Not online, not included:

consumers say broadband essential for all

RESEARCH REPORT | JUNE 2009

The Communications Consumer Panel was established under the Communications Act 2003 as an independent advisory body. Its role is to influence Ofcom, Government, the EU, and service and equipment providers so that the communications interests of consumers and citizens are protected and promoted.

The Consumer Panel is made up of part-time members with a balance of expertise in consumer issues in the communications sector. There are members representing the interests of consumers in Scotland, Wales, Northern Ireland and England.

Consumer Panel Members are appointed by Ofcom, subject to approval by the relevant Secretaries of State. They are appointed in accordance with Nolan principles and are eligible for re-appointment. The Consumer Panel is assisted by a small advisory team.

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Section 1

Foreword

In the ten years since broadband was launched, fast, always-on access to the internet has made a huge difference to all our lives. As take-up has increased and the impact on society has become more apparent, policy makers have begun to ask whether broadband should be classed as a "universal service" that would provide a guaranteed minimum level of service throughout the UK. This debate gained momentum through the Government's Digital Britain review, which proposed a commitment to make broadband with a download speed of 2Mb/s available to everyone by 2012.

The Communications Consumer Panel has presented to the Digital Britain Steering Group the research findings set out in this report together with its views on how the Government's planned initiatives should be linked clearly to the needs of consumers and citizens. In particular the Panel highlighted the need for:

- A universal broadband commitment that enables everyone to use the services and carry out the activities that people value, and is kept under review so that it does not become outmoded.

- Action to help people get online and reap the benefits that reflects the full spectrum of consumer and citizen needs and is targeted at the groups that most need help.

- New content, especially, more (and better) public services online, to help drive take-up and harness the benefits of digital communications.

The Panel had previously told the Government that the level of the universal service commitment should be determined by applying a "consumer test", i.e. what speed of service is needed to use the services and activities that consumers think should be available to everyone? Obviously, a consumer test should be applied only after finding out what consumers think. So the Panel commissioned this research to find out what services and applications people value and, therefore, what speed of service is needed. We also wanted to test how widespread is the belief that broadband is essential and find out what role people think Government should play in stimulating broadband availability and take-up.

The research involved talking to 16 groups of people throughout the UK, which allowed us to explore the issues in depth and understand the reasons for people's views. We also carried out a face-to-face survey of more than 2000 adults UK-wide. This was a sample representative of the UK population and so enabled us to understand the views of the population at large and the views of particular groups of people, such as older people or people in rural areas. This report sets out the findings in detail, but the following are particularly relevant to the current policy debate are that:

- Most people with broadband at home feel already that they could not be without it. 73 per cent of such people described it as essential or important. People with broadband at home value it more highly than their mobile phone, land line or digital TV.

- Most people (regardless of whether they have broadband or not) consider that it is essential for some groups of people to have broadband at home, notably people with school-age children and people who are physically isolated.

- Most people consider that in the near future it will be essential for everyone to have broadband at home. 84 per cent agreed (46 per cent strongly) that it should be possible to have broadband at home, regardless of where people live. 81 per cent agreed (42 per cent strongly) that it is everyone's right to be able to have broadband at home;

- People who do not have it are expected to be at a significant disadvantage. This is because people expect that more vital services will be delivered solely online in the future, or be provided offline in a way that penalises people who access them in this way, perhaps at a higher cost or lower quality. It is expected that people will miss out in respect of a wide range of services and activities: shopping, banking, school work, public services, and downloading TV content.

- Of the activities that broadband is used for currently, people place most value on accessing information, communicating and carrying out transactions. These activities do not require a particularly fast broadband connection. But, a considerable proportion of people are now using the internet for relatively new entertainment services, such as downloading and streaming TV content. Activities such as these require a faster broadband connection of around 2Mb/s.

- There was broad support for the Government's decision to intervene to ensure that people can get consistent access to broadband wherever they live. Government has also identified the need to help people get online. In our survey 80 per cent agreed (32 per cent strongly) that it should be possible for people to gain the confidence and skills to make full use of broadband at home.

Overall, the research shows that there is strong support for universal broadband, which will need to be at a speed that enables everyone to use the services and carry out the activities that people value. In the Panel's view, 2Mb/s is the minimum download speed needed to use services like iPlayer, but it will be important to keep the speed under review so that it does not become outmoded. Government should commit to a review within a specified time frame and an interim review should be triggered if: a re-application of the consumer test shows that the level of service is no longer sufficient for the services and activities that everyone should be able to use; or the level of service has become too far out of line with the average broadband speed.

But, it is not enough simply to make broadband with a download speed of 2Mb/s available to everyone. It is equally important to help the 40 per cent of people who do not have broadband at home to get online. This means action co-ordinated across Government and industry to meet people's needs, in particular the needs of older people, people with a disability and people on low incomes. In the not-too-distant future, if these people are not online they will not be included. Some people cannot afford to pay for the equipment and services that they need in order to get connected. Others are just not interested. Others lack the necessary skills, confidence and support. Ofcom will be publishing research shortly that complements the Panel's report and looks in more depth at the barriers to broadband take-up. And the Government's Digital Inclusion Champion will have a vital role in stimulating action across industry and the public sector.

Anna Bradley

Chair, Communications Consumer Panel

Section 2

Executive summary

2.1   Introduction

The Communications Consumer Panel (the Panel) was established under the Communications Act 2003 as an independent advisory body with the role of advising Ofcom, and such other persons as the Panel thinks fit, on the interests of consumers and citizens in the communications sector. Until recently the Panel was called the Ofcom Consumer Panel. The Panel defines its role more specifically as:

> "To influence Ofcom, Government, the EU, and service and equipment providers so that the communications interests of consumers and citizens are protected and promoted."

In late 2008, the Panel commissioned Opinion Leader to conduct deliberative research to understand better the likely future needs of consumers and how public policy and regulation may be required to change to meet these needs. A key finding from this research was that broadband at home was seen as increasingly 'essential' and for some even as a 'right' on a par with utilities such as water or energy.

The Panel felt that this finding was worthy of more detailed exploration and therefore commissioned Opinion Leader to carry out a follow-up study focused on investigating attitudes to broadband at home specifically in order to assess:

- how widespread the belief is that broadband is essential to citizens and consumers, now and in the future;

- drivers of the attitude that broadband is / is not an 'essential' service;

- activities and services that the internet facilitates, and underlying benefits;

- importance of level / type of service (speed, fixed line vs. mobile);

- the role (if any) people think government should play in ensuring universal availability;

- the importance of government action in relation to broadband compared to other public services; and

- the extent to which views vary according to attitudinal / demographic characteristics.

One aim of this research is to inform the Government's Digital Britain project.[1] The research includes both people with and without broadband at home. It focuses on the overall UK population and examines their views on broadband and what is driving them. Ofcom has also recently carried out research among people without the internet at home, 'Accessing the Internet at Home' (2009), that is also relevant to the work of Digital Britain. Ofcom's research looks in detail at why people do not have the internet at home, at what price, if any, would they be willing to pay for it, and what can be done to encourage take-up. The report of this research can be found on Ofcom's website. Ofcom's study, together with the research

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[1] For more detail see the BERR/DCMS report *Digital Britain: The Interim Report* (2009).

published in this report, provide a comprehensive picture of views on broadband among people in the UK.

The Panel's research included both qualitative and quantitative components. The qualitative research comprised of 16 extended focus groups across the UK, while the quantitative research was a face-to-face survey (via a nationally representative omnibus) of more than 2,000 adults UK-wide.

It is worth noting that people in the qualitative research did not specifically refer to broadband access when discussing the internet at home. However, expectations about internet speed and functionality, as well as awareness of the obsolescence of dial-up internet access, strongly indicate that broadband has become synonymous with the internet for most people. Therefore, this report uses 'broadband' throughout when referring to the internet.

2.2   Current and expected future importance of broadband internet at home

Broadband at home is currently on the cusp between being useful and vital

The qualitative research found that, at present, it is generally regarded as 'useful' or 'important', but not quite 'essential', for people to have broadband access at home. There are many benefits perceived from having broadband at home, with greater speed and convenience of undertaking a range of activities being top of mind amongst these. However, the continuing presence of offline alternatives, as well as the possibility of accessing the internet elsewhere, prevent those without broadband at home from being seen as entirely 'missing out'. Thus, while people are perceived to derive benefit from having broadband at home, they are less likely to be seen as significantly *dis*advantaged by not having it.

The quantitative research supports this finding, with stronger agreement with the statement that 'having broadband at home makes it easier for people to access information, services and activities' than with the statement that 'people could miss out on important information, services and activities by not having broadband at home'. However, more than half agreed to some extent that people without broadband could 'miss out', indicating that broadband is currently on the cusp between being useful and being vital.

For some groups broadband at home is already essential

However, the generalised view outlined above masks some significant sub-group differences. For many people having broadband at home has already tipped over to being personally essential. For example, many of those with broadband at home already feel that they couldn't be without it, and this particularly holds true for more regular and confident internet users, those from higher socio-economic groups and younger people.

In addition, whilst those without broadband at home tend to value it less, there are some without broadband who feel strongly that they are missing out by not having it. Those with children under 16 at home, for example, stand out as a group which values the internet more than others. The qualitative research also found another niche group – those who cannot access broadband because they live in 'notspots' – that places a particularly high value on getting broadband at home.

From a broader societal perspective, the qualitative research found that some groups are perceived by others as having the potential to derive particular benefits from having broadband at home. Families with school aged children, for example, are identified as a group for whom broadband at home would be especially useful for the educational resource this would provide. In addition, groups who may be physically isolated – such as older people,

disabled people, and those living in rural and remote areas – are highlighted as groups for whom the internet could make it easier to communicate, and access goods and services.

However, some of the groups expected by others to benefit most from broadband at home are personally less interested – this is the case, for example, with older people who themselves are more likely to regard having broadband at home as relatively unimportant.

Broadband at home is expected to become essential in the not-too-distant future

A general view was reached during the qualitative discussions that having broadband at home will become essential to individuals and society in the near future. This view was shared even by those who currently ascribe significantly lower priority to internet access. While the quantitative survey shows less consensus about how *personally* important the internet is expected to be in 2-5 years time, this is likely to be related to the survey recording a more top-of-mind response while the qualitative research enabled people to consider the potential future importance of broadband in more depth and to discuss this with others. For some people, it was also possible to hold the view that broadband would be generally important in future, but not necessarily more important to them personally (e.g. some in the 65+ age group who felt they were "too old" for the internet).

A key reason why the internet is anticipated to become essential in future is that more essential services are expected to be delivered solely online or be provided offline in a way that penalises people who access them in this way. Examples cited include shopping, banking, school and university work, job searching and government services.

Thus, in the not-too-distant future *not* having broadband at home is expected to mean reduced options and financial penalties. Participants in the qualitative research spontaneously raised the prospect of not having broadband at home in future potentially limiting people's opportunities in life, including social mobility (as people spontaneously refer to having broadband at home as being a route out of poverty by providing additional educational and vocational opportunities).

It appears from this research, therefore, that we are approaching a tipping point in terms of the internet's perceived role and importance. Currently, advantages are seen from having broadband at home. However, in the near future people without broadband at home are expected to be tangibly *dis*advantaged or to miss out as a result. It will be at this point that having broadband at home is perceived to be essential and critically, people expect this time to be not long off - in the next five years or so.

Importance of broadband is as a means to an end

The perceived importance of broadband at home, both now and looking to the future, is driven by the activities and services it is used for – in other words, it is valued as a means to an end.

Internet users are currently utilising it for a wide variety of functions, particularly as a way of accessing a broad range of information, for communicating through email and social networking sites, and for completing transactions such as online shopping and banking. In addition, more than half of internet users have used it for entertainment purposes (including watching video clips, listening to the radio or downloading music, and watching TV or films online). Almost one in three have used it for a civic participation activity (such as getting in contact with a government department or council, or signing an online petition) and one in six have completed a government process online.

Not surprisingly, use of the internet for all of these activities is higher amongst those with broadband at home compared to those accessing it elsewhere, with the difference being particularly marked with respect to use of the internet for communications or transactions.

Of all the activities the internet is currently being used for, people currently place most value on accessing information, communicating and carrying out transactions, which do not require a particularly fast broadband connection. However, as outlined above, a considerable proportion of people is already using the internet for relatively new entertainment activities, such as those which involve downloading and streaming content. Activities such as these require a faster broadband connection.

There are many perceived advantages associated with conducting activities over the internet compared to offline alternatives. Being quicker, easier and more flexible than traditional channels is top of mind amongst these. Other perceived benefits include increasing consumer choice, delivering cost savings and providing emotional benefits such as a feeling of connection, and the empowerment related to making more informed decisions.

The activities that people use and value most at present are expected to become even more important in the future. People anticipate a future where the internet is ubiquitous and fewer offline alternatives are available. This trend is expected to be driven by generations coming through who have grown up with the internet and for whom using it is considered second nature. In addition, cost and environmental pressures are anticipated to drive the delivery of more goods and services online, while the decreasing price of hardware and broadband packages is expected to mean that having broadband at home will be more affordable.

2.3   Implications for government and industry

Broad support for the principle of access for all

Given the expected growth in importance of having broadband at home, the principle of access for all is broadly supported, with some in the qualitative research having heard that this is the Government's intention. Interestingly, one of the specific reasons for regarding universal access as an important policy goal is that having broadband at home is associated with providing social mobility benefits.

The quantitative research confirms the endorsement of access for all, with high levels of agreement that:

- It is everyone's right to be able to have broadband at home.

- It should be possible to access broadband at home, regardless of where people live or whether they have a low income.

- It should be possible also for people to gain the confidence and skills to make full use of broadband at home.

General support for government involvement

The question of the comparative importance of government involvement in broadband provision compared to other public services is difficult for people to assess. This is because most do not understand what involvement government has in relation to particular services, how government spends its money across services, or what different services cost to provide.

Initially, the tendency is to respond according to Maslow's hierarchy of needs[2], where utilities such as water and electricity are deemed most important because people need these to survive.

Upon consideration, however, government involvement in broadband is seen to be on a par with, or more important than, a range of other communications services. For example, the qualitative research found that government involvement in broadband is seen to be equivalent in importance to government involvement in mobile phones, and as overtaking government involvement in both landlines and the post, which are each seen as being on the wane, due to perceived lower use of these services by consumers and also branch closures in the case of post offices. Similar results were found in the survey, although postal services are afforded a higher priority overall and this is particularly the case for specific groups such as older people and those living in rural areas.

Mixed views on retail subsidies but endorsement of other forms of intervention

In considering what type of involvement government might have in this area, there is a tendency for the public initially to focus on retail subsidies, an aspect of government involvement which polarises opinion. Given that broadband subscriptions and computer hardware are felt to be coming down in price, some are against subsidies as they believe that most people could get broadband at home even if this meant they had to 'do without something else'. There are also some who are generally less supportive of the welfare state and means tested benefits. Others, however, feel that affordability could be a barrier for groups with the lowest incomes and that government providing assistance would therefore be appropriate, particularly if this facilitates greater social mobility. The groups for whom the provision of retail subsidies would be least controversial are older people, those who find it difficult to leave the house because of mobility issues, and children from low income families, each of which tend to be seen as more 'deserving' of government help than other groups.

In terms of what level of broadband service government should provide if it embarks on retail subsidies, the results referred to above show that the activities people currently use and value most do not require the greatest speeds, but this could change rapidly in the future, particularly with more use of audio-visual downloads and streaming in entertainment, and more use of video in communications. Even so, there is some indication from the research that a 'basic' service subsidised by government would be regarded as acceptable, with those able to afford it expected to self-fund a more premium broadband service.

Other types of potential government involvement, while less top-of-mind, are less contentious than retail subsidies. For example, there is broad support for the government intervening to ensure people can get access to broadband where they live by providing consistent broadband across the UK. This is particularly strongly voiced by people residing in 'notspots'. There is also general endorsement of government initiatives to help people who lack the ability and confidence to use the internet, particularly if they are older or internet novices. Specific ideas put forward about providing free training, easy to use devices, a safe environment and a free telephone helpline are all regarded as useful.

