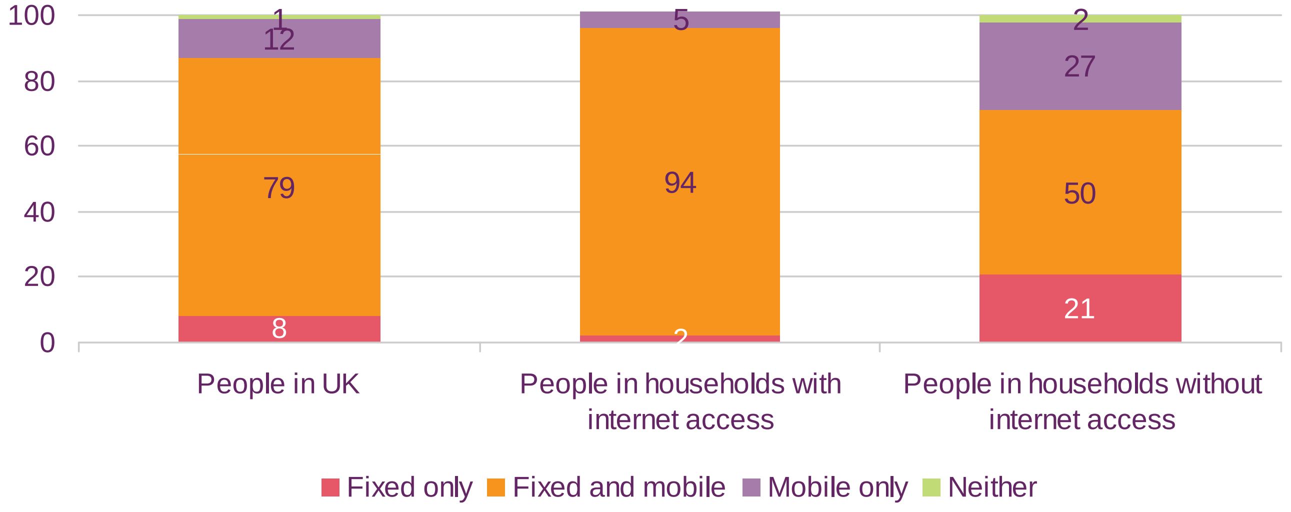
Source: Ofcom communications tracking survey, Q2 2008
Base: All adults 15+

Almost two thirds of people without internet access are not working



Source: Ofcom communications tracking survey, Q2 2008
Base: All adults 15+

One fifth of people without internet access live in fixed line only households, and just over one quarter in mobile phone only households



Source: Ofcom communications tracking survey, Q2 2008
Base: All adults 15+

Mobile phone only homes

- 12% of people in the UK live in mobile phone only homes. They are more likely to be younger (58% are aged 15-34) and in DE socio economic groups (47%), live in rented accommodation (76%) and less likely to have a pc at home (36%) compared to the UK average. They tend to have below average ownership of home entertainment services, although above average for games consoles and MP3s. They tend to be urban dwellers. Their mobile phones tend to be high spec models and pre-pay.

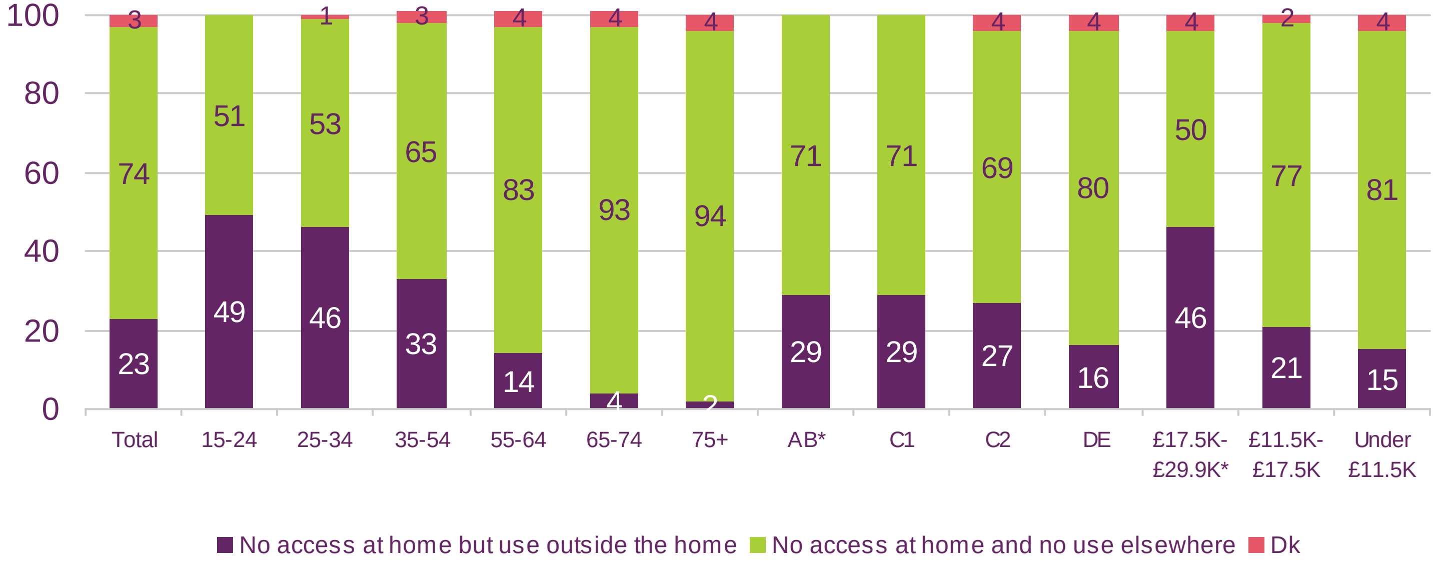
- They are less likely to have the internet at home, compared to the UK average, with around one quarter of people in mobile only homes (25%) with internet access.

- However, among those without internet access at home, they are more likely to use the internet outside of the home compared to other groups without the internet at home

- Among those without internet access at home, one third say they intend to get it in the next 12 months. Among those who do not intend to take up, cost is the most mentioned reason for not getting the internet at home

Internet use outside of the home

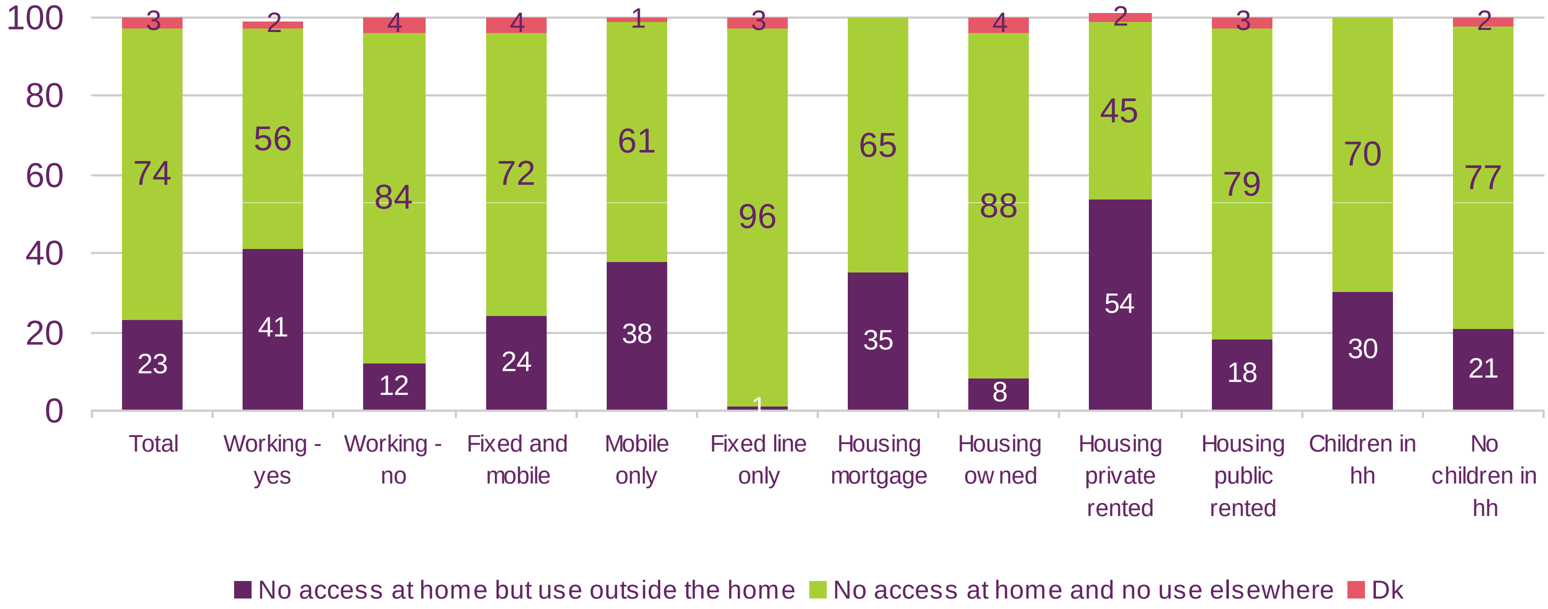
Among people without internet access at home, about one quarter (23%) use the internet outside of the home, leaving around three quarters (74%) who neither have access at home, nor use the internet outside of the home



Source: Ofcom communications tracking survey, Q1 2008.
Base: Adults 15+ without internet access at home. *Small base size, treat with caution. Base size too small to publish £30k+.

Internet use outside of the home

Among people without internet access at home, about one quarter (23%) use the internet outside of the home, leaving around three quarters (74%) who neither have access at home, nor use the internet outside of the home

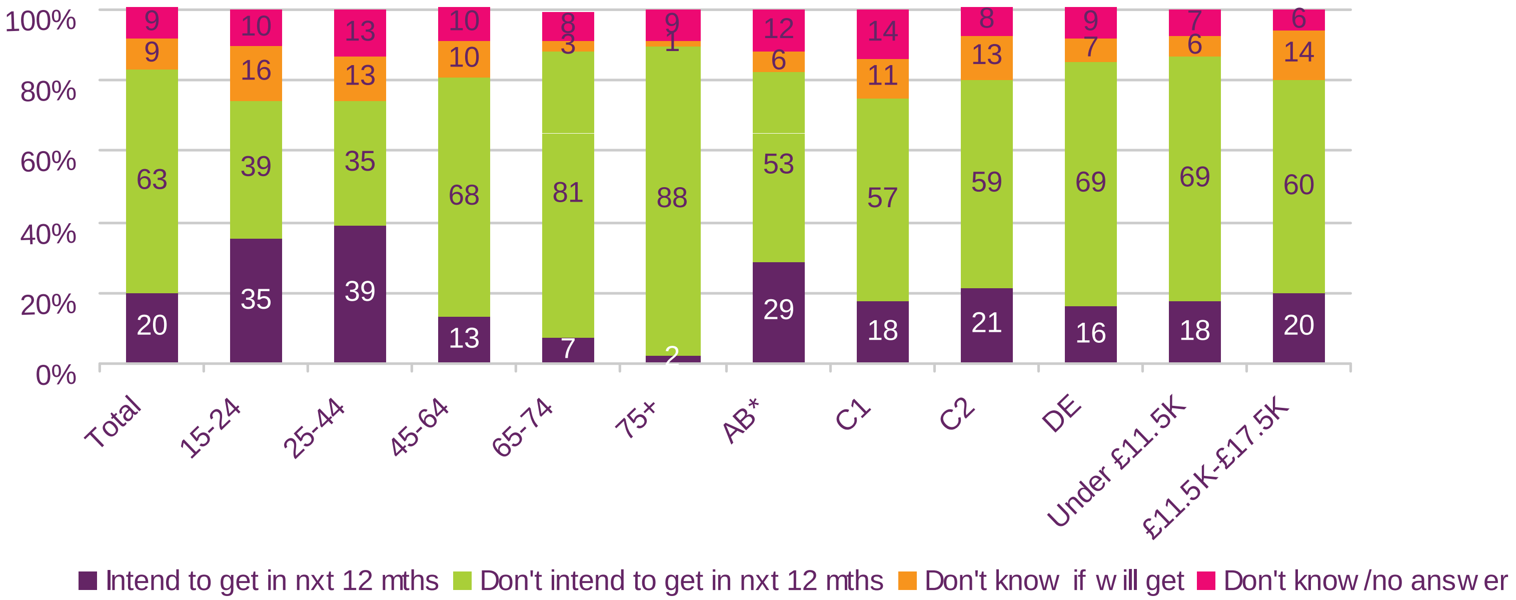


Source: Ofcom communications tracking survey, Q1 2008.
Base: Adults 15+ without internet access at home

Intention to get the internet at home

Among people without the internet at home, one fifth of people say they intend to get it in the next 12 months. Younger people aged 15-24 are more likely to say they intend to get the internet, as are people in AB homes.

Do you intend to get the internet at home in the next 12 months?

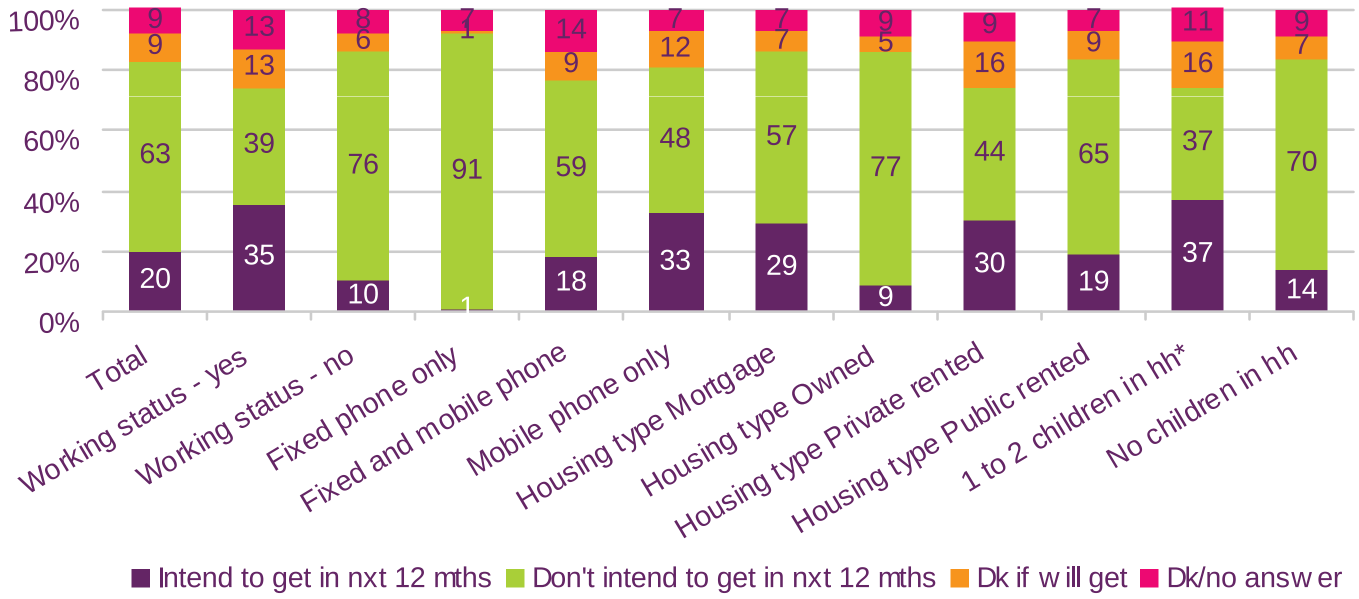


Source: Ofcom communications tracking survey, Q2 2008. Base: All adults without internet access at home. *small base size – treat with caution as indicative only. Household income above £17.5k base too small to report

Intention to get the internet at home

Among people without the internet at home, one fifth (20%) of people say they intend to get it in the next 12 months. People in mobile only homes (33%) are more likely to say they will get the internet in the next 12 months, as are people who are working (35%) and households with children. Our communications tracking survey also provides an indication of intention to take up among people with disabilities. However, sample sizes are small and the information must be treated with caution as indicative only. In Q2 2008 over four fifths of people with visual, hearing or mobility disabilities said they did not intend to get the internet in the next 12 months. See Ofcom Consumer experience report 2008, annex 3, for further analysis.

