

ESSENTIAL

Ipsos MORI

Encouraging Home Broadband Adoption Research Report

**A report for the BBC prepared by Essential Research
and Ipsos MORI**

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BBC

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EXECUTIVE SUMMARY

The context

Delivering the benefits of emerging communications technologies and services is one of the core public purposes of the BBC. Earlier in 2009, the BBC was invited to play a leading role in driving interest in broadband take-up as part of the government activity that led to publication of the *Digital Britain* report.¹ This research forms part of the BBC's response to that call, along with a revised and more prominent BBC media literacy strategy and the appointment of the BBC's first Online Access Champion, along with a Head of Media Literacy. The research sought to understand more about those in the population who do not use the internet, why they are not online and what the BBC and others could do to encourage adoption of the internet at home.

The research

The research comprised:

- a market sizing exercise to determine the profile and make-up of the offline population
- a questionnaire survey of 401 non-users of the internet
- ten discussion groups with non-users
- and, in order to understand the journey to home internet adoption, visits were made to 20 households that had taken up the internet in the preceding six months.

The landscape

This research found that, as of June 2009, 27% of the UK adult population did not have access to the internet at home. This 27% comprises:

- 6% who do not have the internet at home but use it outside the home and
- 21% who neither have the internet at home nor use it outside the home.

It is this latter group that is the focus of this research, referred to as 'non-users':

- Non-users are significantly older than the population overall: their average age is 61, with over half (54%) aged 65+ and one-third aged 75+. That said, a significant minority of non-users are younger, with 14% aged 15-34
- Non-users are much more likely to belong to lower socio-economic groups, with 46% from DE social grades. Those non-users aged under 55 are most likely of all to be from DE groups.

¹ Digital Britain. Final Report. (June 2009)
<http://www.culture.gov.uk/images/publications/digitalbritain-finalreport-jun09.pdf>

The challenge

Responses to the quantitative survey suggest the scale of the challenge in encouraging take-up:

- 83% of non-users surveyed said they were unlikely to acquire the internet in the next year
- 66% had little or no interest in it.

When describing the reasons why they did not have the internet, basic affordability was an issue for non-users aged under 55. However, for older non-users in particular, bigger barriers to take-up centred around limited understanding of what the internet is and limited computer skills / confidence:

- 81% of non-users surveyed said that they know little or almost nothing about the internet
- 74% said they had little or no confidence in their ability to use a computer.

And while not a primary barrier to adoption, the acquisition and installation of a home internet connection also emerged as an area of considerable confusion for most non-users.

The opportunities

Given their low levels of interest in and knowledge of the internet and their limited experience of computers, the task to get non-users online will be extremely challenging. However, the qualitative work did suggest that there are opportunities to encourage take-up.

The research highlighted that non-users were at different stages in a journey to internet adoption, ranging from those who fundamentally reject the internet ('rejecters'); those who do not reject the internet but who are not considering it ('non-rejecters'); and those who are actively considering take-up ('active considerers'). Whilst this research did not uncover any immediate means to raise rejecters' interest in the internet, it did point to opportunities to aid non-rejecters and active considerers by understanding more about the barriers faced at each stage:

- **Non-rejecters** are held back by low understanding of what the internet is and low confidence and skills. Before they can start to consider getting online, they need first to understand more about it and build their awareness of the potential benefits they could personally reap, and thereby find a very compelling reason for take-up, not least because of the effort that will be required on the part of most to learn new skills or to overcome particular fears.
- **Active considerers** already believe in the potential of the internet, but are hindered by a lack of skills (mainly those aged over 55) and/or by cost (mainly an issue among the younger considerers). They also need some support in understanding and undertaking the internet acquisition and installation process.

Understanding the different barriers affecting non-rejecters and active considerers can offer insight into the support needed at each stage:

- First, the evidence suggests a need to **increase understanding of the potential benefits of the internet** in order to enable non-users to

make a more informed choice on whether or not they would like to connect to the internet at home

- And then for those who do choose to do so, there is a need to **facilitate adoption** by tackling skills deficits and access barriers.

Increasing understanding and interest in the internet

During the qualitative discussions, participants were given an explanation of certain online activities and had the opportunity to ask questions and discuss with their peers. As they started to understand more about the internet, some, who had previously expressed no interest in it, started to see its potential appeal and benefit.

This reaction suggests that it can be possible to engage non-rejecters by:

- **Communicating relevant benefits** – These include keeping in touch through email and social networks; photo sharing; holiday and travel resources; receiving answers to any question e.g. through search engines or online information resources; resources for children and grandchildren; indulging hobbies and passions; using the computer as a media centre (especially for services such as 'catch-up' TV); online transactions and shopping.
- **Providing reassurance** – Non-users need a great deal of reassurance that the internet is for them. The research suggested that they could be engaged by challenging commonly-held perceptions about the internet, for example that it is time-consuming and detracts from everyday life, and also by delivering positive, relevant messages that the internet is fun, can keep one's mind active and can save money.

Facilitating adoption

Once interest in the internet has been sparked, considerers need help in order to progress to actual acquisition. Some, especially younger considerers, may need help with cost. In addition, the research suggested four main areas of potential support for those considering taking up the internet.

- **Making media skills less intimidating** – Whilst needing help to build their computer skills, for many participants the potential embarrassment of attending skills courses held as much fear as the internet itself. The research suggests that communications about courses would need to demystify them by conveying what happens, who attends, what the tutor will be like and what will be covered, and to offer reassurance that courses are for people like them.
- **Enlisting families, friends and communities** – Most recent adopters of the internet interviewed for the research would not have been online without the persuasion, help and support of their friends and family. Friends and family could tailor explanations of the benefits of the internet to the interests of their relative, provide help with installation and give on-going skills support. Initiatives to inspire and assist friends and family to help get the non-users they know online could potentially be very fruitful. These could involve providing friends and family with resources or online information that they would need to help non-users (e.g. price comparison, contacts for skills training, ideas of websites to visit).

- **Making home internet access easier**
 - ***Internet-connected TV²*** – Given the low computer skills of many non-users, this research suggests that internet-connected TV could offer a potential means of access for some. One in six non-users surveyed expressed interest in the concept based on a short written description. The idea of free internet-enabled TV catch-up and archived programming through the television was well received in the qualitative research. However, those who were seeking particular internet benefits would need to be sure that these would be available through such a service in order that they could properly assess its appeal and value for money.
 - ***Promoting internet take-up by learning from digital switchover activities*** – More than one in four (27%) non-users do not have digital TV. It may be beneficial when promoting internet take-up activities to learn from the promotion of digital television.
 - ***Installation made easy*** – The evidence suggests that there would be benefit in initiatives that help with the initial set-up and installation of a new computer and internet service for novices, as well as prompting fuller use of the internet once installed. For example, contract-free trial periods, initial technical support in layman's terms, and content 'packages' (e.g. recommended bookmarks tailored to the user's preferences) could help to ease the acquisition process.
- **Addressing affordability issues and cost confusion** – There was confusion about the cost of internet access and this suggested that non-users may benefit from access to simple explanations and comparisons of the costs involved in standalone and 'bundled' contracts.

The role of the BBC and other organisations

Organisations such as the BBC, with the ability to deliver large-scale communications campaigns, could help non-rejecters to see the internet as something that is relevant to them, not by promoting the platform, but by showcasing particular online benefits that this research suggests are relatively more appealing to this audience.

Certain content within BBC Online could be used to illustrate these benefits, including news, sport, weather, local news, recipes, gardening, family history, the children's sites and the iPlayer. However, the evidence suggests that, on its own, BBC Online would not be a primary driver of take-up, and that other benefits of the internet would also need to be conveyed, such as email and communications, photo-sharing, holiday and travel resources, search engines and shopping.

Further ways in which the BBC and others could help those considering the internet to take steps towards acquisition and installation include: making basic computer and internet skills development material available on TV, for example through the red button or on DVD; making home access easier through internet-connected TV; and initiatives encouraging friends and family to help non-users get online and providing information and support to assist friends and families with this.

² The research looked at the general concept of internet-connected TV. It did not examine any specific product.

SECTION 1 **INTRODUCTION**

1.1 Context

Delivering the benefits of emerging communications technologies and services is one of the core public purposes of the BBC. In recent times, this has been seen in the part the BBC has played, with others, in the development of Freeview and DAB digital radio, and in publicising and demystifying the internet and providing content online.

Although the majority of people now use the internet and have home access, a significant minority do not. The BBC commissioned this research to understand more about these non-users, why they are not online, what might change that and what the BBC could do to encourage adoption of the internet at home.

Earlier in 2009, the BBC was invited to play a leading role in driving interest in taking up broadband as part of the government activity that led to publication of the *Digital Britain* report.³ This research forms part of the BBC's response to that call, along with a revised and more prominent BBC media literacy strategy and the appointment of the BBC's first Online Access Champion as well as a Head of Media Literacy.

1.2 Objectives

The research was designed to address the following questions:

- What are the barriers to home internet take-up and the triggers that encourage adoption?
- What can be done to drive greater home internet take-up?
- What role can the BBC play through its content, services and technology development to encourage internet take-up, and what role can others play?
- What awareness is there around the BBC's current offerings in these areas?

1.3 Methodology

This research draws on the following pieces of evidence:

i) A quantitative phase conducted by Ipsos MORI, comprising:

- A market sizing survey to determine the proportion and make-up of the population without home access to the internet
- A survey of those without the internet at home and who do not use the internet elsewhere.

ii. A qualitative phase conducted by Essential Research, comprising:

- Ten mini-group discussions with those who do not have the internet at home nor use the internet elsewhere

³ Digital Britain. Final Report. (June 2009)
<http://www.culture.gov.uk/images/publications/digitalbritain-finalreport-jun09.pdf>

- 20 in-home individual depth interviews and accompanied internet use sessions among recent adopters of the internet
- Six 40-minute telephone interviews with providers experienced in running courses or initiatives to train adults in computer and internet skills.

Further details are given below.

Quantitative phase

• *Market sizing survey*

Using the Ipsos MORI omnibus survey of 2,050 UK adults, this element of the research sought to determine the proportion and the demographic profile of the population that does not have access to the internet at home. Having identified those without the internet at home, the survey went on to probe the extent to which, if at all, this group used the internet outside the home. The purpose of this was to identify the subset of the offline population who neither have the internet at home nor use the internet outside the home. It is this group that became the focus of further investigation in this study, referred to as 'non-users' throughout this report.

• *Non-users survey*

Having been identified as those who have no home internet access and do not use the internet elsewhere, these non-users were asked further questions on the Ipsos MORI omnibus in order to gain preliminary insights into why they were not online and to ascertain their initial degree of interest in the content and activities available on the internet. The non-users survey sample comprised 401 respondents, and the questions posed covered four main areas:

- Current experience of the internet and barriers to adoption, including degree of confidence in using computers, reasons why they do not have the internet at home, and likely take-up in the next 12 months
- Knowledge of and interest in the internet, including awareness of the types of content available and areas of potential interest, if any, online
- The BBC's online offer, including awareness of the types of sites available from the BBC; whether any have appeal; and views on things the BBC could do to facilitate internet usage amongst current non-users
- The degree of interest in accessing online content through internet-connected TV.

Qualitative phase

• *Ten mini-group discussions with non-users*

Ten discussion groups, each with four to six participants, were conducted with non-users.⁴ The purpose of the mini-groups was to explore more deeply than is possible in a questionnaire survey the reasons preventing home internet adoption, in particular to delve into these barriers in detail in order to

⁴ Individuals who did not have the internet at home and did not use the internet elsewhere, matching the definition from the quantitative 'non-users' survey.

understand the factors impeding take-up, and to discuss at some length with participants potential ways to facilitate internet acquisition.

The sample for the mini-groups was designed to reflect broadly the demographic profile of the 'non-users' population. To this end, six of the ten groups were conducted with over 55s, split between ABC1 and C2DE socio-economic grades, and the remaining four groups were conducted with under 55 year olds from C2DE socio-economic grades (with a focus on D groups). The mini-groups were held in the four nations of the UK, and locations included urban, suburban and rural areas.

- ***20 in-home individual depth interviews and accompanied internet use sessions among recent adopters of the internet***

Twenty home visits, each of two hours' duration, were made to those who had signed up for broadband at home within the last six months, referred to as 'recent adopters' throughout this report. The purpose of this element of the research was to understand the journey to home internet adoption amongst those who had recently converted with a view to giving insight into how barriers to take-up were overcome. Discussions with the recent adopters covered the following areas:

- The acquisition process, including triggers and motivations for adoption, the barriers that were faced and how they were overcome
- Current experiences of the internet, perceived benefits, areas for improvement. This included accompanied usage of the internet, using the participant's own computer and observing the sites visited, navigational behaviour and any ergonomic difficulties or confusion. As part of this, moderators, where appropriate, introduced participants to certain types of website or activity not previously tried in order to gauge reaction and level of interest
- Ways to encourage home internet adoption, including what could be learnt from their own experiences of getting online in the past six months; what could have driven their earlier adoption of the internet; what could have made the process easier; and potential actions to aid take-up, including what the BBC and other organisations could do.

The recent adopters interviewed had never had the internet in their homes previously nor had they used the web for personal use prior to acquiring the internet at home. The 20 home visits covered the four nations of the UK, and involved 21 participants (13 women and eight men). Participants were from C1C2D social grades, with ten aged under 55 and 11 aged over 55.

- ***Six telephone interviews with providers experienced in running courses or initiatives to train adults in computer and internet skills***

The purpose of these interviews was to provide some context for discussions with non-users and recent adopters. Given the small number of interviews involved, this element was intended only to provide some background information and an additional perspective on the skills development needed by non-users.

The quantitative research was conducted between 24 – 30 April 2009 and 29 May – 4 June 2009, and the qualitative work from 17 April – 21 May 2009. A

full account of the research methodology, together with the research instruments themselves, is available in the technical appendix – please contact helen.moor@bbc.co.uk for a copy.

1.4 The focus of this research

This study concentrates on the majority of the offline population that neither has the internet at home nor uses the internet elsewhere (the ‘non-users’). This is a different focus from recent research conducted by Ipsos MORI for Ofcom⁵, which included in its sample both the non-users and also those who do not have home access but use the internet elsewhere. This difference in sample explains why, in cases where both studies cover similar ground, different percentages may be recorded.

Ipsos MORI’s research for Ofcom comprehensively considers the offline population’s attitudes towards the internet; the factors inhibiting home internet adoption; different ways of payment (e.g. pre-pay versus contract options) and connection methods (e.g. fixed line or mobile dongle); how much, if anything, they would be willing to pay to get connected; and responses towards different ideas to encourage take-up. It found that 42% of people surveyed were willing to pay something for an internet connection, 13% would get it if they could get a free connection and computer, but 43% would not get it even if both were free and said that the internet was irrelevant to their lives. The study found a strong correlation between experience of the internet and intention to take it up at home, and showed that a genuine interest in the internet is a prerequisite to adoption.

Following on from Ofcom’s findings, this research focuses more on the potential ways in which interest in the internet could be ignited amongst non-users, and the support mechanisms that would be needed to facilitate adoption once this interest has been sparked.⁶

⁵ Accessing the internet at home: a quantitative and qualitative study among people without the internet at home by Ipsos Mori (June 2009)
<http://www.ofcom.org.uk/research/telecoms/reports/bbresearch/bbathome.pdf>

⁶ For context, this study also includes areas already covered in Ofcom’s work, especially around the barriers to home internet acquisition and non-users’ current degree of interest in and experience of the internet.

SECTION 2

THE PROFILE OF THE OFFLINE POPULATION

This section provides a breakdown of the UK adult population according to whether they use the internet and have home access to it. It also examines the demographic profile of internet non-users – the primary focus of this research - and how they compare to the population overall.

2.1 The UK population in terms of access and usage of the internet at home

The quantitative survey conducted by Ipsos MORI for the BBC in May and early June 2009 found that 73% of UK adults aged 15 or over have access to the internet at home through a computer or laptop, while 27% have no access at home.

Those with and without the internet at home can be broken down further depending on their usage of the internet, as set out in Figure 1.

Figure 1

Access to the internet at home

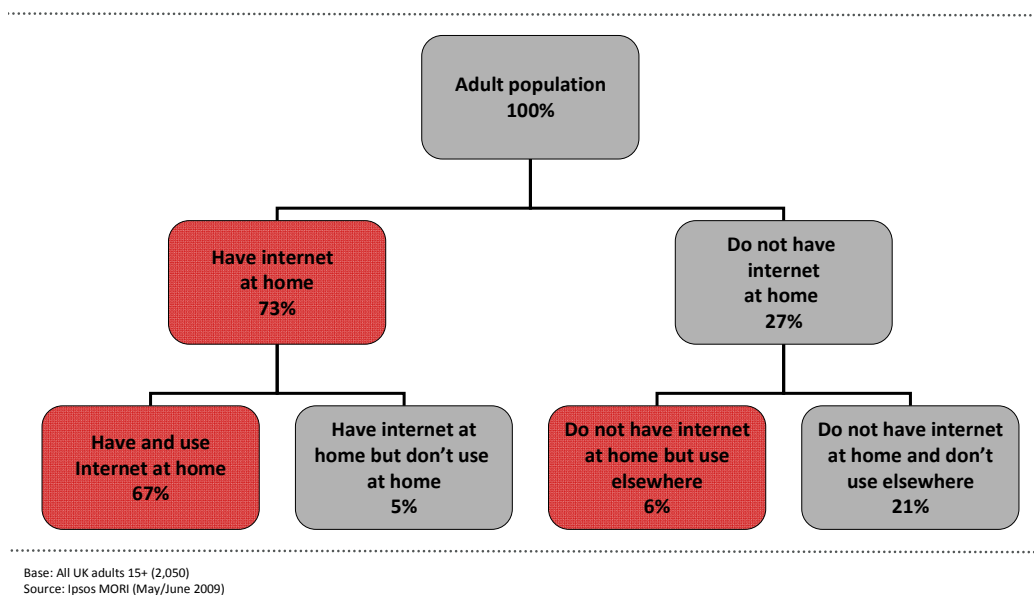


Figure 1 shows:

- Just over two-thirds of the adult population (67%) have home access to the internet and use the internet at home
- 5% have home internet access but do not use it at home
- 6% do not have access to the internet at home but do use the internet outside the home, and
- 21% do not have home internet access and do not use the internet in any other location.