Role for industry also identified

It is important to note that there are other organisations apart from government which are also perceived to have a part to play in providing access for all. Commercial providers, such as computer manufacturers and ISPs, are spontaneously identified as having a role in providing consistent coverage across the UK and bringing down costs (e.g. by providing bundled

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[2] A theory of psychology which proposes that a hierarchy of needs exists, with basic needs (e.g. food, water, shelter, safety) requiring fulfilment before higher order needs (e.g. esteem, self-actualisation).

offers, pre-payment options and potentially capped charges for low income groups). Other businesses are also seen to have a potential role, including by adapting existing Corporate Social Responsibility (CSR) schemes (e.g. Tesco's Computers for Schools).

Managing the downside of a technologically-led future still a priority

An important finding from the research Opinion Leader conducted for the Panel on future consumer needs was that despite many advantages associated with the internet, people also saw a potential downside of an internet-dominated future. The same sorts of concerns are referred to in the current study, including about privacy and the security of data, personal safety (particularly of children) and the potential contribution of the internet to a less social and more sedentary society.

There is a continuing desire for people to control the technology (and not the other way around), and for a balance between technology and 'real life' to be struck. Controlling the negatives is another area where government and others are seen to have a role.

Section 3

Introduction

3.1 Background and objectives

The Communications Consumer Panel was established under the Communications Act 2003 as an independent advisory body with the role of advising Ofcom and others on consumers' interests in telecommunications, spectrum and, with the exception of content issues, broadcasting.

In October and November 2008, Opinion Leader conducted an initial stage of research on behalf of the Communications Consumer Panel to anticipate the future needs of consumers, and what policies and regulation are likely to be required to meet these. Following a pilot event, four day-long deliberative workshops, each involving 20 people, were conducted in October and November 2008 in London, Caernarfon, York and Glasgow.

A key finding from this research was the high value that the public ascribed to communications services and devices – and, in particular, to internet access. The internet was perceived to help people to meet their core life and consumer needs by increasing access to information, providing new ways of keeping in touch and being entertained, and enabling daily tasks and transactions to be conducted more quickly and easily. In addition, a number of anticipated future trends – including greater time poverty, more services being delivered online and technological advancements increasing people's ability to get what they want, when they want it – were expected to increase the importance of the internet in people's lives in the future. However, a number of concerns related to these expected developments were also apparent – these included worries about privacy and data security, as well as the possibility of an increasing digital divide where those without internet access miss out on opportunities and essential services as a result.

The belief was expressed that no one should miss out on the digital age and that access to the internet is becoming 'essential'. Consequently, some felt that having the internet in order to access content and services should be seen as a 'right' on a par with the right to have access to utilities such as water and electricity. While people did not specify what type of internet connection they were referring to, it was taken for granted that broadband would be required to deliver the expected internet speed and functionality[3].

The Communications Consumer Panel felt that it would be useful to explore the deliberative research finding that broadband is seen as 'essential' and might be a 'right' , in more depth, and to provide a UK-wide perspective on the public's views of broadband. The Panel therefore commissioned Opinion Leader to carry out a follow-up study. As with the initial research, this research will be used to help inform the Government's Digital Britain project (for more detail see the interim Digital Britain report BERR and DCMS, Digital Britain: The Interim Report (2009). Our research includes both people with and without broadband at home and focuses on the overall UK population and their views on broadband and what is driving this. Ofcom has also recently carried out research among people without the internet at home, 'Accessing the Internet at Home' (2009), that is also relevant to the work of Digital Britain. This looks in detail at why people do not have the internet at home, at what price, if any,

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[3] The findings from this research have been published in February 2009 in a report entitled No one should miss out: consumers say what they want from a digital future. This report is available on the Communications Consumer Panel's website (www.communicationsconsumerpanel.org.uk)

would they be willing to pay for it, and what can be done to encourage take-up. The report of this research can be found on Ofcom's website. Ofcom's study together with the research published in this report provide a landscape of the views on broadband among people in the UK.

The specific research objectives for this research were to assess:

- How widespread the belief is that broadband is essential to citizens and consumers, now and in the future.

- Drivers of the attitude that broadband is / is not an 'essential' service.

- Activities and services that the internet facilitates, and their underlying benefits.

- Importance of level and type of service (speed, fixed line vs. mobile).

- The role (if any) people think government should play in ensuring universal access.

- The importance of government action in relation to broadband compared to other public services.

- The extent to which views vary according to attitudinal / demographic characteristics.

- Opinion Leader conducted both qualitative and quantitative research with the public to explore these areas of interest in more detail.

3.2   Methodology and sample

In summary, the research comprised:

- A **qualitative phase** consisting of a programme of 16 extended discussion groups with the general public, which covered a cross-section of socio-demographics (including age and socio-economic group), and locations across the UK (including all nations, urban as well as rural areas, and areas with high/low broadband uptake as well as those without access to broadband)

- A **quantitative phase** which involved a face-to-face survey, on a nationally representative omnibus, of 2,000+ people UK-wide

More details on each phase are provided below.

Qualitative phase

The qualitative phase of the research comprised of 16 x 2 hour focus groups conducted with members of the public between 2nd and 9th March, 2009. The groups spanned all nations and regions, including both urban and rural areas, and broadband 'notspots'. Groups were segmented by age and socio-economic grade but each group (with the exception of those in 'notspots') comprised a mix of broadband users and non-users to enable experiences of both audiences to be shared. The full qualitative sample breakdown is shown in Figure 1 on the opposite page:

Figure 1: Qualitative sample

Location	Age	SEG	Rural/urban	Whether have BB access at home
Llanpumsaint (Carmarthen)	40-64	E	Rural	None with broadband (notspot)
Llanpumsaint (Carmarthen)	65+	ABC1	Rural	None with broadband (notspot)
Colwyn Bay	25-39	C2DE	Rural	Mix of those with and those without
Colwyn Bay	18-24	ABC1	Rural	Mix of those with and those without
Belfast	18-39	E	Urban	Mix of those with and those without
Belfast	40-64	ABC1	Urban	Mix of those with and those without
Glasgow	40-64	C2D	Urban	Mix of those with and those without
Glasgow	65+	C2D	Urban	Mix of those with and those without
Consett (Durham)	25-39	C2D	Urban	Mix of those with and those without
Consett (Durham)	65+	ABC1	Urban	Mix of those with and those without
Bexleyheath (London)	25-39	ABC1	Urban	Mix of those with and those without
Bexleyheath (London)	40-64	C2D	Urban	Mix of those with and those without
Purley (London)	18-24	ABC1	Urban	Mix of those with and those without
Purley (London)	18-24	C2DE	Urban	Mix of those with and those without
Plymstock (Plymouth)	18-39	E	Rural	Mix of those with and those without
Plymstock (Plymouth)	65+	E	Rural	Mix of those with and those without

Participants were recruited by Opinion Leader's network of local recruiters. Opinion Leader prepared a detailed screening questionnaire, which was agreed by the Communications Consumer Panel, and this was used to check participant eligibility. At the recruitment stage participants were given only a very general explanation of the purpose of the research and what would be covered.

After an initial warm-up, the discussion groups covered the following broad topic areas:

1. Role and importance of the internet currently – both to the individual and to society.

2. Expected future importance of broadband.

3. Views on broadband access for all and on the potential role of government in ensuring this

Within the group discussions, participants were asked to fill in a range of individual questionnaires to enable individual views to be recorded, and to work in smaller break-out groups, as well as to discuss the issues in the round.

Indicative sub-group differences from the qualitative research are commented on in this report, but a more comprehensive qualitative sub-group analysis is contained in Annex A.

Quantitative phase

The quantitative phase consisted of a series of questions placed on a nationally representative face-to-face omnibus survey of 2,043 adults aged 16+ on 12th -17th March 2009. Figure 2 below shows how the quantitative sample broke down.

Figure 2: Quantitative sample
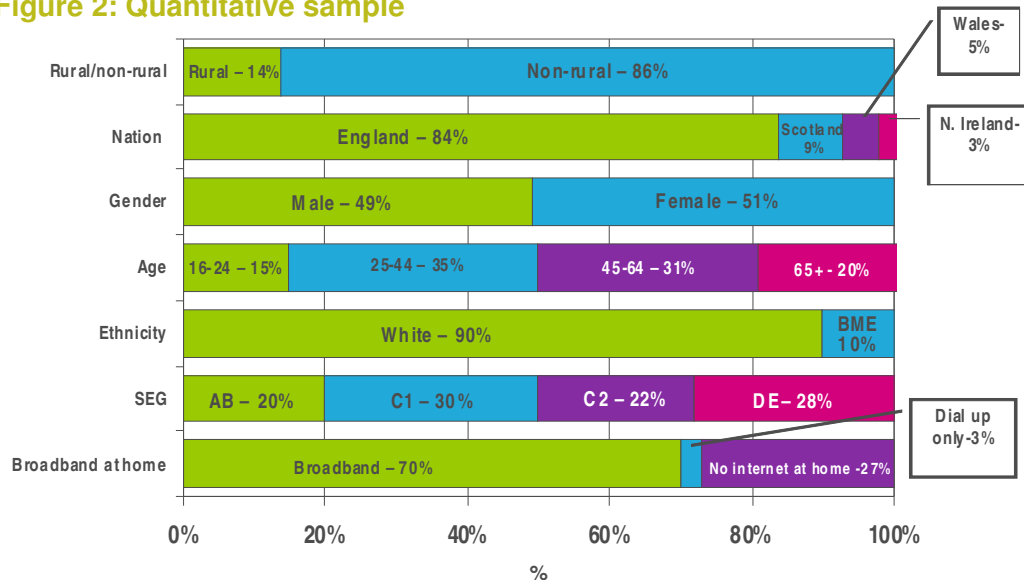
At the analysis stage, the data were weighted to ensure that they were representative in terms of known population data on age, sex, socio-economic grade[4], number of adults in household, working status and region.

Sub-groups from the quantitative research which show statistically significant differences are highlighted in this report if the sample is sufficiently large[5]. For example, those with and without broadband are routinely compared and any other key differences within these two groups (such as by age, life stage, socio-economic grade or location) are also identified. This research was not intended to focus on specific audiences such as ethnic minority groups (EMG) or disabled people. Key differences have been highlighted with respect to EMGs, but this has not been possible in the case of disabled people due to the sample size.

Note on how to interpret the different methodologies

As mentioned, deliberative methods were used in Stage 1 of the research, while qualitative and quantitative methods were used in Stage 2. Combining all three approaches provides the clearest possible picture of people's views by contributing different but complementary perspectives:

- **Deliberative research** (Stage 1) is a process which seeks to achieve consensus after deliberation. It provides the most informed consumer and citizen view as more time and tools are provided to help people reach considered conclusions, and because a

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[4] The socio-economic classification is a standard measure of socio-economic level used in market research. It is based on occupation and takes account of job title, education and qualifications and level of responsibility. Broadly, the categorisations equate to the following: ABC1 – non-manual, professional jobs (examples A – headmaster, CEO, B – lawyer, C1 – junior executive to junior management); C2 – skilled manual (e.g. plumber) D – unskilled manual worker (e.g. factory operative) E – dependent long-term on state benefits
[5] We do not report on sub-groups with fewer than 50 people in them and indicate all small samples (between 50 and 100) with an asterisk (*)

heterogeneous participant mix within the sessions encourages people to consider other points of view. This is a qualitative research process which seeks to achieve consensus of opinion after deliberation.

- **Qualitative research** (Stage 2) provides a considered but less fully informed view. It is particularly useful in idea-forming and in-depth exploration of the 'why' and 'how' behind participants' views. It also enables differences in views between different audiences to be recorded.

- **Quantitative research** (Stage 2) provides the most 'unprimed' perspective thereby providing the clearest overview of general population views. It also allows for differences in views within the population to be drawn out fully and quantified.

It is worth noting that there was a great degree of commonality in perceptions across the three methodologies, with this phase of research largely confirming the findings arising in the initial deliberative research. There is a sense in which, as we move from the quantitative to qualitative to deliberative research, we can gain a feel for the forward trajectory of people's opinions. While it is difficult to get a considered view about the future in quantitative research, deliberative research lends itself to this well. So quantitative research gives the strongest, most representative picture of people's immediate views and deliberative research is the best way to identify considered and forward-looking views.

This report focuses on Stage 2. The findings from the qualitative and quantitative research have been integrated throughout the report.

The main findings which follow in this report have been divided into four sections:

- How important broadband at home is currently perceived to be

- What is the expected future importance of broadband at home

- What is driving views on the perceived importance of broadband at home

- What extent of support is there for 'access for all' and what is the expected role of government and others in achieving this

There is also a separate annex containing additional sub-group analyses from the qualitative and quantitative research, as well as all the research materials (questionnaire, discussion guide, qualitative exercises and recruitment documents).

How important is broadband at home currently perceived to be?

In general, broadband at home is currently **on the cusp between being seen as useful and vital**. Broadband at home is perceived to benefit those who have it, particularly by making it easier (quicker, more convenient) to undertake activities. However, people who don't have access at home are not yet regarded as being significantly disadvantaged as a result. This is because of the possibility of accessing the internet elsewhere and continuing presence of equivalent offline alternatives.

However, **for some people broadband at home has already tipped over to being personally essential**. A very clear example is that many of those who already have broadband at home, particularly if they are more regular and confident internet users, from higher socio-economic groups or younger age ranges, now feel that they couldn't be without it. While those without broadband at home generally value it less, there are some important exceptions: those with children aged under 16 stand out as a group for whom it is more important than others without broadband at home, along with people who do not have broadband because of cost. In addition, the qualitative research found that those living in 'notspots' value getting broadband at home particularly highly.

At a societal level, broadband at home is perceived to **hold particular benefits for certain groups**. These include families with children and also those who could be physically isolated due to age, disability or location. However, it is worth noting that while families themselves also identify a greater need for broadband at home, older people without broadband tend to be least personally interested.

On the cusp between being useful and essential

The qualitative research found that, in general, people view having broadband internet at home as 'useful' or even 'important', but not quite yet 'essential'. The primary reason for this is that while people are seen to benefit from having broadband at home, they are not yet perceived to be significantly *dis*advantaged by not having it.

This is partly because offline alternatives still exist for many of the online information, activities and services currently used. 'Essential' is understood to be something that cannot be done without and, because most of the important internet uses carried out by participants can still be done offline (albeit sometimes less conveniently), there is a sense that most people can still do without the internet at home.

Combined with this, the possibility of accessing the internet elsewhere, such as at someone else's house, a local library or at work, is another reason for believing that internet access at home is not yet imperative.

> "It's not vital but it just makes your life easier if you do have it." (Male, Colwyn Bay, 25-39, C2DE)

"There are other ways to do things rather than use the internet but it just makes it so easy. Plus it's the cheapest option…. It doesn't make it essential. It just makes it the wise option." (Male, Belfast, 18-39, E)

"Probably not [essential] at the moment. It is not a necessity to have the internet. I mean really it is just a luxury, isn't it, at the moment? Things are starting to go that way where you have to use them but at the moment you can get by without having the internet. You would miss out on some things but they are not necessary things you need." (Male, Colwyn Bay, 18-24, ABC1)

It is worth noting that people in the qualitative research did not specifically refer to broadband access when discussing the internet at home. However, expectations about internet speed and functionality, as well as awareness of the obsolescence of dial-up, strongly indicate that broadband has become synonymous with the internet for most people. Therefore, this report uses 'broadband' throughout when referring to the internet.

The quantitative research broadly supports the qualitative finding that broadband at home is on the cusp between being 'useful' and 'essential', with stronger agreement that 'having broadband at home makes it easier for people to access information, services and activities' (50% strongly agree) than that 'people could miss out on important information, services and activities by not having broadband at home' (22% strongly agree). However, the majority (63%) at least 'tend to agree' that people without broadband at home could miss out, a finding which adds weight to the finding that broadband at home is currently on the cusp between being considered useful and vital. This is shown graphically in Figure 3 below.