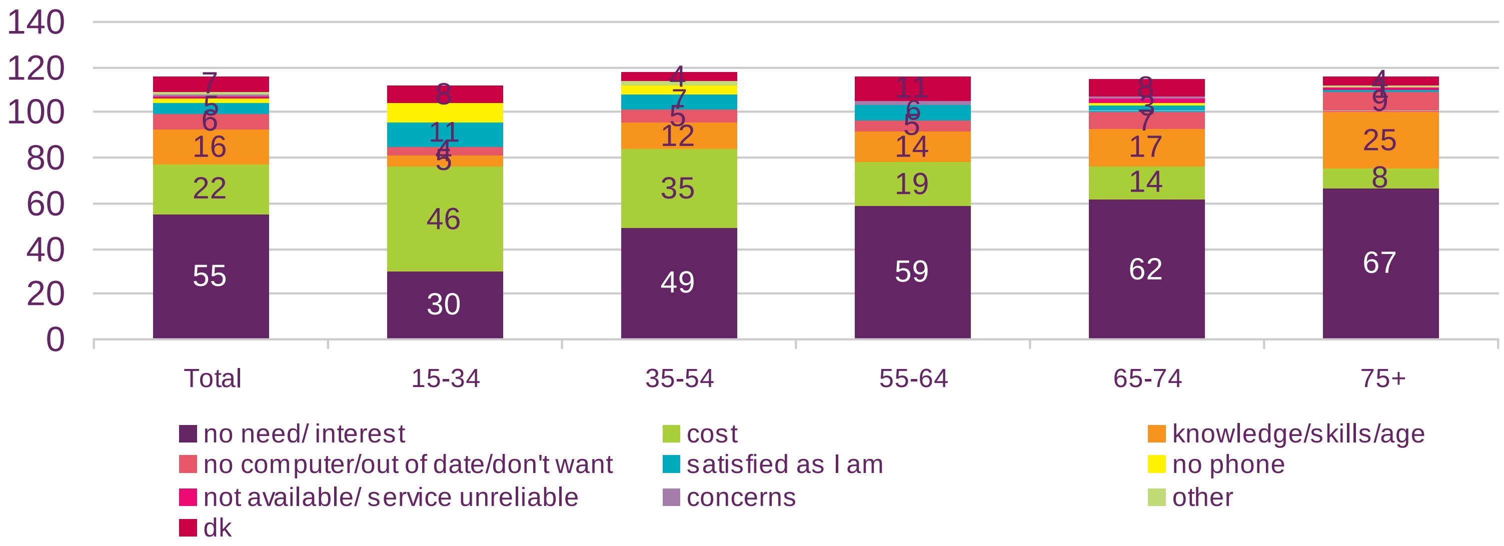
Do you intend to get the internet at home in the next 12 months?



Source: Ofcom communications tracking survey, Q2 2008. Base: All adults without internet access at home. Base small – treat with caution as indicative only

Reasons for not taking up internet at home

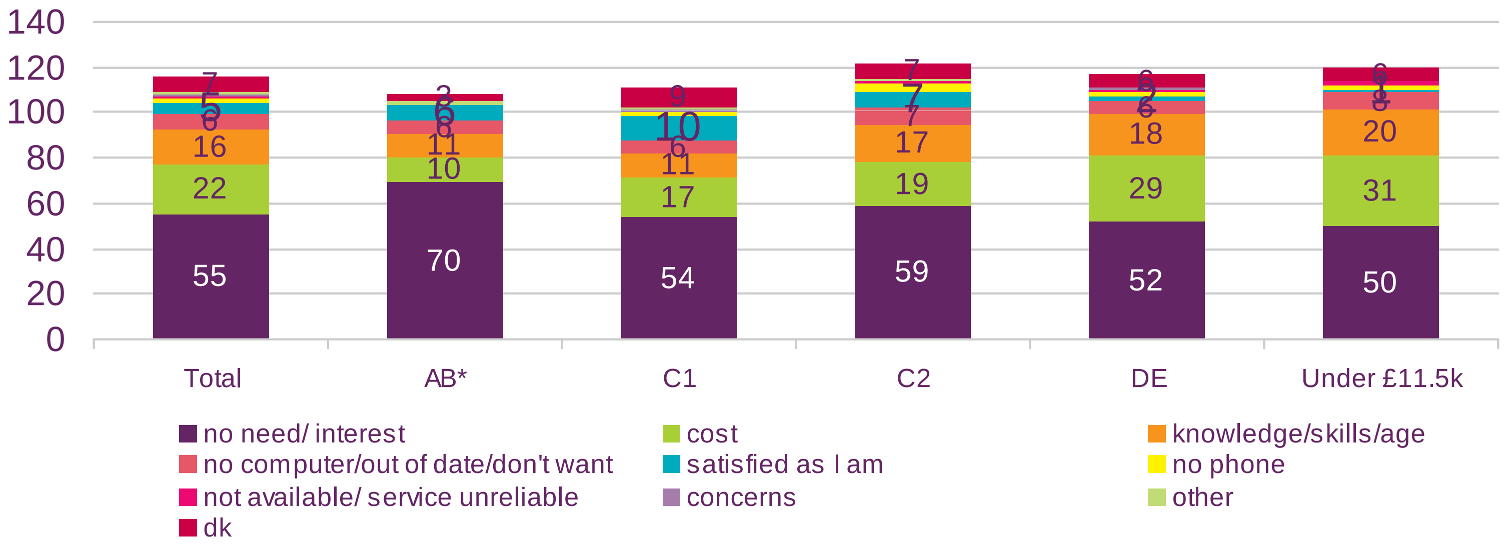
People who said that they did not intend to get the internet in the next 12 months were asked their reasons for not taking it up. The most named reason was ‘no need/interest’ (55%), followed by cost (22%). Among people 75+, two thirds (67%) cited no need/interest, whereas less than 10% named cost. This pattern is reversed among younger audiences, with cost most named barrier among 15-34s.



Source: Ofcom communications tracking survey, Q1 and 2 2008, n = 887. No subsample below 125
Base: Adults 15+ without internet access at home who say unlikely to take up in next 12 months, multiple answers possible, spontaneous.

Reasons for not taking up internet at home

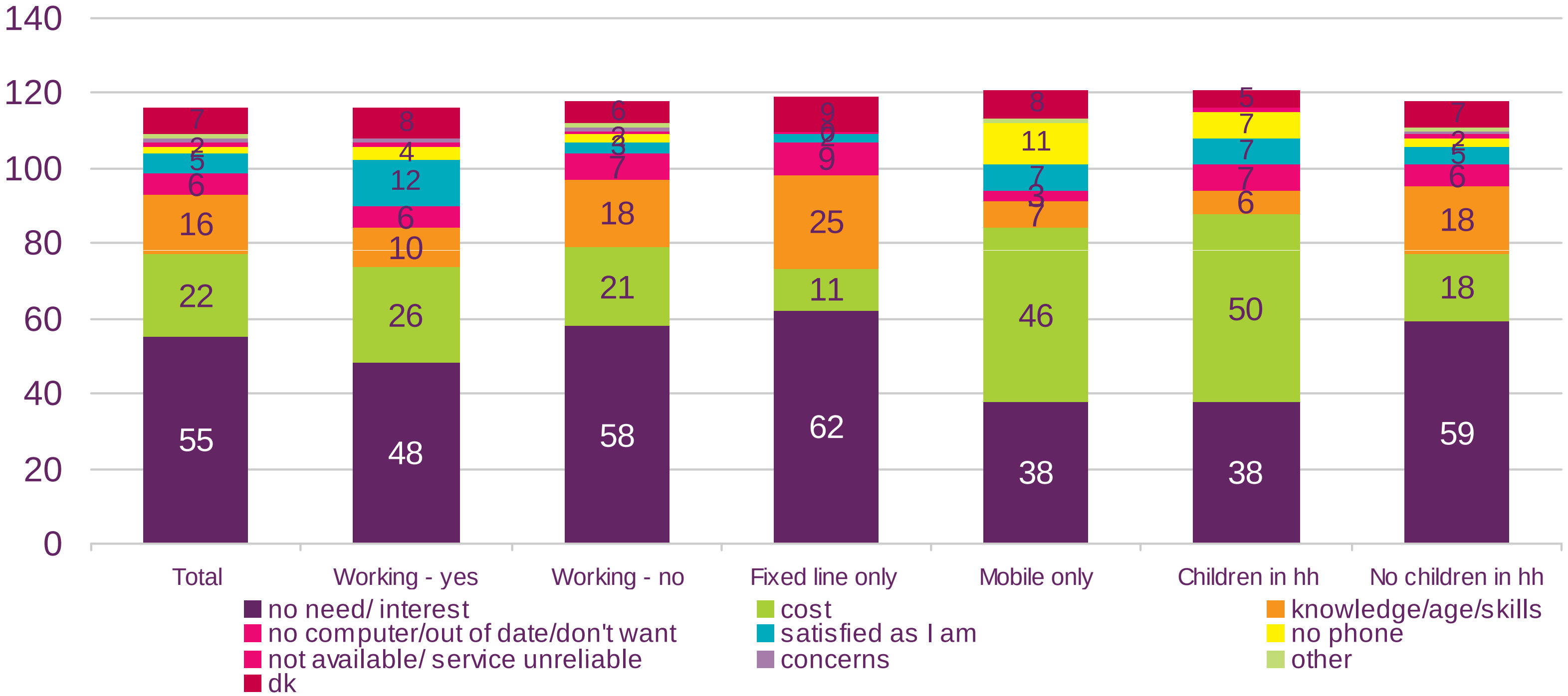
People who said that they did not intend to get the internet in the next 12 months were asked their reasons for not taking it up. Among people in DE households, no need/interest is named by 52%, whereas cost is named by just under one third (29%). Among people in household incomes under £11.5k, 'no need/interest' is named by 50%, with cost in second place, named by just under one third of people (31%).



Source: Ofcom communications tracking survey, Q1 and 2 2008, n = 887. No subsample below 125, except * AB base size small – treat with caution as indicative only. Base: Adults 15+ without internet access at home who say unlikely to take up in next 12 months, multiple answers possible, spontaneous.

Reasons for not taking up internet at home

Among people with no children in the household, no need/interest was the most named reason (59%) followed by cost (18%), whereas this pattern was reversed among people with children in the home, with 50% citing cost and 38% no need/interest. People in mobile only households were more likely to cite cost (46%) and less likely to cite ‘no need’ (38%).



Source: Ofcom communications tracking survey, Q1 and 2 2008. n = 887. No subsample below 125.

Base: Adults 15+ without internet access at home who say unlikely to take up in next 12 months, multiple answers possible, spontaneous.

Cluster analysis

- We undertook a statistical technique called cluster segmentation analysis of people without internet access at home to identify people with similar demographics and reasons for not getting the internet.
- We identified 8 distinct groups. The characteristics of each group are described below, together with the size of the group:
  - Older, retired people: with income between £11.5k and £30k, in C2DE homes (18%)
  - Older, retired people: with income below £11.5k, in DE homes (12%)
  - Older, retired people: with income below £17.5k in ABC homes (16%)
  - Under 55s in DE homes, with household income below £11.5k (13%)
  - Under 55s, in ABC1 homes, with household income above £17.5k (14%)
  - Mobile only homes. Under 55s in CDE homes with spread of household incomes between £11.5k - £30k (7%)
  - Mobile only homes: under 55s, predominantly in DE homes with low household income, not working (7%)
  - Mobile only homes: Under 35s in CDE homes (13%)

Over 55s segments

Summary	Over 55, retired with household income between £11.5k and £30k, in C2DE homes. Little or no experience of internet. Very low intention to take up the internet in the next 12 months. Barriers are interest and then knowledge/age.	Over 55, retired people, with income below £11.5k, in DE homes. Little or no experience of the internet, and very few people with a pc. Interest, age/knowledge and cost are key barriers.	Over 65, retired people, in ABC1 homes with spread of income. Very low experience of the internet and low intention to take up the internet in next 12 months. Main barrier is interest.
Size of group	18%	12%	16%
Details	All are over 55+ (35% 55-64, 33% 65-74, 31% and 75+). Almost all are in C2DE homes (7% C1, 40% C2, 54% DE), with 93% with household income between £11.5k and £30k. 84% are retired. Only 8% with a pc in the home. 3% use the internet outside the home and 6% say they are likely to take up internet in next 12 months. Main reasons given for not taking up the internet are 'no need/interest' (65%). One quarter cite knowledge and age (24%). Cost is not a key barrier, being named by only 12%.	All over 55+ (27% 55-64, 34% 65-74, 37% 75+). Almost all are in C2DE homes (C1 3%m C2 16%; DE 82%). Most are in low income homes (91% under £11.5k, 9% between £11.5k and £17.5k). 94% are retired. Mix of fixed phone line only (48%) and mobile + fixed line homes (46%). Only 4% with a pc. 3% use the internet outside of the home. Only 3% say they intend to get the internet in the next 12 months. Main reasons given for not getting the internet at home are 'no need/interest' (59%), cost (21%) and age/knowledge (24%) and 9% no computer.	Almost all are over 65+ (with 8% 55-64, 38% 65-74 and 53% over 75) 41% are in AB homes, and 56% C1 and 4% in C2 homes. 42% have income below £11.5k and 40% between £11.5k and £17.5k, and 19% over £17.5k. 94% are retired. Mix of phone access with 56% with both and 41% with fixed line only. 7% have a pc. 5% use the internet outside the home. 6% intend to take up in next 12 months. Main barrier is interest (70%). Then knowledge/age (15%), with few naming cost (8%).

Under 55s, mobile phone only segments

Summary	Under 55s, in work, in DE homes, with low household income. Half have children at home. One fifth have a pc. One quarter intend to take up the internet in next 12 months. Main barriers to take up are no need/interest and then cost.	Under 55s, in ABC1 homes, with household income above £17.5k. Just over one third with children. Half use the internet elsewhere and one third intend to take up the internet at home in next 12 months. Main barriers are no need/interest and then cost	Mobile phone only homes. Majority under 55 in CDE homes with spread of household incomes above £11.5k. One third use the internet elsewhere. Main barriers are no need and then cost. 11% cite no phone line.
Size of group	13%	14%	7%
Details	92% are under 55, with 50% 35-54 and 42% under 35. All are in C2DE homes, with 25% C2 and 75% in DE. Household income tends to be low (43% under £11.5k, 30% between £11.5k and £17.5k, 20% £17.5k-£30k). 58% are working. 49% have children at home. 98% with mobile and fixed line phone. 20% with a pc. Just under one third (30%) have access to internet elsewhere. 25% say they are likely to take up the internet in next 12 months. Main barriers to take up are no need (48%) and cost (30%), followed by no computer (9%)	82% are under 55 (with 18% 55-64, 47% 35-54, 23% 25-34 and 12% 15-24.) Almost all are in ABC1 homes, with 25% in AB, 61% in C1 and 14% C2 homes. Most have household income above £17.5k (72%) and majority are working (81%). 37% with children at home. 99% fixed line and mobile homes. 27% with a pc. Half use the internet elsewhere. One third (32%) intend to take up in next 12 months. Main barriers to take up are no need/interest (54%) and cost (24%).	73% are 35-54, and 23% are 55-64. 34% are in C1, 30% C2, 27% in DE homes. Income spread 34% £11.5k-£17.5, 43% are £17.5k-£30k, 21% £30k+. 66% are working. 27% with children at home. 92% are mobile only homes, 12% have a pc. One third use the internet elsewhere. 20% intend to take up the internet at home in next 12 months. Main barriers are no need (54%) and then cost (34%). 11% cite no phone line.