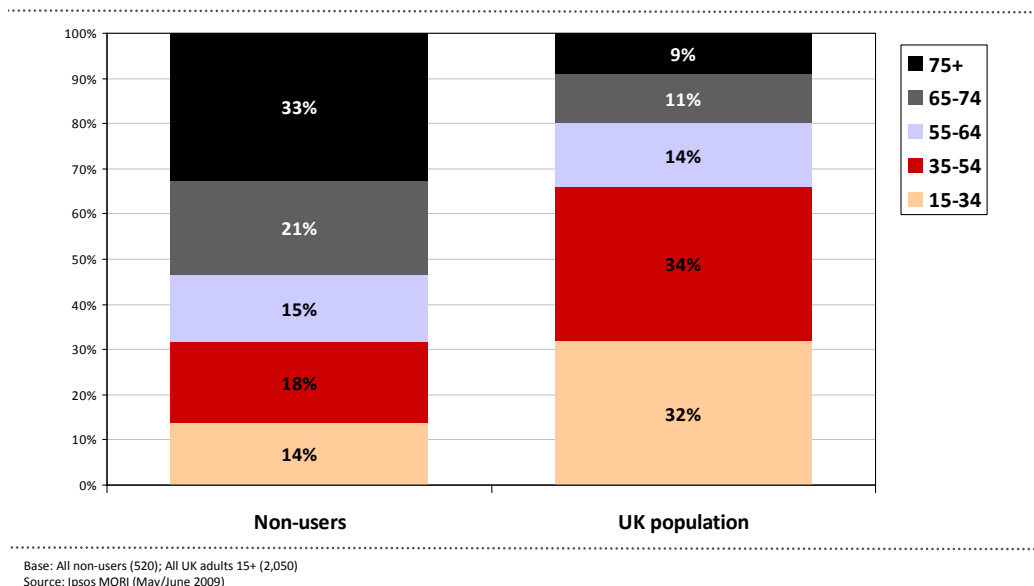
This latter group – one-fifth of the adult population – is completely offline: they do not have access to the internet at home nor do they use the internet elsewhere. They are the primary focus of this study, and, for the purpose of this report, are referred to as ‘non-users’. The demographic profile of these non-users is examined below.

2.2 The demographic profile of ‘non-users’

- 55% of non-users are **female** (55%) and, with an average age of 61 years, non-users are **significantly older** than the population overall (average age 46 years). As shown in Figure 2, over half (54%) of non-users are aged 65 or over, with one-third aged 75+. That said, a very significant minority of non-users are from younger age groups: 14% are aged 15-34 and a further 18% are aged 35-54.

Figure 2

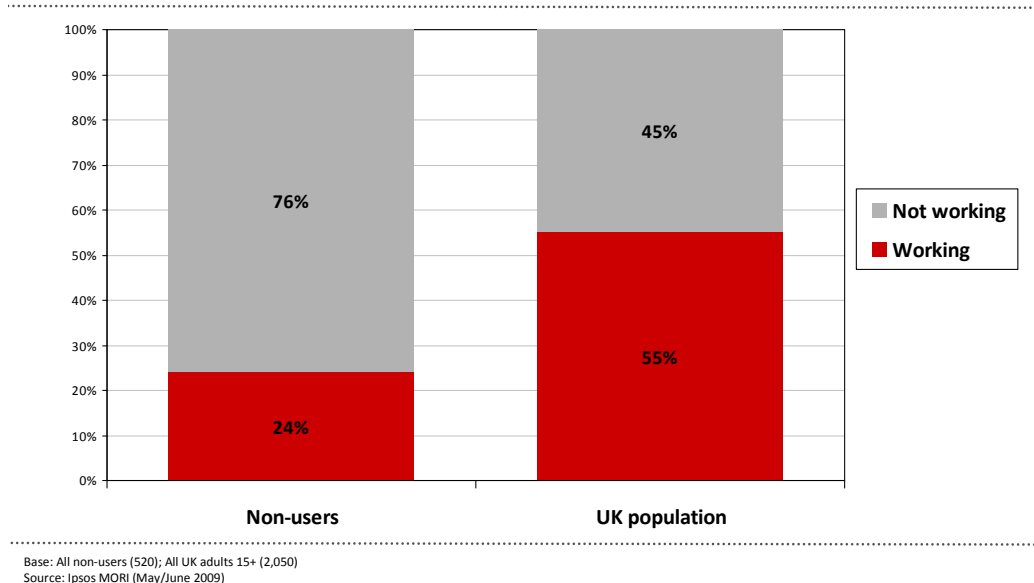
Age



- Over three-quarters of non-users (76%) are **not in work**, as shown in Figure 3. Related to their older age profile, over half (55%) are retired, 10% are not working owing to a long-term illness or disability, 6% are housewives or househusbands, 4% are unemployed and 1% are in full-time education.

Figure 3

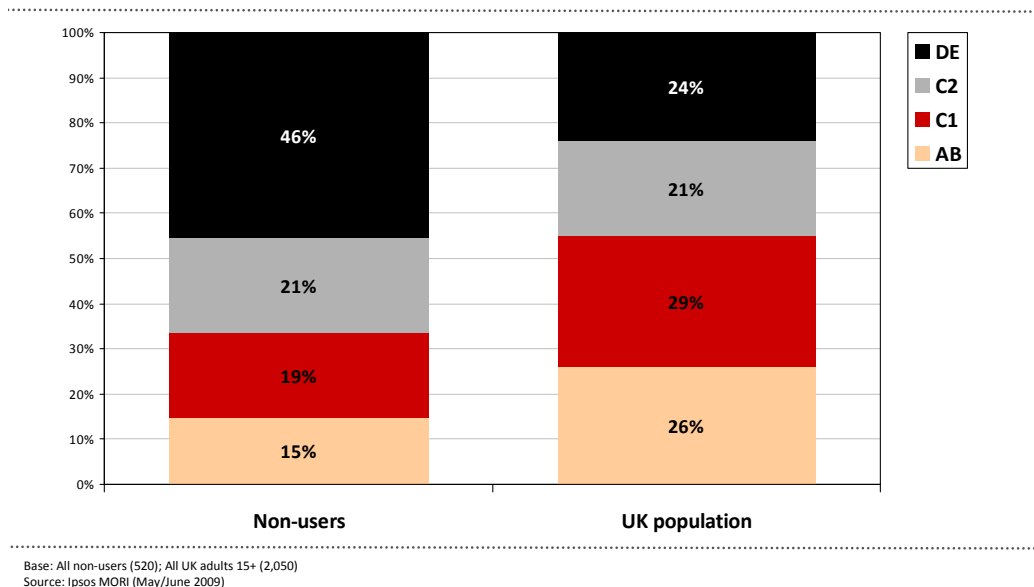
Working status



- Non-users are also more likely to belong to the **lower socio-economic groups**, with two-thirds (67%) belonging to the C2DE groups. DE groups are particularly over-represented with 46% of non-users from these two socio-economic groups, almost twice the proportion in the UK population overall (24%) (Figure 4).

Figure 4

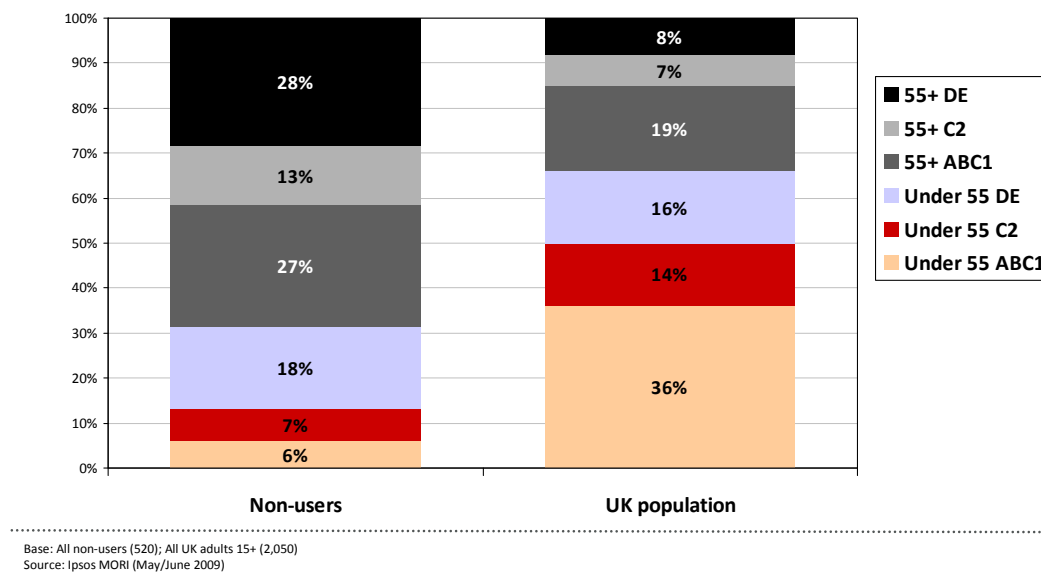
Socio-economic groups



- However, examining social grade by age shows some differences in the socio-economic make-up of non-users depending on whether they are under or over 55 years. Those under the age of 55 are more likely to be from DE groups. Those aged 55 or over still skew towards DE groups compared with the population overall; however, there is a more even split of socio-economic groups with 27% of non-users being 55+ ABC1, 13% being 55+ C2 and 28% being 55+ DE, as shown in Figure 5.

Figure 5

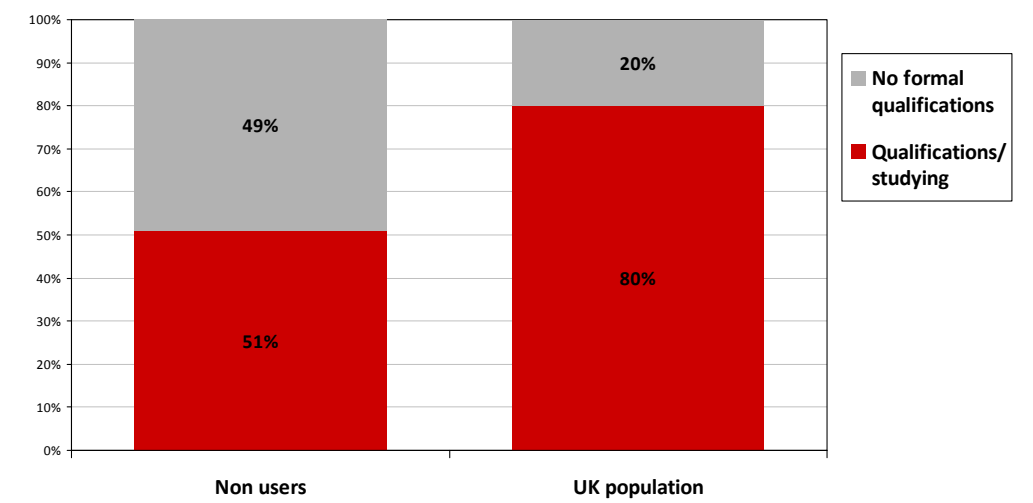
Age and socio-economic groups



- Non-users are more likely to be on **low incomes** compared with the overall UK population. Two in five respondents (41%) declined to give an answer when asked about their household income. However, of those who did respond, just under half (45%) live in a household with a gross income of less than £11,500, 30% live in a household with a gross income between £11,500 and £17,500 and 24% live in a household with a gross income over £17,500. In the population overall, 56% of all adults live in a household with a gross income over £17,500.
- The education level of non-users also differs very significantly from the overall population. Nearly half (49%) of all non-users **do not have any formal qualifications**, significantly higher than in the overall population (20%).

Figure 6

Education

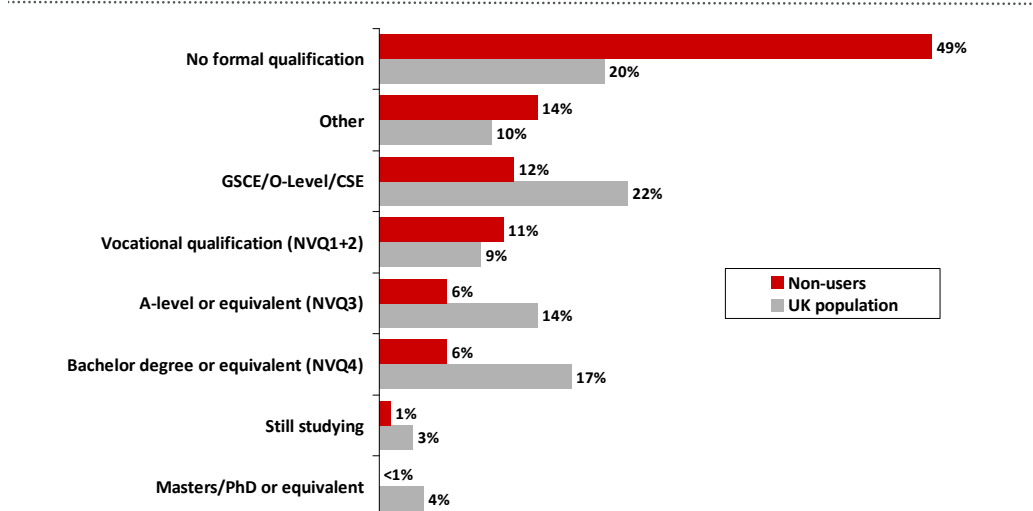


Base: All non-users (520); All UK adults 15+ (2,050)
Source: Ipsos MORI (May/June 2009)

- Only 7% of non-users have a university degree or postgraduate qualification compared with 22% of the total population. 12% have GCSE/O levels, 11% vocational qualifications, 6% A-levels and 14% other qualifications, as shown in Figure 7.

Figure 7

Qualifications



Base: All non-users (520); All UK adults 15+ (2,050)
Source: Ipsos MORI (May/June 2009)

- Non-users are significantly more likely to **live on their own** (44%) compared with the overall population (18%). Of these non-users who live alone, two-thirds (67%) are aged 65 or over. Only 1 in 10 (11%) of non-users have children under the age of 15 living in their home.
- Off-liners' level of **computer ownership** at 14% is markedly lower than the national penetration of 74%. In the quantitative survey, not having a computer emerged as one of the main barriers to accessing the internet at home (see Section 4.1). However, this could also be viewed as an opportunity as 14% of the non-users – 3% of the UK population overall – already have a computer at home that could possibly be connected to the internet (computer specification and local availability of broadband permitting).
- Levels of **take-up for digital television** are also low: 27% of non-users have terrestrial television only, 38% have Freeview, 22% have satellite (pay or free) and 8% have cable television on their main sets.⁷ This compares with figures for the overall population which show that 10% live in a household with terrestrial television only; 39% have Freeview, 37% have satellite television (pay or free) and 13% have cable television on their main sets.⁸ It may be beneficial when promoting internet take-up activities to learn from the promotion of digital television.

Summary

Non-users – those who neither have the internet at home nor use it outside the home – comprise 21% of the UK adult population. More than half are aged over 65, although a sizeable group is younger, with 14% aged 15-34. Non-users are much more likely to belong to lower socio-economic groups, with almost half from DE social grades. Those non-users aged under 55 are most likely of all to be from DE groups. Non-users have lower levels of ownership of technology products, with just 14% already owning a computer and 27% not having digital TV.

⁷ 5% said 'none of these' or 'don't know' or 'no TV'

⁸ Ofcom Communications Tracking survey, quarter one 2009. 1% have an ADSL connection or 'other' type of TV

SECTION 3

INTEREST IN AND KNOWLEDGE OF THE INTERNET AMONG NON-USERS

In order to understand what experience of and familiarity with the internet non-users have, this section examines their levels of interest in and knowledge of the web and reports their claimed likelihood to acquire the internet at home in the next 12 months.

3.1 Level of knowledge in the internet

As explained in Section 1, the focus of this research is those in the offline population with the least contact with the internet: those who neither have the internet at home nor use it outside the home.