Figure 3: Perceptions about whether broadband at home makes it easier and whether those without it miss out
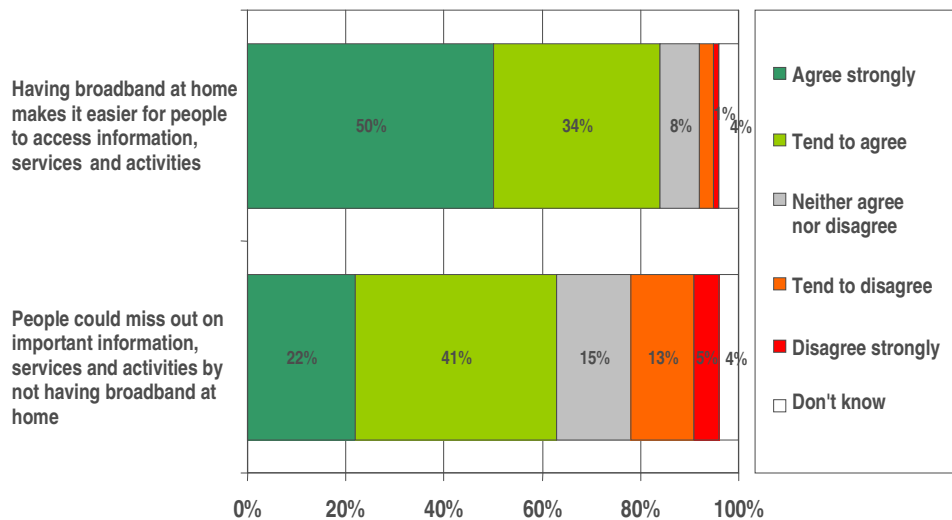
Q12: "To what extent do you agree or disagree with the following statement: People could miss out on important information, services and activities by not having broadband at home" / "To what extent do you agree or disagree with the following statement? Having broadband at home makes it easier to access information, services and activities". Base: total sample (2043)

For some groups broadband has already tipped over to being essential

Respondents in the quantitative survey were also asked how personally important broadband at home is to them. This question was asked separately of those currently with and without broadband at home, however combining the data shows that, overall, three in ten (31%) regard broadband at home as being personally 'essential' and that they couldn't be without it, while an additional one in four (24%) perceive it as being 'important' although not quite 'essential'. Thus, more than half of the UK population (55%) can be considered to place a high priority on having broadband at home, although only a minority regard it as vital.

However, this aggregated view masks some significant sub-group differences. The quantitative research indicates that a relatively greater number of those with broadband at home already feel either that this is 'essential' (42%) or at least 'important' (31%). Similarly, in the qualitative research many participants stated that they believe that they 'would not know what to do' if they did not have broadband access at home. In comparative terms, those with broadband at home tend to regard this as being equally or more important than most other communications services. The quantitative findings indicate that broadband is considered by those who have it at home to be as or more important than every other communications service measured with the exception of the post; the qualitative research provides very similar findings. Those with broadband at home are also more likely to feel that it makes it easier to access activities and information, and that people without it could miss out.

Conversely, those who are without broadband internet at home at present tend to value it less (53% of them regard it as 'not at all important' personally) either because they are not interested in using the net or make do using alternatives. Those without broadband at present tend to regard it more as 'nice to have' (14%) than as either 'important' (7%) or 'essential' (4%). In addition, those without broadband at home are more likely to place a higher priority on other communications services (postal services regarded as 'essential' by 53%, landlines by 43%, mobile phones by 28% and digital TV reception by 16%) compared to broadband at home (regarded as essential by only 4% of this group overall).

In addition, those without broadband at home are less likely to agree with the statement that broadband at home 'makes it easier' to access information, services and activities (93% of those with broadband at home agree compared to 61% of those without broadband) or that 'people without it could miss out' on information, services and activities (42% of those without broadband at home agree compared to 72% of those with broadband), although a considerable proportion of those without broadband do still agree with these statements.

The qualitative research found an exception to this pattern of people with broadband at home placing greater priority on this than those without: this was that people who did not have broadband at home because they could not access it in their area (those in 'notspots') placed a similarly high priority on having broadband at home to those who already had it at home.

These differences, between those with broadband and those without, from the quantitative survey are highlighted in the following charts:

- Figure 4 shows differences in the personal importance of broadband between those with and without broadband at home

- Figure 5 shows the personal importance of broadband compared to other communications services to those with broadband at home

- Figure 6 shows the personal importance of broadband compared to other communications services to those without broadband at home

- Figure 7 shows differences in two key attitudinal statements on the importance of broadband ('makes it easier', 'people could miss out') between those with and without broadband at home

Figure 4: Personal importance of broadband – comparing those with and without broadband at home
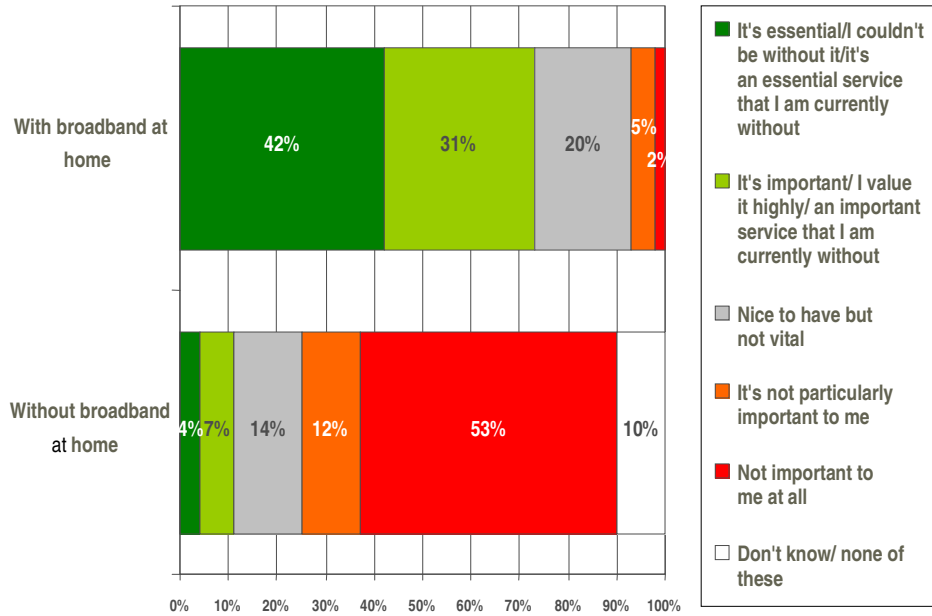
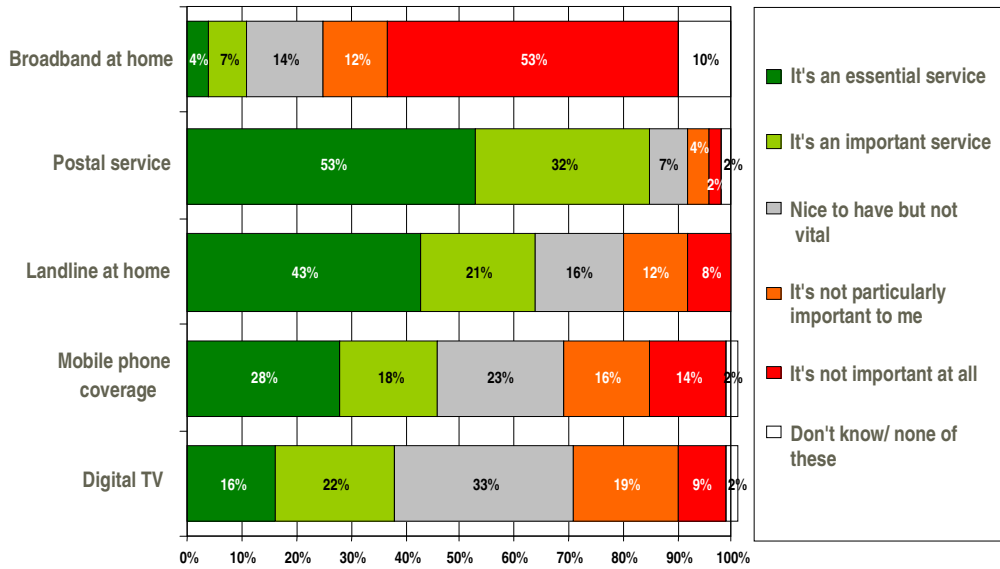Q2:"How do you currently feel about having access to broadband at home? / Q9: "How do you currently feel about not having access to broadband at home?" Base: those with broadband at home (1433) and those without broadband at home (610)

## Figure 5: Personal importance of broadband at home compared to other services - those with broadband
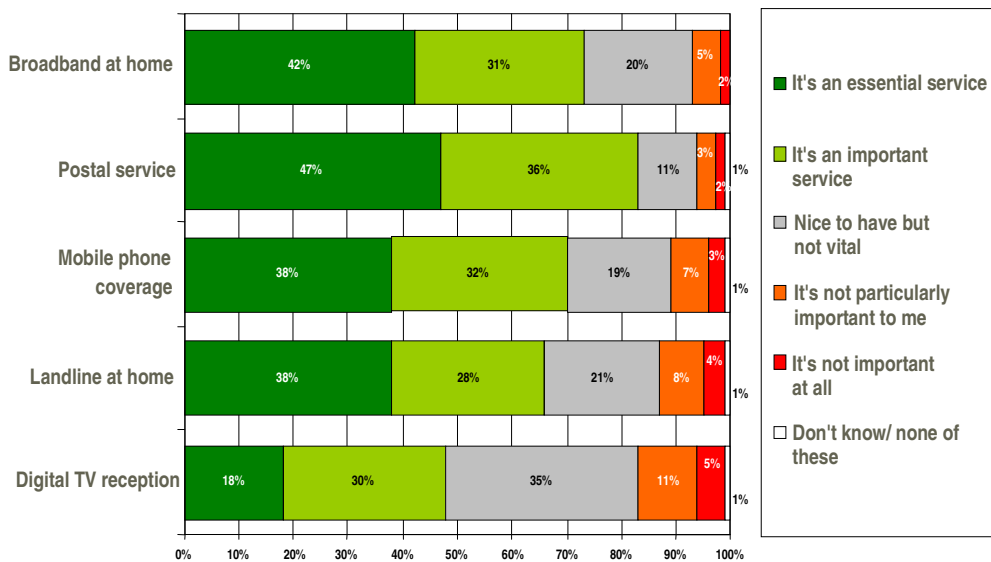
Q2: "Which of the statements best describes how you currently feel about having access to each service at home?" Base: Those with broadband (1433)

Figure 6: Personal importance of broadband compared to other services – those without broadband

Q8: "Which of the statements best describes how you currently feel about having access to each service at home?" / Q9 "How do you currently feel about not having broadband at home?" Base: Those without broadband (610)

Figure 7: Perceptions about whether broadband at home makes it easier to access information, services and activities, and whether those without it miss out – comparing those with and without broadband at home
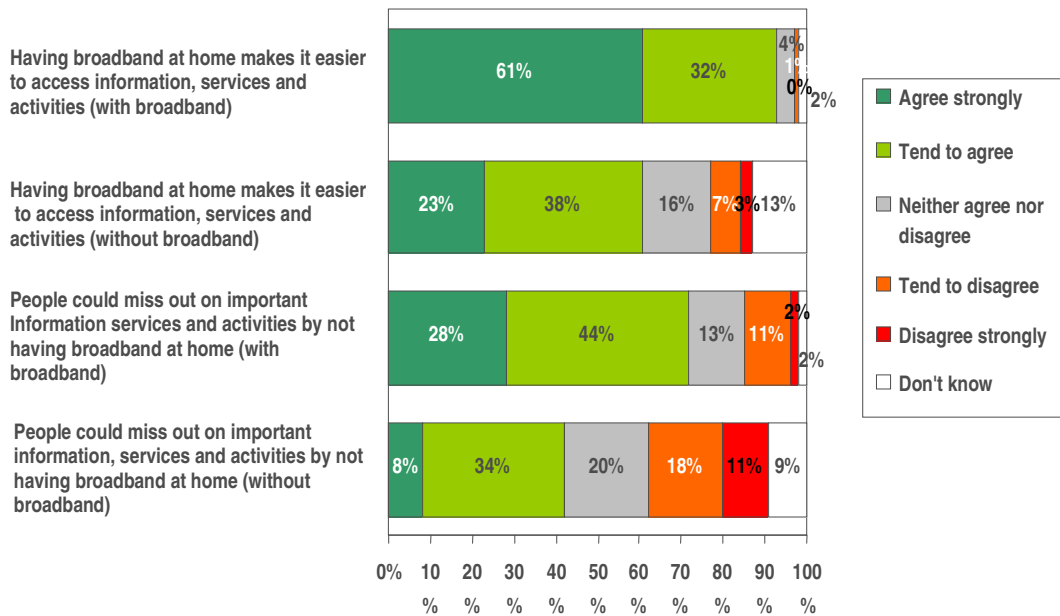
Q12: "To what extent do you agree or disagree with the following statement? People could miss out on important information, services and activities by not having broadband at home" / "To what extent do you agree or disagree with the following statement? Having broadband at home makes it easier to access information, services and activities". Base: those with broadband at home (1433) and those without broadband at home (610)

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Amongst those with broadband at home, some differences were also found, both in the qualitative and the quantitative research. In the survey, those from higher socio-economic groups, more regular and confident internet users, and younger people (particularly those aged less than 25) prioritise having broadband at home most highly (refer to Figure 8 below). As in the earlier deliberative study conducted by Opinion Leader, some participants in the qualitative research spontaneously likened it to an essential utility such as water or electricity.

> *"(Broadband at home is) like a limb. Yes the internet hanging off your shoulder… It is just, it's basically just one of those things that I've grown accustomed to. (I use it) every day now, and when it isn't, you know, if it ever did go down, it would just cause loads of problems." (Male, Colwyn Bay, 18-24, ABC1)*

> *"I think I control almost my whole life on the internet whether it's banking, shopping, socialising, music, photos, everything revolves around it." (Female, London, 18-24, C2DE)*

> *"I wouldn't be without the internet at all now. Like I said before, I think I'd be a bit lost because I use it so much. Especially with work and things, it would just make things – life – so much more difficult." (Female, London, 18-24, C2DE)*

> *"It's become a rather essential service, just like water and electricity." (Male, Belfast, 40-64, ABC1)*

Conversely, quantitative research found that older people and those from lower socio-economic groups are more likely to place a lower value on broadband at home, even if they have this service (see also Figure 8 below). The findings from the qualitative research were also in line with this.

Figure 8: Quantitative sub-group differences – those with broadband at home who more likely to place a high and low importance on broadband at home

Which statement best describes how you currently feel about having access to broadband internet at home?	Total	AB	C1	C2	DE	16-24	25-44	45-64	65+
It is essential/I couldn't be without it	42%	51%	46%	35%	31%	40%	45%	42%	28%
It is important/I value it highly	31%	30%	31%	27%	34%	42%	32%	26%	24%
It is nice to have but not vital	20%	13%	17%	30%	22%	14%	18%	22%	30%
It's not particularly important to me	5%	4%	5%	5%	8%	3%	3%	8%	9%
I don't value it at all	2%	2%	1%	2%	3%	1%	1%	2%	5%
Don't know	1%	0%	1%	1%	3%	1%	1%	0%	3%
Total - essential & Important	73%	82%	77%	62%	65%	82%	77%	68%	52%
Total - not particularly important & don't value it at all	7%	5%	5%	7%	11%	3%	4%	9%	14%

Which statement best describes how you currently feel about having access to broadband internet at home?	Total	With children under 16 at home	Without children under 16 at home	Rural	Non-rural
It is essential/I couldn't be without it	**42%**	42%	42%	42%	42%
It is important/I value it highly	**31%**	34%	28%	29%	31%
It is nice to have but not vital	**20%**	17%	21%	20%	20%
It's not particularly important to me	**5%**	3%	6%	7%	5%
I don't value it at all	**2%**	1%	2%	2%	1%
Don't know	**1%**	2%	1%	0%	1%
Total - essential & Important	**73%**	77%	70%	71%	73%
Total - not particularly important & don't value it at all	**7%**	4%	8%	10%	6%

Which statement best describes how you currently feel about having access to broadband internet at home?	Total	Very/ quite confident using the internet	Not very/Not at all confident using the internet
It is essential/I couldn't be without it	**42%**	48%	18%
It is important/I value it highly	**31%**	33%	30%
It is nice to have but not vital	**20%**	17%	40%
It's not particularly important to me	**5%**	2%	11%
I don't value it at all	**2%**	0%	2%
Don't know	**1%**	0%	0%
Total - essential & Important	**73%**	80%	47%
Total - not particularly important & don't value it at all	**7%**	2%	13%

Significantly more likely than average   Significantly less likely than average

Q2: "Which of the statements best describes how you feel about having access to [broadband internet] at home – it's essential / I couldn't be without it, it's important / I value it highly, it's nice to have but not vital, it's not particularly important to me, I don't value it at all?" Base: All those with broadband at home (1433 total - aged 16-24 239; 25-44 585; 45-64 482; 65+ 127; AB 359; C1 484; C2 315; DE 274; with children at home under 16 579; without children under 16 at home 854; rural 167; non-rural 1266; very/quite confident with the internet 1141; not very/not at all confident with the internet 115

While people without broadband at home generally place a lower priority on having access to broadband at home, the findings from both the quantitative research are that those with children under 16 at home see it as more important than others without broadband at home (refer to Figure 9 below). In the qualitative research, similar results were found with participants pointing to the increased pressure that schools are placing on parents to provide broadband access for homework assignments and the inconvenience of accessing the internet outside the home.