Mobile phone only segments

Summary	Mobile phone only homes: under 55s, not working, predominantly in DE homes with low household income. Cost a key barrier to getting the internet at home followed by no need/interest.	Mobile phone only homes: younger people in mobile only hhs, half have children. Spread across C1, C2, DE homes, with half in DE. Cost is a key barrier to getting the internet at home.
Size of group	7%	13%
Details	90% are under 55, with 57% 35-54 and 24% 25-34 and 8% 15-24. 40% have children. 90% are in DE homes and 8% C2. 85% with household income under £11.5k and 15% between £11.5k and £17.5k. 70% are not working. 40% have children at home. 87% are mobile only homes, 11% have no mobile or fixed line and 11% have a pc. 31% use the internet elsewhere. 20% intend to take up the internet in next 12 months. Main barriers to take up are cost (51%) and no need (37%)	All are under 35 (67% 15-24 and 34% 25-34). 47% have children. 25% in C1, 17% C2 , 49% in DE homes. 44% household income under £11.5k, 32% between £11.5 and £17.5k, 13% £17.5-£30k. 10% over £30k. 45% are not working. 95% are mobile phone only homes. 26% have a pc. 45% use the internet elsewhere and 36% intend to get the internet at home in the next 12 months. Main barrier to take up is cost (49%), then need (26%) and 15% naming no phone and 12% satisfied as they are.

People with visual, hearing, or mobility disabilities

Ofcom communications tracking survey shows that people with visual or hearing or mobility disabilities are less likely to have the internet at home compared to the UK average. Results need to be treated with caution as indicative only due to small sample sizes. (See Ofcom *Consumer experience report* 2008, annex 3 for further analysis). Results from this survey suggest that among people without internet access at home, a clear majority do not intend to get it at home in the next 12 months. Reasons given for not getting it are ‘no need/interest’, followed by age/knowledge. Cost is named by around one tenth of people in each group.

People with hearing impairments
Qualitative research among people with hearing impairments found that the internet was perceived as extremely important, possibly the most important development in communication services, by those who use it. Users claim it had transformed many aspects of their lives, reduced unpleasant aspects of communicating with a hearing impairment and increased the quality and extent of other communication, and created a ‘level playing field’ with equal contact between hearing and hearing impaired.

However the study identified significant barriers to internet take up, which was lowest among people 60+ and people in DE households. There was little evidence that an individual’s hearing impairment significantly reduced take-up. Barriers were more likely to be general than hearing-specific (although they could be exacerbated due to a hearing impairment). Key barriers to take-up amongst people 60+ and people in DE homes were affordability and confidence in using new technology. (Note: Affordability could be higher than identified in this study which excluded anyone who only owned one communication device) **.** There was a lack of awareness of different elements of cost involved and perception that the internet and using a PC would be expensive. Other barriers were lack of interest/perceived need or inertia or understanding of potential benefits, and lack of confidence in new technology, as well as a lack of others in the participants’ social group with access which was linked to no need to use the internet (such as for email communication). As to how to overcome take-up barriers, many people suggested free access to the internet, free provision of PCs, training on internet functionality (especially email) for those aged over 60 and from lower SE groups.

Source: Ofcom *People with hearing impairments and communications services*, qualitative research, 2007.

People with visual, hearing, or mobility disabilities

People with visual impairments

- Qualitative research among people with visual impairments found that participants' level of impairment had obvious impact on access to services; someone with mild impairment had very different needs/preferences compared to someone with severe impairment. There were many differences in terms of level, onset and variability of impairment which meant that the ability to tailor services and devices to suit the individuals impairment was very important. The research indicated that everyone with some degree of visual impairment required assistance at some stage in accessing and using communication services. Onset of impairment impacted access with those with congenital impairments were typically better informed about services/support vs. those with acquired impairments
- The study reported that software trial periods may assist many people with visual impairments either get online or make greater use of the internet.
- The software and hardware required by some people with visual impairments in order to use the computer/internet was considered useful and of a high quality (e.g. screen readers or specialist key boards), but too expensive. Speech recognition software was appealing in principle, but the software itself did not live up to expectations.
- Opportunities for trialling software options were limited but thought to be beneficial in order to find the most suitable solution according to personal requirements.
- Modifications can be made to keyboards that improve the usability by making keys more tactile. These are often implemented on a DIY basis, though specialist keyboards can also be purchased. Some uses, particularly younger people, are less comfortable with such approaches due to a desire not to stand out.
- Some websites were almost inaccessible due to their design while others allowed users to tailor aspects which enhanced the experience for people with visual impairments. Similar to the desire to tailor screens on mobiles, consumers with visual impairments would benefit from the ability to tailor the presentation of websites.

Source: Ofcom *People with visual impairments and communications services*, 2008

People over 55

Qualitative research carried out by the Communications Consumer Panel (2006) among people over 55 found that the most significant factors in the decision to take up the internet at home were past experience of PCs and the Internet, as well as individual attitude and character. These were more likely to contribute to internet take up than age, health or income. Costs and other economic factors were rarely mentioned as a barrier. It seemed that those on lowest incomes would find the money if they had sufficient interest. Though it should be noted that the research in to older people did not focus on those with a low income. The study found that the internet is an experiential medium and giving older people, who had not previously been exposed to the internet through work or education, opportunities to try it out and build confidence could lead to increased take-up. Older people were observed to fall in to four groups:

Absorbers: internet users who have previously used PCs and/or the internet at work. Almost all of the people who used PCs at work had the internet at home. The internet was among other things an important part of staying in touch with other people.

Self starters: internet users who had not had experience of a PC or the Internet at work but had taught themselves. Motivations for getting the internet varied from the specific (e.g. a relative moving abroad and using email to communicate) to something more general such as not wanting to get left behind. This group was diverse in terms of age, socio economic background, location and health. A key determinant appeared to be attitude and character

Disengaged: around two thirds of non internet users were classified as disengaged. This group had voluntarily excluded themselves from using the internet. However, many were observed to have increased interest in the internet as the discussions in the study progressed. Reasons for non take-up were largely consistent and were: lack of skills/ability, motivation/information needs and social/environmental factors (including the speed of change/pressure to keep up, not enough time due to other commitments, a perception of reduced social interaction due to new technologies, stories in the press about security and privacy issues). Many were afraid – of the unknown, of breaking the PC or appearing foolish. Cost was rarely mentioned as a barrier. Research findings suggest that those ‘disengaged’, if given appropriate support, may overcome concerns and fears. Support included courses designed for and run by older people, and a mentoring scheme.

People over 55 cont.

Rejecters: around one third of non internet users did not shows any signs of interest in the internet and actively rejected it. This was often due factors such as: being busy caring for grandchildren, busy with other hobbies, no desire to take on new challenges, and not wanting to risk appearing foolish in front of the family if they struggle.

See *Consumer Panel Older people and communications technology* research report 2006 for further details.

The Consumer panel *Social inclusion and communications literature review* 2007 identified that older people are less likely to show interest in ICT; have experience via work or education; or have incentive to gain ICT skills to enhance labour market participation. These factors rather than income are likely to affect digital engagement. Some older people can be inhibited by some aspects of technological use, e.g. arthritis sufferers may find keyboard usage difficult. The review argued that older people are not a homogenous group, and internet access reflects social, economic and demographic factors.

Low income households

- Qualitative research showed that internet take-up among low income households was based on a variety of social and environmental factors, in which income was a consideration but not generally deciding factor. For a majority in the research, there were few barriers to take up (Note: the research was carried out among people who had at least one communication device at home and as such is not fully representative of people on low incomes). Communication services were generally found to be affordable, good value and respondents had access to the services they wanted. For a significant minority, predominantly at lowest end of income scale and on full benefits, there were a number of interrelated income factors (involving financial status and management), that in combination formed barriers to take up. These barriers were felt by younger people, whereas older people aged 60+ were less likely to be interested in the internet anyway.
- Factors affecting take up included age, work status, family status, health and financial management. Take up was wide spread among singles on higher incomes and families with teenage children and tended to be lowest among over 60s and those in the lowest income households.
- Families with teenagers were likely to see internet as almost essential for school work, whereas broadband use was widespread among those on higher income levels (between £11.5k and £15k). in the sample. For both groups broadband was thought to be value for money and the flat monthly fee good for budgeting. Those housebound were more likely to take up communication devices than those who were active.
- People over 60 were less likely to take up the internet than other age groups.
- Families with younger children were less likely to have the internet as under less pressure to provide it and tended to prioritise budgets differently to those with older children.
- Those on a regular wage were more likely to take up the internet than those on irregular payments or benefits as a wage brought access to a bank account.
- Financial management was important for all participants spoken to (e.g. pay as you go mobiles were more appealing than a contract as a means of effective budget management.)

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Low income households cont.

- People in mobile only homes were less likely to have the internet. A change in family circumstances such as divorce or living in temporary accommodation were contributing factors for this group who tended to be either young living in temporary or shared accommodation, or in 40s/50s and recently divorced wanting to keep overheads to a minimum.
- For a significant minority, predominantly at lowest end of income scale and on full benefits, there were a number of interrelated income factors (involving financial status and management), that in combination formed barriers to take up. These barriers were felt by younger people, whereas older people aged 60+ were less likely to be interested in the internet anyway. The contributing factors to barriers included:
- No bank account, and therefore no access to banking facilities and also belief that this would not be possible due to poor credit history.
- Lack of a regular wage was a barrier to signing up to a contract requiring regular monthly payments for fear of ending up in debt. The benefit payment system was not considered sufficiently reliable to risk missed payments and bank charges.
- Most preferred to avoid banks and operated on a pay as you go basis, collecting benefits via Post Office and paying bills through PayPoint. Managing finances in this way was felt to be easier and more transparent than running direct debits through the bank.

Source: Ofcom *Low income consumers and the communications market* qualitative research study 2007

People with learning difficulties

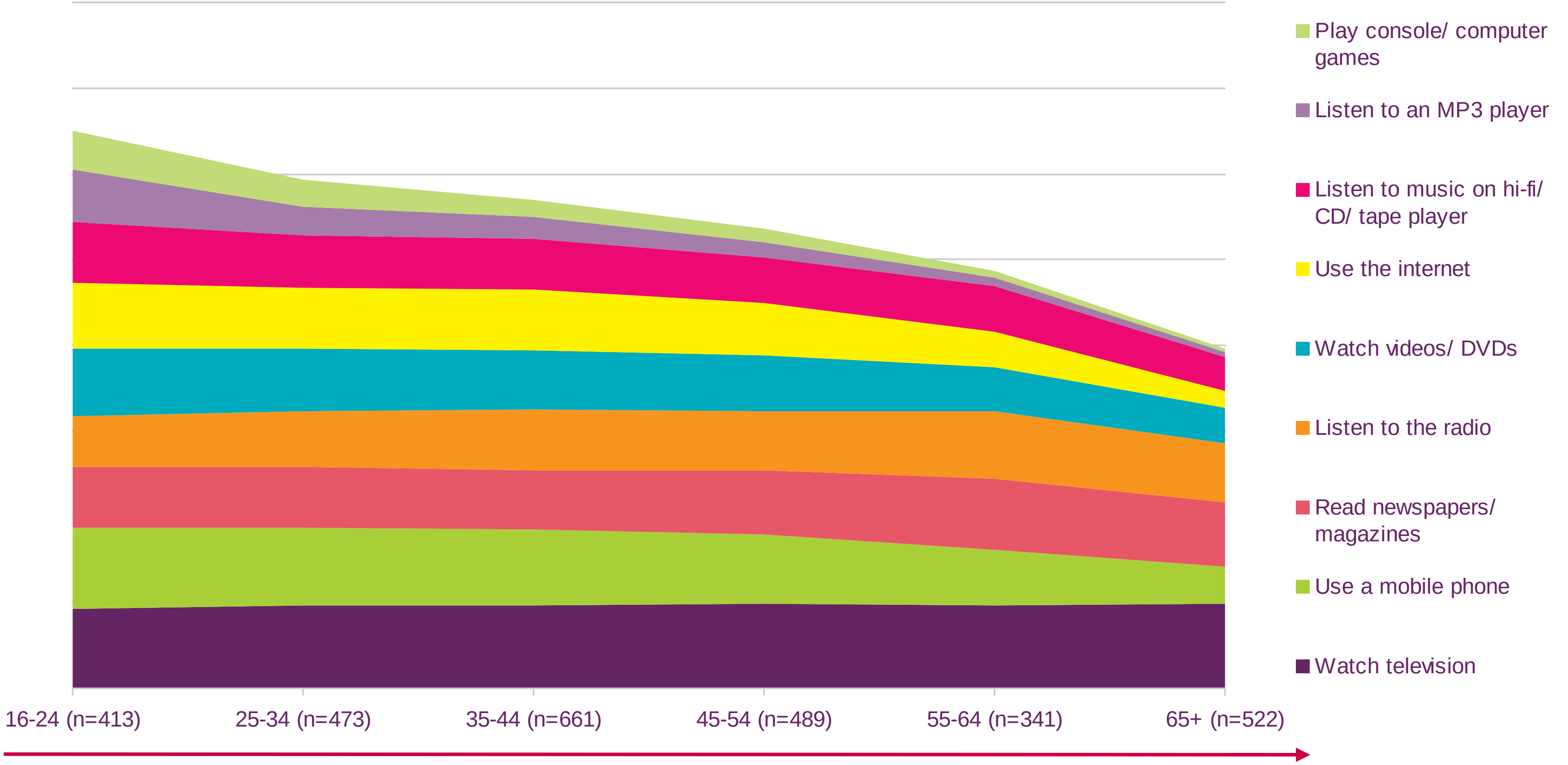
- Qualitative research among people with learning disabilities identified a range of barriers to internet take up and use including cost, literacy/numeracy, short-term memory difficulties, a lack of awareness of what one could do with the internet, perceived lack of need, and parents and carers associating the internet with potential dangers.
- Few had internet access in the home; some had access at home and others (younger participants) accessed the internet in day centres.
- The severity of the learning disability was not always the most differentiating factor in accessing or using the internet; access to support, age and income had a significant impact. Internet use was more common among younger participants than older participants. The cost and age related barriers are similar to those in the wider population, though it should be noted that people with learning disabilities are also more likely to have low incomes.
- Participants who used the internet tended to be younger. It was generally seen as a hobby, largely used for entertainment (e.g. looking at pictures, watching videos and chatting to friends as opposed to searching for information or making transactions or for work or study).
- There was a perception of increased effort to use the internet, compared to the effort required to watch television. There was relatively low awareness of functions that might make experience easier - such as saving websites into ‘favourites’ as opposed to re-typing them every time. Visual impairments and literacy affected aspects of internet use.
- The report found that perception of effort, coupled with a limited understanding of the benefits of the internet and its security options among respondents’ support networks, is likely to limit take-up of internet services among this group.