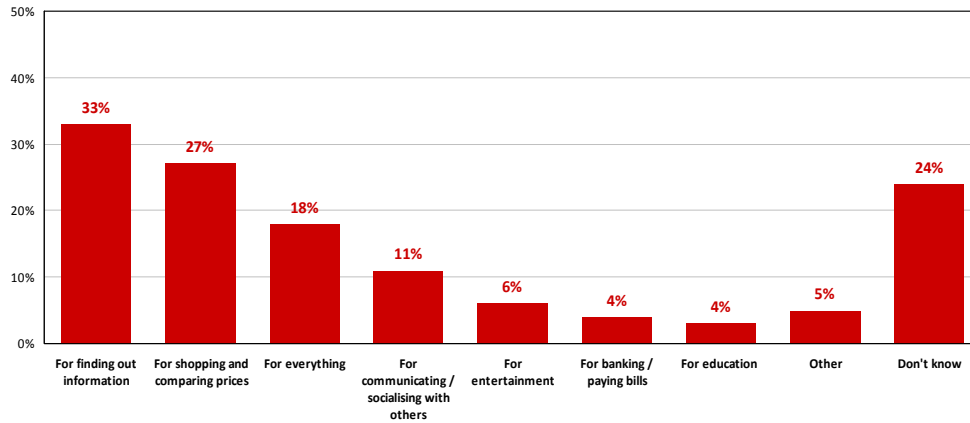
When asked about the extent of their knowledge about the internet, almost all of the non-users surveyed (97%) had heard of it. Beyond this, however, the vast majority declared their knowledge to be very limited, with eight in ten (81%) indicating that they knew little or almost nothing about the internet. Age was a significant factor, with knowledge decreasing as age increased:

- Of those aged under 55, over one-third (36%) stated that they knew a lot or a fair amount about the internet with 61% registering they knew little or almost nothing about it
- Of those aged over 55, only 7% knew a lot or a fair amount about the internet with the overwhelming majority (91%) indicating that they had little or almost no knowledge.

In the questionnaire survey, non-users were asked in an open-ended question, what they thought people could find or do on the internet. As Figure 8 shows, over one-third of respondents (33%) were aware, unprompted, that the internet could be used for finding information. However, one-quarter could not think of a single thing that could be done or found on the internet.

Figure 8

Non-users' awareness of what can be done and found on the internet: spontaneous response



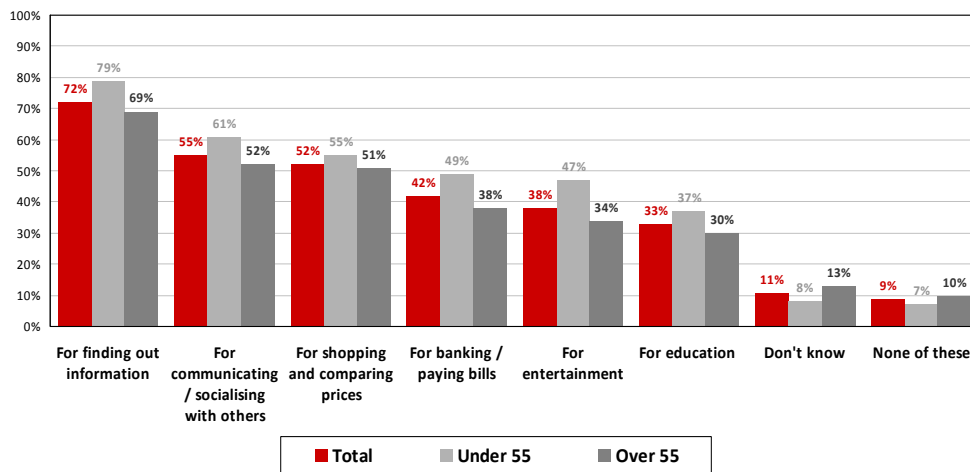
Question: Overall, what do you think people can find or do on the internet?
Base: Non-users (401)
Source: Ipsos MORI (April to May 2009)

In a follow-up question, survey respondents were then shown a list of online content and activities and asked which, if any, they knew before today could be found or done on the internet. With this prompting, finding information was again the most frequently identified online activity – now cited by 72% of non-users. However, one in five (20%) were still not aware or were not sure whether any of the prompted activities could be found or done on the internet.

Those aged under 55 showed a higher prompted awareness of all kinds of activity than those aged over 55.

Figure 9

Non-users' awareness of what can be done and found on the internet: prompted response



Question: Here are a list of things that people can find or do on the internet. Which of these, if any, did you know could be found or done on the internet before today?
Base: Non-users (401); under 55 (95); over 55 (306)
Source: Ipsos MORI (April to May 2009)

The qualitative research also suggested that non-users aged under 55 knew relatively more about the internet than older non-users, although most referred only to the more functional aspects of online use, such as email and transactions. Some also referred to social networking.

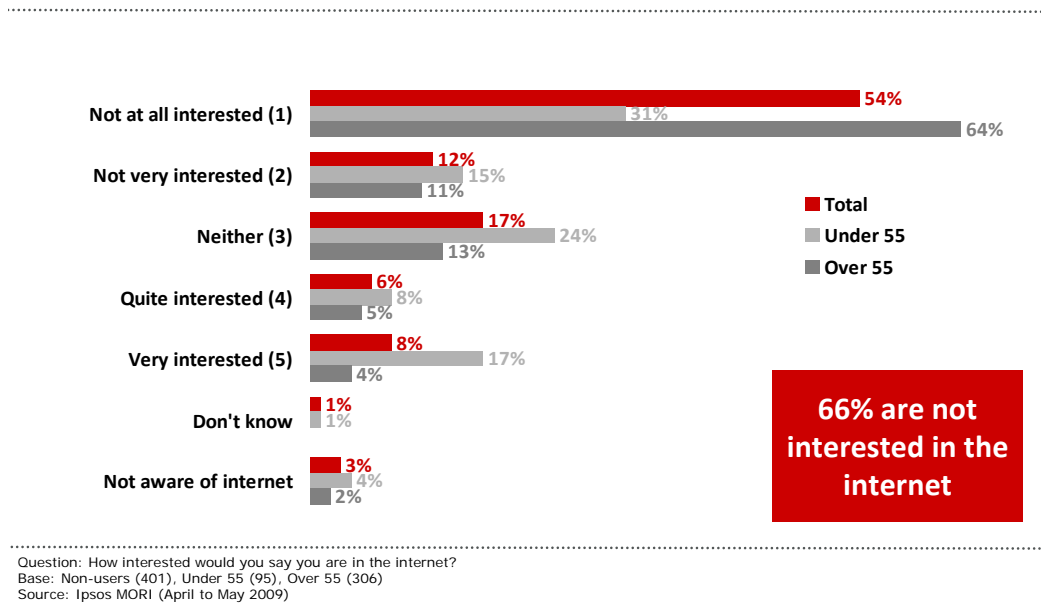
Among older non-users in the qualitative work, there was a broad (if very shallow) recognition of the internet's ability to provide information, communication and transactions, but there was very little awareness of specific websites, beyond Google and eBay, and few had any real appreciation of what was provided or what happened on a website, or how users interacted with them.

3.2 Level of interest in the internet

Asked about their level of interest in the internet in the questionnaire survey, nearly 7 in 10 non-users (66%) claimed to have little or no interest. Age was again a significant factor, with double the proportion of those aged over 55 compared with those under 55 saying they were 'not at all interested' (Figure 10).

Figure 10

Non-users' level of interest in the internet



Looking at the results by age in more detail:

- Of those aged under 55, one in four (25%) registered interest in the internet (selecting points 4 or 5 on the five-point scale) with around half (46%) claiming to have little or no interest (choosing points 1 or 2 on the scale)
- Of those aged 55-64, one in five (19%) registered interest in the internet with around two-thirds (68%) claiming to have little or no interest
- Of those aged 65+, fewer than one in 10 (7%) indicated any interest, with eight in 10 (77%) claiming to have little or no interest.

Unsurprisingly, there was a strong correlation between interest in the internet and knowledge about the internet: 93% of those who had little or no interest in the internet said they knew little or almost nothing about it.

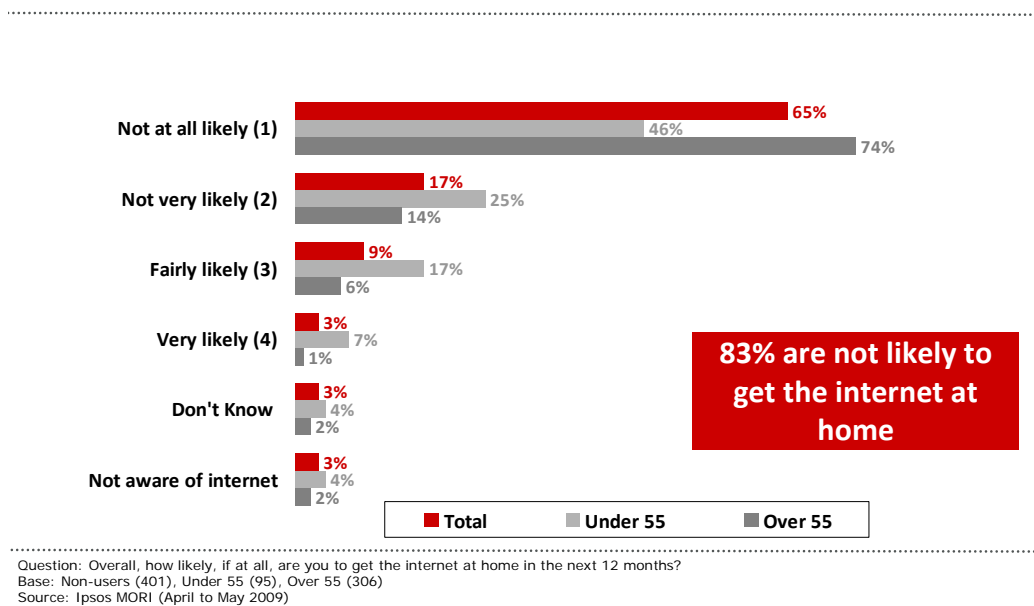
3.3 Likely take-up of the internet at home in the next 12 months

Survey respondents were asked about the likelihood of them getting the internet at home in the next 12 months. Overall, 12% stated that they intended to get the internet in the next year. However, more than eight in ten non-users (83%) stated that they were not likely to do so, in line with the low levels of claimed interest in and knowledge of the internet.

There were, however, significant differences in intentions to take-up the internet at home depending on respondents' age. As Figure 11 shows, three-quarters of those aged over 55 stated they were not at all likely to get the internet at home, compared with just under half (46%) of those under 55.

Figure 11

Non-users' likelihood to get the internet in the next 12 months



Looking at the results by age in more detail:

- Of those aged under 55, one in four (24%) stated they were very or fairly likely to acquire the internet at home in the next 12 months, with a total of 71% of those under 55 stating that they were not very or not at all likely
- Of those aged 55-64, 14% said they were very or fairly likely to get home internet access in the next year with 84% indicating that they were not very or not at all likely
- Of those aged 65+, just 5% were very or fairly likely to get the internet at home with 89% not very or not at all likely.

The qualitative findings from non-users – at least in the initial stages of discussions – were consistent with the quantitative results, in suggesting a low level of claimed likelihood to acquire the internet at home.

Overall, the findings suggest that knowledge of and interest in the internet amongst non-users is very low, especially amongst those aged 65+, who account for 54% of non-users and 11% of the overall adult population in the UK.

Non-users aged over 65 = 54% of all non-users
92% know little / almost nothing about the internet
89% claim they are not likely to get the internet at home
77% are not interested in the internet
<i>"Well, I don't know what's on the internet! I've got no idea but I don't think I need it. I wouldn't know what to do with it, it's not a necessity"</i> Female, 75-84, non-user

That said, given that this research focused on those in the offline population with least contact with the internet, some interest was still evident. In total, 15% of non-users in the survey sample stated that they were very or fairly interested in the internet and 12% said they were very or fairly likely to get it at home in the next 12 months, which, *if* fulfilled, would equate to another 3% of the adult population having internet access at home.

Likelihood was also higher among younger non-users: nearly 1 in 4 (24%) respondents under 55 said they were very or fairly likely to get the internet in the next year, compared with 7% of those aged over 55.

There was also an association between knowledge of, interest in and likely take-up of the internet. The minority of the survey sample who felt they knew a fair amount or a lot about the internet had greater interest in it and those with greatest interest expressed higher likelihood of taking it up at home in the next 12 months. Given that most non-users knew very little about the internet, there may be mileage in raising their awareness of its benefits so that they are able to make a more informed choice about whether or not they wish to acquire it.

Summary

The vast majority of non-users surveyed claimed little interest in the internet, low knowledge of its capabilities and low intention to get the internet at home in the near future. This indicates the scale of the challenge in encouraging home internet take-up amongst this group.

Given that experience of and therefore knowledge of the internet was low amongst non-users, most were making decisions about the internet with limited awareness about its capabilities. This suggests that informing non-users more about the internet may help them to make a decision, armed with some knowledge, about whether or not they wish to acquire it.

Indeed, whilst the quantitative results paint a picture of a group that is far removed from the internet, one of the purposes of the qualitative research was to understand more about the barriers to adoption and how non-users perceived these challenges. As outlined in the later sections, the qualitative findings did suggest that, whilst the task is far from straightforward, there are opportunities to raise non-users' interest in the internet and to encourage take-up.

SECTION 4

BARRIERS TO INTERNET TAKE-UP

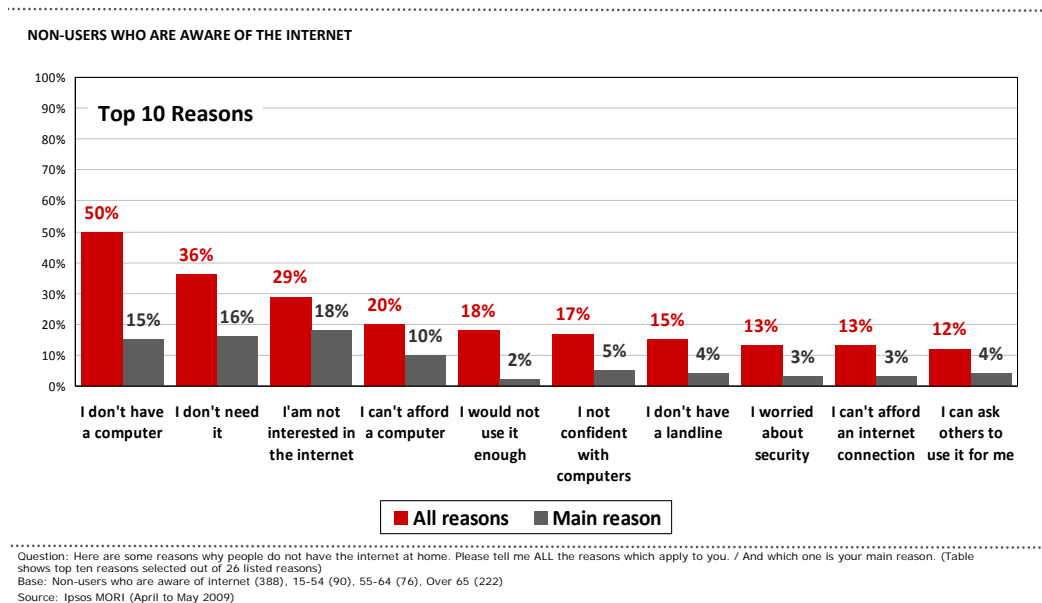
This section considers the reasons why non-users do not have the internet at home, beginning with the quantitative analysis from the questionnaire survey, before moving on to a qualitative examination of those barriers and other factors that influence perceptions of the internet amongst non-users. It also considers the stages to internet adoption and the differences between those who are rejecters, non-rejecters and active considerers of going online.

4.1 Measuring the barriers to home internet adoption

Respondents who were aware of the internet in the questionnaire survey were shown a list of reasons why people may not have the internet at home, and asked to indicate all the reasons that applied to them. They were then asked to pick their main reason. The top 10 reasons given are shown in Figure 12.

Figure 12

Top ten reasons why non-users do not have the internet at home



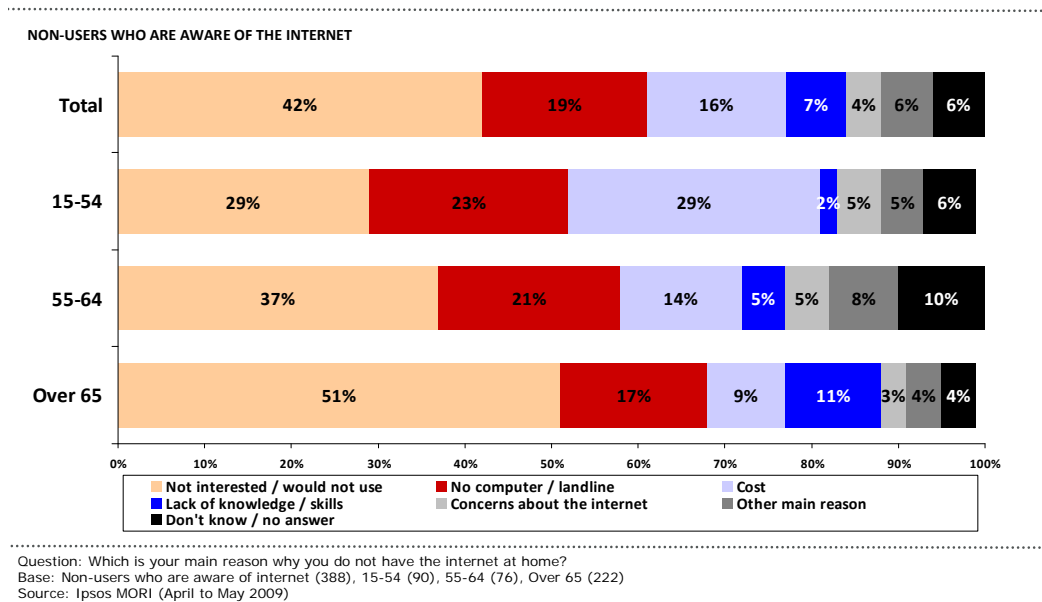
When indicating all their reasons for not having the internet at home, the lack of a home computer was most commonly cited, registered by half (50%) of non-users. Beyond this, a lack of perceived need or interest was each selected by around one-third of non-users. In terms of affordability, the cost of a computer was a more significant factor (cited by 20% of respondents) than the cost of an internet connection (registered by 13% of respondents). A lack of computer skills was also acknowledged by 17% of respondents as a reason for not having the internet at home, and concerns about online safety were raised by 13% of respondents.