> *"My son does homework at his Nan's (who has the internet at home) and he is only eleven. He is not even at secondary school yet. Actually I was told by another mum whose son had gone into secondary school that children are expected to have internet access at home. I was horrified by that, but how can a school suggest that you need to have an internet connection?" (Female, London, 40-64, C2D)*

> *"Yes, and the children have got homework to do, it's like if I finished at five, what time does the library shut? Half five or whatever, so you need, how are you going to get home to get your kids, get them down to the library so they can research their homework? So for them it's easier and it's … less time consuming, they can do it on the internet." (Female, Colwyn Bay, 25-39, C2DE)*

In addition, in the survey those without broadband at home who are regular and confident internet users (who are either accessing it elsewhere or using dial-up), tend to place a higher importance on broadband at home, as do those without broadband at home who are aged under 65, particularly those in the youngest age brackets (see also Figure 9). These differences were again found in the qualitative as well as the quantitative research.

The qualitative research also found that another niche group – those who cannot access broadband because they live in 'notspots' – place a particularly high priority on getting broadband at home. While some in this group are currently using dial-up, this is seen as being far inferior to broadband because of slower speeds, less reliable connection and not having access to the telephone line when using the internet.

> *"It is essential … because the schools are doing more now, computer work, you know computer print outs. My daughter's come home twice this week, 'Mam I need to go on the internet'. We don't have internet so it means finding access then to internet … and she's quite distraught then having to go back to school and say look, sorry sir I couldn't have internet access." (Female, Llanpumsaint and Carmarthen – 'notspot', 40-64, E)*

> *"(My comparison is with) a constant supply of electricity and not having a power cut every half hour. Is that a fair comparison? … Water or electricity, you know, a constant supply of something." (Male, Llanpumsaint and Carmarthen – 'notspot', 65+, ABC1)*

> *"It's, like, discrimination isn't it [not to have access to broadband]?" (Female, Llanpumsaint and Carmarthen – 'notspot', 40-64, E)*

> *"Well, you know, dial up is a nightmare. I mean it's as simple as that. I could be half way through a tax return and you're at the point of filing it on line and I've lost the connection." (Male, Llanpumsaint and Carmarthen – 'notspot', 65+, ABC1)*

Conversely, the quantitative research also found that older people (particularly those aged 65+) who are currently without broadband at home, as well as those who have either never used the internet or not used it within the past 12 months, unsurprisingly ascribe lower importance to having broadband access at home (refer again to Figure 9). In addition, those who do not have broadband at home because of lack of interest/usage or knowledge/concerns are less likely to value it than those who don't have it due to cost issues. The qualitative research was again in line with the survey in this regard, with some of the views expressed by participants highlighted below:

> *"I am the dinosaur. I am useless because they are taught daily at school aren't they. To them it's an every day, no phobia. Some will have laptops. It's amazing. So, I consider myself to be he caveman." (Male, London, 40-64, C2D)*

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"They teach it, when you try to teach your grandkids sums and things like that, they learn enough at the computers, it's totally different to the way that we were taught. So we are obsolete in that sense, we can't help them." (Male, Consett, 65+, ABC1)

"Probably would be (more important to me) if someone showed me how to use it, because I use computers a lot at work… If I was shown how to use it and I was using it every day then I'd build my confidence up that way, but at the minute I hardly use it at all." (Female, Belfast, 40-64, ABC1)

Figure 9: Quantitative sub-group differences – those without broadband at home who are more likely to place a high and low importance on broadband at home

How do you currently feel about not having broadband at home?	Total	AB*	C1	C2	DE	16-24*	25-44	45-64	65+
Broadband at home is an essential service that I am currently without	**4%**	2%	7%	5%	3%	13%	12%	2%	0%
Broadband at home is an important service that I would value highly but am currently without	**7%**	4%	8%	9%	6%	11%	15%	6%	2%
It would be nice to have broadband at home but I don't think it is vital to get it	**14%**	15%	13%	10%	15%	30%	26%	15%	3%
Having broadband at home is not particularly important to me	**12%**	15%	11%	14%	11%	26%	12%	14%	8%
Having broadband at home is not important at all	**53%**	57%	51%	53%	53%	15%	23%	54%	75%
None of these	**9%**	7%	9%	6%	10%	6%	6%	8%	11%
Don't know	**2%**	0%	2%	3%	2%	0%	5%	2%	1%

How do you currently feel about not having broadband at home?	Total	With children under 16 at home	Without children under 16 at home
Broadband at home is an essential service that I am currently without	4%	14%	2%
Broadband at home is an important service that I would value highly but am currently without	7%	17%	5%
It would be nice to have broadband at home but I don't think it is vital to get it	14%	32%	9%
Having broadband at home is not particularly important to me	12%	13%	12%
Having broadband at home is not important at all	53%	21%	60%
None of these	9%	3%	10%
Don't know	2%	1%	2%

How do you currently feel about not having broadband at home?	Total	Rural	Non-rural	Very/quite confident using the internet
Broadband at home is an essential service that I am currently without	4%	1%	5%	14%
Broadband at home is an important service that I would value highly but am currently without	7%	7%	7%	15%
It would be nice to have broadband at home but I don't think it is vital to get it	14%	14%	14%	31%
Having broadband at home is not particularly important to me	12%	18%	11%	15%
Having broadband at home is not important at all	53%	53%	53%	19%
None of these	9%	6%	9%	7%
Don't know	2%	1%	2%	0%

	Significantly more likely than average		Significantly less likely than average

Q9: "How do you currently feel about not having broadband at home – BB at home is an essential service that I am currently without, BB is an important service that I would have highly but am currently without, it would be nice to have BB at home but I don't think it's vital to get it, having BB at home is not particularly important to me, having broadband at home is not at all important to me?" Base: All those without broadband access (610 total – 16-24 65, 25-44 123, 45-64 146, 65+ 277, AB 56*, C1 122, C2 126, DE 306, with children under 16 at home 113, without children under 16 at home 498, rural 112, non-rural 498, very/quite confident using the internet 16).*
Bases less than 100 highlighted with asterisk (*) and bases less than 50 not shown (e.g. those not very/not at all confident using the internet n = 34 not included because base size too low)

Seen as providing particular benefits for specific groups

From a broader societal perspective, the qualitative research found that some groups are perceived by others potentially to derive particular benefits from having broadband at home. Families with school aged children, for example, are generally identified as a group for whom broadband at home could be particularly useful for the educational resource this would provide. In addition, groups who may be physically isolated – such as older people, disabled people and those living and doing business in rural areas – are highlighted as audiences for whom the internet could make it easier to communicate, and access goods and services.

> *"Children are perhaps more disadvantaged at school because so much of the work now is internet based." (Female, London, 18-24, ABC1)*

> *"Obviously the disabled... It helps them connect with the outside world if they're housebound… So like… with the shopping. Also with things like Skype and that." (Male, Belfast, 18-39, E)*

> *"I think people maybe that are disabled could find it hard to get out of the house. So obviously they're going to benefit for things that they can't go shopping for, like Tesco's do a home delivery now don't they. So would elderly people, if they can use it, would probably benefit because they've not got to struggle getting on and off a bus and all of that sort of thing." (Female, London, 18-24, C2DE)*

> *"I think the rural groups benefit for a number of reasons. They've got much more choice than if they're going to a small village for something just to buy in one local shop… The advantages we have from living in the city are magnified for them." (Male, Belfast, 40-64, ABC1)*

However, some of the groups expected by others to benefit most from broadband at home are shown by both the qualitative and quantitative research to be less personally interested. This is the case, for example, with older people who, as outlined previously, are themselves more likely to regard having broadband at home as relatively unimportant , particularly if they do not already have it at home but even if they do have it (see Figures 8 and 9 above). However, other audiences identified as potentially benefiting, for example families with school aged children, themselves concur that having broadband is important (see also Figures 8 and 9).

> *"I don't think it's more essential for me, but I'm thinking of my daughter…. As they grow up, you know, unfortunately they get bullied for not having things at school that other kids do have." (Female, London, 25-39, ABC1)*

Section 5

What is the expected future importance of broadband at home?

A general consensus was reached during the qualitative discussions that having broadband at home will become **essential for individuals and society in the not-too-distant future**. This view was shared even by those who currently ascribe significantly lower value or importance to the internet. While the quantitative survey does not always align fully with findings from the groups in how personally important they expect the internet to be, this is likely to be in part related to the survey recording more top-of-mind responses while the qualitative research enabled more in-depth consideration of future possibilities. It also suggests that for some people, broadband can be regarded as essential for the future 'generally' but less so on a purely personal level. This is the case, for example, for some older people who accept that broadband at home will become generally essential but feel that they will personally be left behind or be 'too old'.

A key reason for anticipating that broadband will be essential in future is the **expectation that more essential services will be delivered solely online or penalise people who go offline.** Examples cited include shopping, banking, school and university work, job searching and government services. Thus, not having broadband at home is expected to mean reduced options and financial penalties. Looking to the future, the internet is also increasingly associated with providing opportunities – for example for social mobility – which people are expected to miss out on if they do not have broadband at home.

It therefore appears, from this research, that we are approaching a **tipping point in terms of the internet's perceived role and importance.** Currently, advantages are associated with having broadband at home, however in the near future people without broadband at home are expected to be tangibly disadvantaged or to miss out as a result. It will be at this point that having broadband at home is perceived to be essential and critically, people expect that this time is not a long way off - in the next 5 years or so.

In an internet-dominant future, **other access points are not necessarily seen to provide an adequate alternative** because of the cost, restrictive hours and less secure environment provided.

Broadband access expected to be become essential in the not-too-distant future

Participants in the qualitative research are agreed that having broadband internet access at home is rapidly growing in importance. Although it is still classed as being useful rather than essential, the time is seen as being not far off when having broadband at home will become integral to all people in their everyday lives.

The tipping point appears to be when people will no longer have the same offline options and will therefore be disadvantaged or miss out by not having ready access to broadband. The following quotes from the qualitative research show that participants expect this tipping point to be approaching within the very near future.

> *"I don't really know. I think at home it's a choice. I think in the future, it will be a necessity. I don't think we'll have the choice in the future. I think, at the moment, we have a choice between going online and going into the bank, or going into the store, and I think in the future, we won't have that choice. I think eventually, all will go down that path." (Female, Belfast, 40-64, ABC1)*

> *"We're at the crossroads actually, where there's a major shift, you know, in the way that we lead our lives." (Male, Llanpumsaint and Carmarthen - "notspot", 65+, ABC1)*

> *"Whereas if you didn't have it a couple of years ago, you were losing out on some benefits… In two to five years' time… if you don't have it it's not just that you're losing out on some benefits, but I think you're actually going to be disadvantaged by not having it. I think that will just get worse." (Male, London, 18-24, C2DE)*

In the quantitative research, respondents were asked a similar question, about how *personally* important they expected broadband at home to be to them in 2-5 years compared to now. The findings from the survey on this question differ somewhat from those of the qualitative research which focused on importance *generally* to individuals and society. Those with broadband at home in the survey, most of whom already value it (see section 4), expect broadband access home to be as (43%) or more (52%) important to them in the future. However, amongst those without broadband at home, who tend to regard it as less important now, fewer (29%) anticipate broadband will increase in importance, and some (17%) actually feel it will become less important. These findings are highlighted in Figure 10 over page.

The difference between the qualitative and quantitative research here is likely to relate to the quantitative survey being intentionally focused on gauging top-of-mind reactions to provide a 'general population perspective', while the qualitative research provided the opportunity to discuss the issues further and reach more considered views. It also suggests that, for some people, the internet can be expected to become essential 'generally' but less so on a purely personal level. For example, some older people in the qualitative research felt that broadband at home would become generally essential but not for them as they were 'too old' or 'not confident enough' to make use of broadband at home.

Figure 10: Expected personal importance of broadband at home in next 2-5 years
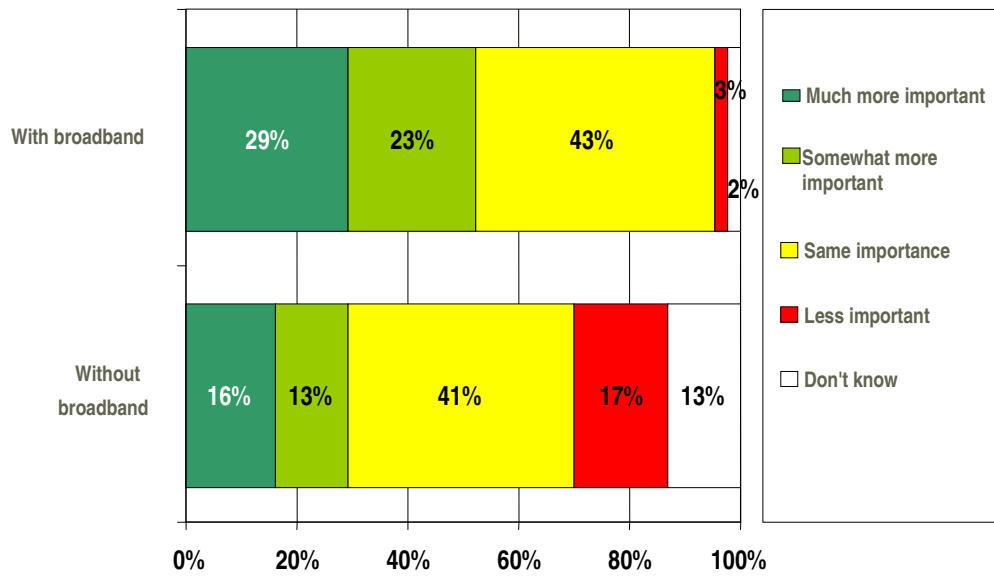
Q4/Q11 "How important do you expect having broadband internet at home will be to you in 2-5 years time compared to now?" Base: All respondents (2043): With broadband at home (1433); without broadband at home (610)

Amongst those who currently have broadband at home, certain sub-groups in the quantitative survey are particularly likely to expect an increase in the personal importance of broadband. These include ethnic minority groups, younger people (particularly those aged between 25-34 years) and those with children under 16 years in the household – as seen in the previous section, these groups also tend to regard broadband at home as already particularly vital (refer to Figure 11 below).

Conversely, while the qualitative research found some aged 65+ could identify benefits such as greater mobility and keeping up-to-date with the younger generations and modern world, the quantitative survey found that those aged 65+ with broadband at home tend to expect the importance of broadband to remain the same and they are also more likely than average to expect the importance to decrease, possibly due to feeling less than confident in using it now and anticipating that its relevance will be less as they get older and potentially infirm.