Source: Ofcom *People with learning difficulties and communications services* qualitative research report, 2008

Internet usage

Range of regular media activities – by age

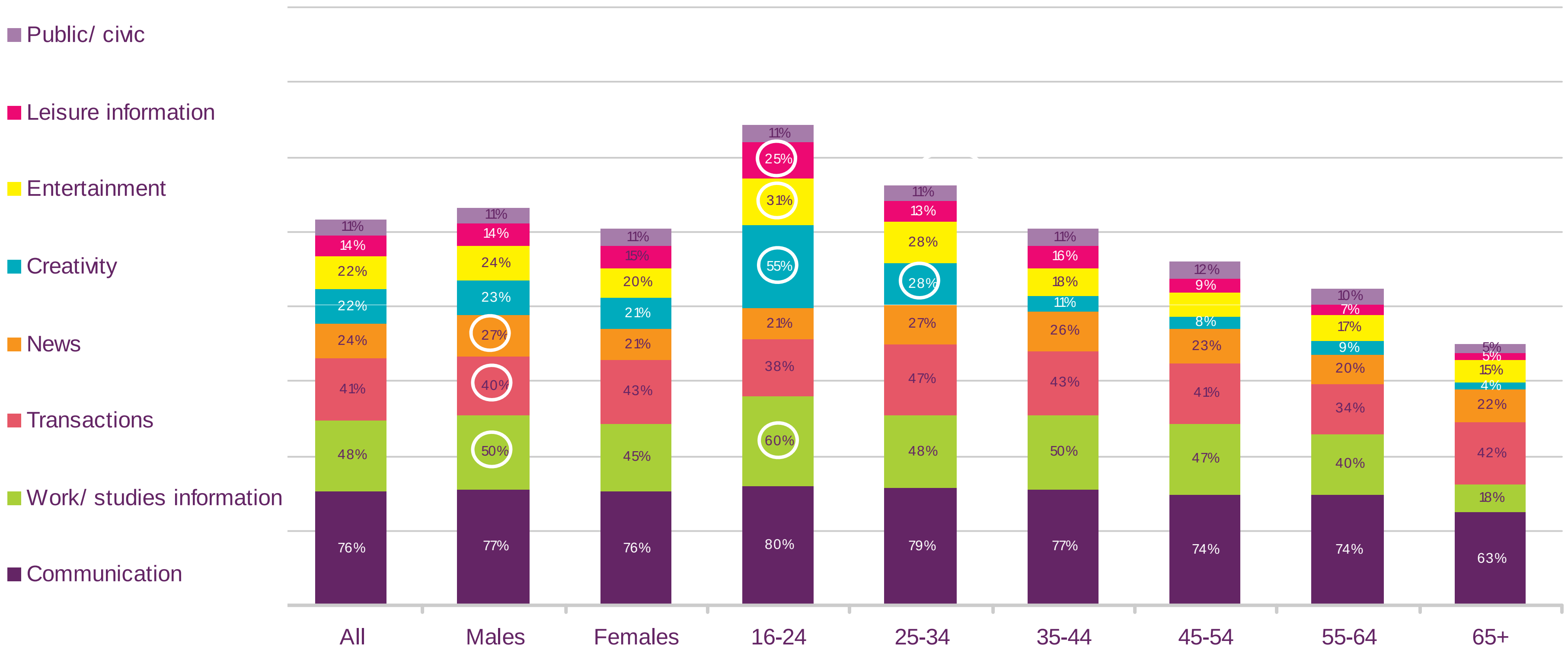
The range of media activities used regularly decreases with age.



A1 – Which of the following do you regularly do?
Base: All adults aged 16+ (n=2905)
Source: Ofcom Media Literacy Audit among adults, fieldwork October-December 2007

Type of internet use at least once a week – by age

Internet use differs by age, with younger people using the internet for a wider variety of activities compared to older people.



Mean out of maximum 18 individual types of uses	*3.2*	*3.3*	*3.2*	*4.3*	*3.6*	*3.1*	*2.8*	*2.4*	*2.2*

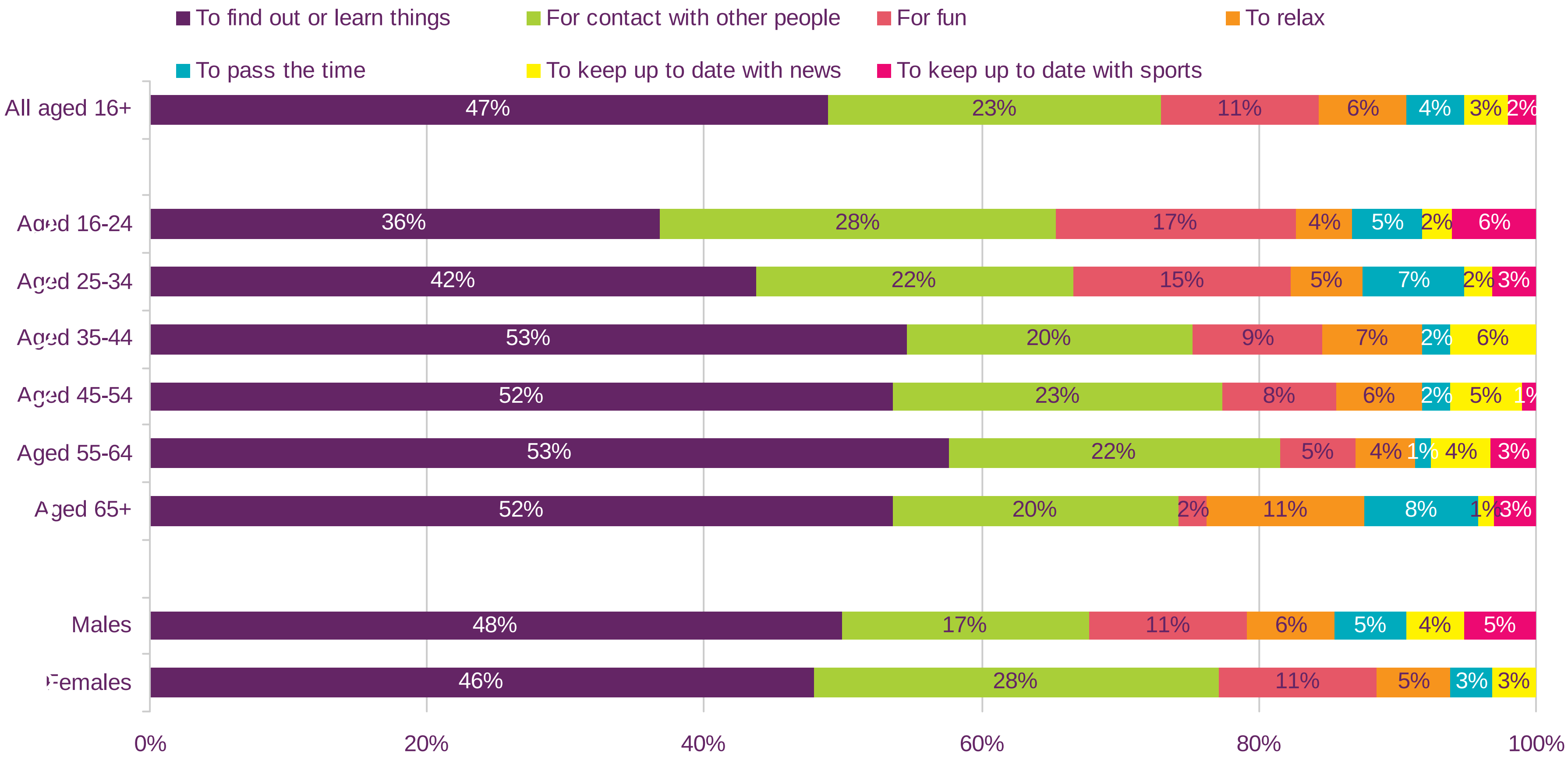
IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each?

Base: All adults aged 16+ who use the internet at home or elsewhere (n=1723)

Source: Ofcom Media Literacy Audit among adults, fieldwork October-December 2007

Main reason for using the internet

The most commonly named main reason for using the internet is to find out or learn things (47%).



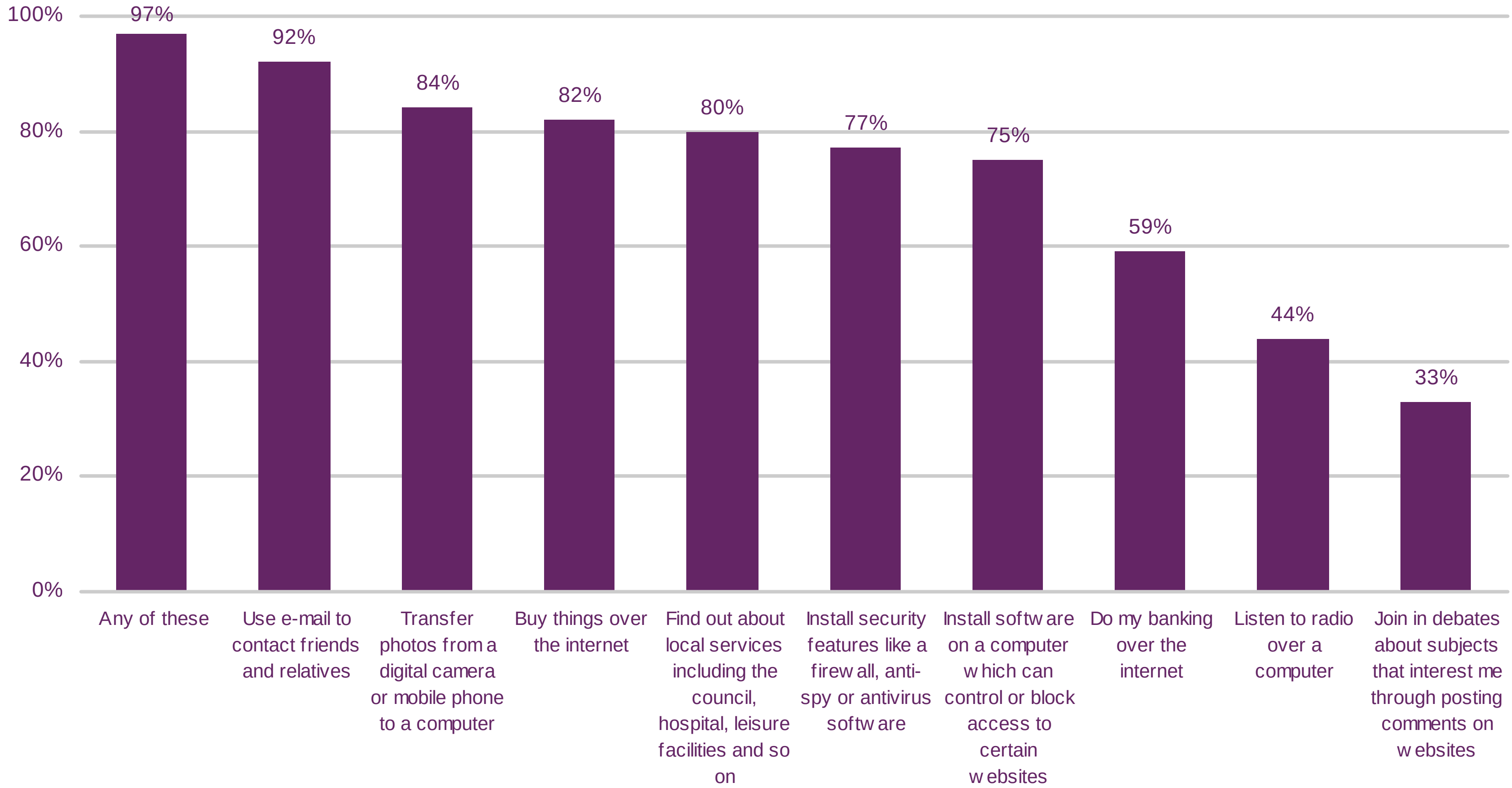
IN51 – Which one is your main reason for using the internet?

Base: Adults aged 16+ who use the internet at home or elsewhere (n=1723)

Source: Ofcom Media Literacy Audit among adults, fieldwork October-December 2007

Interest in internet functionality

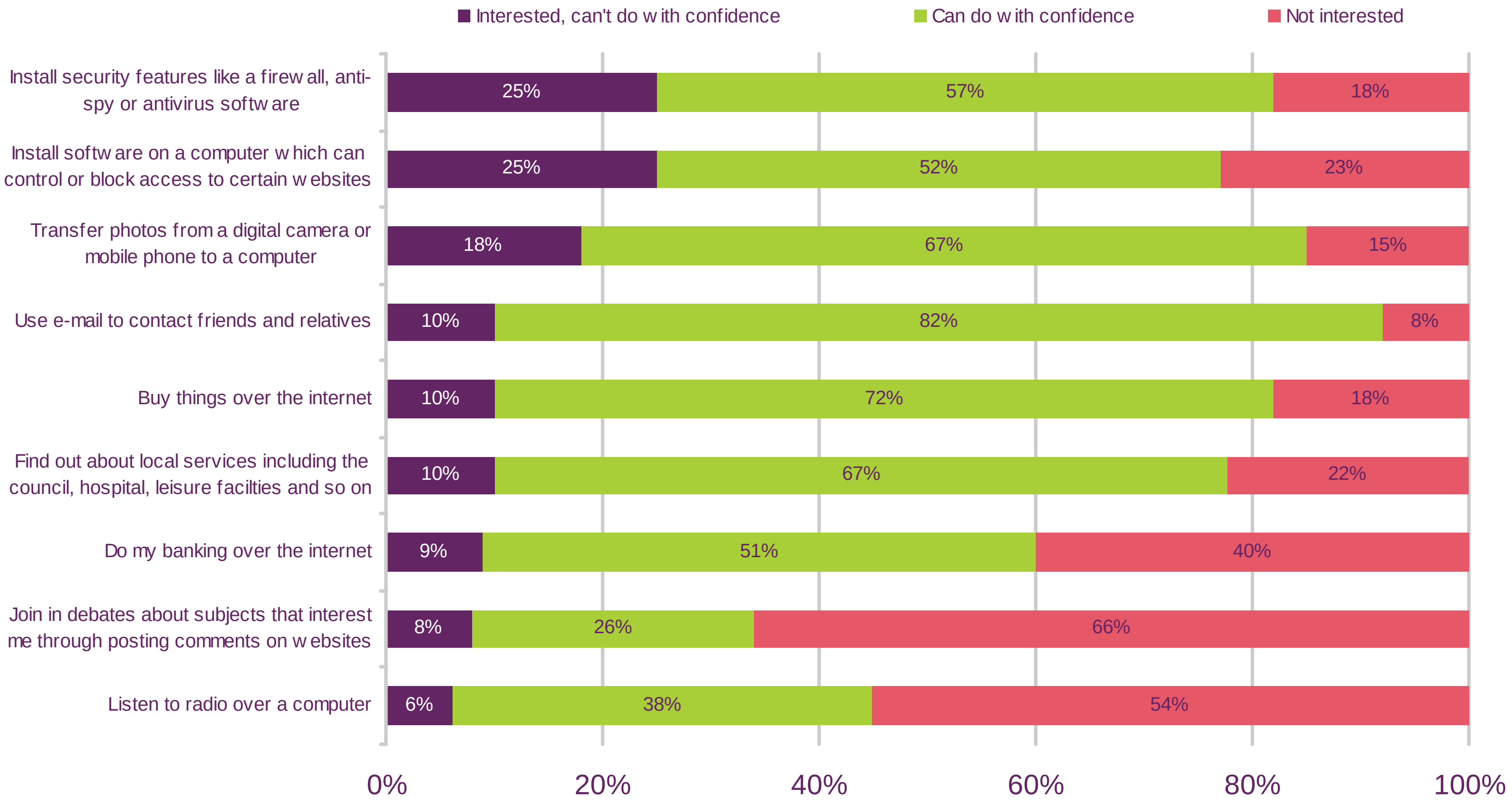
This chart shows interest in different types of internet or pc function among people who use the internet at home or elsewhere.



IN7-8 – I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you. Base: All adults aged 16+ who use the internet at home or elsewhere (1723)
Source: Ofcom Media Literacy Audit among adults, fieldwork October-December 2007

Interest and confidence in internet functionality

This chart shows interest in different types of internet or pc function and levels of confidence among people who use the internet at home or elsewhere.