The main reasons given for not having the internet were then aggregated into five over-arching categories: not interested / would not use; no computer /

landline; cost; lack of knowledge / skills; and concerns about the internet, as shown in Figure 13.

Figure 13

The main reason why non-users do not have the internet at home



As Figure 13 illustrates, this analysis suggested that the main reason for not having the internet at home differed significantly according to non-users' age:

- Lack of perceived need or interest was much more frequently cited by those aged 65+ (selected by 51% of this age group) compared with those aged between 15-54 (29%) and even compared with those aged 55-64 (37%)
- Non-users aged 65+ were also much more likely to be impeded by a lack of knowledge (11%) than those aged 15-54 (2%) and even those aged 55-64 (5%)
- By contrast, issues around cost were much more significant for non-users under 55. In total, 29% of those aged under 55 stated that cost was their main barrier compared with 14% of 55-64 year olds, and 9% of those aged over 65
- In terms of equipment, looking at a lack of computer and lack of landline separately, for non-users under 55, both were issues (12% of under 55s cited no landline as their main barrier and 11% cited a lack of computer). For older non-users, the issue was primarily a lack of a computer.

4.2 Understanding further the barriers to home internet adoption


As the above account shows, the quantitative data indicated that a lack of perceived need or interest in the internet was the single biggest reason overall for non-users being offline. The qualitative research was conducted to understand more about non-users' barriers to home internet adoption and to probe more deeply than was possible in the survey into the attitudinal and perceptual factors that come into play. This qualitative work revealed that whilst many participants claimed to have no interest in acquiring the internet at home, this did not always tell the full story as:

- A claimed lack of interest could be an initial reaction that was masking some deeper underlying barriers to adoption that were not immediately articulated. A number of non-users began the qualitative discussions stating that they had no interest in the internet, but this gradually changed to reveal other barriers that they found more difficult to verbalise or embarrassing to admit, such as a limited understanding of the internet or a lack of confidence when using computers
- Other non-users who started by expressing no interest in the internet became more interested in it over the course of the discussion as they began to understand better what it was and how it could be used. Indeed, many of the recent adopters interviewed for the research stated that they had no interest in the internet before they started using it, but that this had been because of a lack of understanding of its potential benefits to them.

Thus, the qualitative and quantitative results paint a slightly different picture of the main barriers to internet adoption, with the more detailed probing possible in the qualitative work suggesting that a claimed lack of interest in the internet was often masking other barriers. It was also clear from the qualitative discussions that, when considering the barriers to adoption, non-users were not a homogenous group. Even among those who initially appeared to have no interest in or requirement for the internet, there were a range of concerns and perceptions that was shaping this thinking, which differed for each person.

The qualitative discussions suggested that certain factors tended to be primary barriers to adoption, while other factors tended to be secondary barriers, which, though important to participants, were not in themselves directly restricting internet adoption. While the relative importance of these barriers differed from one type of non-user to the next, on the basis of the evidence from the qualitative discussion groups, the barriers can be categorised as in Figure 14.

Figure 14 Primary and secondary barriers to internet adoption

Primary barriers	Secondary barriers	Majority
<ul style="list-style-type: none"> • Limited understanding of the internet experience • Cost – benefit considerations (weighing up cost of computer / landline / ISP subscription against perceived benefits) • Lack of digital media skills / low confidence • Basic affordability • Concern about impact on lifestyle or relationships • Broader issues of adult literacy or social exclusion 	<ul style="list-style-type: none"> • The acquisition and installation process • Concerns about security or offensive content. 	
		Minority

Each of these barriers is considered below.

4.2.1 Primary Barriers

A. Limited understanding of the internet experience

As discussed in Section 3, the quantitative research suggested that:

- Eight in ten non-users (81%) surveyed felt they knew little or almost nothing about the internet and
- One in four (26%) could not name any activity that could be conducted online.

In the qualitative discussions, many non-users had some experience of seeing the internet in action, often through observing family members. However, this – combined with media coverage of sites such as Facebook – often meant that they had a fairly narrow view of what the internet was, what it could do, or who it was for, and this directly affected their sense of the internet's value to them. Very few non-users involved in discussion groups had a broad sense of what the internet offers.

"There's nothing on there that you couldn't get from Teletext." Male, 55-64, non-user

Indeed, even the recent adopters interviewed tended to have a narrow, tactical relationship with specific websites, rather than a broader sense of the internet as an enabling medium. Most were using the internet for specific purposes, such as email, holiday and flight bookings, local news and sports sites, sites specific to a particular hobby or interest and, for younger recent adopters, online banking. Beyond this, most were largely unaware of wider activities or potential benefits:

"The limit of my abilities is to send and receive an email." Male, 65-74, recent adopter

B. Cost – benefit considerations

As the above section shows, non-users had a limited understanding of the range of information and functions available online and without this, there was no compelling reason for them to take up the internet at home. In particular, there was no compelling reason for them to justify the outlay required for a computer and internet connection.

The qualitative research suggested that cost considerations tended to be directly linked to the perceived benefits (or otherwise) of an internet connection. Evidence from qualitative discussions suggested that non-users would weigh up the perceived costs of an internet connection, landline and home computer against:

- The benefits they felt they or their children would derive
- The extent to which they felt they had the ability to master the skills necessary to reap those benefits
- The amount they felt the internet would be used in their household.

Participants who had significant skill barriers and/or a fear of computers and doubted their ability to learn how to use the internet as a result, were also less likely to consider that the benefits of an internet connection would outweigh the costs. This feeling was more prevalent amongst older participants who were generally less confident in their skills and more fearful of technology.

Furthermore, this lack of confidence in their ability often caused them to block out many messages about the benefits of the internet, as they saw these benefits as not accessible to them.

For some, the knowledge that they could ask friends or family to conduct occasional online tasks for them if necessary reduced the perceived benefit in having a connection in their own household. This was particularly the case for older people whose children or grandchildren offered support.

"I've got enough things that keep me going. And I have a place to go if I have to use it. My kids are always happy to do things on it for me." Male, 75-84, non-user

For parents, and some grandparents, the potential benefits to children and grandchildren were an important factor, even if they did not envisage themselves using the internet much at first.

Younger audiences were more likely to see some potential benefits from the internet, as a result of seeing peers with a home connection benefit in ways which they could directly relate to their own daily life. Conversely, they were also likely to believe that the internet could inflict damage on household dynamics and lifestyles (see Section E).

Ultimately, however, the benefits had to be sufficiently clear, compelling and achievable to merit (a) the initial outlay for a computer and (b) the perceived ongoing cost of a broadband subscription and ongoing support and maintenance costs and (c) in several cases, the perceived impact on electricity costs.

C. Basic affordability

For a significant minority of non-users, actual cost was the stated main barrier to adoption. As discussed above, 16% of the quantitative sample who were aware of the internet cited cost as the main barrier, and this was notably higher among younger non-users compared with older non-users. 29% of non-users aged under 55 cited this as their main barrier compared with 10% of those over 55.

The qualitative discussions revealed that the cost of a broadband subscription was often perceived as higher than the reality. However, many non-users also commented on the fact that the cost of both computers and broadband connection had come down in recent years.

D. Lack of digital media skills/low confidence in ability to learn

In the quantitative survey, respondents were asked how confident they were, if at all, in using a computer.

Three-quarters of the non-users (74%) surveyed described themselves as not very or not at all confident in using a computer. Again, there are significant differences by age: half of those under 55 were not confident (51%), compared with the vast majority of those aged over 55 (84%). There was also a strong association between interest in the internet and confidence with computers: 59% of those interested in the internet were confident using computers. However, 85% of those who were not interested in the internet also said they were not confident using computers.

In qualitative discussions among non-users and recent adopters, participants tended to make little distinction between computer skills, internet skills, and other digital media skills such as the ability to upload, display or share digital photos or video recordings.

Most of those who had not had much hands-on experience of computers - for example because of age or occupation - were reticent about learning to use computers from scratch. Many of the older participants considered themselves to be 'luddites' and told stories of struggling to cope with DVD players and microwave ovens. The thought of coping with a computer was therefore very daunting for them.

"You've got to learn a new keyboard, don't you? All those computer controls! On my TV you've got buttons all over the place; I can barely cope with that!"
Male, 75-84, non-user

"I've looked over their shoulder [grandchildren] and the keyboard is going dutdudut and the screen's flashing and I said, 'I have to sit down, my head's spinning.'" Male, 65-74, non-user

Further, many older non-users expressed very low confidence in their ability to master the skills needed to operate a computer and use the internet and a minority simply considered themselves too old to acquire them – although this often went hand-in-hand with a fear of computer skills coaching or courses, which is addressed in Section 6. Another key concern was short-term memory loss and the effect this would have on retaining any new skills learnt.

"I can read a chapter in a book tonight and tomorrow morning I will say to you, 'What the hell did I read last night?' Your mind can't retain it." Male, 75-84, non-user

A number of participants, generally older, expressed a real fear of making mistakes that might result in breaking the computer or causing a critical loss of personal data or photos. This was one of the main fears that had been overcome by older recent adopters interviewed – generally through repeated reassurance from family and friends, or through attendance at computer skills courses.

"I'd be frightened I'd do something and it'd go boom!" Female, 65-74, non-user

"I was a bit apprehensive at first at the thought of going on to it and touching a button and crashing the whole thing." Female, 55-64, recent adopter

On top of this, many older non-users commented on the speed at which technology is changing and expressed fears that by the time they had learnt how to use a computer, things would have changed so much that their newly acquired skills would no longer be relevant.

"But would the internet be the same in a few years' time? If I learnt it now, it won't be any good in a few years anyway." Male, 75-84, non-user

E. Concern about impact on lifestyle or relationships

Those with very busy lives, such as parents of young children, and active pensioners, often believed the internet to be something which would require a heavy time investment, to the potential detriment of their current lifestyle. This perception was driven by various factors including:

- Experience of friends or family who were felt to spend too much time on the internet.

"The internet is antisocial! From our point of view, we'd like to see our grandchildren!" Male, 65-74, non-user

"My next door neighbour is 73 and it's his life now [the internet] - they are almost having a love affair. He spends four or five hours a day on it and I don't really see him any more." Female, 65-74, non-user

- Direct experience of using computers and finding that simple tasks took a long time because of a lack of basic computer literacy.

Those who were the most firmly opposed to the internet tended to claim that they preferred to visit banks, bookmakers, shops and more in person, as this helped them to maintain a physically and socially healthy lifestyle. It was hard to ascertain how much this was a genuine belief, and how much it was a stance that some non-users adopted to conceal other fears about using the internet.

A minority of non-users, generally younger, also expressed fears about the potential impact on their relationships of an internet connection at home, for example concern about possible infidelity or marital problems driven by access to social networking sites, or concern that a partner could become 'addicted' to using the internet in general, or to specific activities such as online gambling and gaming.

F. Issues of adult literacy and social exclusion

A minority of participants (insufficient sample for full analysis) felt that the internet was not accessible for them, either through issues with adult literacy or because they felt they had withdrawn from everyday life to the degree that they were unable to envisage any benefits from the internet. Further research among these groups will be required in order to identify the specific initiatives that could address these particular barriers.

4.2.2 Secondary Barriers

A. Uncertainty about acquisition and installation of the internet

This was an area of some confusion for most non-users and although it was not a primary barrier to adoption for most, it was clear that those in the discussion groups:

- Were unsure which providers to approach – although telephone or digital TV providers were the most frequently mentioned
- Had a limited grasp of what was required in terms of infrastructure and installation
- Felt they would need some help in finding the most appropriate deal for them
- Were in some cases reticent about signing up to an internet service provider contract when still unsure as to the value they would derive from being online.

The majority of recent adopters interviewed had received considerable help and support in this area from family members.

B. Concerns about internet security and offensive content

Whilst not a primary barrier to internet take-up, some non-users expressed fears about identity theft, hackers and online scams. This seemed to be influenced more by the media than by the actual experiences of internet users they knew.

"That's what I worry about, when you give your card details. My daughter banks on the internet. You hear all those cases of people being robbed." Male, 75-84, non-user

Some younger non-users also expressed concern about threats posed by the internet to their children by paedophiles or bullying.

A minority in the discussion groups expressed concerns at their potential vulnerability or exposure through being connected to the internet – with everyone from neighbours to the Government perceived as being able to snoop on them.

Only a small minority of non-users in the discussion groups specifically mentioned offensive or pornographic content as a barrier to adoption.

4.3 The stages to internet adoption

As cited in the previous section, non-users of the internet were not a homogenous group. From the quantitative data and particularly from the qualitative discussions, it was evident that non-users were at different stages of internet consideration: from those who were actively considering going online to those who fundamentally rejected the internet. There were notable differences in terms of the attitudes, understanding and requirements of non-users at the different stages. These are set out below.

4.3.1 Active considerers

In both the quantitative and qualitative work, a minority of non-users were actively considering getting the internet. As discussed in Section 3, 12% of non-users surveyed described themselves as very or fairly likely to get the internet at home in the next 12 months. The quantitative data and qualitative discussions suggested that those actively considering the internet tended to exhibit different characteristics from the others. At this stage in the progression towards internet adoption, they were interested in what the internet had to offer and they had a greater understanding, albeit sometimes a narrow one, of the content and activities available online. They were positive about the internet's potential to enhance their life and provide new opportunities and, as the qualitative findings revealed, they had a sense of what they would use the internet for, often influenced by friends and family. They had begun looking into how to acquire internet skills (if necessary) and investigating the cost of getting the internet at home.

"I would love to learn more about it (internet) and we are actually about to go for lessons." Male, 75-84, non-user

However, there were still obstacles to overcome:

- Considerers aged under 55s were impeded by issues related to cost or particular personal circumstances. (This had also been the case for younger recent adopters interviewed as part of the research, who had needed to save up for a computer, move house or have a landline installed prior to take-up.)
- Considerers over 55 had begun to weigh up the cost versus the benefits of a home internet connection, but were being held back primarily by a lack of computer skills. They also expressed a need for some clarification of and support through the internet acquisition and installation process.

4.3.2 Non-rejecters

As discussed in Section 3, the quantitative data suggested that most non-users consider themselves not at all likely to get the internet at home in the next 12 months. However, the qualitative discussions indicated that many in this group were not fundamentally opposed to the internet but had a limited understanding of the web and lacked the skills needed to use it, making it difficult for them to see the value that could be derived from going online at home. This, therefore, translated into a low likelihood to acquire the internet.

The qualitative research suggested that many non-rejecters felt that they had never previously had an opportunity to understand the capabilities of the internet, and that messages or communications about it tended to be expressed in language that they did not understand. Once non-users in the qualitative phase had gained a better understanding of the internet (albeit often through lengthy discussions), some did start to see potential benefits that caused them to reappraise their initial position.

"Now that you have shown us all that and explained it all, I'm quite a lot more interested. Maybe I'll go to a course now to try and learn a bit more or ask my daughter to show me." Female, 75-84, non-user

"I think it was very educational what you just showed me. I didn't realise..."
Male, 75-84, non-user

Another non-user, for example, had a negative initial reaction to the internet:

"See, I don't want to sit in front of a computer when I'm retired. I have so much more interesting things to do now, and time. I've got enough things that keep me going." Female, 75-84, non-user

However, the same participant became more interested after some explanation was given of what the internet could offer:

"I could actually use this to find out about places. And you can see people as well [webcam]. My husband likes to keep in touch with his cousin in America."
Female, 75-84, non-user

Such reappraisals often followed considerable discussion and explanation about the internet, which indicates that, although there is potential to spark interest, sustained effort would be required. None the less, this does suggest that there is an opportunity to build consideration of the internet among these individuals, engaging them emotionally by describing internet activities and benefits that are compelling and helping them to understand how these benefits could be accessible to them.

Igniting interest in the internet would be the first step for non-rejecters. Following this, further barriers would need to be overcome. In the qualitative work, many non-rejecters – especially older participants – had never used a computer before, had low confidence with technology and doubted their ability to learn.

4.3.3 Rejecters

Although some participants did modify their views of the internet during the qualitative discussion groups, for others there was no change in view. These individuals did not believe the internet could deliver any benefits to them, nor did they have any inclination to find out more.

"I don't need it ... if I was younger and had a young family I would have a need for it but I don't." Male, 55-64, non-user

The qualitative work intimated that older rejecters had very limited understanding of what the internet could offer and very low levels of confidence with technology. Some also hinted at adult literacy issues. A small number of younger rejecters encountered in the qualitative phase were aware of some of what the internet could do but were opposed to it principally for ideological or lifestyle reasons. This study did not identify any immediate opportunities to build rejecters' interest in the internet. Further research would be required amongst this group to understand their concerns better.

4.3.4 Different approaches needed at different stages of internet adoption

The above discussion indicates that the primary barriers preventing home internet adoption differ between those who are already actively considering an internet connection, those who do not reject the internet but are not actively considering it, and those who fundamentally reject it.