Figure 11: Summary of quantitative sub-group differences in expected future importance of broadband at home – those with broadband at home

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	AB	C1	C2	DE	16-24	25-44	45-64	65+
Much more important than now	29%	30%	28%	28%	29%	28%	34%	26%	17%
Somewhat more important than now	23%	23%	24%	24%	21%	28%	23%	22%	18%
Same importance as now	43%	44%	42%	42%	41%	38%	39%	46%	54%
Less important than now	3%	3%	4%	2%	4%	4%	2%	3%	9%
Don't know	2%	1%	2%	4%	5%	2%	3%	3%	3%

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	With children under 16 at home	Without children under 16 at home	Rural	Non Rural
Much more important than now	29%	33%	25%	28%	29%
Somewhat more important than now	23%	22%	24%	19%	24%
Same importance as now	43%	39%	45%	47%	42%
Less important than now	3%	2%	4%	4%	3%
Don't know	2%	3%	2%	1%	3%

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	Very/Quite confident using the internet	Not very/ Not at all confident using the internet	White	EMG
Much more important than now	29%	31%	25%	26%	49%
Somewhat more important than now	23%	23%	23%	23%	20%
Same importance as now	43%	43%	44%	46%	19%
Less important than now	3%	2%	4%	3%	1%
Don't know	2%	1%	4%	2%	10%

▧ Significantly more likely than average	▧ Significantly less likely than average

Q4 How important do you expect having broadband internet at home will be to you in 2-5 years time compared to now? Base: All those with broadband access at home (1433 – AB 359, C1 484, C2 315, DE 274, 16-24 239, 25-44 585, 45-64 482, 65+ 127, with children under 16 at home 579, without children under 16 at home 854, rural 167, non-rural 1266, very/quite confident using the internet 1141, not very/not at all confident using the internet 115).

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Amongst those in the quantitative research who do not currently have broadband at home, there are also some differences. Not surprisingly, those who intend to get broadband at home in the next 6 months are more likely to expect its personal importance will increase, along with those who currently have a dial-up service or access the internet elsewhere. In addition, younger people (particularly those aged 25-34), more regular and confident internet users and those with children under 16 at home tend to expect its importance to grow, as do people who currently regard it as 'nice to have' but not essential. Mobile only households also emerge as a group which tends to expect the internet to become personally more important in the future, which may relate to this group being predominantly younger and/or more comfortable with technology. On the other hand, 65+ year olds, those unlikely to get the internet in the next year and those who have never used it, are more likely to anticipate no change or a decrease in the personal importance of broadband at home (see Figure 12 below).

Figure 12: Summary of quantitative sub-group differences in expected future importance of broadband at home – those without broadband at home

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	AB*	C1	C2	DE	16-24*	25-44	45-64	65+
Much more important than now	**16%**	15%	22%	16%	13%	40%	33%	16%	2%
Somewhat more important than now	**13%**	18%	15%	13%	12%	25%	21%	15%	6%
Same importance as now	**41%**	48%	37%	45%	40%	26%	30%	44%	49%
Less important than now	**17%**	14%	12%	13%	21%	4%	3%	12%	28%
Don't know	**13%**	6%	14%	13%	15%	5%	14%	14%	15%

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	With children under 16 at home	Without children under 16 at home	Rural	Non Rural	Very/ quite confident with the internet
Much more important than now	**16%**	42%	10%	14%	16%	38%
Somewhat more important than now	**13%**	23%	11%	16%	13%	23%
Same importance as now	**41%**	25%	45%	37%	42%	31%
Less important than now	**17%**	3%	20%	26%	15%	3%
Don't know	**13%**	8%	15%	7%	15%	5%

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	Likely to get broadband in the next 6 months	Unlikely to get broadband in the next 6 months	Dial up internet access at home*	Uses internet elsewhere
Much more important than now	16%	52%	7%	33%	33%
Somewhat more important than now	13%	20%	11%	14%	26%
Same importance as now	41%	24%	47%	34%	30%
Less important than now	17%	0%	21%	7%	6%
Don't know	13%	5%	14%	12%	5%

How important do you expect having broadband at home will be to you in 2-5 years time?	Total	Access to mobile phone and landline	Access to mobile phone only	No mobile phone
Much more important than now	16%	15%	29%	5%
Somewhat more important than now	13%	13%	21%	5%
Same importance as now	41%	42%	32%	49%
Less important than now	17%	19%	6%	22%
Don't know	13%	11%	12%	19%

▰ Significantly more likely than average	▰ Significantly less likely than average

Q11 How important do you expect having broadband internet at home could be to you in 2-5 years time compared to now? Base: All those without broadband internet at home; Base: All those without broadband access (610 total – 16-24 65 25-44 123, 45-64 146, 65+ 277, AB 56*, C1 122, C2 126, DE 306, with children under 16 at home 113, without children under 16 at home 498, rural 112, non-rural 498, very/quite confident using the internet, with access to mobile phone and landline 312, with access to mobile phone only 144, no mobile phone 154, likely to get broadband in the next 6 months 103, unlikely to get broadband in the next 6 months 468, with dial up internet access at home 59*, uses internet elsewhere 127)*
Bases less than 100 highlighted with asterisk (*) and bases less than 50 not shown (e.g. those not very/not at all confident using the internet n = 34 not included because base size too low)

Broadband internet will be essential when people are disadvantaged or miss out by not having it

There is an expectation among participants in the qualitative research that people will be disadvantaged by not having ready access to the internet in future, either because they will have to pay more or miss out on some services or options. The potential for the internet to create broader life opportunities – such as for social mobility – was also raised in the qualitative research. For example, people spontaneously refer to having broadband at home being a route out of poverty by providing additional educational and vocational opportunities. Those without broadband are expected to miss out in this respect too.

"I think you'll pay more too, if you don't use the internet. There are so many forms, like tax forms, now that are online. You see that you can save £10 or £15 if you do it online. Soon it'll be, 'If you do it on paper, it'll cost £10 or £15 more'." (Male, Belfast, 40-64, ABC1)

"Things like, you can fill out your gas meter online and stuff, and I think gradually that will become compulsory, and you'll have to do stuff like that online. And also I think a lot more things are coming through by email than post, and I just think that you will be more disadvantaged by not having it." (Male, London, 18-24, C2DE)

"At first, (firms were) incentivising you to use the internet. Now they're more penalising you for not doing it. So I think that's going to come around a lot more. Here, we said earlier, the girl at uni, she had to do it online. It's not fair for people without it." (Male, London, 18-24, ABC1)

"It's a good way out of poverty as well. You know, like entrepreneurs using it, and I think that's the way forward. I don't know, you could use the internet to get out of poverty, you know, and create a sort of social mobility, with the internet. If you haven't got that then, you know, you're definitely disadvantaged." (Male, London, 18-24, C2DE)

"If they're young families that are out of work, and I hear what you say, sometimes with four children. But those four children probably don't have the internet, and they would do better at school if they had the internet. They then won't be doing the same as their mum and dad because they will then have access to the internet at home." (Female, Plymouth, 65+, C2DE)

"You might be on a low income because you can't get a decent job; the opportunities to get a decent job, more ways are on the internet. I know it's a vicious circle, but if you get the internet you can get yourself out of the low income situation." (Male, Plymouth, 18-39, E)

It is felt that, as more services and activities move online, people will find that using alternative access points to the home – such as work, libraries and internet cafés - are a less and less feasible proposition because of the costs, restrictive times they can be accessed and the less secure environment they represent. Such alternative access points are also likely to be particularly inconvenient for some groups, such as those living in rural areas (where there may not be an alternative access point at all locally) or those who cannot access alternative points during working hours when they are likely to be open.

"I mean at the library you go in for an hour. It might be 8 at night, you can go onto your computer. You can't go to the library. You can't go to these community centres. But if you have got one at home it's okay." (Female, Consett, 65+, ABC1)

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"There's internet cafes. Two internet cafes (locally) have closed down because the drugs and everything getting passed about inside them. Fights inside. The equipment is getting wrecked, so they closed them down. You go to the library and… you sit with maybe about twenty-odd people and a librarian is instructing that person there, when that person there is trying to concentrate on what they're doing." (Male, Glasgow, 65+, C2D)

"If you have to go to something at say, eight o clock at night, you know, you don't have that. I think there are lots of examples that you can think of where people actually need (access at home)… You could argue that it does become an essential thing, so you can do your banking." (Male, Belfast, 40-64, ABC1)

Section 6

What is driving the perceived importance of broadband at home?

The internet is valued by those who use it as a **'means to an end'**; that is, for the information it provides and activities it facilitates. Internet users are currently utilising the net for a wide variety of functions, particularly as a way of accessing a broad range of information, for communicating through email and social networking sites, and for completing transactions like online shopping and banking. Not surprisingly, use of the internet for all of these activities is higher amongst those with broadband at home, with a particular difference in use for communications or transactional purposes.

Of all the activities the internet is currently being used for, people currently place most value on information, communication and transactions, each of which **do not currently require the greatest broadband bandwidth or speed**. However, a considerable proportion is using the internet for relatively new entertainment activities which involve downloading and streaming content.

There are **many perceived advantages** associated with conducting these sorts of activities over the internet compared to offline alternatives. Being quicker, easier and more flexible than traditional channels is top-of-mind amongst these. Other perceived benefits include increasing consumer choice, providing cost savings, making it easier to connect to others and maintain communities of interest, furthering learning opportunities and equipping people to make more informed decisions.

A number of developments are expected to increase the importance and value of the internet in future. For example, generations are seen to be coming through who have grown up with the internet and for whom using it is second nature. In addition, cost and environmental pressures are anticipated to drive the delivery of more goods and services online - and the expectation is that transactions will be one of the uses of the internet that increases most in importance over time. In addition, the decreasing price of hardware and broadband packages is expected to mean that having broadband at home will be more affordable.

The internet is important as a means to an end

The internet is valued by those who use it as a 'means to an end'; that is, for the information it provides and activities it facilitates.

Internet users are currently utilising the net for a wide variety of functions. In the survey, nine in ten (90%) internet users report utilising it for finding information, more than three quarters (78%) for communication, seven in ten (71%) for completing transactions, more than half (55%) for entertainment and almost one third (30%) for a civic participation activity, as shown in Figure 13 below.

Figure 13: Categories of activities using the internet
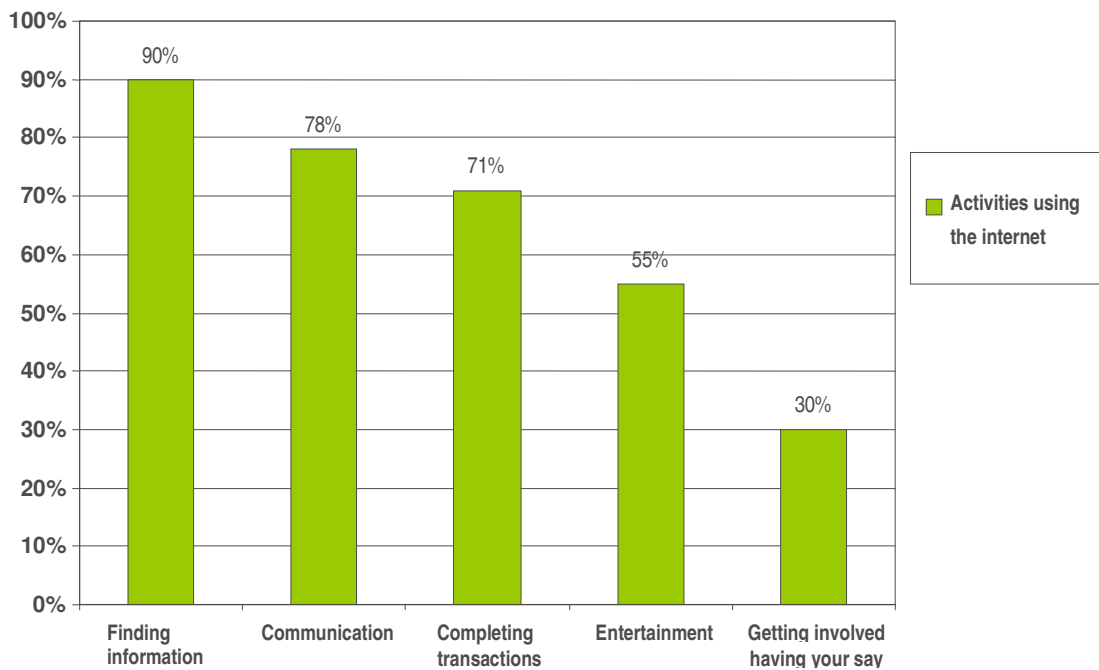
Q1A "Can you please tell me from this list the kinds of things you currently do using the internet?"
Base: Those who have used the internet in the last 12 months (1527)

Within these broad categories of activities, the more specific functionalities or services used are highlighted in Figure 14.

Figure 14: Specific activities using the internet within each category

| Information	90%
General information/searching	61%
Information for hobbies	54%
Information for work	51%
News and weather	48%
Travel/holidays/what's on	45%
Information on government/local council	28%
Information for school/college/uni	26%
TV/ entertainment information	21%
Communication	**78%**
Emailing	70%
Social networking	38%
Online chatrooms	24%
Completing transactions	**71%**
Online shopping	51%
Online banking	48%
Buying and selling online	37%
Paying government taxes/fees	21%
Completing a government process	15%
Entertainment	**55%**
Watching video clips online	34%
Listening to radio/downloading music	33%
Watching TV/films online	27%
Playing online games	21%
Civic participation	**30%**
Contacting government department/local council	16%
Signing an online petition	15%
Taking part in a government survey online	9%
Joining/donating money to a campaigning organisation online	9%
Giving views on a community/social/political issue online	8%

Not surprisingly, the quantitative research reveals that those with broadband at home are more likely to undertake each category of activity, and they show significantly higher use of the internet for communication and completing transactions compared to those accessing the internet elsewhere or who only have dial-up at home. There are also some other sub-group differences, including that most activities are carried out by more from the highest socio-economic (AB) groups and by fewer from the lowest socio-economic grades (DE). Younger people (16-24) use the internet more for entertainment, but less for other activities such as transactions or civic participation. It is the 45 to 64 year old group that stands out for doing most civic participation activities online. Those in rural areas are using the internet to a similar extent to urban dwellers for the most part (and slightly more for transactions). However, they are less likely to use the internet for communication, which may relate to them living in less transient geographically-based communities than their urban counterparts. All of these differences in usage of the internet are shown in Figure 15 below.

Figure 15: Categories of activities using the internet – sub-group differences

Activity	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
Finding information	90%	91%	78%	95%	92%	89%	80%
Communication	78%	82%	56%	85%	82%	73%	68%
Completing transactions	71%	75%	41%	83%	73%	68%	56%
Entertainment	55%	58%	32%	58%	59%	53%	48%
Civic participation	30%	32%	11%	44%	33%	19%	18%

Activity	Total	16-24	25-44	45-64	65+
Finding information	90%	87%	91%	92%	80%
Communication	78%	83%	80%	75%	68%
Completing transactions	71%	64%	75%	72%	60%
Entertainment	55%	68%	58%	48%	31%
Civic participation	30%	20%	31%	35%	21%

Activity	Total	With children under 16 at home	Without children under 16 at home	Rural	Non Rural
Finding information	90%	88%	91%	89%	90%
Communication	78%	79%	78%	70%	79%
Completing transactions	71%	72%	70%	74%	70%
Entertainment	55%	56%	54%	53%	55%
Civic participation	30%	28%	31%	24%	30%

Significantly more likely than average

Significantly less likely than average

Q1a "Can you please tell me from this list the kinds of things you currently do using the internet?"
Base: All adults aged 16+ who have used the internet in the last 12 months (1527 total - those with broadband internet access at home 1325, those without broadband internet access at home 201, AB 364, C1 514, C2 336, DE 313, 16-24 294, 25-44 648, 45-64 478, 65+ 107, with children under 16 at home 626, without children under 16 at home 900, rural 184, non-rural 1343)

In the qualitative research, participants who use the internet tend to do so for so many things that they find it difficult to name them all. The following quotes give a flavour of the many different ways the internet can fit into and improve participants' lives, and the various tasks they use it for:

> *"I've been on Friends Reunited … somebody contacted me. I've ordered a birthday cake. Ordered some school uniform and I've checked for car insurance." (Female, London, 25-39, ABC1)*

> *"Booking tickets for a concert. Just football team news. Regarding work, checking stock levels, and just e-mailing friends." (Male, Colwyn Bay, 25-39, C2DE)*

> *"Just buying things and personal emails. I do all my banking and buy a lot of stuff off of the internet as well. Sports clothes, things like that. What else do I do? Pay my road tax. Anything you can kind of do on the internet, I tend to do it." (Female, Glasgow, 39-64, C2D)*

> *"I have booked flights to Spain. Gatwick car park, car hire. I have looked up recipes and have looked up theatre tickets." (Female, London, 40-64, C2D)*

Internet access perceived to provide many benefits

The qualitative research found many perceived advantages associated with conducting activities over the internet compared to offline alternatives. Being quicker, easier and more flexible than traditional channels are top-of-mind amongst these.