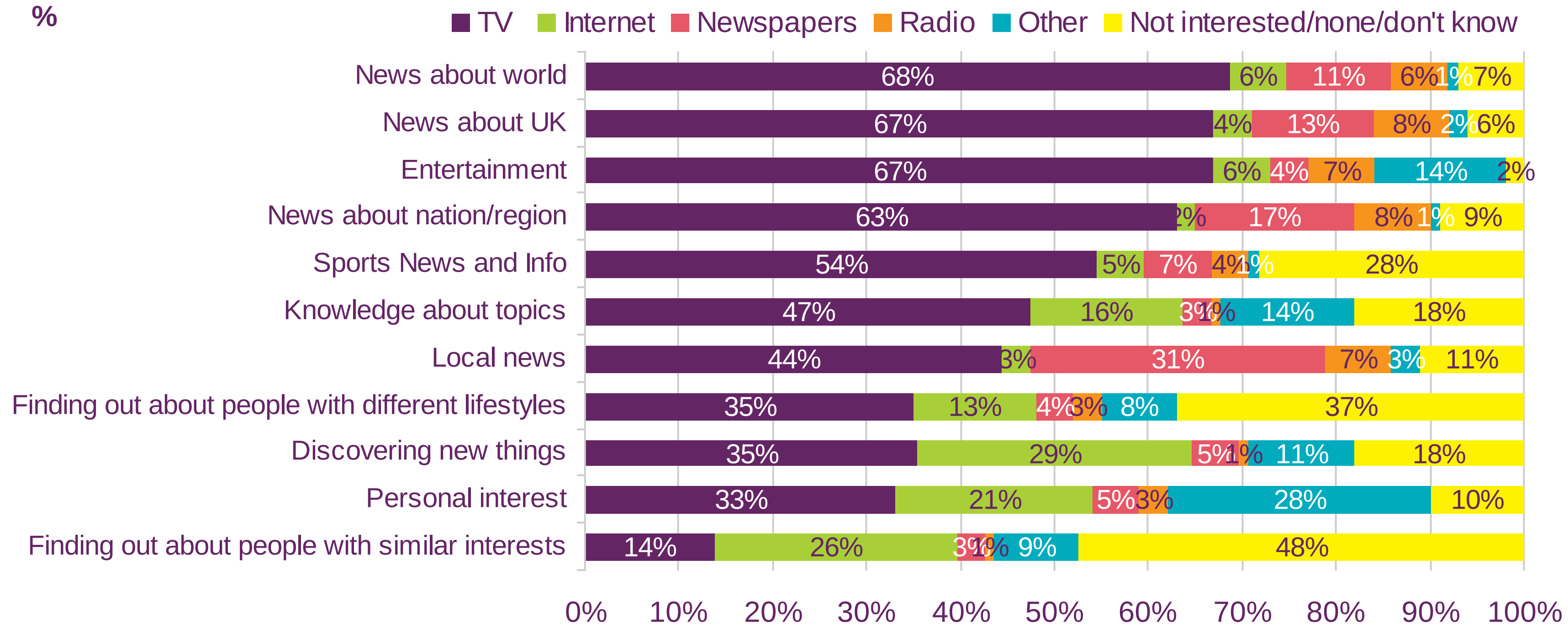


IN7A-I – Please look at the options shown on this card. I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you. Base: Adults aged 16+ who use the internet at home or elsewhere (1723). Source: Ofcom Media Literacy Audit among adults, fieldwork October-December 2007

Audiences are using the internet for a range of media interests

This chart shows the main source that people name for a range of media information. Although television is most named source for most media interests, the internet is most named for finding out about people with similar interests (26%). Among people with broadband at home, TV remains the main source for most media interests, but internet is most named source for finding out about people with similar interests (42%), personal interests (35%), and discovering new things (49%). Usage varies by age.

Which of these media would you say is your main source for …?

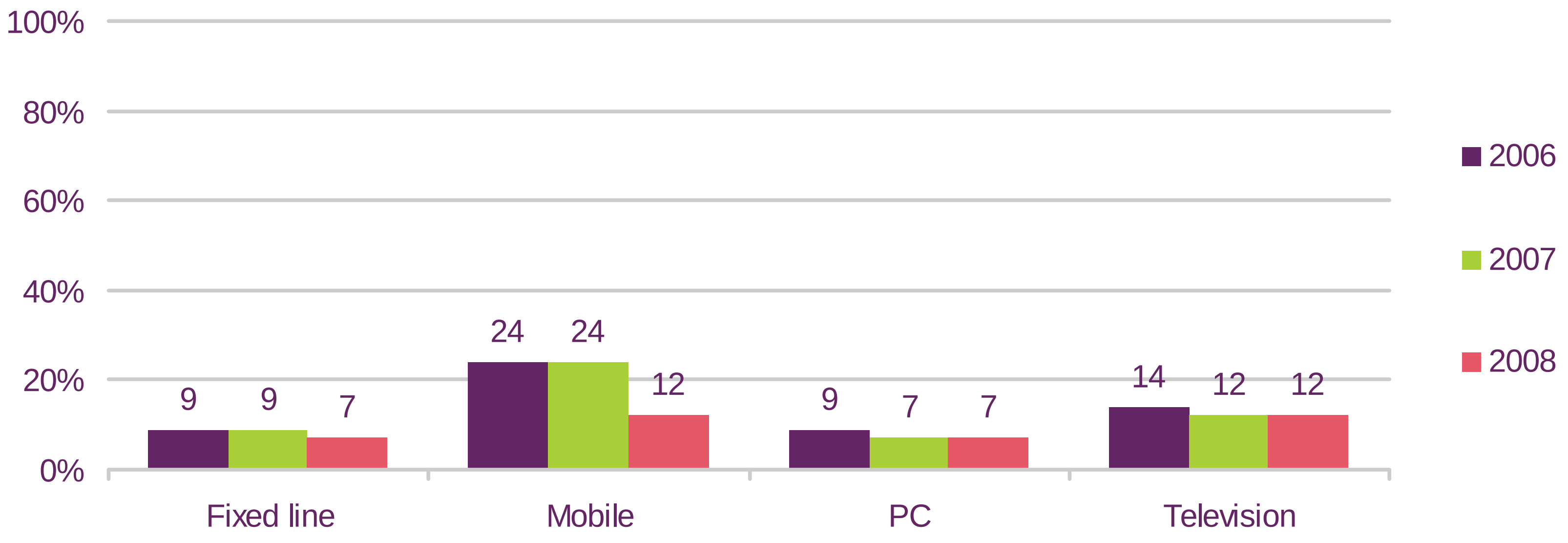


Source: PSB review survey: Q12: 2,260 interviews 16+, October-December 2007, results for TV on main channels and TV on digital channels combined under TV.

Difficulties using communications services

The evidence on usability is that consumers are most likely to experience difficulties using a mobile phone (12%), or television (12%) followed by fixed-line telephony (7%) and PCs (7%).

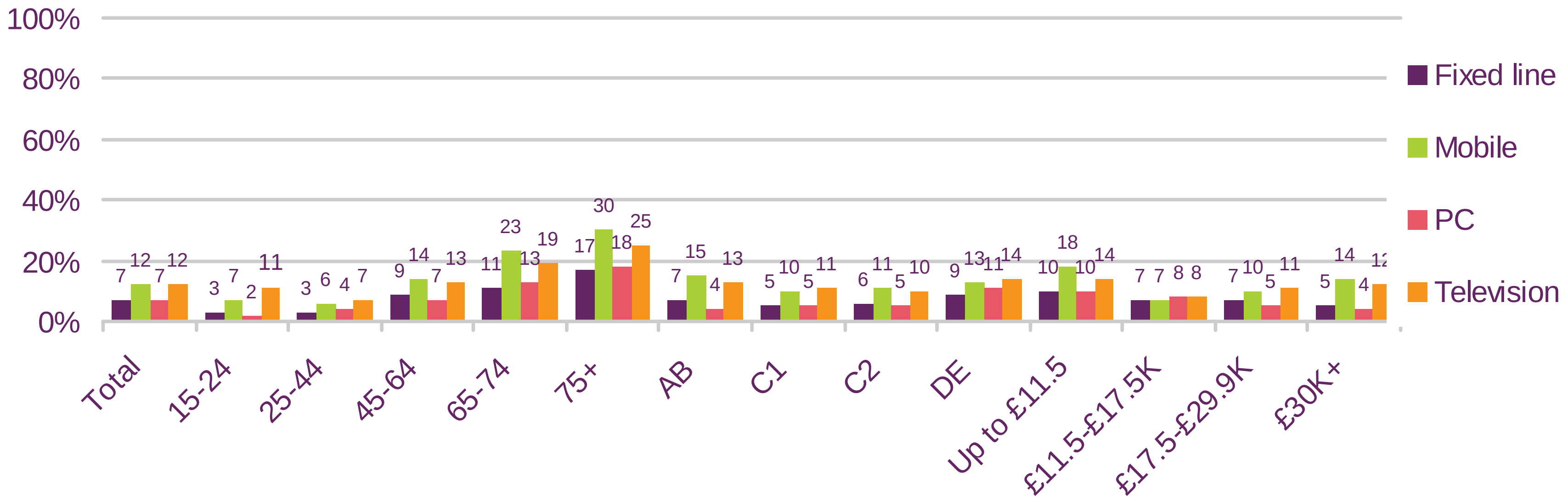
There has been little change in the percentage of consumers who experience difficulty using communications services, except for mobile phones, where there has been a significant decrease in the number of consumers saying they experience difficulties.



Source: Ofcom communications tracking survey
Base: All adults 15+ (Q1 2006, 2214) (Q2 2006, 2234) (Q1 2007, 1547) (Q2 2007, 1497) (Q2 2008, 2109)

Difficulties using various communications services by age and socio-economic group

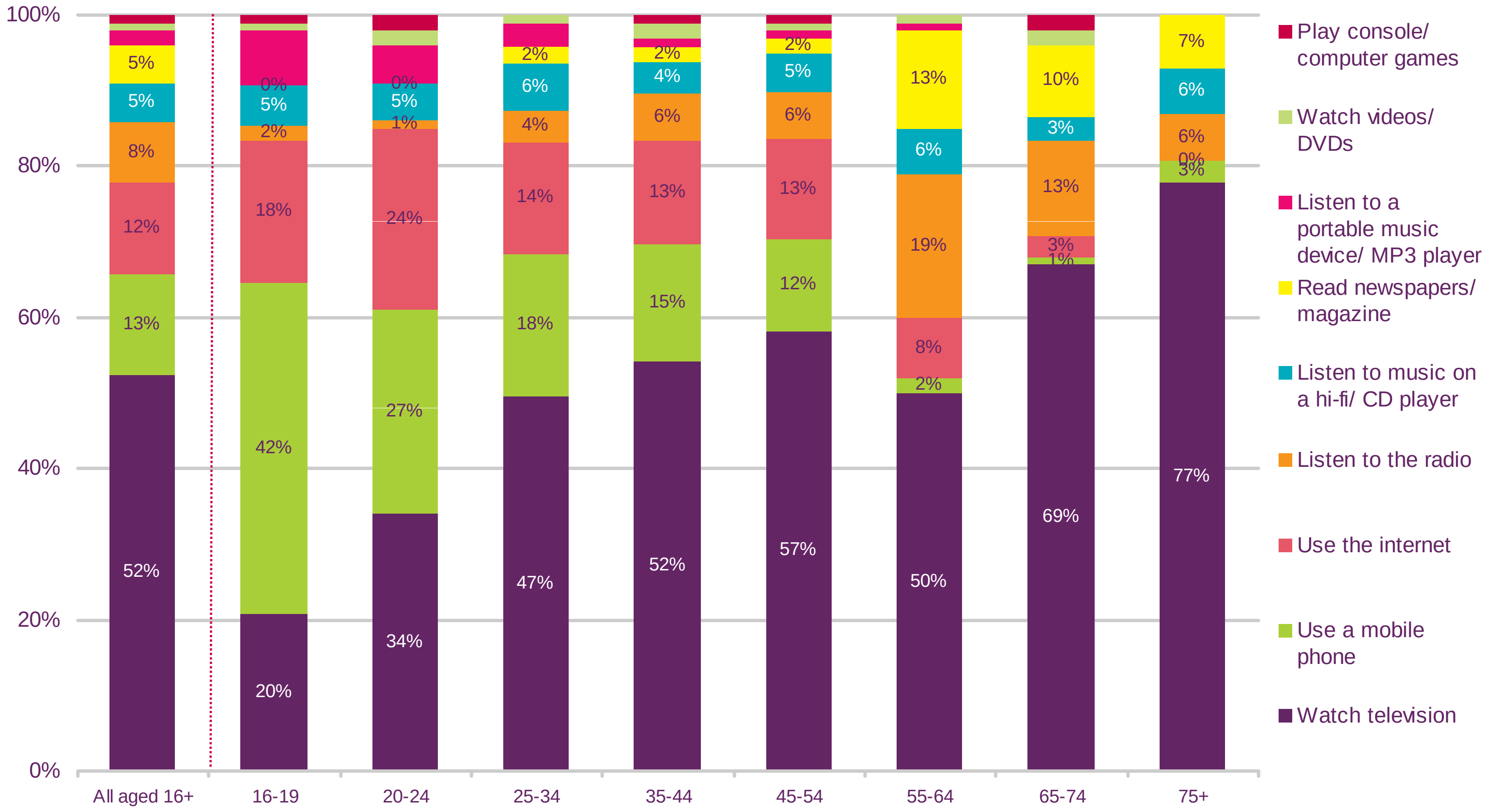
Across all demographic groups the mobile phone and television are the communications services consumers are most likely to experience difficulty with. Difficulty is strongly correlated with age. Over 45s are more likely to experience difficulty using a mobile phone, and over 75s more likely to experience difficulty with television compared to other age groups.



Source: Ofcom communications tracking survey
Base: All adults 15+ (Q1 2006, 2214) (Q2 2006, 2234) (Q1 2007, 1547) (Q2 2007, 1497) (Q2 2008, 2109)

Attitudes towards the internet

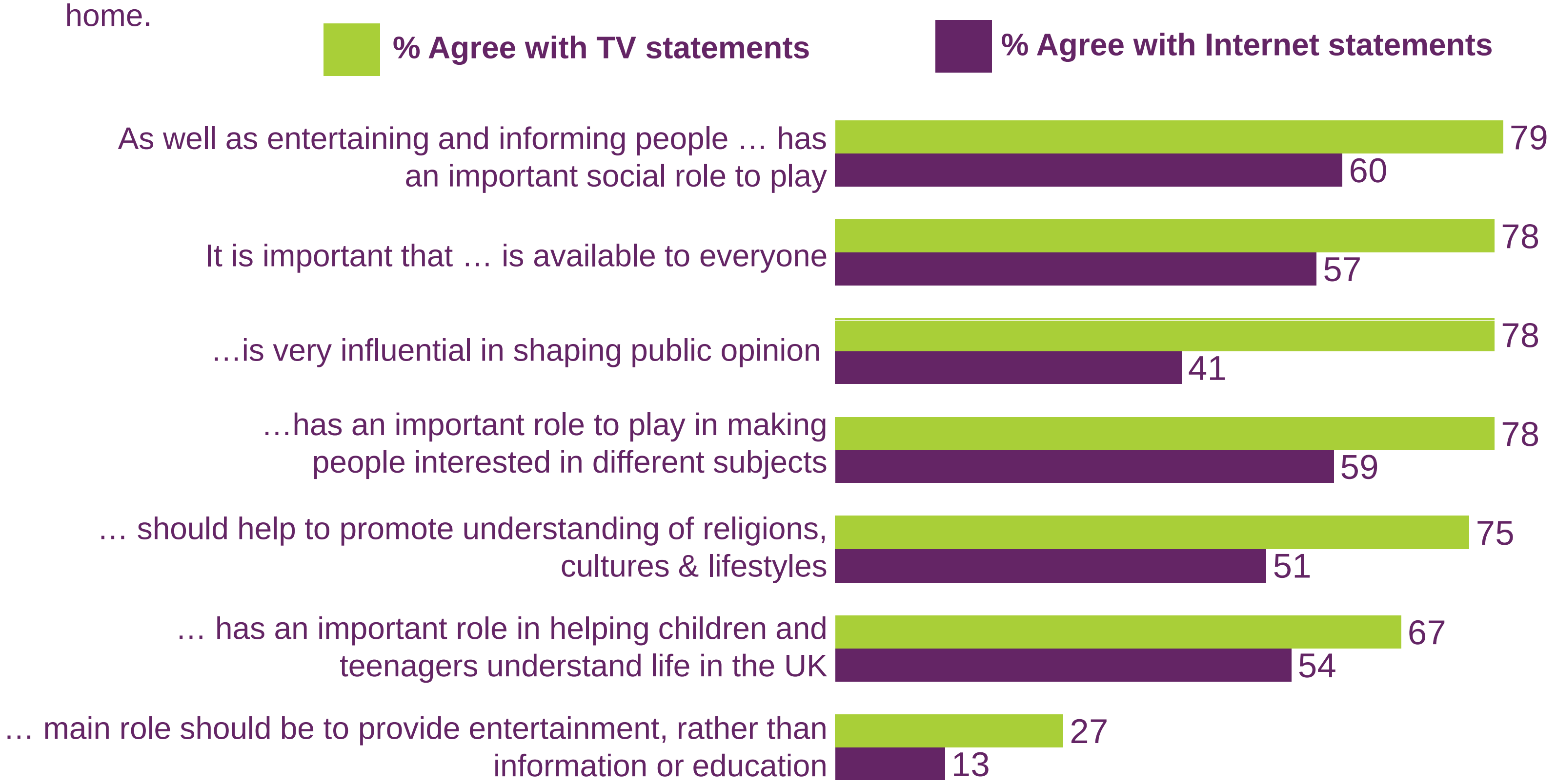
Media activity would miss most by age



A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (2905 aged 16+, 1370 males, 1535 females, 552 AB, 836 C1, 605 C2, 897 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Views on the internet and television