Whilst this research did not uncover any immediate means to raise rejecters' interest in the internet, it did point to opportunities to aid active considerers and non-rejecters through understanding their barriers and addressing them directly. Because they are at different stages towards internet adoption, different approaches would be required.

Active considerers already believe in the potential of the internet, but there are some important obstacles to overcome. These are primarily skills-related (mainly those aged over 55) and cost-related (mainly an issue among the younger considerers). Active considerers also express a need for some clarification of and support through the internet acquisition and installation process.

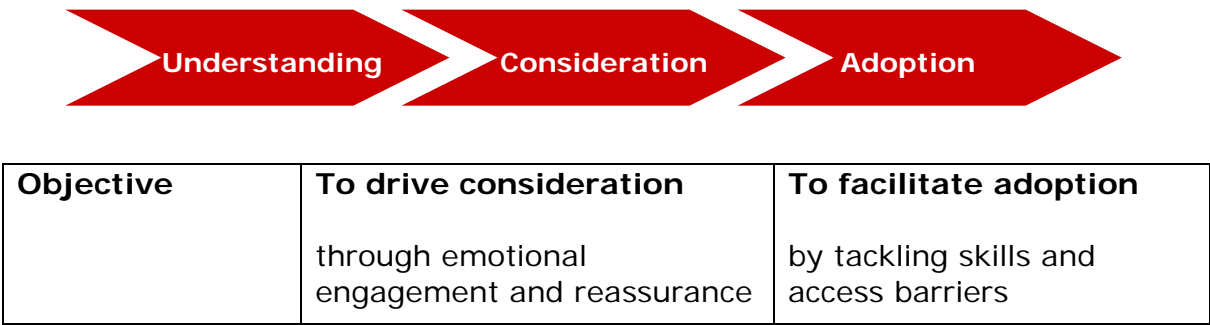
However, non-rejecters are further away from adoption and the findings suggest that they will be unlikely to progress to active consideration of the internet until they understand more about it and find a very compelling reason for take-up, not least because of the effort that will be required on the part of most to learn new skills or to overcome particular fears.

Many non-rejecters in the qualitative research suggested that before now, they had not been given any such reason, or had not been engaged by communications or messages about the internet in a way that triggered enough interest to motivate them to find out more, or to address any skills concerns.

An understanding of the different barriers affecting non-rejecters and active considerers provides insight into what is required at each stage to aid internet

adoption and, as such, provides an outline for how to structure support. First, there is a need to increase understanding of the internet in order to enable non-users to make a more informed choice about whether or not they would like to connect to the internet at home and then, for those who do choose to do so, there is a need to facilitate adoption by tackling skills deficits and access barriers (see Figure 15).

Figure 15 The stages leading to internet adoption



Section 6 explores ways to increase awareness of and interest in the internet in order to drive consideration, whilst Section 7 outlines means to help those for whom interest has been sparked to move towards acquisition if they wish.

Summary

Whilst a lack of perceived need or interest was cited in the quantitative survey as the single biggest reason for non-adoption of the internet, qualitative discussions suggested that this barrier can mask other issues such as poor understanding of what the internet offers, embarrassment about having to seek help with computers and fears about making critical mistakes when using the internet.

The qualitative findings suggested that with sustained effort and explanation, there is the possibility of sparking interest in the internet amongst non-users who do not fundamentally reject it. Once interest has been generated, further help is needed to facilitate adoption by tackling skills deficits and aiding the acquisition and installation process.

SECTION 5

OVERCOMING BARRIERS TO INTERNET ADOPTION: WHAT CAN BE LEARNED FROM RECENT ADOPTERS

This section considers the journey to internet acquisition undertaken by recent adopters and explores the common factors that contributed to them installing the internet at home. Their experiences provide insights that may be used to facilitate internet acquisition amongst current non-users.

5.1 Who the recent adopters are

Over half of the 20 recent adopters interviewed as part of the research were over 55 and most had very limited computer skills. Nearly all had and were receiving ongoing support and advice from friends and family who had played a key role in persuading them to get the internet at home.

Nearly all recent adopters claimed that in the past, they had not felt the need to have the internet at home and their barriers were very similar to those of non-users (see Section 4). Some had been accustomed to asking friends and family members to undertake tasks for them online and some younger participants had some experience using computers in libraries and at friends' houses, and felt that they could get by without having it at home for themselves.

"People were saying 'Internet', Bill Gates was talking 'World Wide Web' – it was a mystery. It's a wonderful concept, but I thought it was a little bit late for my age." Male, 65-74, recent adopter

5.2 Confident and knowledgeable adopters

Some younger recent adopters claimed to have long been considering a home internet connection and had a good understanding of what they would use it for. These recent adopters were in the minority and had seen the internet in action many times before, at college and at friends' houses and had used it themselves in libraries, internet cafes, at work and with friends, experiencing the benefits first hand. Many felt that they had been managed well without home internet access.

The main factors that had held these recent adopters back were the actual costs involved in getting the internet at home along with various different circumstantial factors. For example, some had been waiting to move into long term accommodation or a property where they could split the cost of the connection with housemates; others were waiting for a more steady income or financial support to buy a computer.

"It was just the money for me and the 18-month contract." Female, 18-25, recent adopter

For these recent adopters, the journey to internet take-up was relatively simple: as soon as their circumstances were right and they could afford it, they got the internet at home.

5.3 Adopters lacking confidence and internet knowledge

For most recent adopters, however, the journey online was not as simple. The majority had a very limited understanding of the internet and, in most cases, had never before used it themselves. These recent adopters tended to be older, although some were under 55 and had simply not been required or motivated to use the internet before.

These recent adopters had to build their interest in the internet and their understanding of the benefits before they began to consider getting the internet at home. Their barriers, prior to getting online, were similar to those discussed in Section 4.

5.3.1 Building interest and consideration

The key factor that contributed to driving consideration amongst these recent adopters was the ongoing influence from close friends and family. Friends and family played a number of significant roles in:

- *Persuading* recent adopters that they were 'missing out' by not having the internet at home
- *Encouraging* and *reassuring* them that they would be able to learn how to use it and that they would be there to offer technical support
- *Demonstrating* specific benefits of the internet and promoting those relevant to them.

This encouragement had generally occurred over a significant period of time, right up to the point of adoption. Recent adopters spoke of their children, grandchildren, neighbours and friends persistently 'nagging them' until they eventually 'gave in' and started thinking about getting the internet for themselves.

"My boys told me I needed to get into the 21st century! You need a computer so we can send you stuff." Male, 65-74, recent adopter

For those with children at home, this pressure came mainly from their offspring. The children themselves had emphasised how they felt left out when with friends and at school as a result of not having the internet at home. Parents also felt guilt and concern that their children's education may be suffering and that their children could get left behind if they were not as computer literate as their peers.

"My eldest was feeling left out at school because all of his friends had the internet and he was the only one who didn't. He said that kids at school who did their homework on the computer were getting better marks." Female, 35-44, recent adopter

For those without children at home, influence came from grown-up children, partners and from friends and neighbours who understood the benefits of having home internet access and believed their friends or family members could also gain from it. These benefits included email, photo sharing, booking

and researching holidays, and information relating to hobbies; for younger recent adopters, social networking was key.

"It was little things, like I wanted to know about an amaryllis, and my husband said that you don't need to look it up in a book, you could look on the internet." Female, 65-74, recent adopter

"My son takes lovely pictures and the only way I could see them was by going onto the websites, the Flickr site." Female, 55-64, recent adopter

At the same time as receiving this encouragement and persuasion from friends and family, many recent adopters referred to a sense of pressure from the constant references to the internet in the media and in their daily lives. In particular, participants talked of online services that made them feel excluded, such as online airport check-ins and the financial savings that could be made by booking holidays or making purchases online. Although these messages did not always help to explain much about the internet and what they would need to do to get these benefits, they contributed to the sense of 'missing out'.

"I felt as if life was passing me by because I didn't know anything. Every time you put the telly on there was something about the internet. I'm an inquisitive person and I wanted to know." Female, 65-74, recent adopter

Partly as a result of these pressures and their growing understanding of what the internet could do, many recent adopters described how increasingly they began asking their friends and family to perform practical tasks for them online. Some said that they began to feel like a 'burden' on others and claimed this was part of their reason for deciding they should consider getting the internet for themselves.

Often combined with this ongoing pressure were more circumstantial factors that helped recent adopters to identify a particular benefit they would get from having the internet at home. For example, a child moving abroad or away to college would emphasise the benefits of being able to use email. Or a retirement would suddenly free up more time to learn how to use the internet to pursue hobbies and to keep one's mind active. For one recent adopter, the key was setting up a new business with her husband. These circumstantial factors often acted as the final push for recent adopters to take action and to get the internet at home.

"[I got the internet] mainly because I was coming up to retirement and the fella came to assess my short-term memory, and I thought I should keep the old memory box ticking and get some mental stimulation." Male, 65-74, recent adopter

5.3.2 Moving towards adoption

Most of these recent adopters at the point of acquisition were still unclear about exactly how much they would use the internet and what for. Few had an epiphany where they realised that they could not live without it and so a number of factors were needed to turn their interest into a decision to arrange for installation.

At this stage, the journey to adoption tended to focus on:

- The costs involved in getting the internet at home
- Building skills, understanding and confidence
- Support through the installation and set-up process.

Critically, at this stage participants started to weigh up the perceived effort required to get the internet installed and set up, the overall and ongoing costs involved and their ability to learn how to use it – with the perceived benefits of having the internet at home. Again, friends and family played a key role for those least confident with technology and their skills.

A. Focus on cost

Cost barriers for recent adopters were often removed or reduced by friends and family handing down old computers and helping them to get the best deal with a broadband provider. These recent adopters said that had these cost barriers not been removed or reduced, they would not have got the internet so soon as they were yet to understand fully the benefits it could provide. Effectively, this support removed some of the risk for recent adopters: they could worry less about not using the internet as their personal financial loss would be limited.

"I don't think I would have got the internet so soon if my friend hadn't given me his old computer. I really didn't know whether I'd use it enough to go out and spend all that money myself." Female, 35-44, recent adopter

"I think I was probably more attracted to that [a bundle deal], than the whole broadband thing at first. Once he said free phone calls, we decided to get it." Male, 65-74, recent adopter

Other recent adopters received less financial support but had often been pleasantly surprised by how affordable the internet and a laptop were. They also tended to have a clearer idea of exactly what they would use the internet for and more confidence in their ability to acquire the skills. This was because they had seen friends using it and, in some cases, because they themselves had used it at friends' houses and in libraries and colleges. This meant that they could understand the value of the internet better, weigh up the cost and make the decision to acquire it.

B. Focus on building skills, understanding and confidence

Recent adopters who received extensive support from family and friends, including, in some cases, a free computer, often did not begin to build their skills and understanding of the internet until after acquisition, although all had a limited understanding of what they would try to use it for at first.

However, others felt they needed to build their understanding and skills, and confidence in their ability to use the internet and a computer, prior to acquisition. In these cases, recent adopters wanted to feel confident that they would use the internet and wanted to see for themselves how they would benefit from using it before they made the financial commitment. Some spent time at other people's houses or used computers at their local library and a small minority in this sample attended a course. Friends and family played an important role in providing reassurance and learning support.

"I wouldn't have been confident on the computer until my son started showing me bits on his computer. If I hadn't have had a son, I would never have been confident enough to get the internet in." Male, 65-74, recent adopter

"My son-in-law had to keep saying, 'You can't break it, trust me!'" Female, 55-64, recent adopter

C. The installation and set up process

Many recent adopters had concerns around the installation process of the internet at home and this had often been the final hurdle to overcome. Nearly all needed support and few felt they could have tackled the process alone, feeling nervous and overwhelmed given their lack of experience and technical skills.

Friends and family provided support in some cases by arranging installation and, in most cases, by being there to oversee installation on the day. Recent adopters also received support getting their laptops and PCs set up. Friends and family offered to set up email addresses, to install virus protection and to demonstrate basic functions such as how to turn the computer on and off and access the internet browser.

Also important to recent adopters was the knowledge that someone would be there to help them if something went wrong. Again, in nearly all cases, it was a close friend or family member who offered this reassurance and support.

Summary

Evidence from the recent adopters suggested that a minority of those interviewed were relatively knowledgeable about the internet and had been waiting until their finances and living arrangements allowed before they acquired the internet at home. Most, however, had very limited prior understanding of what was available online and had been cajoled into getting the internet by friends and family, who persuaded them of the benefits, provided practical help to get them started and then ongoing assistance.

SECTION 6

INCREASING AWARENESS AND INTEREST IN THE INTERNET

This section considers ways in which interest in the internet could be generated amongst non-users who, as earlier sections have shown, have very low levels of interest in the web and limited understanding of the range of potential activities available online.

Section 4 set out that the first stage in the support needed to encourage internet adoption was to increase understanding of the potential benefits of the internet in order to enable those non-users who do not reject it to make a more informed choice on whether they would like to connect to the internet at home. The findings highlighted that in order to make an informed choice about internet adoption, non-rejecters needed to understand more about it and find a very compelling reason for take-up. However, many non-rejecters in the qualitative research suggested that before participating in it, they had not been given any such reason, or had not been engaged by communications or messages about the internet in a way that triggered enough interest to encourage them to find out more, or to address any skills concerns. Given that sparking interest in the internet is a primary requisite to adoption, it is necessary to understand why these non-rejecters had not previously responded to messages about the internet, and to draw from the qualitative and quantitative data, any learnings that might help to make communications more motivating. Three main themes are discussed in this section:

- The likely reasons why most messages about the internet or online services do not appear to have driven consideration of the internet among these non-rejecters.
- The potential to drive interest in and consideration of the internet by communicating particular tangible benefits and providing reassurance about the accessibility of these benefits to people of all ages.
- The need to engage non-rejecters by making the internet feel more personally relevant and compelling.

6.1 Identifying messages that cut through

The qualitative research suggested that marketing messages or communications about the internet or online services previously had limited impact on non-rejecters or did not challenge the fundamental perceptual barriers that prevent many of them from actively considering going online. When talking to older non-rejecters, their responses to communications about the internet or online activities were often influenced by one or more deep-seated beliefs (see Figure 16).

Figure 16 Deep-seated beliefs about the internet held by non-rejecters



However, the research suggests that communications campaigns could have the potential to drive consideration of the internet through engaging non-rejecters emotionally by:

- **Focusing on particular online benefits that they are more likely to find compelling, while reassuring them that these benefits are accessible to people like them** (rather than just younger people with more advanced technology skills). The research suggested that non-rejecters would not be motivated to overcome their current barriers to adoption if they did not understand the potential benefits to them of using the internet, or did not believe that those benefits were aimed at people like them.

"They should put real people our age saying, 'Listen I only just started to use the internet.' They could take us through how they did it. Not a young person, they are too fast." Male, 75-84, non-user

- **Making the internet feel more relevant to them.**

"They [family] told me get a computer and you will be able to do the 'tap, tap, tap, tap' and get the [local ping pong club] results straight away!" Male, 65-74, recent adopter

This is based on two key qualitative findings.

- Firstly, as discussed in Section 4, many non-rejecters exhibited more interest in the internet once moderators in discussion groups had taken the time to explain fully the purpose and potential benefits of different online activities
- Secondly, in conversations with recent adopters, many relayed that their family or friends had conveyed to them the benefits of the internet in terms that they understood or that particularly resonated with them.

It was clear that the emphasis needed to be on making the benefits of the internet feel achievable through much explanation and reassurance. We know from the research process itself that simply describing the features of the internet can increase interest but this only goes so far.

During the research, respondents were shown an introductory video about the internet, and were then asked what impact, if any, the video had on their interest in the internet and their likely take-up of it. In the quantitative phase, with only the introductory video for information, there was positive, albeit limited, reaction and some small uplifts in interest. However, with the additional probing and explanation possible in the qualitative work, response was more positive.

After seeing the video, survey respondents who had been aware of the internet before viewing it were asked whether the video had affected their level of interest in the internet:

- one in four (24%) said watching the video had increased their interest in the internet
- 57% said it made no difference to their opinion
- 10% said it made them less interested
- 9% did not know.

As might be expected, the video made a particular impact on those who had already said they were interested in the internet prior to watching it, with half (50%) saying that the video had made the internet seem more appealing to them. One-third (34%) who had previously said that they had no opinion of the internet said they had become more interested after watching the video. One in six (15%) of those who had previously said they were not interested in the internet felt more interested after viewing the video. 63% of those who had previously claimed not to be interested in the internet, however, said that the video had not changed their opinion.

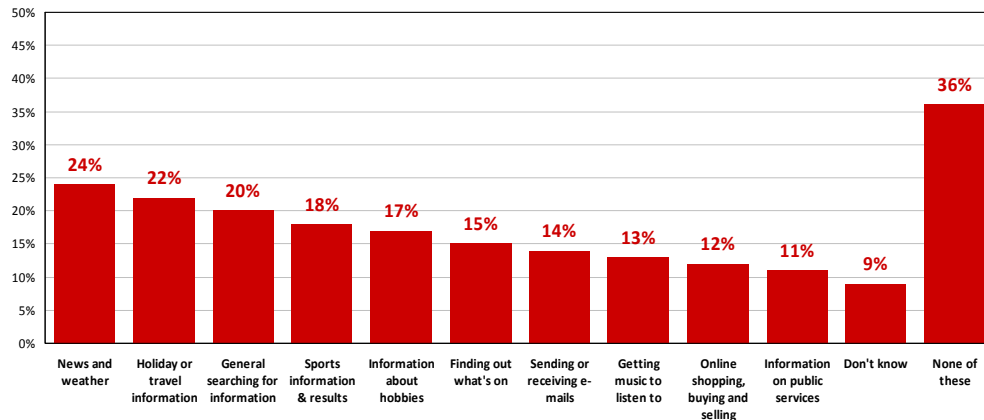
Respondents in the survey were also asked if having seen the video, they were likely to acquire the internet in the next 12 months. They were asked to respond taking the costs of the internet into account, and then to answer as if costs and installation were not an issue.