The main activities the internet is used for and the benefits provided also underlie perceptions from those with broadband at home in the quantitative survey as to why they have broadband at home. As seen in Figure 16 below, the main reasons spontaneously given for prioritising broadband at home were its usefulness of communication, finding information, for work and for 'everything'.

Figure 16: Main reasons for views about the importance of broadband access at home – those with broadband
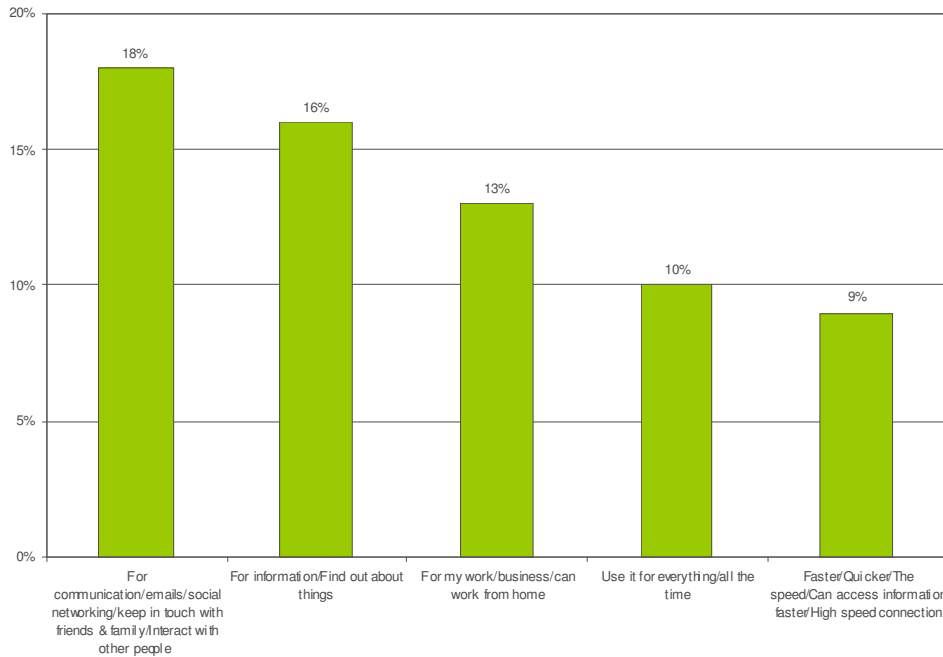
Q3: "You said that broadband internet access at home was – It's essential / I couldn't be without it, it's important / I value it highly, it's nice to have but not vital, it's not particularly important to me, I don't value it at all, I don't know. Why do you say this?" Base: those with broadband (1433)

By contrast, fewer of those without broadband tend initially to recognise the advantages and therefore are less interested in or perceive a lower need for broadband at home. Some also cite barriers such as perceiving broadband at home to be too costly or complicated as shown in Figure 17 below.

Figure 17: Main reasons for views about the importance of broadband access at home – those without broadband
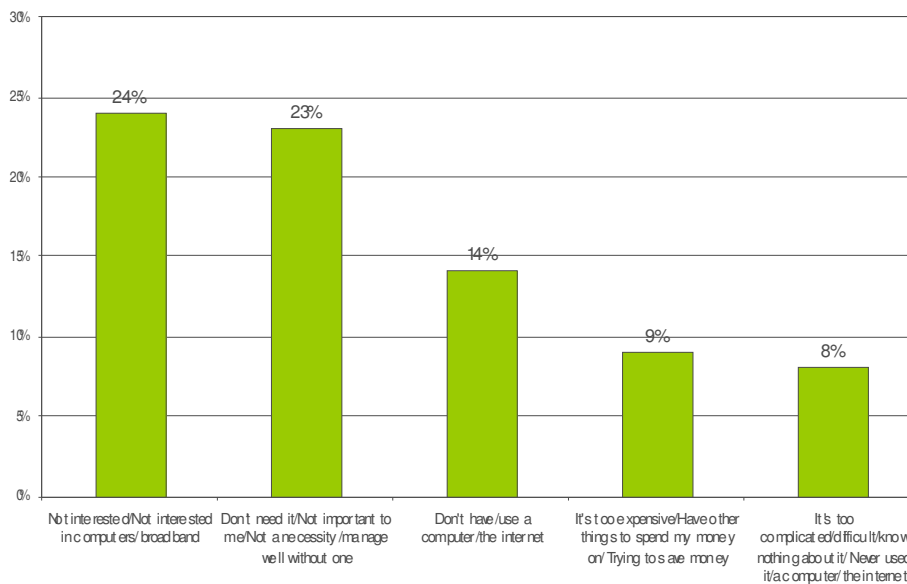
Q10 "Why do you say that?": (In response to Q9: "Broadband at home is an essential service that I am currently without/Broadband is an important service that I would value highly but am currently without/ It would be nice to have broadband at home but I don't think it is vital that I get it/ Having broadband at home is not particularly important to me/ Having broadband at home is not important to me at all/ None of these/ Don't know") Base: All those without broadband (610)

However, upon further consideration in the qualitative research, even those currently without broadband at home can see many benefits, such as:

- **A quick and convenient way to access a wealth of information:** Information provided by the internet is seen in the qualitative research to be particularly important for those in full-time education or in business, but also to help people pursue personal hobbies or interests, further their learning and opportunities, and make informed decisions and choices. Specific mention is made of information that people would not otherwise be able to access easily (for example, family records or medical information), as well as of information to help people make choices (such as comparator websites and user recommendations).

  "It's easier to type it in than going to the library looking through hundreds of books but not getting it." (Female, Colwyn Bay, 25-39, C2DE)

  "I think just the level of information that you can get hold of so quickly. Actually if you don't know something you need to find out it's really like 30 seconds, less than that, then you've got it in front of you." (Male, London, 18-24, ABC1)

  "Mostly Googling. A lot of things to do with, because we're planning on moving to France in this year, so it's just anything to do with that in terms of looking at jobs. That's another thing. We're looking at jobs abroad and stuff like that. That's far easier to do." (Male, Colwyn Bay, 25-39, C2DE)

  "Medical information. My daughter was ill (at) night and we had to give her medication… So I was able to go online and just check it all out before I could go ahead and give it to her." (Female, Belfast, 18-39, E)

  "In college, I've got to, like, learn, like, all the things in the bones, so you know like, you can go, like, see the outer layer of all the skin and that, I couldn't get that from anywhere else, but I can just get it straight off the computer." (Female, Colwyn Bay, 18-24, ABC1)

  "You can research on holidays. Before you even pick things you can research them. You will have people's opinion on what's good and what's not good." (Female, London, 40-64, C2D)

- **The ability to communicate and socialise with people all over the world:** The internet is perceived by qualitative research participants to have made the world smaller, enabling people to keep in touch with friends and family wherever they reside, maintain communities of interest and provide a feeling of connection to compensate for traditional communities which can be perceived to be breaking down. Email is seen as a particularly efficient transactional form of communication, overtaking the telephone in some cases, while services such as Skype enable people to keep in touch with close family and friends, and social networking sites allows them to maintain wider networks, or reconnect with friends and acquaintances from the past.

  "I've got a niece who stays in New Zealand and her daughter stays in Portugal and my niece saw the birth of her daughter's child through the internet. … She watched it on her screen through a webcam and it was filmed. … It was filmed in the hospital in Portugal." (Male, Glasgow, 65+, C2D)

  "Yes, the computer to me has been great because one of my daughters lives in Beijing and I've been able to Skype her, so that's a really, you know, fantastic to be able to see the grandchildren." (Female, Plymouth, 65+, C2DE)

"Social networking sites I suppose. A lot of my friends live away from home now and one of my brothers as well, so I can see what they're up to. Especially when I go travelling it will be easier to get in touch with my friends and family." (Male, London, 18-24, C2DE)

"Well, as I say, to keep in touch with my family that are abroad. Facebook, because I keep in touch with just all of my family and friends and some of my friends I haven't seen for a long time, I'm able to now talk to and it's really rather nice." (Female, Plymouth, 65+, C2DE)

"Skype allows you to talk. I mean I remember when I was young, and that's going back a bit, my uncle used to ring from America and you'd get about one minute to talk to him on the phone and be passed to someone else. Now my brother lives in Canada and you can't shut him up. He's over there and I'm here, you know." (Male, Belfast, 40-64, ABC1)

"It makes the world a smaller place. My brother is in Australia and I know what he did last week and the week before that, you know, it would be hard for me to keep in contact." (Male, London, 18-24, C2DE))

- **Convenience, enhanced choice and cost saving associated with online transactions:** Saving people time searching shops, and the convenience of being able to make transactions at the most convenient times to the individual, are top-of-mind benefits of online transactions outlined by participants in the qualitative research. However, the increased options available through the internet are also felt to enhance consumer choice and provide lower cost options. In addition, online transactions such as banking and bill paying are perceived to help people to keep on top of their finances and administration more easily.

"That's another thing with booking holidays and flights (online). You can do it any time of day, can't you? It's not, like, you're not tied to when the travel agent's open." (Male, Colwyn Bay, 25-39, C2DE)

"I see it as time saving. You can sit down at the computer and get an email from Scottish Power, your meter readings are now required, you go to the meter take a reading and send it through the computer and that's it." (Male, Glasgow, 65+, C2D)

"Because it's less hassle. When you go to the Post Office to buy your car tax, you've got the queues. I can only get out at lunch-time. You've got the queues and then you've got half your lunch-time taken up, isn't it? And you've got to pay your TV licence. You've got to go, I don't know, different places where you have to pay your bills. It's so much easier to do it online than end up queuing all day, especially if I'm working." (Female, Colwyn Bay, 25-39, C2DE)

"You can save quite a bit of money (online), last year we got a washing machine, and they said they were £140 getting it through Dixons, if we had gone to Comet we would have paid an odd £100 more, you know." (Male, Glasgow, 65+, C2D)

"Also they can go on and compare prices, so obviously they get better deals. They have the access, I mean you're not going to go round 40 insurance places for your car insurance." (Female, Belfast, 40-64, ABC1)

- **A range of entertainment options at people's finger tips:** Getting 'what you want, when and where you want it' is increasingly a consumer expectation when it comes to

entertainment, and was again emphasised in the qualitative research. The internet is perceived to be technology which is particularly helpful to people achieving this. For some, discovering the range of activities the internet has to offer can also be a leisure activity in its own right. For younger people in particular, the opportunity to be creator as well as consumer of content appeals.

"It's (the Xbox) just taking advantage of the broadband as in playing with people around the world whether it be from different parts of this country or America or wherever but downloading games, demos even movies as well" (Male, 24-39, Consett, ABC1)

"I actually found a site where you can go on and watch films only released in the cinema. Then after I registered twice, it wouldn't let me register again so I don't go on it anymore. You get to watch films." Male, Belfast, 18-39, E

With civic participation, because so few in the qualitative research were conscious of undertaking these sorts of activities online, less value was ascribed to it. However, the minority who were undertaking civic participation activities online regard it as a **quicker and easy way to have your say or get involved** compared to traditional channels. However, in the quantitative research, three in ten (30%) were actually undertaking some sort of specific activity that could be deemed civic participation, with related government activities also being undertaken by some people (15% completed a government process, 21% had paid a government tax or fee online – refer to Figure 14). Participants in the qualitative research expected that more government services and processes would be moving online in future, and that they will be interacting more with government in this way as a result.

Activities that people use and value most do not require greatest bandwidth

The quantitative survey found that of all the activities the internet is currently being used for, internet users currently place most value on information (76% ranked an information-related activity as one of the most important), communication (57% ranked a communication-related activity as one of the most important) and transactions (53% ranked a transaction-related activity as one of the most important), each of which do not require the greatest broadband bandwidth or speed (refer to Figure 18). These same categories of activity are what consumers expect will become even more important to them in the next 2-5 years, with the most frequently mentioned specific activities being information for work (31% expect an increase in importance), emailing (29% expect an increase in importance) online banking (27% expect an increase in importance) and online shopping (22% expect an increase in importance)[6].

However, some are already using the internet for entertainment activities which involve downloading and streaming content. This was a finding in both the qualitative research, when participants were asked what they use the internet for, and the quantitative research (for example 34% watch video clips online, 33% listen to the radio or download music and 27% watch TV or films online – see Figure 14). It could be expected that usage (and value) of these activities will increase as more options become available to consumers in this area.

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[6] More detail on individual activities used and prioritised is contained in Annex 1 of this report.

Figure 18: Categories of activities used and prioritised
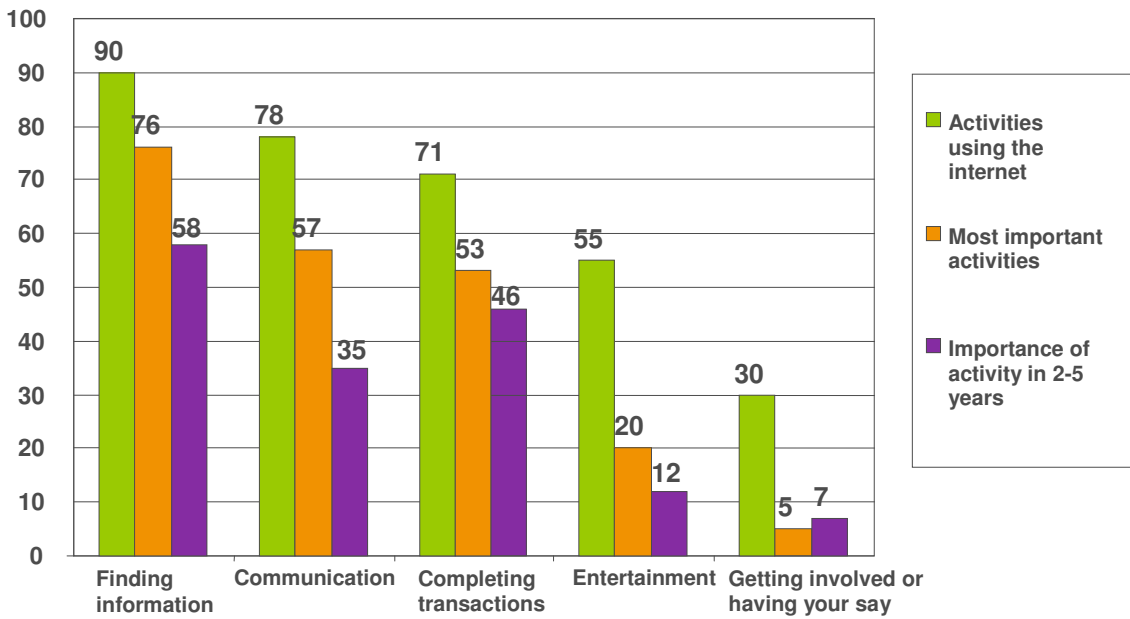
Q1a: "Can you please tell me from this list the types of things you currently do using the internet?"
Q1b: "Which of these activities and services are most important to you?" Q1c "And which of these do you think will become more important to you in the next 2-5 years?" Base: All those who have used the internet in the last 12 months (1527)
Note: Respondents were given a maximum of five choices when asked which was the most important/which they expected to become more important.

Expectation of increased importance driven by anticipated demand and supply driven changes

The previous section showed that having the internet at home is expected to be essential in the near future. The qualitative research found that a number of factors are anticipated to contribute to the increased importance of the internet and its greater use for the activities described above.

Firstly, the increase in the number of people who are learning to use the internet and acquiring broadband access at home is perceived to be contributing to a growing importance of having broadband at home. In part this increased home access is felt to be because prices of both computer hardware and internet contracts have come down enough to make having broadband access at home a realistic proposition for most people.