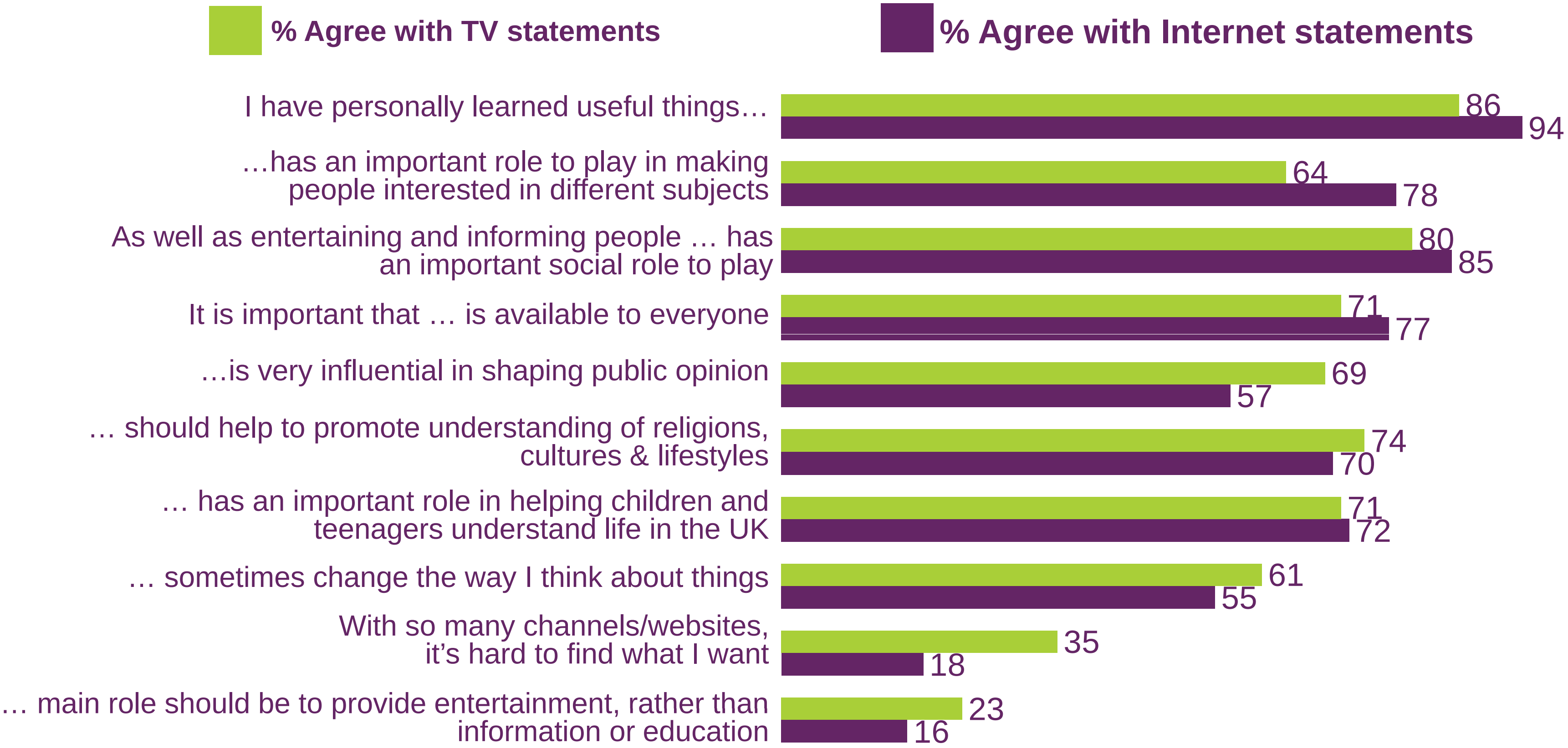
As part of Ofcom’s public service broadcasting review, we undertook a survey among adults 15+ which included finding out about attitudes towards television and the internet. Audiences were asked to what extent they agree with each statement about the internet and television. This research showed that just under three fifths of people (59%) thought the internet should be available to everyone. This rises significantly among younger people and those with internet at home.



Source: PSB review survey 2,260 UK adults aged 16+, October - December 2007.

Views on the internet and television

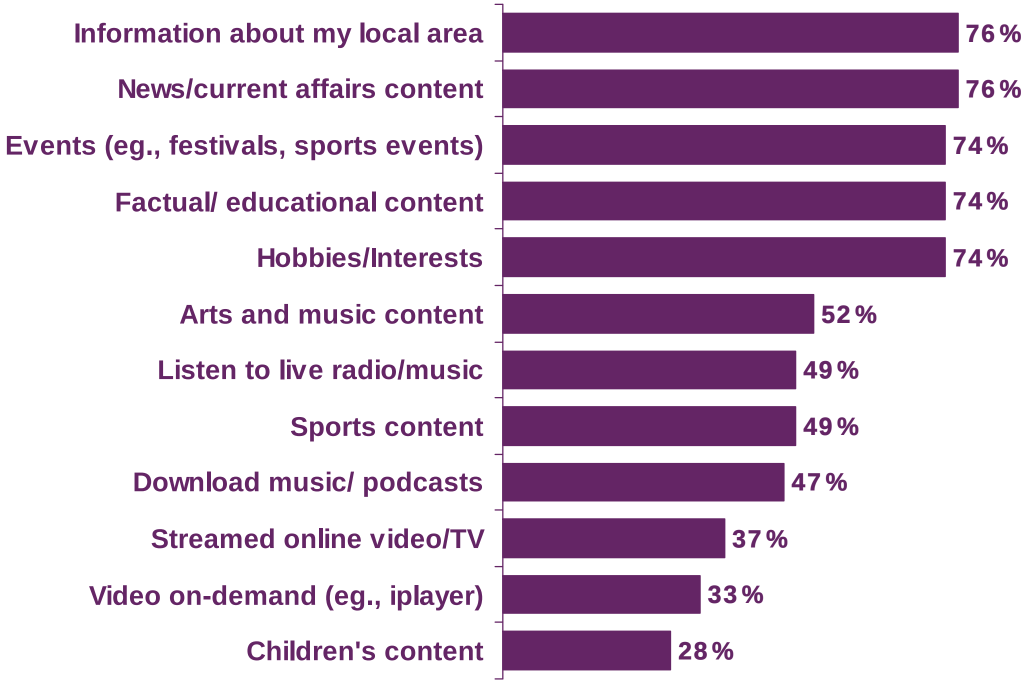
Among 16-24s with broadband at home, internet is valued for learning and 77% think it is important that the internet is available to everyone.



Source: PSB review survey, 16-24 years with broadband, October - December 2007

Use of internet for public service content

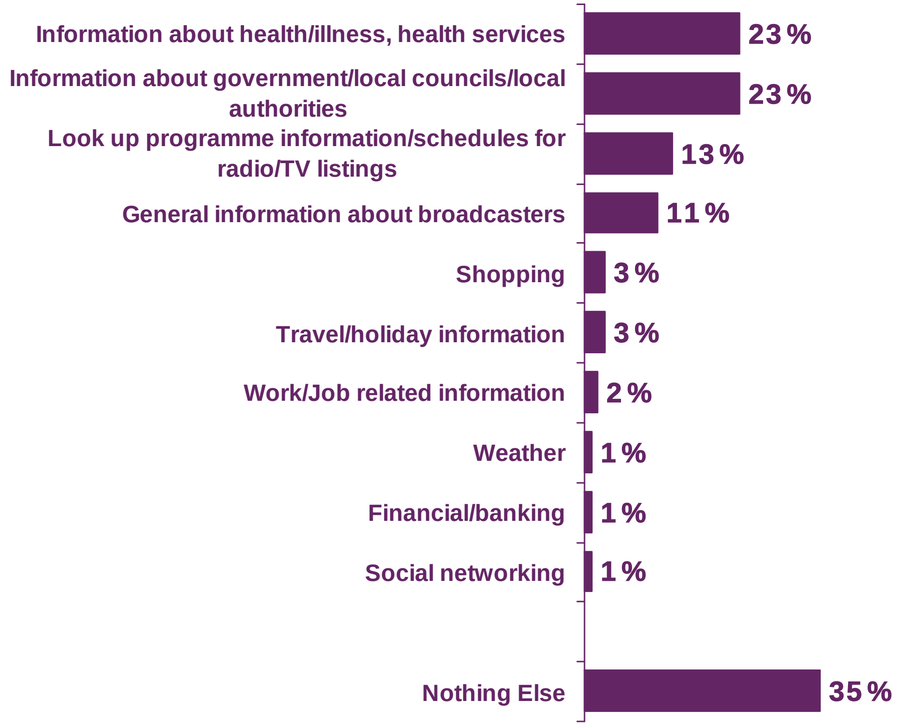
As part of Ofcom’s public service broadcasting review we undertook a survey on public service content online. (See annex 9 Public Service Broadcasting Review Phase II 2008). This chart shows which public service content related activities are carried out online (prompted), amongst those using PSC online.



Q6: “Still thinking about this type of PSC, which of the following, if any, do you currently use websites for?” (Respondents were give a description of PSC and prompted with the list of types of PSC)
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452). Source PSB Review Phase II 2008, annex 9.

Use of internet for public service content

As part of Ofcom's public service broadcasting review we undertook a survey on public service content online. (See annex 9 Public Service Broadcasting Review Phase II 2008). This chart shows which public service content related activities are carried out online (unprompted), amongst those using PSC online.



Q7: "Do you use the internet for any other types of PSC, not mentioned above?" (unprompted)
Base: Gfk NOP. June 08. All adults 16+ who use the internet for PSC (452). Source PSB Review Phase II 2008, annex 9.

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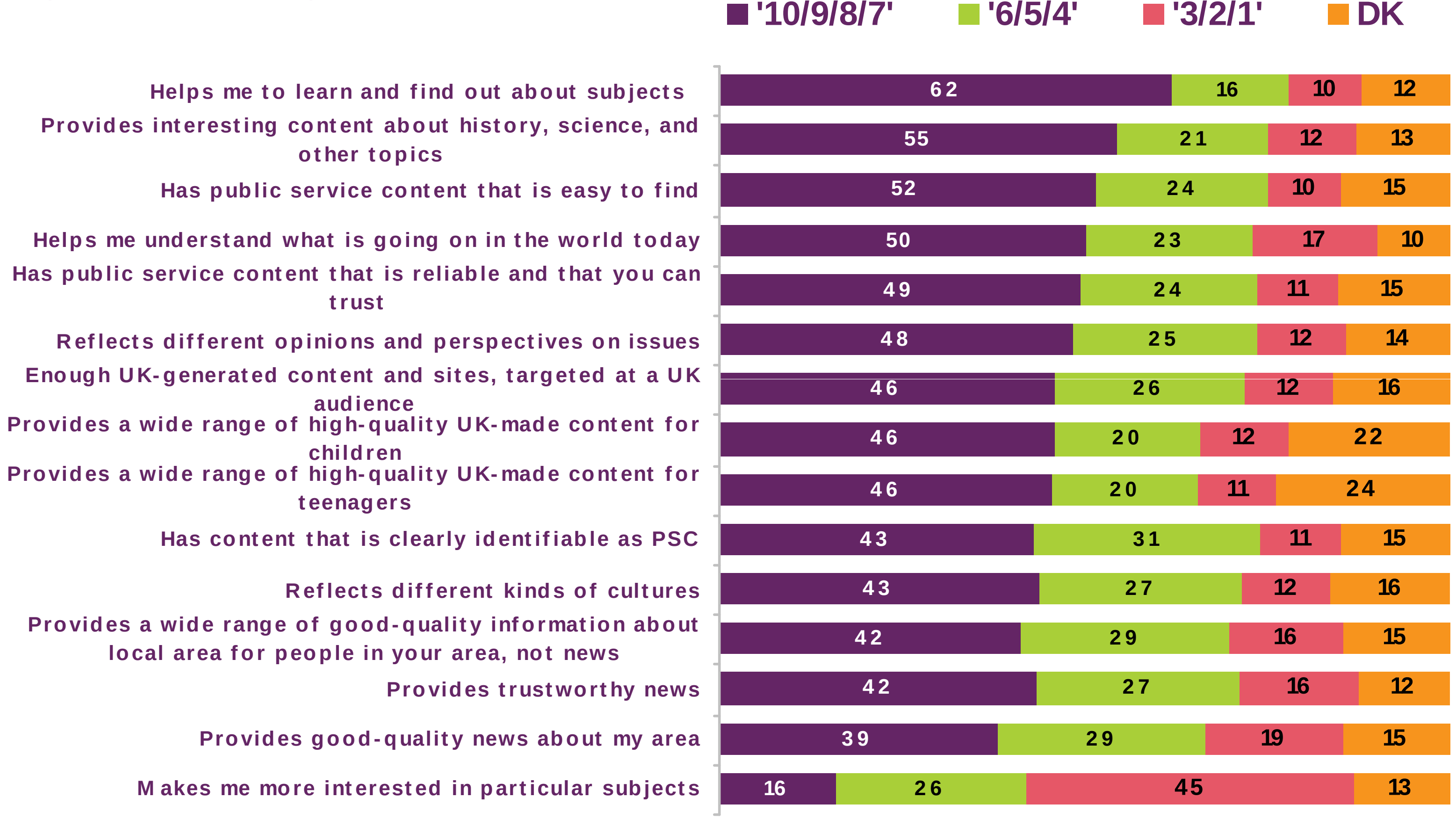
Importance of public service content online