- Prior to seeing the video, 12% of the sample had said they were likely to get the internet in the next 12 months
- Taking costs into consideration, there was a small but significant increase in claimed likelihood to take up the internet after they had seen the introductory video compared with likelihood prior to watching (an increase of five percentage points from 12% to 17%).
- Without costs and installation in the frame, claimed likelihood rose further to 28%.

In the quantitative survey, after watching the video, respondents were shown a list of types of content featured in it and asked what, if anything, interested them. Overall, 36% of respondents found nothing featured on the video that was of interest to them and 9% were undecided. However, given that two-thirds had previously registered little interest in the internet (see Section 3), it was notable that over half of the sample was interested in some of what they saw. News and weather, holiday or travel information and general searching for information generated most interest, each identified by around one in five of non-users surveyed.

Figure 17

Top online activities and types of website that interested non-users after they watched a video about the internet



Question: Which of these activities and types of websites, if any, are of interest to you? Table shows top ten selected from a list of 18.
Base: Non-users (401)
Source: Ipsos MORI (April to May 2009)

As the above discussion of the quantitative results suggests, the video descriptions of the internet generated some interest. However, as outlined earlier, in qualitative discussions with both non-users and recent adopters, activities available on the internet were explained in much more depth than was possible in the questionnaire, and with this increased understanding, there was evidence of more positive reactions⁹. It was apparent from the qualitative work that messages and communications about the internet for non-users needed to help them to understand benefits they found relevant and compelling and to make these benefits feel achievable through considerable reassurance and explanation. Section 6.2 relays the online content and activities that, when understood, were of interest to non-rejecters in the focus groups.

6.2 Focusing on tangible benefits

The qualitative research suggests that specific content or experiences such as booking a holiday, selling an item on eBay or tracing one's family tree are more appealing to non-users than an abstract notion of the internet as an enabling service or platform. Indeed, many of the recent adopters interviewed were motivated to acquire the internet because of one or two specific benefits or goals, or had discovered particular benefits since using the internet that they had not expected.

⁹ This apparent disparity between the quantitative and qualitative research can be explained by the time taken in the qualitative research to explain each type of activity and to check regularly for comprehension among participants and, where appropriate, to answer participants' questions. As discussed in Section 4, many participants became more interested in online activities once they had a better understanding of the activities and associated benefits.

"I was surprised... When someone is getting married, you can look at the wedding list, you can see rooms and menus in hotels you book, you can even book a taxi before you go." Male, 65-74, recent adopter

"I never thought I would say this but I would miss the internet [if I no longer had it]. I sit on it every evening ... and I can look up recipes any time I want." Female, 65-74, recent adopter

Below we set out the online content and activities that the qualitative research suggests can play an important role in sparking non-rejecters' interest in the internet when coupled with reassurance that these benefits are accessible to people like them.

6.2.1 Keeping in touch – email, social networks, chat

Those with an existing social network of close family and friends often saw some benefits of using the internet to keep in touch or keep up-to-date. An understanding of how communication can be revolutionised by the internet and email was compelling, for example, communicating and sharing with those who live abroad or who are hard to reach, using video calling.

"It's quite good, the email thing. My son receives it whenever he wants. It's not like I'd have to be at home to answer the phone." Female, 75-84, non-user

"I thought with [son] leaving to go to university, it would be good to be able to keep in touch by email." Female, 35-44, recent adopter

"You can actually see people! That [webcam] would be wonderful." Female, 65-74, non-user

A minority of non-users did feel that email was contributing to a decline in letter-writing and general communication skills but the concept of email was generally received more positively than negatively.

6.2.2 Photo-sharing

The ability to view digital photos from family and friends, or to upload one's own photos, was a key driver of internet access for several recent adopters (see Section 5) and was of interest to non-rejecters with an existing network of friends or family. Again, this held appeal across demographic groups and, for some, was of even more interest than using email or other communications tools. However, many non-rejecters indicated they would need to acquire new digital media skills to be able to photo-share themselves.

6.2.3 Holiday and travel resources

Booking cheaper flights or holidays; visually discovering new places or potential destinations e.g. through Google Maps; and making travel easier through services such as rail timetables and route planners were all identified by non-rejecters as potential benefits of being online.

Cumulatively, these services were seen to save time and money, which was compelling for a significant minority of non-users, and had been a key driver

for some recent adopters to go online. Once understood, this appealed to all ages although the qualitative and quantitative research suggest a slightly higher appeal among older audiences.

"You can use it to find out about new places, holidays and prices. I can see tremendous benefits." Male, 75-84, non-user

6.2.4 Answers to everything

A number of participants of all ages remarked on the power of resources such as Google or Wikipedia to answer just about any question. While some non-users claimed that libraries offered a similar benefit, few in practice could remember the last time they had used the reference section of a library.

"It's the information; it's like an encyclopaedia on the screen which is much easier than going down to the library and going through all those pages." Male, 75-84, non-user

6.2.5 Resources for children and grandchildren

Parents and grandparents generally believed in the potential educational and learning benefits to children of having the internet at home. However, they weighed up these benefits against potential risks, such as paedophiles and bullying, and adverse impacts, including laziness or diminished communication skills.

Most felt that on balance their children or grandchildren would benefit from having internet access at home or at their grandparents' homes, and for some recent adopters with young children at home, the benefit of having the internet at home for their children had been a key driver to adoption.

"We have used it [the internet] as a family to look at CBeebies and to do a maths quiz online. We really enjoyed that." Female, 25-34, recent adopter

6.2.6 Indulging hobbies and passions

Those non-rejecters who had specific interests or passions, be it gardening, football or genealogy, were interested to see examples of websites that could support and develop their interest. Communications around such sites should stress the benefits they present, such as: learn how to protect your raspberries from frost; or discuss a game with other fans of your football club. Tracing a family tree was also cited in discussions among non-users and recent adopters.

"I would like to do the family tree; this is one of the reasons why I would like to learn (about the internet). I'd love to do it." Female, 75-84, non-user

6.2.7 Computer as entertainment centre

As outlined in Section 1, the recent adopters interviews included an element of accompanied web use and during this time, moderators demonstrated certain online activities that participants had not seen before.

A number of recent adopters were surprised, when shown, that the internet could deliver video and audio clips and long-form content on-demand, for example from YouTube and BBC iPlayer, and streamed music services such as Last FM and Spotify. Prior to these accompanied sessions, awareness and understanding of such services had been low.

"So you're telling me I can pick any of these programmes and watch them here [iPlayer]? I can't wait for my wife to come home, to show her this! It's amazing!" Male, 65-74, recent adopter

In the qualitative discussion groups, non-users were shown short video clips introducing services such as iPlayer, ITV Player, Demand 5 and 4oD, and were often surprised to learn that such services were free. Many felt that they had filtered out messages for services such as the iPlayer, believing that they would never have the requisite skills or kit to make use of them.

Overall, online multimedia or entertainment activities were among the most difficult activities for non-users to comprehend (and indeed most recent adopters, particularly in the older age groups) as they often had a fairly narrow view of the internet as a practical or functional tool. However, the favourable reaction of non-users and recent adopters to these services suggests that, if not a primary driver of consideration, they can contribute positively to non-users' perceptions of the internet if they can understand that such services are free and easy to use for people of all ages.

"I like the idea of that 'catch up' as sometimes all the programmes you want to watch are on at the same time. What would you need to get it?" Female, 75-84, non-user

6.2.8 Online transactions and 'window shopping'

There was a relatively high awareness among non-users of the ability to buy products or order delivery of groceries online, or to buy and sell items via eBay, although many, including recent adopters, believed there to be a high risk of credit card fraud and did not believe they would be confident enough to take this step without considerable reassurance.

Many saw the benefit – at least in principle - of shopping online for purchases that were difficult to carry home, and some older participants recognised the value such services would have if they were ever to become less mobile or housebound.

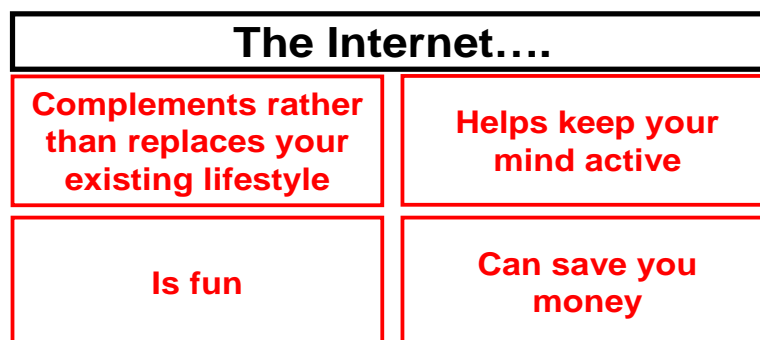
"I like to go out and do my shop while I still can but it would be good for the more bulky stuff" Female, 65-74, non-user

6.3 Making the benefits relevant

Many non-users explained in qualitative discussions that they had filtered out messages about the internet owing to a perceived lack of relevance, or because of concerns about or objections to the internet as they understood it. However, those discussions also pointed to an opportunity to engage non-rejecters emotionally by challenging particular perceptions or beliefs about the web or appealing to people's individual passions or interests.

Analysis of discussions in the qualitative research suggest that the following ideas or concepts may be motivating to a greater or lesser degree among those non-users who did not fundamentally reject the internet.

Figure 18 Concepts with potential to spark interest in the web among non-rejecters



These are examined briefly below.

6.3.1 The internet complements rather than replaces your existing lifestyle

Many non-users believed that the internet would demand too much of their time and as a result they would end up spending more time inside 'glued' to a screen and less time out and about talking to people. Online social networking, online gaming and even practical services such as online shopping and banking were all felt to encourage more time spent indoors and away from the real world.

"We're too busy for the internet. Going to do a bit of shopping, a bit of swimming, play some table tennis...you're asking us to change our way of life, really." Male, 75-84, non-user

This would suggest that messages may resonate if they can show that the internet can enhance rather than replace existing lifestyles by freeing up time and providing easy access to information relating to existing offline activities.

6.3.2 The internet helps keep your mind active

Many older non-users spoke about how their memory was declining and the importance of keeping their mind active. Several older recent adopters also said that a key reason for getting the internet at home was to keep them youthful by challenging them to learn and discover new things. A few also

expressed a desire to 'escape' from the TV which was felt to have the opposite effect on mental agility.

"The internet gives him an interest, it keeps him young" [talking about 98 year old internet user] Male, 75-84, non-user

6.3.3 The internet can save you money

There was a broad acknowledgement that the internet can save money for users, through price comparison, cheaper online prices, and the avoidance of punitive charges for offline transactions (e.g. flight reservations, utility bills, etc.). However, these potential savings were weighed up against the potential cost of an internet subscription and computer, and the perceived risk of sharing personal details online.

"[Supermarket] sent me a coupon deal for £15 for a bottle of champagne, but only if I do it online." Male, 75-84, non-user

"They say they can go on the internet to get cheaper energy bills. I guess I could do that myself if I had one." Female, 44-55, non-user

6.3.4 The internet is fun

For most non-users and recent adopters, the internet was seen as a largely functional or transactional tool and had not previously been seen as 'fun' (with the exception of photo-sharing). When shown content such as YouTube and online catch-up TV services, participants (mainly recent adopters who were able to experience the services at first hand) saw another side of the internet and many found this compelling.

"There is a lot more information than you would think there is. That woman who has a lovely voice [Susan Boyle] – I missed that so [my son] came down and showed us how to watch it again." Female, 55-64, recent adopter

6.3.5 Other potential 'hooks'

Some older non-users admitted that they rely on family members or friends to undertake some web-based activities such as booking flights and printing off maps for car journeys, and felt concerned that they may be becoming something of a burden. The internet could give them more independence.

A number of participants also expressed a sense that 'life is moving online', influenced by the cumulative effect of advertising, word of mouth and broadcast mentions of websites, and for some non-users, this led to a feeling of missing out or being left behind.

"I feel that to some extent life is passing me by because I don't know about the internet when the rest of the world does." Female, 65-74, non-user

However, care is required, since discussions suggested that the idea that 'life is moving online' could strengthen some non-users' resistance, or reinforce their pride in being different.

"I think in society there is a sales pitch to make you feel like you're missing out if you don't have it, but I know I wouldn't use it." Female, 65-74, non-user

Several participants also reacted negatively to any references to a Government objective to drive greater home internet access, complaining of 'nanny state' policies.

"I would like to know why it's [the internet] being forced on us, and it is being forced on us." Male, 65-74, non-user

Summary

Both this research and that by Ofcom has suggested that an interest in the internet is an important prerequisite to adoption. However, the qualitative research indicated that messages about the internet had not previously resonated with non-rejecters because of perceptions that these communications were not targeted at them or because they did not understand how they would benefit from the internet.

From the qualitative discussions, there was evidence that interest in the internet could be sparked among non-rejecters by focusing on tangible benefits that they find compelling, such as the ability to find the answer to anything; keep in touch; share photographs; indulge hobbies and interests; be entertained online through video and music, and help children and grandchildren learn.

Such communications would need to be coupled with careful explanation and reassurance that these benefits are accessible to people like them. Further analysis suggests that messages about the internet could be made more relevant to this group by relaying that the internet can enhance one's lifestyle rather than replace it, aid memory and mental agility, be fun, and save money.

SECTION 7

FACILITATING ADOPTION

This section considers the actions needed to help those with greater knowledge of and interest in the internet progress to actual acquisition. It discusses a number of possible ways to aid take-up, derived from asking non-users and recent adopters in the qualitative work for their reaction to potential solutions. For further insight, it also draws on analysis of how recent adopters overcame the barriers they had faced before getting online.

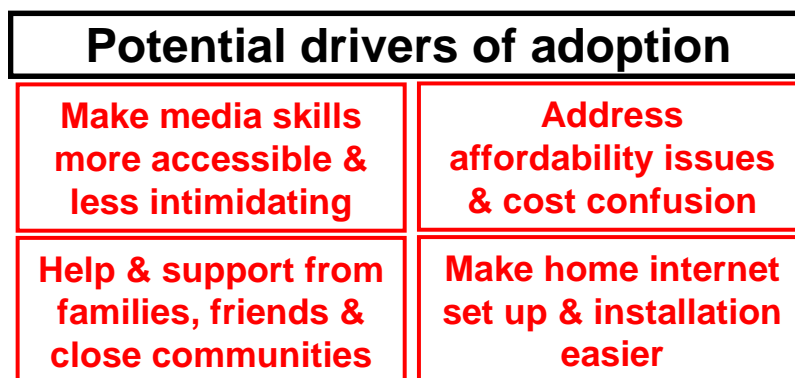
Once interest in the internet has been sparked (see Section 6) and non-rejecters are considering getting the internet, they need help in order to progress to actual acquisition.

Certain initiatives to aid home internet take-up were suggested spontaneously by participants in the qualitative research, and they were also asked for their reaction to potential solutions.

Naturally, participants are inclined to look favourably on any initiatives that appear to provide something for nothing, so the findings are based not just on participants' direct answers, but also on interpretation of their needs, motivations and the likelihood of specific initiatives to overcome the barriers outlined earlier.

Analysis suggests the potential solutions broadly fall into the categories shown in Figure 19.

Figure 19 Potential ways to encourage internet take-up by non-users



7.1 Making media skills more accessible

As discussed in Section 4, confidence with computers was a very significant barrier impeding internet take-up: three-quarters (74%) of non-users in the quantitative survey said that they were not very or not at all confident using a computer.

Many non-users in the qualitative discussions believed that they would require some form of coaching or teaching before they could benefit from the internet.

In this section, three types of skills support for non-users are considered: skills courses; video-based learning and online support websites.

7.1.1 Skills courses

Many non-users in the qualitative research were held back from attending skills courses by the potential embarrassment of being the slowest / oldest / least clever in the class. There was a perception (especially among older participants) that other attendees in any such classes would be younger than them and would have more advanced computer experience, and that attending a course would bring back negative memories of school.

"They need to let you know that they [courses] won't be too much like school... that they will be fun and interesting." Female, 55-64, recent adopter

"I think that what puts a lot of people off is that they think they are going to look silly in front of all those people- especially if they have never used a computer. They'd say 'go to Google' and you wouldn't know what they meant." Male, 55-64, recent adopter

Conversely, some younger participants expected to be in a class of people much older and slower than them, which was equally embarrassing.

"I don't want to be stuck in a room with a bunch of people older than me. I'm not old yet!" Male, 45-54, recent adopter

Hence, courses or classes often held as much fear (or more fear) than the internet itself, and this perception represented a significant barrier for those non-users who were otherwise open – at least in principle – to the idea of using the internet. It also appeared that certain people were prevented by pride from learning how to do something about which they currently knew nothing at all.