> "The more people get savvy with it, so, like, my dad and mum, they hadn't got a clue about it until maybe a year or so ago. But now they are sending e-mails and my dad's on the poker site and my mum wants to look for a new washing machine. They are starting to, you know, they want to be consumers… and now, they're actually thinking to themselves, 'Well, hold on, I can save money.' So, the generations, as they get older, more people are going to be using it and less people are going to be (left out)." (Male, Belfast, 18-39, E)

> "I think as well if you look at the old sort of generation who are just, I would say my parents' generation, sort of 60 and 70 year old who are using it and do see it as important, although they've not become reliant on it, it's quite slow their usage; it's quite limited. The fact that they've felt the necessity to get it, that's an indication of how important it is." (Male, London, 25-39, ABC1)

Secondly, people identify the longer-term trend of generations coming through who have grown up using the internet and for whom it is second nature.

"It will be more important to everyone because now children are being brought up on it. They don't know any different so it's going to become the norm like it's expected. Whereas obviously the older generation where they're used to the dial-up and that kind of thing, but there are new generations that have never ever experienced it before. So it's going to be just the done thing." (Female, London, 18-24, ABC1)

"Especially the younger generation that are growing up now. My son is four years old and he knows how to work the internet because of school, so they're going to rely on it more than what we rely on it now." (Female, Colwyn Bay, 25-39, C2DE)

"Yes, it's very important, especially for the young children, more and more they've all got their computers at school, they've got their laptops now a lot of them are using and they're doing their homework on them. For our generation, almost passed us by, but for the youngsters it's an essential part of their life." (Male, Plymouth, 65+, C2DE)

Thirdly, the importance of broadband at home is viewed by qualitative participants as growing due to the perceived increasing tendency for goods, services and activities to migrate online, resulting in fewer or more expensive alternatives being available offline. This is a trend that people feel is affecting many types of transactions and activities including shopping, banking, school/university work, job searching and accessing government services. This trend is perceived to be driven by the lower overheads involved in commercial organisations providing goods and services online. It is also seen to be a trend that government and educational institutions are also seen to be encouraging, because of both efficiency and environmental considerations.

While some welcome these changes for the greater convenience and associated cost savings they may present, others feel that they will be forced to use the internet in future even if they would prefer more traditional alternatives.

"I think it's going to more important because that's the way society is going….More and more is being done on it. Shops are closing down, more people are going to have to shop online to get the things that they want, and I think whether you want it to become more important or not… it will do just with the way society is going." (Female, Plymouth, 18-39, E)

"It'll get to the stage where you can't do things practical, you'll have to go on the internet." (Male, Belfast, 18-39, E)

"I (think it's going to get) more important because I think the options and things that are happening now, the options to buy things, they're so much cheaper on there." (Female, London, 25-39, ABC1)

"I think online shopping will affect a lot of smaller businesses. I think eventually you will not be able to go into a shop and buy things." (Female, Consett, 25-39, C2D)

"Well I think the Welsh Assembly are quite keen on going that route. On communication as well. They have already factored it in their stuff now." (Male, Llanpumsaint and Carmarthen – 'notspot', 65+, ABC1)

"I think it will be much more important because the Government's definitely pushing a lot of their business that way. Say tax returns, they're definitely pushing for you to do your tax returns online if you do get involved with that, your car tax, now online and a

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lot of things are getting pushed up that way. If you want tax forms you can download them straight off the internet and a lot of other forms as well and the Government is definitely pushing the internet, presumably because it saves them a lot of money, you supply the paper and they save labour." (Male, Plymouth, 65+, C2DE)

"There are a lot of kids coming in with homework and they need to go on to get the homework and if you didn't have it what would you do? Go to school and say, sorry I can't do my homework because I haven't got the internet." (Male, Consett, 25-39, C2D)

"Surely because if somebody can't get in touch with me by phone, if I've applied for a job or anything like that, they can send me the maps/directions of how to get there, what I need to prepare myself for etc. From that then I can use the internet to source things that I need to research sort of thing." (Male, Belfast, 18-39, E)

"I go to the Job Centre and you get like a couple of pages of whatever but then you go on the internet which I've been doing lately looking for jobs and stuff and you just get so much more option if like you have got 8 or 9 different sites, job sites you can go on." (Male, Consett, 24-39, C2D)

Section 7

How much support is there for 'access for all' and how should this be achieved?

Given the expected growing importance of having broadband at home, the **principle of access for all is broadly supported**, with some in the qualitative research having heard that this is the Government's intention.

Upon consideration, **government involvement in broadband is endorsed** and seen to be on par or more important than a range of other communications services.

In considering what type of involvement government might have in this area, there is a tendency for the public initially to focus on **retail subsidies**, an aspect of government involvement which polarises opinion. There is broad consensus about the desirability of government intervention to ensure **consistent broadband coverage** around the UK and to **increase levels of skills and confidence**.

Broad support for the principle of access for all

The qualitative research found that access to all initially tends to be taken to mean the geographical ability to get broadband access – that is, the availability of broadband in the local area. The issue of subsidisation for those who cannot afford broadband access is often also spontaneously raised. On discussion, participants also accept the role of skills and confidence as an access issue.

Given the expected growing importance of having broadband at home, the principle of access for all is broadly supported, with some in the qualitative research having heard that this is the Government's intention.

> *"They have made a commitment that they are going to enable all of the country including young people et cetera, by 2011, 2012 whatever it is, right. So they have made this particular commitment and they are doing it for a reason. For business reasons, they are doing it for all government services online, huge, immense savings they are going to make as a result of that. So they are driving it forward." (Male, Llanpumsaint and Carmarthen – 'notspot', 65+, ABC1)*

There is a strong consensus within the research that it should be made possible for everyone to be able to get and use broadband, whatever their income, skills or confidence, and wherever they live. There are several reasons outlined in the qualitative research for this view, including the principle of equality which requires that all essential services are made available to everyone who couldn't otherwise access them. Linked to this is a desire to avoid a 'have and have nots' situation, whereby those without access to broadband miss out on access to learning, employment and economic opportunities. Interestingly, one of the specific reasons for regarding universal access to be an important policy goal is that having broadband at home is associated with providing social mobility benefits. People spontaneously refer to having broadband at home as being a route out of poverty by providing additional educational and vocational opportunities.

> *"Well, let's imagine, right, that worst scenario when you've got a smart child from a poor background, who can benefit from it but they haven't got that home internet. They could learn more and basically improve their education." (Male, London, 40-64, C2D)*

> *"The Government on equality and everything, then it's about keeping the balance, where some people are, you know, maybe a little bit more advanced because of what they have available to them. As I said, children-wise, it isn't really fair." (Female, London, 18-24, C2DE)*

> *"Certain services are only available on line, then all sections of society should definitely have access to it." (Male, Belfast, 18-39, E)*

> *"I think, well, it's like electricity, I mean, a fair few people may do without electricity. So… I think broadband will be done the same. Your bills will come in by broadband, your bank will be done by broadband, and basically everything, your voting will be done by broadband. I mean, we can't rule all these things out." (Male, Belfast, 40-64, ABC1)*

> *"It separates… some people have it and some people don't, like it could become two separate groups." (Male, Colwyn Bay, 18-24, ABC1)*

The idea that everyone should be able to get broadband access no matter where they live draws particularly strong agreement in the qualitative research. Not surprisingly, those living in 'notspots' who cannot get broadband at home express particularly vociferous views on this aspect of access. They point out that they are paying the same rates as those who have access to broadband where they live, and feel that in return they should be entitled to the same services. They view broadband as very much an essential service in the same way as water or electricity and feel that, even though it is possible to exist without it, that it is essential to have broadband access in order fully to participate in modern life.

However, regardless of where people live there is a tendency to agree that having broadband coverage across the UK is an important objective. The point is made in the qualitative research that people living in rural areas may need broadband access more than those living in urban areas, as they can be more physically isolated.

> *"Some people that live in the country might not live there out of choice. They might have been brought up in that area and they still might really want to use it, so it does depend on, it should be available and there for everybody. I mean if you've gone to the country to escape then don't use it, but it should be available for everyone." (Female, London, 18-24, C2DE)*

> *"Well, I say we are demanding it… I am absolutely beside myself with rage that we cannot in this day and age be able to access the internet quickly and speedily. This is crazy stuff, this is. When everyone else is having the benefit and the enjoyment, if you like, that is denied to us, collectively I guess." (Male, Llanpumsaint and Carmarthen – 'notspot', 65+, ABC1)*

> *"Everyone now is entitled to receive mail through the post. Wherever you live in the country, you can live in the Arctic and you're entitled to the mail service; you should be entitled to receive the same service electronically, that's obviously by the internet." (Male, Belfast, 18-39, E)*

> *"If you are going to make something, make it so everyone can have it. Not make it just because you live in a city you can have it." (Male, Colwyn Bay, 18-24, ABC1)*

"I think no-one should lose out. No-one should be treated unfairly because of where they live. Quite often, the idea would be behind that that people who live in remote places might not get it. They need it more! Don't you think, they need the services more because they can't access shops, banks, et cetera." (Male, London, 18-24, ABC1)

The quantitative research confirms the endorsement of access for all[7], with high levels of agreement (as shown in Figure 19) that:

• It should be possible to have broadband at home, regardless of where people live (85% agree, 46% agree strongly)

• It is everyone's right to be able to have broadband at home (81% agree, 42% agree strongly)

• It should be possible also for people to gain the confidence and skills to make full use of broadband at home (79% agree, 32% agree strongly)

• It should be possible to access broadband at home, even if they have a low income (73% agree, 32% agree strongly)

Figure 19: Views on universal access questions
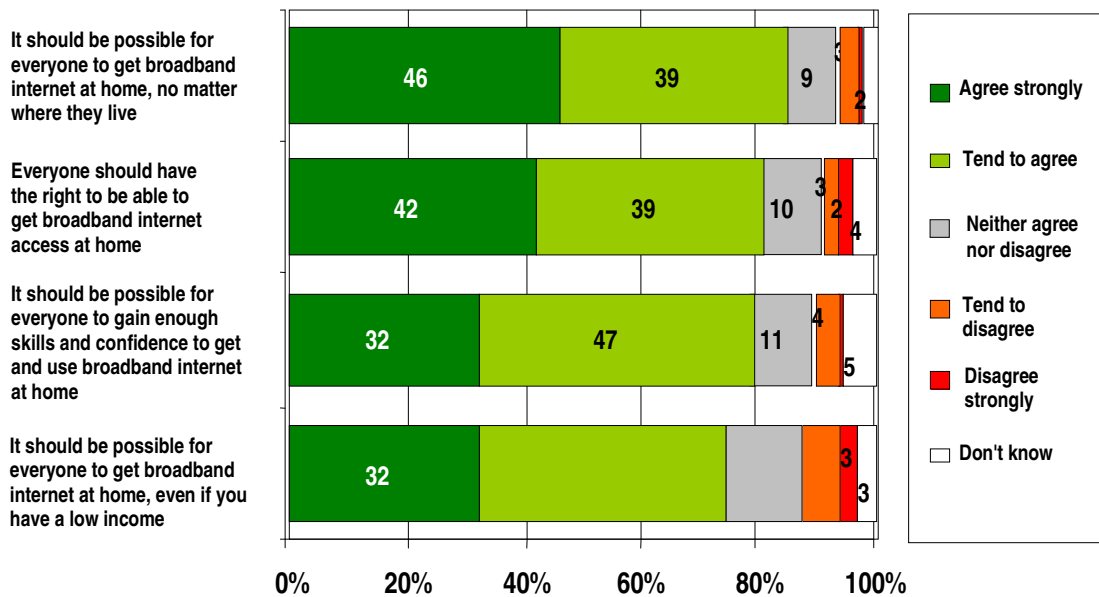
Q12: "Thinking about how important having broadband internet at home is for society generally, to what extent do you agree or disagree with the following statements?" Base: All respondents (2043)

Each of these statements receives a high level of agreement amongst all sub-groups, but a general pattern can also be observed where stronger levels of support come from younger people (particularly 25-44 year olds), those with children at home and those with broadband at home (particularly if they are also younger or have children at home). Conversely, people who are less supportive of these statements (although a majority still agreed) include older people (particularly 65+ year olds), those without children at home and those without broadband at home (particularly if they are also older or without children at home).[8]

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[7] No cost was mentioned to the participants for providing access
[8] The full sub-group analysis of this question can be found in the separate Annex to this report.

General support for government involvement

The question of the comparative importance of government involvement in broadband provision compared to other public services is initially difficult for participants in the qualitative research to assess. This is because most do not understand the exact role of government in different services, how the Government currently spends its money across services, or what different services cost to provide. Initially, the tendency is to respond according to Maslow's hierarchy of needs[9], where utilities such as water and electricity are deemed most important because people need these to survive.

Upon consideration, however, government involvement in broadband is seen to be on par or more important than a range of other communications services. For example, the qualitative research found that government involvement in broadband tends to be seen to be equivalent in importance to mobile phones, and as overtaking both landlines and the post, which are each seen as being on the wane. Those in rural areas are particularly likely to think that email is taking over from post. Many speak of losing their local post office and are therefore keen to make sure broadband infrastructure and individual access is in place before this happens.

> *"It's a means of communication and it's one that is, I mean in its day, the Post Office was a brand new innovative thing, but gradually modern technology has overtaken it to a great extent and although you do use letters and parcels and all the rest of it, the internet is slowly taking over that side of life." (Male, Plymouth, 65+, C2DE)*
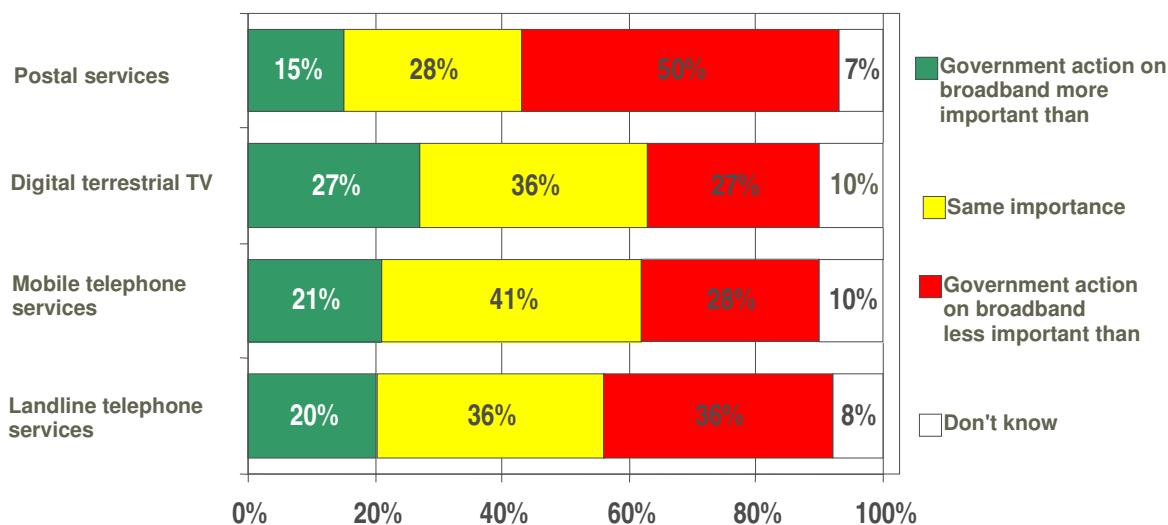
> *"You know, it's like getting rid of the Post Offices so where do you go? You end up online." (Female, Llanpumsaint and Carmarthen – 'notspot', 40-64, E)*

This leads most people in the qualitative research to come to the view that the Government should help people who need it get broadband internet at home (while these are indicative findings only, 41 people 'agree strongly' and 35 'tend to agree' from a total qualitative sample of 110).

In the quantitative survey, the majority feel that broadband at home is as or more important than a range of other services, with the exception of post. Sixty three per cent thought broadband at home was as or more important than digital terrestrial TV, 62% as or more important than mobile telephone services, and 56% as or more important than landline telephone services. This compares to 43% thinking it was as or more important than postal services.

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[9] A theory of psychology which proposes that a hierarchy of needs exists, with basic needs (e.g. food, water, shelter, safety) requiring fulfilment before higher order needs (e.g. esteem, self-actualization) can be addressed.