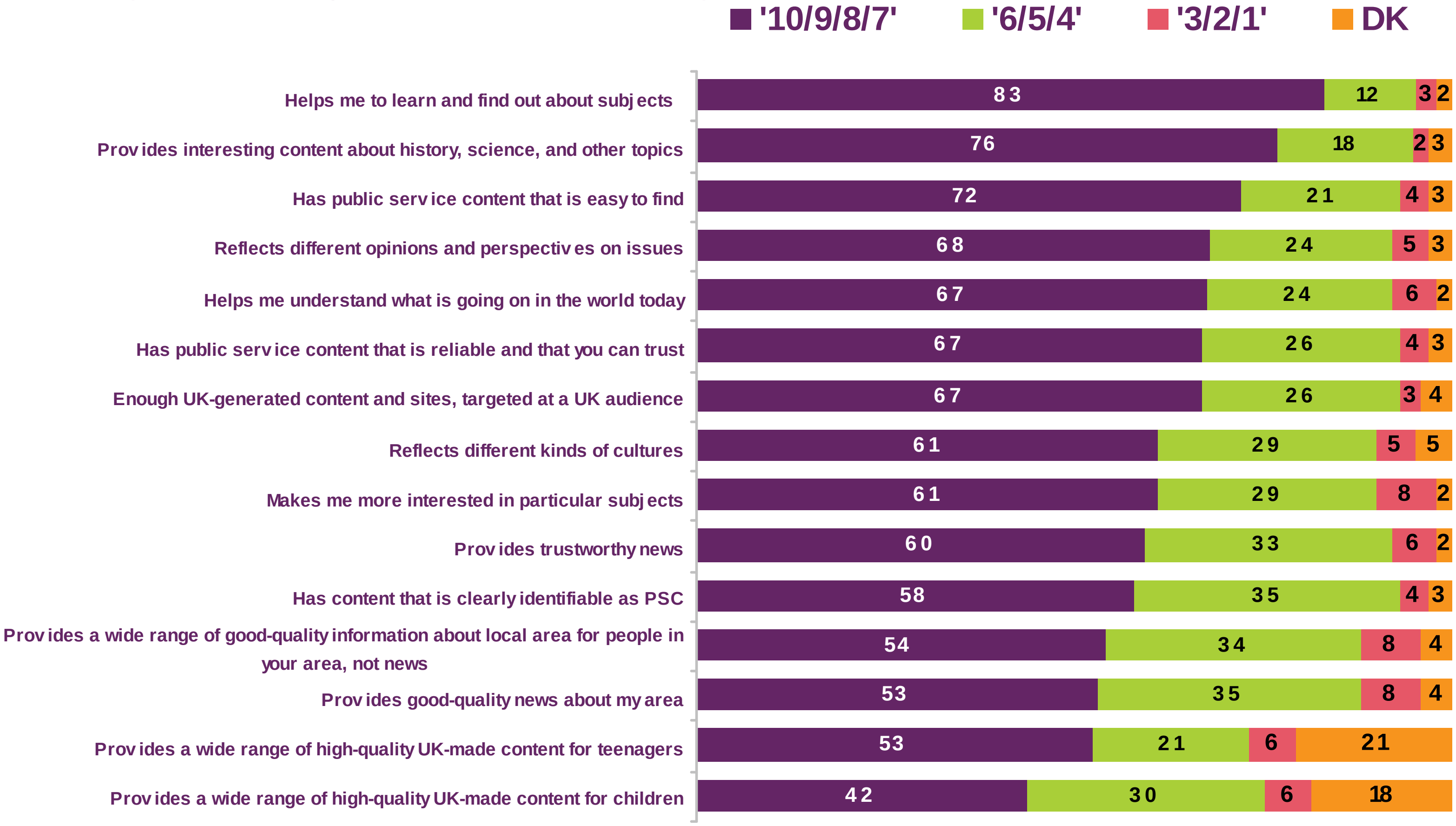
Audiences were also asked to rate the importance of public service content and elements of public service purposes and characteristics (base: all adults 16+).



Q12: “How important do you think it is that the internet does each of the following?”
Base: Gfk NOP. June 08. All adults 16+ (1002) NB: Variation in totals from 98-101% due to rounding

Importance of public service content online

Audiences were also asked to rate the importance of public service content and elements of public service purposes and characteristics (base: users of public service content online).



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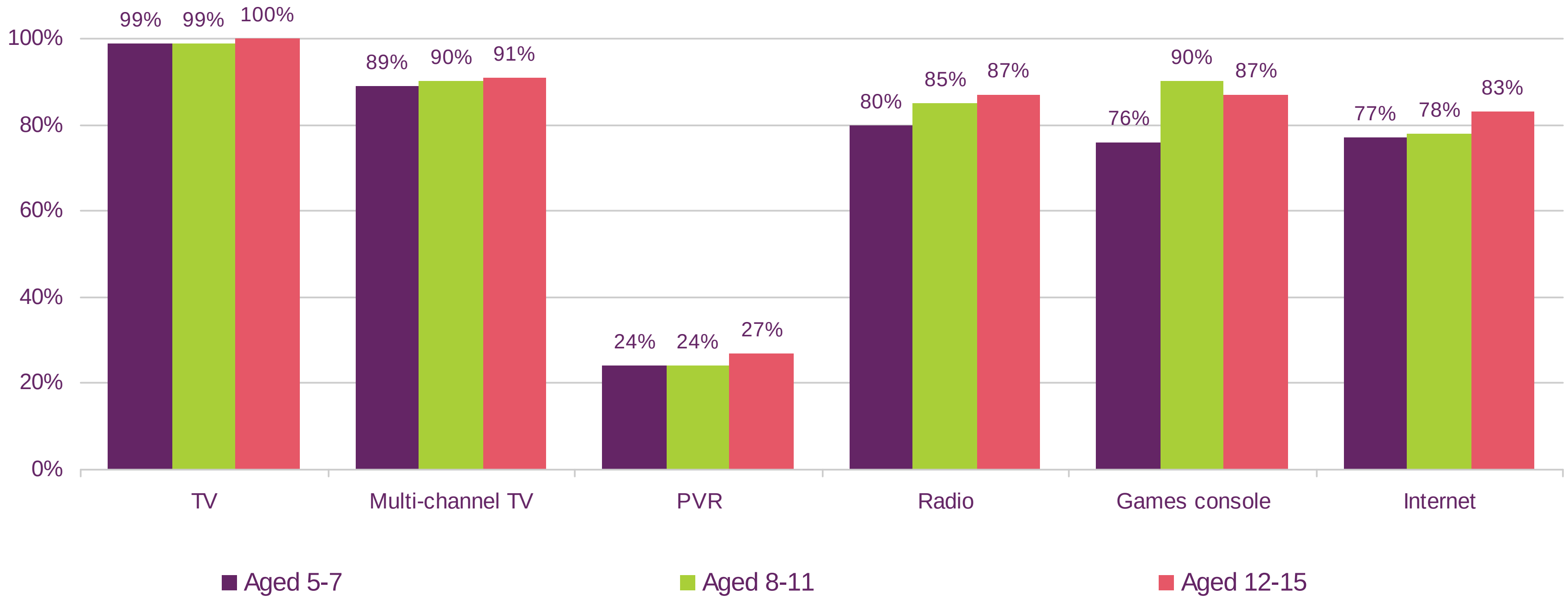
Base: Gfk NOP. June 08. Adults 16+ who use the internet for PSC (452) NB: Variation in totals from 98-101% due to rounding

Children

Household access by age of child

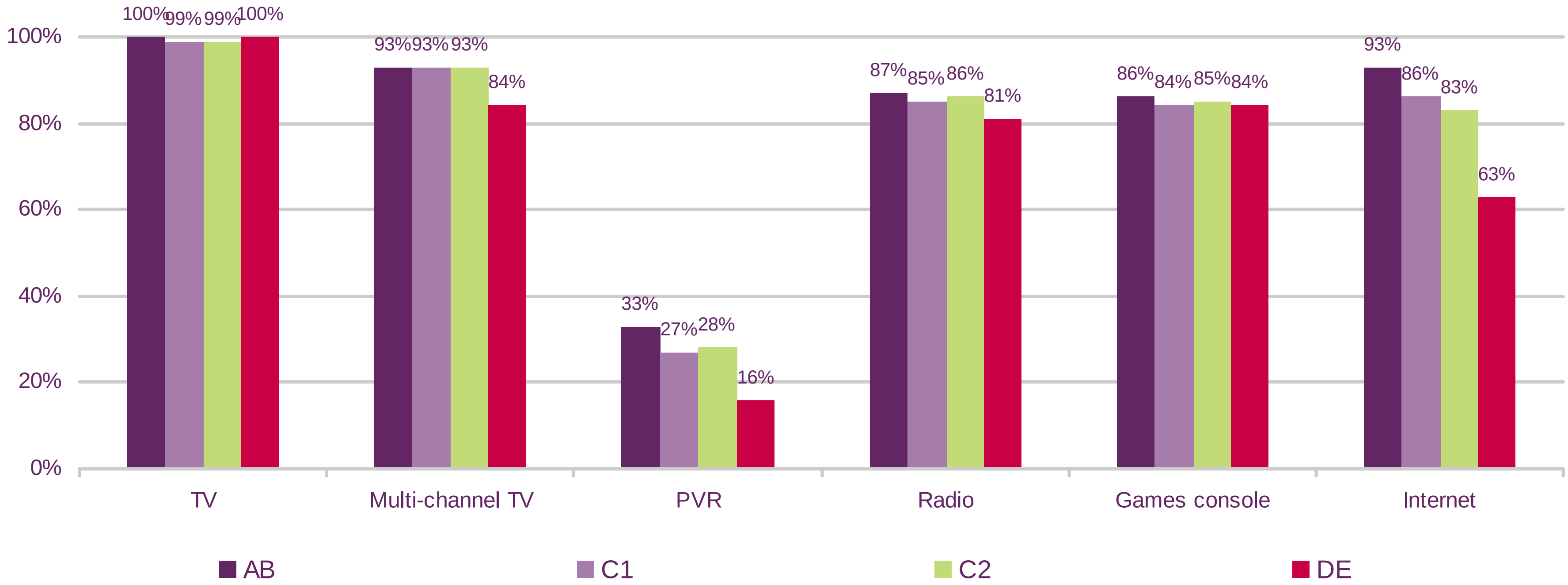
77% of children aged 5-7, 78% of 8-11s and 83% of 12-15s have access to the internet at home.



QP3A/B/D/G/H – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use
Base: Parents of children aged 5-15 (563 aged 5-7 in 2008, 748 aged 8-11 in 2008, 755 aged 12-15 in 2008)
Source: Ofcom Children's media tracker 2008

Household access by socio economic group

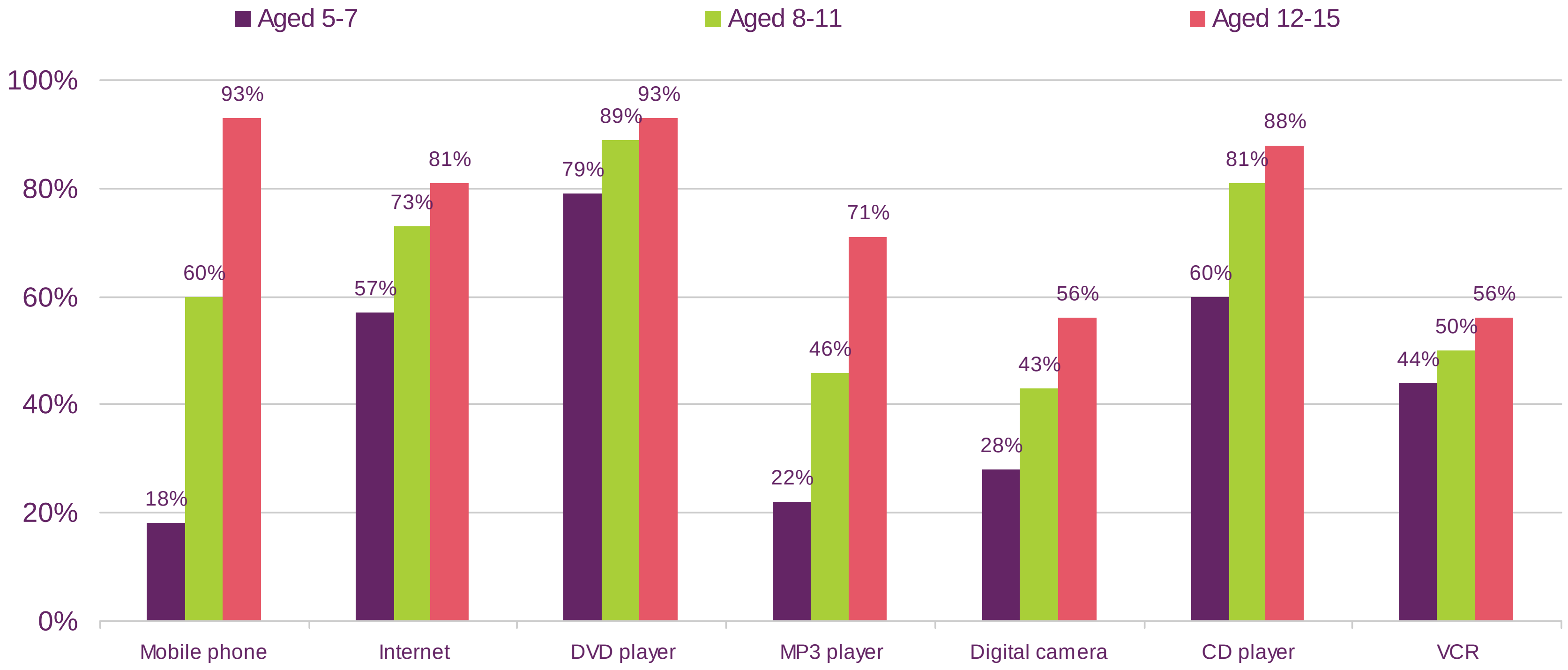
Internet access at home varies by socio economic group, with 93% of children in AB, 86% in C1, 83% in C2 and 63% in DE homes having access.



QP3A/B/D/G/H – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. Base: Parents of children aged 5-15 (371 AB, 531 C1, 466 C2, 671 DE)
Source: Ofcom Children's media tracker 2008

Internet use at home by age of child

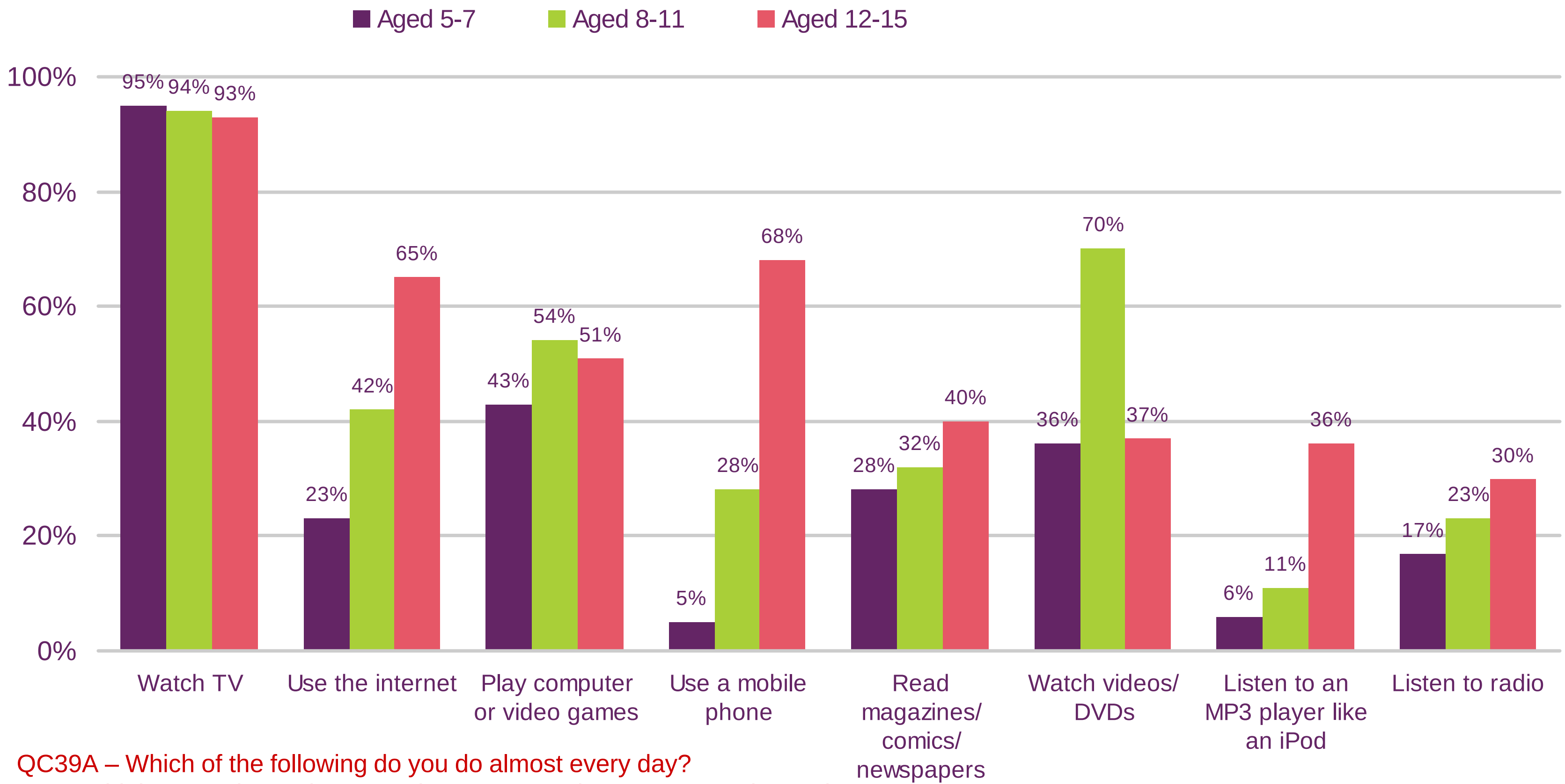
Internet use at home varies by age of child, with 57% of children aged 5-7, 73% of children aged 8-11 and 81% of children aged 12-15 saying they use it.