Given these concerns or fears, the findings suggest that the key to encouraging greater enrolment in skills courses is likely to be demystifying the courses themselves by informing non-users clearly about the content and reassuring them that other attendees will be similar to them in terms of skills and demographics. Specifically, this meant addressing the deep-seated concerns felt by many that:

- Attending a course is like going back to school
- Others in the class will be faster, more experienced, more intelligent or otherwise 'different' from me
- Older attendees will quickly forget key skills after the course has ended.

Participants also expressed a preference for a private but informal setting for learning. The idea of taking part in computer 'taster sessions' in locations such as supermarkets, shopping centres or Citizens Advice Bureaux, was off-putting for most non-users interviewed, owing to fears about public ridicule and concerns about ongoing computer and internet support.

Indeed, some participants had significant concerns regarding the potential need for ongoing support after the end of the course.

Examples of solutions proposed by participants included clearly written down instructions for key tasks and an option to drop in to or call a learning centre if they got stuck. Potential course attendees felt they would require reassurance that these simple refreshers or aides-memoires would be available if needed.

"You need to be able to keep practicing at home. To help you remember what you have learnt, there would have to be booklets on different sections. And a printed out version would be better than an online version, as you can look at it at the time, while you were doing it." Female, 55-64, recent adopter

Some recent adopters felt that, in principle, some form of ongoing online support website could also be a benefit although they had concerns about accessing and using it (see Section 7.1.3).

7.1.2 Video-based learning

There was some evidence that bundling an interactive 'introduction' DVD with new computer purchases or ISP subscriptions could help new adopters to enjoy a more fulfilling early internet experience.

DVD was generally felt to be a more suitable medium than broadcast TV, as it could be paused and rewound, although, interestingly, most felt they would prefer to watch the DVD on a TV rather than a PC as this was a familiar viewing environment over which they had more control, and toggling between windows on a PC was beyond the capabilities of most of the recent adopters interviewed.

However, it is unclear how much an interactive DVD would be used in practice, and technical abilities could still present a significant challenge with some participants unsure about how to operate their DVD player. Some of the least technically-confident recent adopters felt that they would prefer written step-by-step instructions that they could go through at their own pace without relying on technology.

Participants were also asked about the appeal of internet skills development material accessed through the red button. While there was some interest in having material of this kind available, some expressed concern about their ability to access or control such services.

7.1.3 Online support websites

When asked about their interest in visiting skills websites that would help non-users learn more about computers and the internet, such websites were not felt to be the most appropriate initial introduction to the internet for those who were very inexperienced users. Most non-users felt they would need to develop their computer skills and overcome fears of using the computer and the internet first before they would consider going to an online support site unaided as they were concerned that using an online computer skills site would require skills they did not have.

"It's a nice idea but I don't know how I'd get back there again. Also, how do you get back to the internet when that [online tutorial website] is there? It's just too stressful an environment for me to learn in and I don't know what I'd do if it went wrong." Female, 35-44, recent adopter

Recent adopters shared similar concerns to non-users about their ability to interact with such a site unaided, including how they would get back there once they closed the window, how they would toggle between the support site

window and 'the rest of the internet' and whether they would end up changing a setting on their computer that they would not be able to change back.

Furthermore, from observation of recent adopters' online behaviour, it was clear that these inexperienced internet users struggled to:

- Return to websites they had been to before
- Scroll up and down the page
- Navigate between different open windows
- Distinguish between search bars and the address bar.

Many did not feel confident enough to learn alone, particularly through unaccompanied use of a 'skills' website and most felt they would need to be repeatedly shown how to access and use such a site. However, they did feel that following tuition or courses, such websites could be helpful in providing ongoing support. Furthermore, online skills websites could be a valuable resource to help friends and family show non-users how to use the internet. As the interviews with recent adopters showed (see Sections 5 and 7.1.4), friends and family were a key source of support but recent adopters, at times, felt that younger friends and family did not have the patience to teach them or, without realising it, would use words that they could not understand and so often did not make the best teachers. Online skills websites could therefore be a means to aid friends and family in their explanations of the internet, as course providers interviewed for the research suggested.

"Children help them to set up their computers but they do it too quickly- they don't take the time to teach them properly. It would be good to offer them material to help them teach their own family." Course provider

7.1.4 Enlisting families, friends and communities

Almost all the recent adopters had been persuaded or cajoled into getting a home internet connection by family members or friends, who had played several roles:

- Persuasion, often over a prolonged time period
- Directly liaising with ISPs to get a good deal and to arrange installation
- Managing the initial computer purchase, set-up and ongoing IT support
- Funding the purchase of a computer or handing down an old computer
- Providing reassurance that it is not possible to 'break' the computer or erase personal data
- Providing reassurance that computers / internet are not just for young people.

Support from friends and family was an overwhelming driver behind recent adopters' acquisition of the internet and in many cases, their major barriers to adoption would not yet have been overcome without this support.

"It's taken months and months of nagging at me." Female, 55-64 recent adopter

Many non-users also claimed that family and friends would be the first people they would turn to for help, were they to decide to get connected to the internet or acquire the necessary skills.

In the qualitative discussions, accessing computer skills help from others, such as family, neighbours and people in the community, was extremely compelling for many participants as it was felt that this was the best way of receiving tailored, sympathetic skills tuition development without exposing them to embarrassment. This type of initiative was also suggested by several of the Course Providers who were interviewed.

"The Internet opens up a whole new world. Funny enough I told my friend that and he went and got on and now I'm showing him how to do things. The blind leading the blind springs to mind!" Female, 65-74, recent adopter

However, many recent adopters still felt embarrassed about asking for help even from those close to them and some felt that they were annoying friends and relatives by asking them too often for assistance.

7.2 Making home internet access easier

While the acquisition and installation process was not normally a principal barrier to take-up (largely because other perceptual barriers were far more significant), it was none the less clear that many non-users were confused by the precise steps to connect the internet at home, how to buy the requisite computer equipment and how to 'get started' online.

In the qualitative discussions with non-users and with recent adopters, many felt that they would benefit from (or would have benefited from) independent information explaining the internet acquisition process and outlining the different costs involved, the equipment required, the different deals or types of contract available and a simple explanation of the key features of different broadband contracts, in layman's terms.

"I didn't have a clue what I was looking for. I just called [digital TV provider] and said, 'I'll tell you what I need and you tell me if you can do it'... I don't know whether I really got a good deal or not." Female, 65-71, recent adopter

"You see an offer and you think, 'That's ok', but then you always end up spending more money than that. And then you can never speak to anyone about advice, or when you do speak to someone they don't really help. If there was a free helpline, that would be good." Female, 35-44, recent adopter

This suggests that initiatives to simplify the acquisition process would be of value.

7.2.1 Internet-connected TV

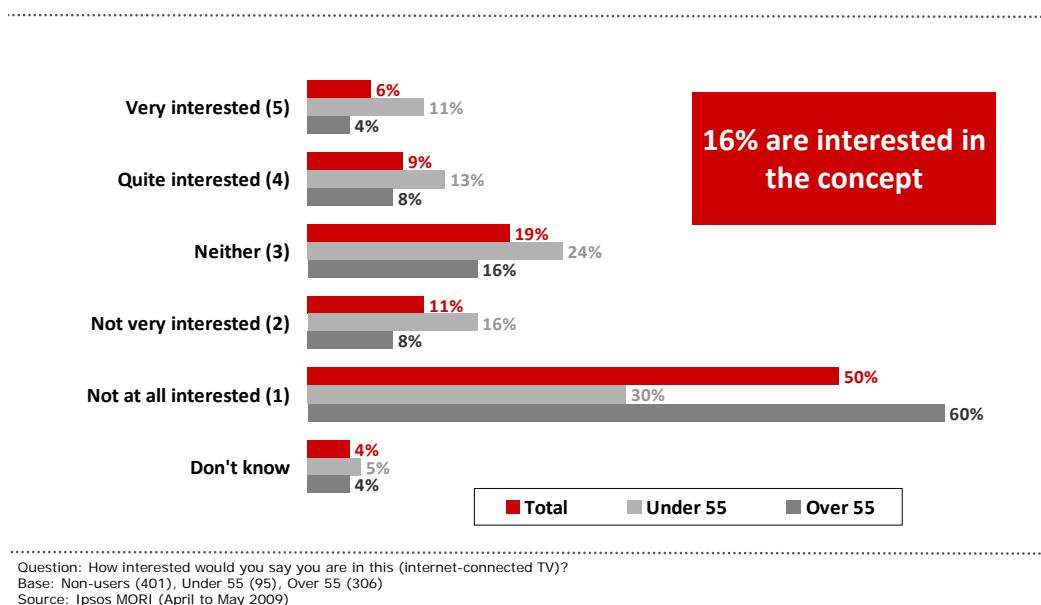
Respondents were told that in future, internet services could be delivered through the TV, comprising catch-up and 'archive' TV services as well as

selected web services. This concept¹⁰ was conveyed only through a written/verbal description whereas when respondents were asked about the internet and about BBC Online, they were shown introductory videos. Because initial reactions only were captured, this does not constitute a thorough appraisal of the concept and its ability to fulfil certain user needs, though it does offer insight into its potential appeal.

In the quantitative survey, non-users were asked how interested they were in the concept of internet-connected TV.

Figure 20

Non-users' level of interest in internet-connected TV



Overall, 16% of non-users said that they are very or quite interested in this service, rising to 24% of those aged under 55, or 22% of those aged 55-64 – compared with 9% of those aged 65+.

Claimed interest was slightly higher among women than men (20% compared with 11%).

DE audiences aged under 65 were those for whom the concept held the greatest appeal, with 27% very or fairly interested.

Respondents in the survey were also asked if having read the description of internet-connected TV, they were likely to acquire the internet in the next 12 months so that they could access these services on their television. They were asked to respond taking the costs of the internet and set-top box into account, and then to answer as if costs and installation were not an issue.

- Prior to seeing the video, 12% of the sample had said they were likely to get the internet in the next 12 months

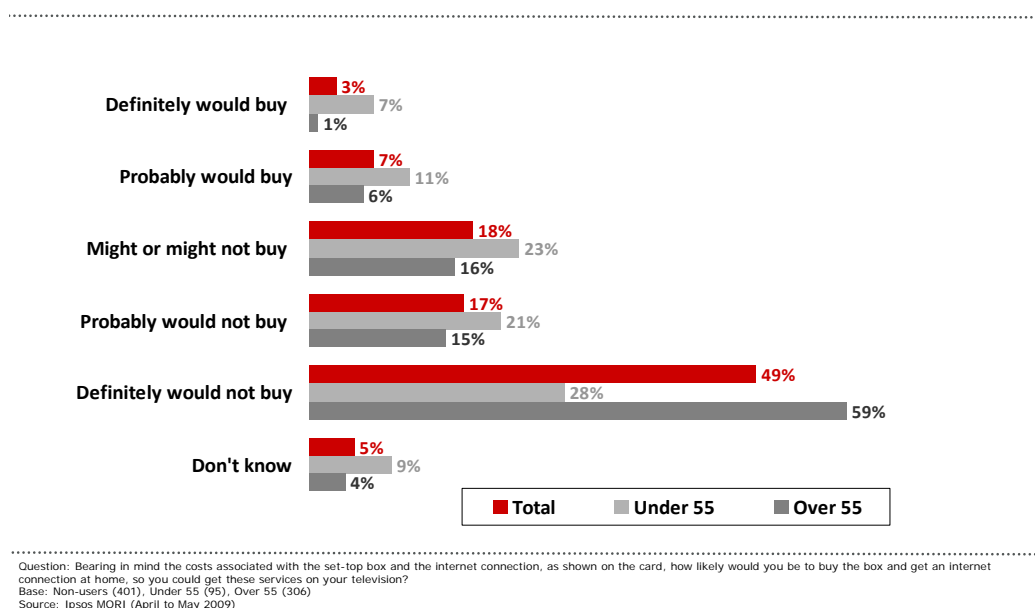
¹⁰ The research looked at the general concept of internet-connected TV. It did not examine any specific product.

- Taking costs into consideration, there was a small but significant increase in claimed likelihood to take up the internet after having read about internet-connected TV compared with prior intended take-up (an increase of five percentage points from 12% to 17%).
- Without costs and installation in the frame, claimed likelihood rose further to 27%.

Respondents were then asked about their intentions to purchase internet-connected TV (Figure 21).

Figure 21

Non-users' intention to purchase internet-connected TV



After reading the brief written description of internet-connected television, 10% said that they would probably or definitely buy such a service, rising to 18% among non-users under 55.

In the qualitative discussions, the response among non-users showed that providing internet services through the TV can combat fears about computers. And as discussed in Section 4, nearly eight in ten non-users in the quantitative survey were not confident in using computers.

"So you wouldn't have to work this typing 'thingy'? I might be able to use that one then, I'm O.K. with my TV." Male, 75-84, non-user

However, the qualitative discussions showed that for most non-users, the specific web services and benefits would need to be clearly defined if this was to be more motivating.

As discussed earlier, non-users needed to identify specific achievable benefits - whether this is photo-sharing, finding cheap holidays or buying and selling - if the internet was to appeal to them.

At the time of the research it was not possible to detail what kind of web content or activities would be offered by an internet-connected TV service, so most respondents found it difficult to appraise the idea fully and to place a monetary value on the requisite set-top box for their TV.

"Would it have the 'full' internet on TV? You'd need to know what you were paying for." Male, 65-75, non-user

Participants were asked to consider the appeal of the separate elements of the concept: internet access through the TV, catch-up TV services (like iPlayer, ITV Player, 4oD and Demand Five), and on-demand 'archive' TV services.

The idea of free internet-enabled TV 'catch up' services and on-demand archive programming through the TV was well received.

However, some concerns were voiced about the shared, social and 'safe' nature of a living room TV and the potential conflict of this with their perceptions of the internet.

"If you're on the telly people can't watch the telly, but if you were in another room with your computer, then they'd still be able to watch the telly." Male, 18-28, non-user

7.2.2 Addressing confusion about the acquisition and installation process

The discussions with active considerers revealed some confusion about the steps involved in successfully acquiring and setting up a new home internet connection and knowing how to use it once connected, although many expected to receive some help with this from friends or family.

"From someone coming at it who really doesn't know what they are doing ... it really is mind boggling. You don't really know what it is you are buying"
Female, 35-44, recent adopter

Further work among active considerers may be required to understand the extent to which different aspects of the process can act as barriers to actual adoption, such as

- Purchasing computer and other hardware
- Contacting an internet service provider
- Accessing impartial information on the providers and their services.
- Concerns about the installation process
- Knowing how to 'get started' with the internet or how to solve any initial problems.

7.2.3 Addressing affordability issues and cost confusion

There was some confusion amongst non-users about the costs involved in getting the internet at home and many did not know who to turn to beyond their telephone or digital TV provider, and their friends and families. Older

participants, in particular, felt vulnerable to being 'ripped off'. Most recent adopters were unsure if they had got the best deal.

There was a perception among some non-users (particularly active considerers) that bundled packages such as those from digital TV or telephone providers could represent a cost saving, and several of the recent adopters in the qualitative sample had signed up to bundled deals. These were felt to make the cost of broadband more manageable (or, in some cases, indistinguishable from the cost of TV and telephone) and this appeared to have taken some of the fear out of the initial acquisition.

"You can get really good deals. My friend gets the package with the internet and it is better than our telephone alone." Male, 75-84, non-user

As discussed in Section 4, basic affordability was a key barrier for younger internet considerers, and in these cases, it appeared that these barriers were unlikely to be removed without initiatives to reduce the cost of a computer, a fixed telephone line or an internet connection, or some combination of the three.

Many non-users felt that trial periods for both a broadband connection and a PC could help alleviate cost concerns, particularly where the benefits of the internet remained uncertain.

Summary

After knowledge of and interest in the internet has been sparked, further support is required to move non-users from consideration to adoption. This research suggests that many considerers will require help to overcome barriers relating to skills (or fear of skills courses), and that this could be achieved by demystifying the courses themselves, in particular communicating what happens, who attends, what the tutor will be like and what specifically they will learn and by when.

Making available learning materials across a range of media or platforms would allow new adopters to access support in the way in which they feel most comfortable. Initiatives that support families and friends in helping people get online could also be of value.

Internet-connected TV can combat fears about computers for some, and the idea of free internet-enabled TV catch up and on-demand archive programming through the TV was well received. However, those who were seeking particular benefits from going online would need to be sure those would be available.

There was also confusion about the cost of internet access, suggesting that non-users may benefit from access to simple explanations and cost comparisons.

SECTION 8

THE BBC'S ROLE

This section explores the potential role of the BBC and other broadcasters in driving consideration and adoption of the internet, through the provision or promotion of content on its website, through communications campaigns and through initiatives that might empower and enable non-users and others who can help them.

8.1 Increasing awareness and interest in the internet - non-users' response to BBC Online

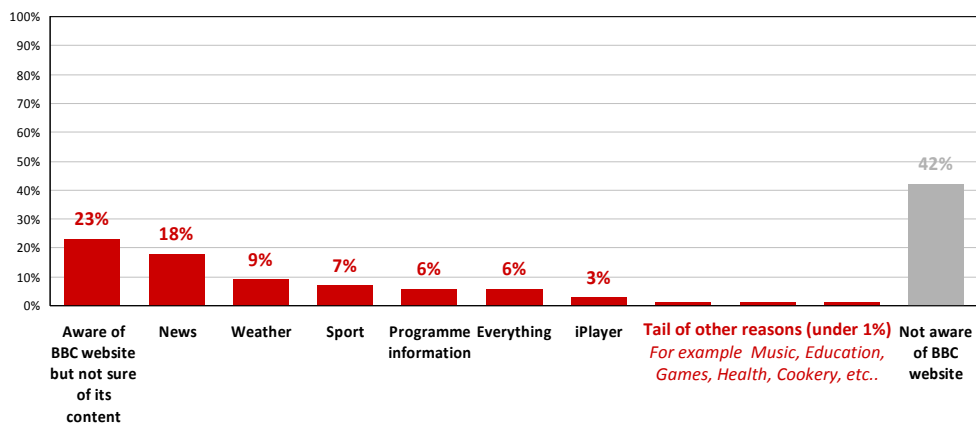
The quantitative and qualitative research explored awareness of and the appeal of different content available on BBC Online.