Figure 20: Importance of government action on broadband compared to other areas

	Government action on broadband more important than	Same importance	Government action on broadband less important than	Don't know
Postal services	15%	28%	50%	7%
Digital terrestrial TV	27%	36%	27%	10%
Mobile telephone services	21%	41%	28%	10%
Landline telephone services	20%	36%	36%	8%

Q13:"I'd like to get your views on how important it is for government to ensure that more money and resources go towards broadband services compared to other communications services that may also benefit individuals and society. Please tell me whether you think that government action on broadband internet at home is more important, the same or less important than government action in these other areas." Base: All respondents (2043)

Consistent with results reported previously, quantitative respondents with broadband at home, and more regular users are more likely to regard broadband as being as or more important than other communications services for government attention, compared to average. So too are younger people, those who are confident and regular internet users, and people with children aged under 16 in the household. In addition, ethnic minority groups are particularly likely to prioritise broadband compared to most other communications services.

Conversely, and as found for previous questions, quantitative respondents without broadband and older people tend to prioritise other services over broadband to a greater degree than average. In addition, those with fewer forms of technology in the household (terrestrial TV, no mobiles etc.) tend to value landlines and postal services more highly, as do people who live in rural areas and also those from Northern Ireland, in the case of landlines[10].

Mixed views on retail subsidies but endorsement of other forms of intervention

In considering what type of involvement government might have in this area, there is a tendency for qualitative research participants initially to focus on retail subsidies, an aspect of government involvement which polarises opinion. Given that broadband subscriptions and computer hardware are felt to be coming down in price, some are against subsidies as they believe that most people could get broadband at home even if this meant they have to 'do without something else'. There are also some in the qualitative research who emphasise their general lack of support of the welfare state or means tested benefits.

> *"They can afford broadband. They can afford cigarettes, you know, there's a difference." (Male, Belfast, 40-64, ABC1)*

> *"If it was that beneficial for you, you would cut expenditure on something else to get it. It's totally dependent on that." (Male, London, 18-24, ABC1)*

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[10] The full sub-group analysis on this question is available in the separate Annex to this report.

> *"Affordability, yes, I think even unemployed people, I think there are very few unemployed people out there who are living on the breadline. Yes." (Male, Belfast, 40-64, ABC1)*

> *"I was unemployed when my two children were growing up, and I'm single. Two kids, unemployed and a single parent, it's hard. We made it. You know, a fiver a week is not an extortionate amount of money. I think if you really want it that badly, for your kids, you'd get it." (Female, Belfast, 40-64, ABC1)*

> *"I just think that if it means financially the government are happy to support people to get computers in their home then its taxes going on something that they are already stretched aren't they. So whether I'd support that, I don't know." (Female, Colwyn Bay, 18-24, ABC1)*

However, others feel that affordability could be a barrier for groups with the lowest incomes and that providing government assistance would therefore be appropriate, particularly if this facilitates greater social mobility, in other words a route out of poverty or to provide greater educational and vocational opportunities. There is also a view that if government wants to bring more services online and potentially reduce access to offline alternatives, it has a duty to make sure people are not left behind. This includes the expectation on the part of schools that children have broadband access at home. The least controversial groups with respect to receiving retail subsidies are therefore older people, those who find it difficult to leave the house because of mobility difficulties and children from low income families, each of which tend to be seen as more 'deserving' of government help than other groups.

> *"I mean these low income families that have got children the same as everybody else, they should be able to have the same benefits." (Female, Consett, 65+, ABC1)*

> *"I work with people with different types of disabilities but I mean, you know, like the Government thinks it's valuing people, everybody's got value whatever their disability. There may be some groups of people within that, or some individuals within that, that would benefit greatly and others that wouldn't. So, you know, it's such an individual thing. It's okay – the right that – you know, but it's not going to be something you do for everyone because it's just stupid, isn't it?" (Male, London, 40-64, C2D)*

> *"The Government chooses to use the internet for their information so they should try and do something because otherwise it's unfair for the other people who haven't got it… If it's their decision to go through that route, rather than phoning up or contacting people another way, then maybe they should do something." (Female, London, 18-24, ABC1)*

> *"If the school are going to have part of the curriculum that is based on computer work, internet access, then I tend to agree. You know, the government should provide… (them) with a computer of some sort for them to be able to do that part of the curriculum. You know, to have a young child at home, quite distraught because she cannot do her school work… Whereas other people in the class have, you know." (Female, Llanpumsaint and Carmarthen - "notspot", 40-64, E)*

Views on the need for retail subsidies also depend on how important having broadband at home is currently seen to be – those in the qualitative research who regard broadband more as a 'nice to have' tend to be less supportive of retail subsidies, whereas those who regard it as essential are more likely to perceive a need for retail subsidies for at least some people.

> *"Do you know what I think, it comes down to the bottom line, how essential, and it's not essential to many people in this society, is it? … So, I think that's what the bottom*

line is, isn't it? … There may be some disabled people or some businesses, even, that it's essential for them to have the internet, other than that it is just a luxury." (Female, London, 40-64, C2D)

"You know, it is not that essential that you have the internet. They do give you the library and that but maybe five years with more shops shut and more things going on the internet then they (could) maybe think about it." (Female, Colwyn Bay, 18-24, ABC1)

"There is subsidies for Council Tax and all sorts of things so why not." (Male, Llanpumsaint and Carmarthen - "notspot", 65+, ABC1)

"Like aids, help aids, they get help with that. They get help with prescriptions, those that are on benefits and that get help. So why can't they get help with computers, if it's going to benefit them." (Female, Consett, 65+, ABC1)

In terms of what level of broadband service government should provide if it embarks on retail subsidies, the results of the quantitative research (in section 6) show that the activities people currently use and value most do not require the greatest bandwidths. There was some belief expressed by participants in the qualitative research that a 'basic' service subsidised by government would be regarded as acceptable, with those able to afford it expected to self-fund a more expensive/premium broadband service.

Other types of potential government involvement, while less top-of-mind, are less contentious than retail subsidies. For example, there is broad support in the qualitative research for the government intervening to ensure people can get access to broadband where they live by providing consistent broadband across the UK, or co-ordinating and compelling broadband companies to do so (this is particularly strongly voiced by people residing in 'notspots'). It is felt that government could co-ordinate access by sharing out the areas companies do not want to cover between them. People in notspot areas are particularly keen that this be done. They do not necessarily expect every provider to cover every area of the country, but think all areas should be covered by at least one provider. This is spontaneously raised both within the notspot groups and elsewhere in the UK.

There is also general endorsement in the qualitative research of government helping people who lack the ability and confidence to use the internet (particularly if they are older or internet novices). Although qualitative participants feel there is already a lot out there for those who want to learn about the internet and how to use it, they feel this will need to be expanded if the government expects everyone, including those who may have little interest, to get online. Specific ideas put forward in the qualitative research about providing free training, easy to use devices, a safe environment and free telephone helpline are all regarded as useful. Ways of making the internet more safe and secure particularly resonate, as protecting children and protecting against fraud are two of the main areas people are concerned about. While ideas such as an easy-to-use internet device or free telephone helpline are also received positively, participants are not sure how these would work.

"Educate people in the use of computers. Take away this fear that is there." (Female, Consett, 65+, ABC1)

"Well for rural places where, like BT or people like that, won't put the broadband in, the government should get involved with it to make sure that they are connected." (Female, Colwyn Bay, 25-39, C2DE)

"I think they should make sure that the broadband providers, between them, in some way, cover the country 100%. So Hobberton might not have Virgin, but they should

make sure that it is covered with someone else. I know you've got the dongle, but they should go round and make sure that every part of the country has coverage of some description so that everybody can get broadband access." (Male, Plymouth, 18-39, E)

"Like my parents, my mum especially, is just petrified that someone is just going to hack into her account and like, but then that's anything to do with money because they think it's going to… they just think it's amazing that you do anything with your money online because it's like, 'You're not scared!'." (Female, London, 18-24, C2DE)

A 'basic' rather than premium level broadband service expected from government

A number of questions about the level and type of service of broadband service that would be expected were also asked in the qualitative research. Key findings include that mobile broadband (i.e. connection through a USB stick or dongle) is seen as an addition rather than as a replacement for fixed broadband – this is because dongles are seen to be less reliable and cost efficient.

"I looked at it (dongles) when I went to get a laptop, thought that would be more convenient. But it's actually got all the download allowances and all that on it and it was really rubbish and I though it was easier just to go when I got a laptop and get a wireless. Got a wireless, rather than be stuck to like three gigs of whatever a month." (Male, Plymouth, 18-39, E)

"It was one of those 'pay as you go'. When you plug it in the side, you can take the laptop anywhere and plug it in and when you're watching videos, all you had was buffer (a delay message). It was buffer really for ages and ages… you couldn't watch anything on it." (Female, Belfast, 18-39, E)

"Well basically they advertise them dongles that are supposed to be x amount of the speed on them but basically it's just a SIM card inside, you are just basically getting dial up speeds." (Male, Consett, 25-39, C2D)

"Very often it's the case that you can't get your mobile signal and therefore you couldn't get the mobile access through your laptop if you're indoors. You could perhaps in the bottom of your garden." (Male, Llanpumsaint and Carmarthen - "notspot", 65+, ABC1)

"You have to put it through the window. I can actually get it if you put the dongle through the window and connect it to the laptop and you will get, more or less, a broadband signal… I have done it on occasions when I've been desperate because I got to a certain point that I have to file certain things on line and I got absolutely desperate and I managed to find a signal but, you know sometimes, if the weather is bad, I put it out, nothing. So, you know, it's all chance." (Male, Llanpumsaint and Carmarthen - "notspot", 65+, ABC1)

Participants in the qualitative research also expect to continue using a computer (or ideally a laptop for the greater flexibility to move around the house) as their hardware of choice – this is because computers are perceived to be a more natural environment for internet use, and to provide much better functionality than, for example, the TV, a game console or mobile handset.

"My son would use the laptop and he would use wireless. It's quite handy that you can carry it around the house. Of course sometimes you're walking round with

laptops you're bumping into each other. Sometimes you're sitting watching TV and they're down and got different computers on, but it's just the versatility – they take it to college and take it to work. They can pick up the internet and use a wireless connection and do their work somewhere. It's all just speed and convenience." (Male, Belfast, 40-64, ABC1)

"Well the laptop I can take into my room. The computer, because we've got a computer as well, because it's a family computer it stays in the living room so I can't really get my work done there really. Escape." (Female, London, 18-24, C2DE)

"What you need it for you can't see, you're wasting your time scrolling across the screen (on a mobile handset), so I just think, I just phone someone up and tell them to look for it at work." (Female, London, 25-39, ABC1)

"It's very slow on the phone and I don't know how to use it." (Male, Belfast, 18-39, E)

Expectations of speed and bandwidth are less clear cut and depend on the needs of the individual and the tasks they want to perform. As shown previously in this report (section 6), the activities people use and value most do not require the greatest bandwidths and speeds – and the qualitative research indicates that even the slowest broadband packages are felt to be quite fast these days. However, more than half overall are already using the internet for downloading and streaming audio-visual content and this type of usage can be expected to increase, as can use of video within communications.

"Well, if you're going to open up a document and there are 400 pages and you have to wait two days to open it sort of defeats the purpose. If you're looking for a bit of information and you call up a report and it's literally seconds the full document is there…. You can go in and check paragraph six and find out that's correct. In the days of the dial up and the wee modem you'd wait a week for something to download, you could get up and have a cup of tea, wash the car, visit your friends, come back and the screen was just starting to fill in, you know, you need the speed. People can't wait." (Male, Belfast, 40-64, ABC1)

"Nobody likes to wait. Everybody wants something done just now." (Male, Belfast, 18-39, E)

"Nowadays with broadband there are packages that are very fast. Now a lot of them they sell are a lot faster, but actually the smaller broadband packages are really fast. I mean where I live we're at the end of a telephone line so actually can't, people can't sell us bigger packages because I can only take two megabytes, but it's the lowest, but it's still pretty quick." (Female, London, 25-39, ABC1)

"If you're downloading a picture or music you really do need the speed. To download it, it really makes the difference between working better-, you might as well wander down the shop and buy the record." (Male, Belfast, 40-64, ABC1)

"If you're screening your TV shows, you need a higher speed to keep it flowing." (Female, Belfast, 18-39, E)

"Depending on your age and things like that and things you use it for, and then the speed of the internet becomes more appropriate to what you do. So if you use iTunes and download films then your need for broadband increases …. So how important it is, it just depends, you know, on the household and their lifestyle." (Male, London, 25-39, ABC1)

That said, even if people start using functionalities requiring greater bandwidths more often, there is evidence that they would not expect the greatest bandwidths and speeds to be available with a government provided or subsidised service - but instead for the service to enable them to do the 'basics' to ensure they are not disadvantaged.

A role for industry also identified

While a definite role for government in this area is seen, a key finding from the qualitative research is that people do not think that ensuring everyone has broadband access is just a matter for government. As well as thinking individuals should play their part, there is broad agreement that commercial providers (such as computer manufacturers and ISPs) should be helping to ensure that everyone can access broadband.

> *"No, I don't at all. I think the Government's got far too many fingers in our pies as it is and I think that the companies who set up these things, once they've set them up its money for old rope. It costs, you know, chicken feed to keep it running and they're coining it in hand over fist in charges, and some of that money could go to help people who actually do need this service and can't get it." (Male, London, 40-64, C2D)*

As well as providing consistent coverage across the UK (even if this is between a number of companies), qualitative participants think that companies should bring down their costs[11] through:

- Changing their offers to make them more economical, e.g. through bundling or pre-paid options

- Providing 'budget' options such as lower speed access for a cheaper price

- Capping their overall charges, or producing lower-cost hardware

- Subsidising low income groups (participants feel that this may have to be enforced by government and may therefore be another potential area for government action)

> *"Cheaper computers, reduced access costs. There is no point providing them with eight megabytes of download if someone cannot afford to pay for it, I mean that defeats the whole object, so you have got to look at these people and you cannot disenfranchise them purely because of low incomes. So you need to embrace that." (Male, Llanpumsaint and Carmarthen - "notspot", 65+, ABC1)*

> *"What we were saying was not solely the Government, but the Government could influence internet service providers. So something like BT, Tiscali, et cetera, to actually provide courses and DVDs and flow charts and things like that themselves, rather than actually putting it all on the Government. At the moment it isn't a necessity. If these people want more cash and they want people to use them, maybe they could advertise that fact." (Male, London, 18-24, ABC1)*

It is also thought that other businesses might also be able to help ensure everyone can access broadband – for example, one suggestion made is that Tesco could extend its 'computers for schools' scheme.

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[11] For some people, particularly those with visual or dexterity impairments, the cost of getting and using broadband is more than the cost of the computer plus subscription, should specific access technology be needed. However, this was not a factor mentioned in the qualitative or quantitative research.

Managing the downside of a technologically-led future still a priority

An important finding from the initial deliberative research Opinion Leader conducted on future consumer needs was that despite the many advantages associated with the internet, a potential downside of an internet-dominated future can also be seen. The same sorts of concerns were raised in the current study, including about the security and privacy of data, personal safety (particularly of children) and the potential contribution of the internet to a less social and more sedentary society.

There is a continuing desire expressed in the qualitative research for people to control the technology (and not the other way around), and for a balance between technology and 'real life' to be struck. Controlling the negatives is another area where government and others are seen to have a role.

> *"There's a responsibility thing side to it where you do come across the gambling sites and that." (Male, Belfast, 18-39, E)*

> *"I don't know. I just think it's a lifestyle that everybody seems to have and it just doesn't interest me, it really doesn't. I just think it takes away a lot of social skills and not meeting people and like, doing things face to face. We could all live in a box and do everything from that and I don't agree with that. He says he's got friends, how can they be friends if you don't know them?" (Female, Glasgow, 39-64, C2D)*

> *"As long as it is voluntary. There are certain older people who say 'I do not want anything to do with it'. They have a right." (Male, Llanpumsaint and Carmarthen - "notspot", 65+, ABC1)*

> *"Kids don't. I have a nephew who will not... go out at all, he won't socialise. He's sixteen. The only place he sees people is in school. That's it. They all stay in their rooms at night time and email each other. They don't go anywhere, do anything. They play those games where they're all playing. It's terrible." (Female, Belfast, 40-64, ABC1)*