QP3A/B/D/G/H – I'm going to read out a list of different types of equipment that you may or may not have in your home, and which your child may or may not use. Base: Parents of children aged 5-15 (563 aged 5-7 in 2008 748 aged 8-11 in 2008, 755 aged 12-15 in 2008)
Source: Ofcom Children's media tracker 2008

Regular media activities – do almost every day

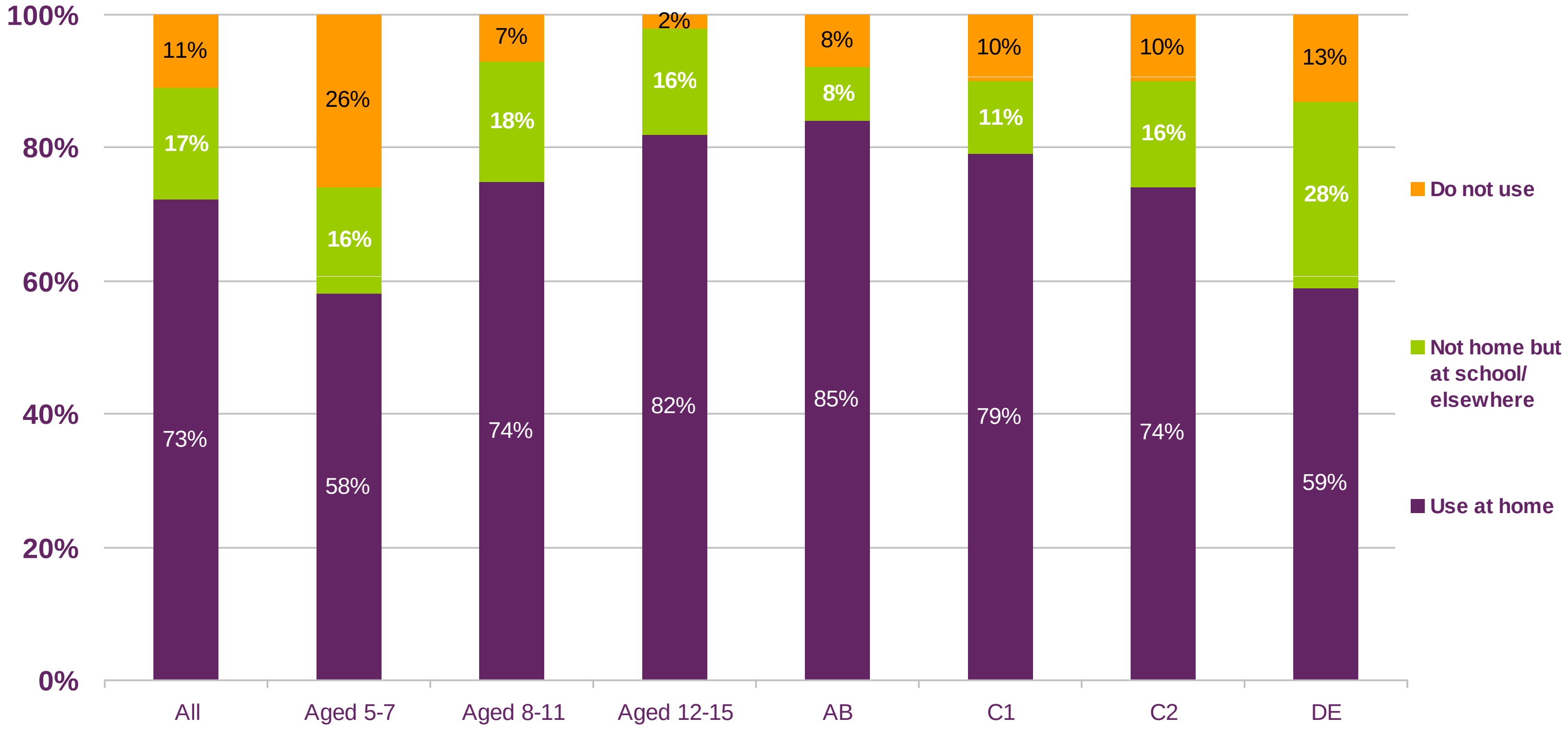
23% of children aged 5-7, 42% of children aged 8-11 and 65% of children aged 12-15 use the internet almost every day at home.



QC39A – Which of the following do you do almost every day?
Base: Children aged 5-15 (563 aged 5-7, 748 aged 8-11, 755 aged 12-15)
Source: Ofcom Children's media tracker 2008

Internet use at home and elsewhere

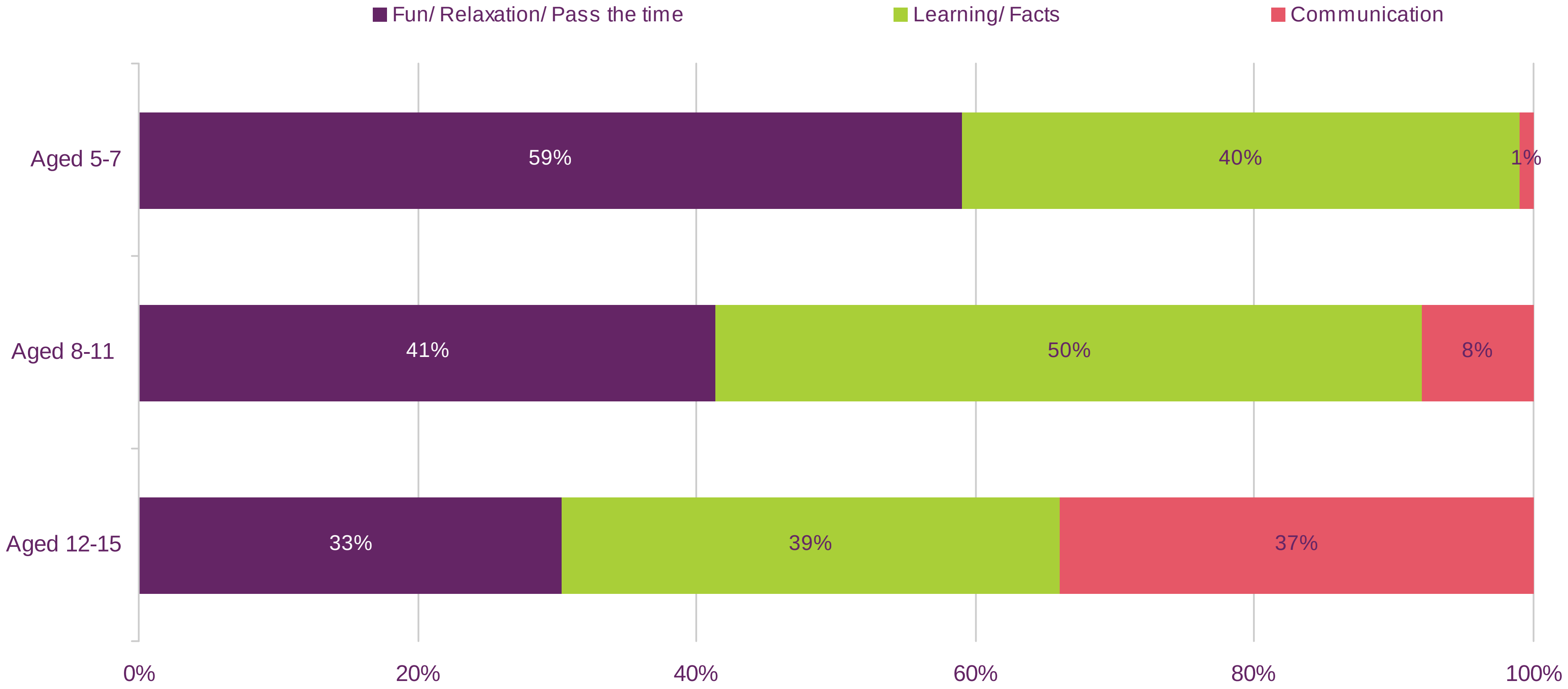
There is a proportion of children who use the internet at school but do not have access at home. Once this is included internet usage rises to 90% of children aged 5-15. There is a significant increase in the levels of usage as children become older, with the internet being used at home or elsewhere by 74% of 5-7 year olds, 92% of 8-11 year olds and 98% of 12-15 year olds.



QP3B/ QP18A/ QP18B/ QC28 – SUMMARY OF WHETHER THE INTERNET IS USED AT HOME/ ELSEWHERE
Base: Children aged 5-15 (2066 aged 5-15, 563 aged 5-7, 748 aged 8-11, 755 aged 12-15, 371 AB, 531 C1, 466 C2, 671 DE)
Source: Ofcom Children’s media tracker 2008

Reasons for internet usage

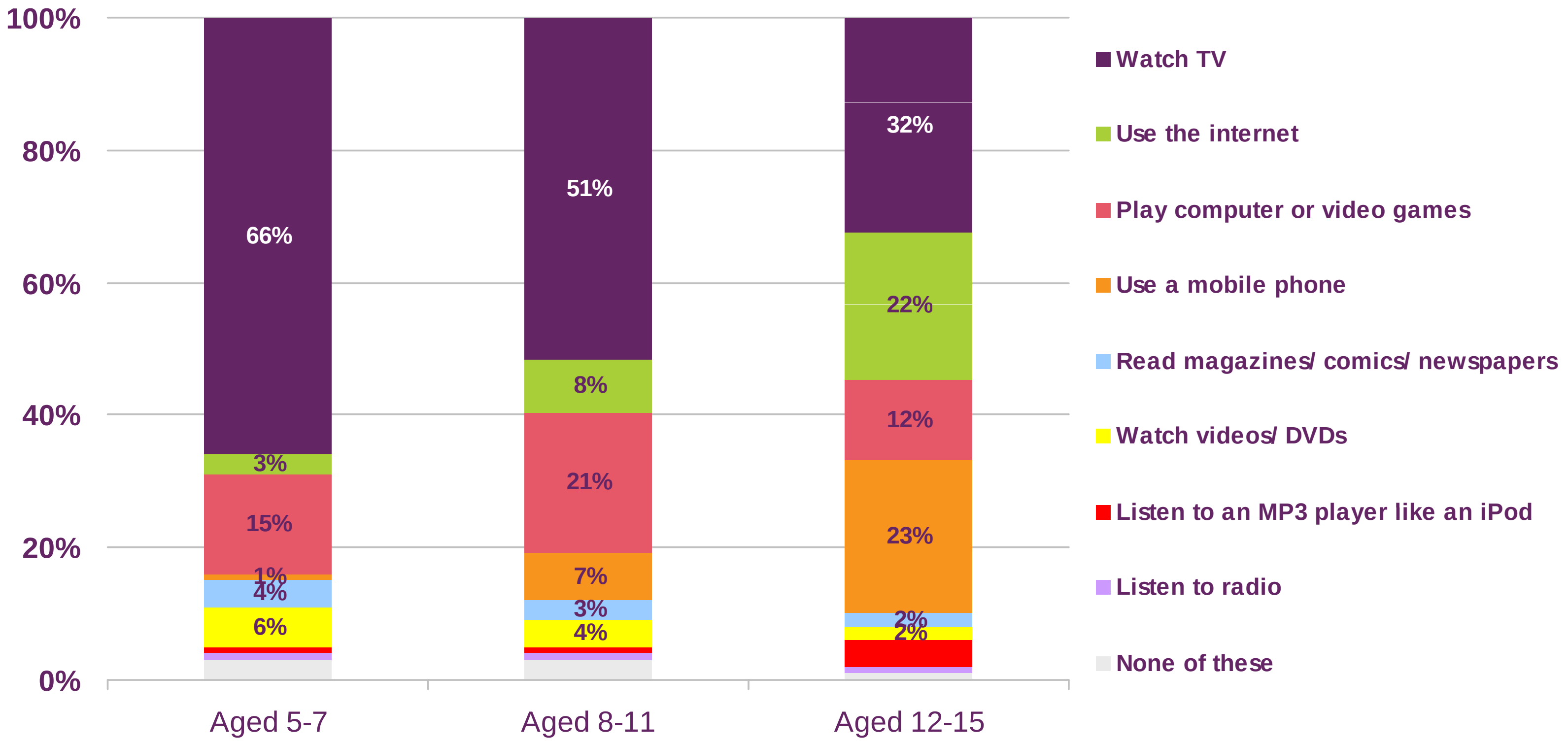
Among those with internet at home, children aged 5-7 are more likely to say their main reason for using the internet at home is for fun/entertainment (59%), whereas for children aged 12-15 this drops to 33%, with 39% citing learning and 37% for communication.



QC24B – Which one is your main reason for using the internet?
Base: Children aged 5-15 who use the internet at home (308 aged 5-7 in 2008, 527 aged 8-11 in 2008, 614 aged 12-15 in 2008)
Source: Ofcom Children’s media tracker 2008

Media activity would miss the most if got taken away

Attitudes towards the internet change with age. Children aged 12-15 are more likely to name the internet as the medium they would miss most (22%), compared to 8% of 8-11s and 3% of 5-7s.



QC39B – Now of the ones you do almost every day, which one of these would you miss doing most if it got taken away?
Base: Children aged 5-15 (563 aged 5-7, 748 aged 8-11, 755 aged 12-15)
Source: Ofcom Children's media tracker 2008

Children without internet access at home

- Consumer panel research among families who do not have internet access at home found the following ‘pull’ factors for getting the internet at home:
  - All children were keen to have the internet at home and the benefits outweighed the negatives. Those without felt excluded, unable to access a world others take for granted. Reasons included for staying in contact with friends, socialising, hobbies and schoolwork
  - There was pressure from school to get the internet at home, which increased at secondary school
- Barriers to take up identified in the study included cost and parenting type:
- Perception of cost of getting the internet at home can be unrealistic
- The study identified three parenting types – ‘planners’, ‘considers’ and ‘fearful’. For all groups the main reason for not getting the internet at home was fear, but the extent and cause of the fear varied by group (e.g. fear of unknown, of dangers of children going online, of being at disadvantage versus their children). There could be opportunities for addressing parental fear, e.g. by encouraging parents to try out the internet themselves in local libraries etc
- The hardest to reach parent group was identified as the ‘fearfuls’. They were often long-term unemployed and the internet was just one example of how they had lost touch with wider society. They tended to be socially isolated with links only to their immediate family and need support to gain confidence in many aspects of their lives. (One possible way forward could be a school policy that encourages parental involvement with the internet and ICT and offers support in internet skills.)
- By contrast among families with the internet at home, it was seen as a key part of family life

Source: Consumer panel *Children and the internet* qualitative research 2007

Children without internet access at home cont.

- Consumer panel literature review highlighted several studies which showed a widening divide in ICT skills among children in higher income households with internet access at home versus those in lower income households without access due to out of school opportunities access the internet. The review also cites Boyes and McCormick's study of perceptions of ICT in deprived neighbourhoods which found that, while the majority of participants in their research were keen to encourage their children to develop IT skills, concerns about the perceived dangers of the internet and ICTs for children outweighed the benefits in the minds of the most marginalised participants. To the extent that parental support is necessary to encourage the development of childrens' ICT skills, there may be potential obstacles.

Source: Consumer panel *Social inclusion and communications literature review, 2007*