As Section 3 shows, non-users had low levels of knowledge about the internet with 81% of those surveyed indicating that they knew little or nothing about the internet. In the quantitative survey, non-users were also asked whether they knew that the BBC had a website before today. 55% of non-users who were aware of the internet claimed to be aware of BBC Online, 42% were unaware and 3% did not know.

Those who did know about the BBC website were then asked what information and services they thought were available on it – they were asked first in an open-ended question and, following this, were prompted with a list. In the open-ended question, news, weather, sport and programme information were most frequently cited. Beyond this, there was negligible spontaneous awareness of other activities or websites within BBC Online (see Figure 22).

Figure 22

Non-users' awareness of the information or services found on BBC online: spontaneous response

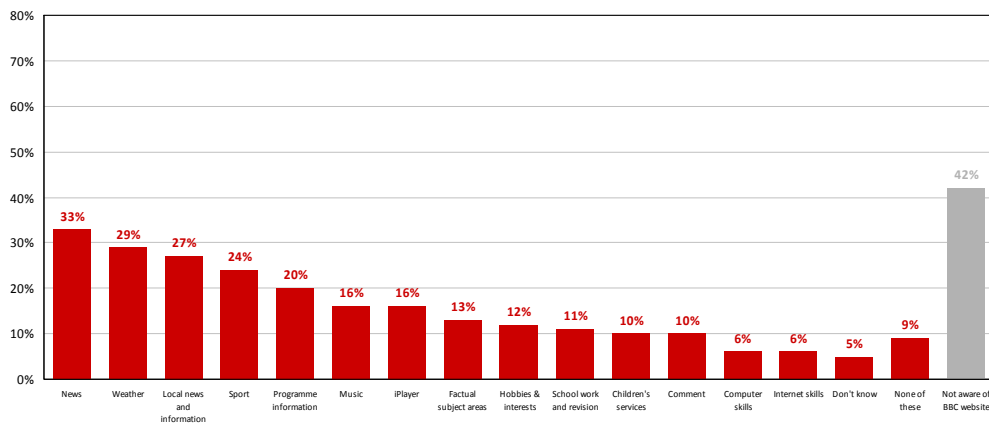


Question: What information or services do you think are available on the BBC website?
Base: Non-users (401)
Source: Ipsos MORI (April to May 2009)

In a follow-up question, survey respondents were shown a list of BBC Online content genres and asked, 'Which of these, if any, did you know were available on the BBC website before today?' When prompted, awareness was again highest for news, weather and sport, as well as local news and information, although one in six non-users (16%) said they had heard of the iPlayer.

Figure 23

Non-users' awareness of the services and information available on the BBC website: prompted response



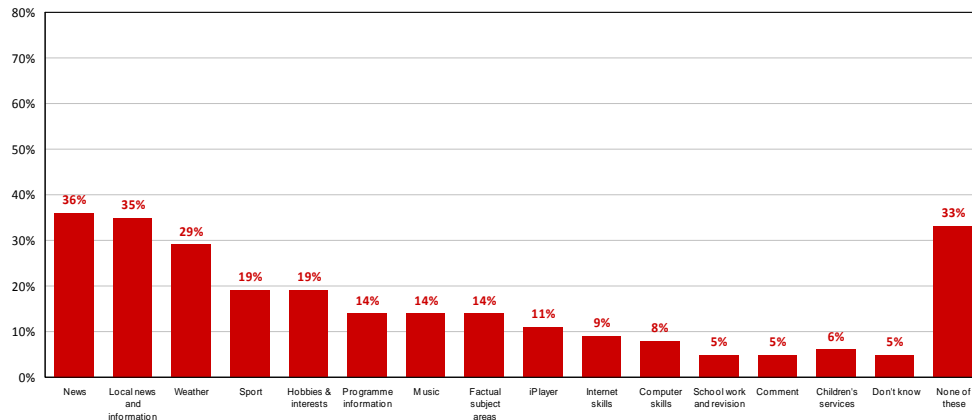
Questions: The services and information shown on this card are available on the BBC website. Which of these, if any, did you know were available before today?
 Base: Non-users (401); under 55 (95); over 55 (306)
 Source: Ipsos MORI (April to May 2009)

Respondents were then shown a video outlining the BBC's online services and were asked whether, having seen it, any of the types of content were of interest to them. 41% did not find anything to be of appeal to them. However, given that two-thirds of non-users had expressed little or no interest in the internet before watching the video, it was notable that 41% did find elements of interest to them. Further, there did appear to be some latent interest in certain types of online content from the BBC. Comparing the percentages for each site in Figures 23 and 24 shows that the percentage of people expressing interest in news, weather, local news, hobbies and interests, factual subject areas, computer skills and internet skills¹¹ was greater than the percentage that were aware of such content being available on BBC Online before watching the video.

¹¹ See section 6 for caveats around unmediated use of computer and internet sites for non-users

Figure 24

BBC online content that interested non-users after they saw a video about the BBC website



Question: Now, having seen all the information and services that the BBC provides on the internet, which of these, if any, are of interest to you (post video)?
Base: Non-users (401)
Source: Ipsos MORI (April to May 2009)

During the qualitative discussions with non-users, respondents were shown the same video that was played to survey respondents giving an overview of the content available at bbc.co.uk. Sites or content such as local news, recipes, gardening, family history and the children's sites held some appeal for certain participants. The concept of the iPlayer – when understood – was well-received.

Survey respondents were asked how seeing the BBC video had affected their level of interest in the internet:

- One in five non-users (21%) said that hearing more about the BBC website increased their interest in the internet
- 60% said it had made no difference to their opinion
- 9% said it made it less interesting
- 9% did not know.

An increase in interest after watching the video was higher among those aged under 55 (28% said the BBC website made the internet seem more interesting to them) compared with those aged over 55 (18%).

As might be expected, the video made a particular impact on those who had already said they were interested in the internet prior to viewing the video, with half (48%) saying that the BBC website made the internet more interesting. Among those who previously said that they had no opinion of the internet, 29% said the internet seemed more interesting after watching the video. And, among those who claimed not to be interested in the internet prior to the video, one in eight (13%) said the BBC website had made the internet seem more interesting to them.

Respondents in the survey were also asked if having seen the video about BBC Online, they were likely to acquire the internet in the next 12 months. They

were asked to respond taking the costs of the internet into account, and then to answer imagining that costs and installation were not an issue.

- Prior to seeing the video, 12% of the sample had said they were likely to get the internet in the next 12 months
- Taking costs and installation into consideration, there was a small increase in claimed likelihood to take up the internet after they had seen the video on the BBC website compared with likelihood prior to watching. 16% now said they were likely to get the internet in the next 12 months compared with 12% before the video (an increase of four percentage points)
- Without costs and installation in the frame, claimed likelihood to take-up the internet after watching the video rose further to 26%.

The discussions during the focus groups suggested that whilst very few non-users felt that BBC Online on its own would be their primary driver to adoption of the internet, certain BBC content – notably the iPlayer, food and gardening sites, children's sites and sites which support hobbies or interests such as history or genealogy (e.g. linked to the TV series *Who Do You Think You Are?*) were among the tangible benefits that, as Section 6 shows, appeal to non-rejecters and could help drive consideration of the internet.

8.2 Facilitating adoption – non-users' response to initiatives the BBC could support

As discussed in Section 7, respondents were asked about a range of possible activities to facilitate internet adoption, including some options that could potentially be delivered or supported by the BBC or other broadcasters.

In the qualitative discussions, few organisations sprung to mind when participants were asked who might be able to encourage home internet take-up. Some mentioned the government, charities or 'internet companies'. When the BBC was mentioned to participants, most agreed that it may be able to play a role.

Survey respondents were asked, 'In the future, there are a number of things that the BBC could do to help people get the internet at home. Please say how likely you would be to make use of each option.' The options were:

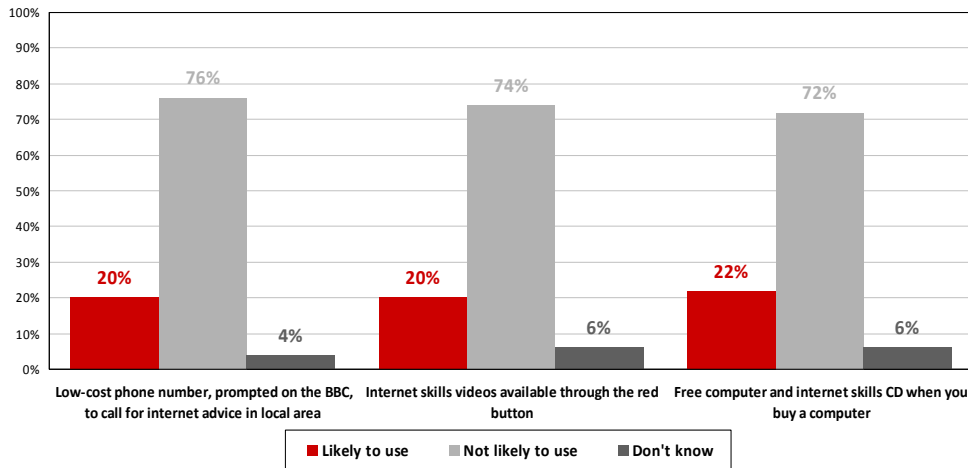
- 'A low cost phone number, promoted on the BBC, to call for advice on who to contact in your local area for help in using the internet'
- 'Videos from the BBC, available to watch through the red button on your TV, to help you learn about how to use the internet'
- 'A free CD from the BBC when you buy a computer, to teach you how to use your computer and the internet.'

The results are shown in Figure 25.

Figure 25

How likely are you to use the following BBC propositions ?

NON USERS OF THE INTERNET (Q24)



Question: In the future, there are a number of things that the BBC could do to help people get the internet at home. Please say how likely you would be to make use of each option
 Base: Non-users (401)
 Source: Ipsos MORI (April to May 2009)

The results suggest that for each of these potential offerings, roughly 1 in 5 of all non-users surveyed said they would be likely to use them. These types of support are most likely to be used as non-users draw close to taking up the internet. As Section 3 showed, the vast majority of non-users (83%) said they had little intention of acquiring the internet in the next 12 months; however, 12% said they were likely to get online in the next year. Among this 12%, likely usage was much higher with around half saying they would use each potential offering. 51% of those intending to take up the internet in the next year said they were likely to use the low-cost phone number; 56% said they were likely to watch videos through the red button and 54% said they were likely to use the free CD.

As regards the low cost phone number to call for advice on who to contact in the local area for internet help, it is worth bearing in mind that the findings discussed in Section 7, 'Making media skills less intimidating'. This explained that it may not be sufficient to make non-users aware of available skills courses. Messaging also needs to reassure them that courses are for people like them and to demystify courses by conveying what happens, who attends, what the tutor will be like and what will be covered.

Summary

Half of non-users surveyed claimed to be aware of BBC Online, but there was negligible spontaneous awareness of activities or websites within it, beyond news, weather, sport and TV information. When shown an introductory video about BBC Online, non-users showed latent interest in certain parts of the site, with the proportions expressing interest in news, local news, hobbies and interests, factual subject areas, computer and internet skills exceeding the proportions who had been aware that such sites existed before the video was viewed. In qualitative discussions, iPlayer – once understood – was also of appeal to participants.

Whilst very few non-users involved in the qualitative research felt that BBC Online would act as their primary driver to adoption of the internet, certain types of BBC content are among the tangible benefits that can appeal to non-rejecters and thereby help to drive consideration of the internet.

Driving internet take-up among the 21% of adults who do not have a home internet connection and do not use the internet elsewhere is likely to be challenging given the profile of these people, their lack of understanding of the internet and the various barriers that stand in the way.

More than eight in ten of these non-users say that they are not likely to get the internet. And nearly two-thirds can not think of anything that could be done to help or encourage them to get the internet at home.

The qualitative research suggests that there is a proportion of non-users who fundamentally reject the internet, and among whom further work may be required to identify any opportunities.

However, it also suggests that there is potential to raise awareness of what the internet offers amongst those non-users who do not fundamentally reject it, so they can make a more informed decision about whether to get online or not. Although many non-users initially claim that they have no interest in doing so, this does not always tell the full story, partly because this initial claimed lack of interest often masks deeper underlying barriers to adoption that are not immediately articulated, and partly because they do not understand the potential benefits the internet can offer.

These people could be engaged emotionally through communications that explain clear and compelling benefits of being online in ways that feel achievable and relevant, while providing a large amount of reassurance and challenging negative perceptions of the internet.

There is a segment of non-users who are ready to adopt the internet: 14% of non-users are interested in the internet and 12% say they are very or fairly likely to get it at home in the next 12 months. However, cost is a primary barrier for some of these active considerers of the internet – particularly those aged under 55.¹²

The research points to several ways in which the BBC and others may be able to support initiatives to help non-rejecters first to consider the internet and then to move towards adoption.

9.1 Driving consideration by increasing awareness and interest in the internet

Organisations such as the BBC and others, with the ability to deliver communications campaigns to large audiences, can help non-rejecters to see the internet as something that is relevant to them, not by promoting the platform, but by showcasing particular online benefits that appeal to them.

Certain BBC content could be used to illustrate these benefits, including local news sites, recipes, gardening, family history, the children's sites and the iPlayer. Communications campaigns would also need to show the broader online benefits, such as email and communications, photo-sharing, holiday and travel resources, search engines and shopping.

¹² No cost-related initiatives were discussed in this research given the comprehensive coverage in Ofcom's research: <http://www.ofcom.org.uk/research/telecoms/reports/bbresearch/bbathome.pdf>

The research suggests that messages need to:

- **Feel immediately relevant to this audience (as opposed to people who are more experienced or more confident users of technology.)**
- **Explain the audience benefit (not just the content) in simple terms**
- **Provide reassurance that people of a wide range of ages and abilities are using these services**
- **Reassure audiences that the services are free to use (where relevant).**

It also shows that non-users can be engaged through challenging certain commonly-held perceptions, for example, that the internet is time-consuming, or by conveying relevant, positive messages about the internet, for instance that it helps keep the mind active or can save money.

9.2 Facilitating adoption

The research suggests a number of different ways in which the BBC could work with other organisations in support of initiatives to help those considering going online to take the final steps towards acquisition and installation.

9.2.1 Computer and online skills

The research suggests that helping to make people aware of local skills courses or experiences will not be sufficient to drive large-scale attendance, as many non-users are held back by considerable fears or concerns about the courses themselves. An information campaign intended to stimulate greater take-up would therefore need to address these fears directly.

Video-based learning initiatives, delivered through DVDs or the red button, would be welcomed, particularly by new adopters of the internet, although some caution is required, since research respondents have a natural tendency to suggest TV or video production when thinking of the BBC.

Non-users expressed some concern about using internet-based skills websites unaided until their computer and internet skills improved. However, the evidence did suggest that such sites could be a valuable resource to friends and family as a tool to help them teach their relatives to use the internet.

9.2.2 Enlisting families and friends to provide help and support

Families and friends played a vital role in getting many of the recent adopters started online. Most recent adopters interviewed would not yet be using the internet without their help, support and persuasion. Hence, initiatives to support families and friends in helping people get online could be beneficial.

These may include providing friends and family with 'packs' or online support including information, price comparison, contacts for skills training courses and ideas for websites to visit. Targeting friends and family could potentially be more effective than initiatives that directly seek to empower non-users to overcome key barriers themselves.

9.2.3 Making home internet access easier

Initiatives such as the provision of internet capability through the TV can combat fears about computers for some.

One in six non-users (16%) said that they are very or quite interested in this service. Interest is highest among those aged under 55 and among the lower social grades.

Overall, one in ten non-users (10%) said they would probably or definitely buy such a service, based only on a written description.

The idea of free internet-enabled TV catch-up and archived programming through the TV was well received. However, those who were seeking particular benefits from going online would need to be sure that these would be available, so they could assess properly the appeal and value for money of this service.

9.2.4 Addressing affordability issues and cost confusion

No specific initiatives to tackle or reduce costs were discussed in this research, but the findings suggest that internet considerers (or their families) could benefit from access to simple, impartial price explanation and comparison services, including an explanation of standalone compared with bundled broadband deals.

Conclusion

The evidence collected in this research suggests that the challenge to get non-users online will be extremely tough. Amongst this group, levels of understanding about the internet, interest in it and computer skills are low, and for younger non-users, in particular, affordability can also be a barrier. However, this research did suggest that there are ways to engage those non-users who do not fundamentally reject the internet.

First, this would involve communicating compelling benefits that non-users could reap from being online coupled with considerable reassurance that the internet is for them.

Then, once interest is sparked, support would be needed to facilitate the acquisition process through demystifying skills courses; enlisting friends and family; making home access easier (for example, through internet-connected TV); and, for some, alleviating cost constraints.