



DIGITAL EXCLUSION RESEARCH

REPORT

JANUARY 2019

FURTHER INFORMATION

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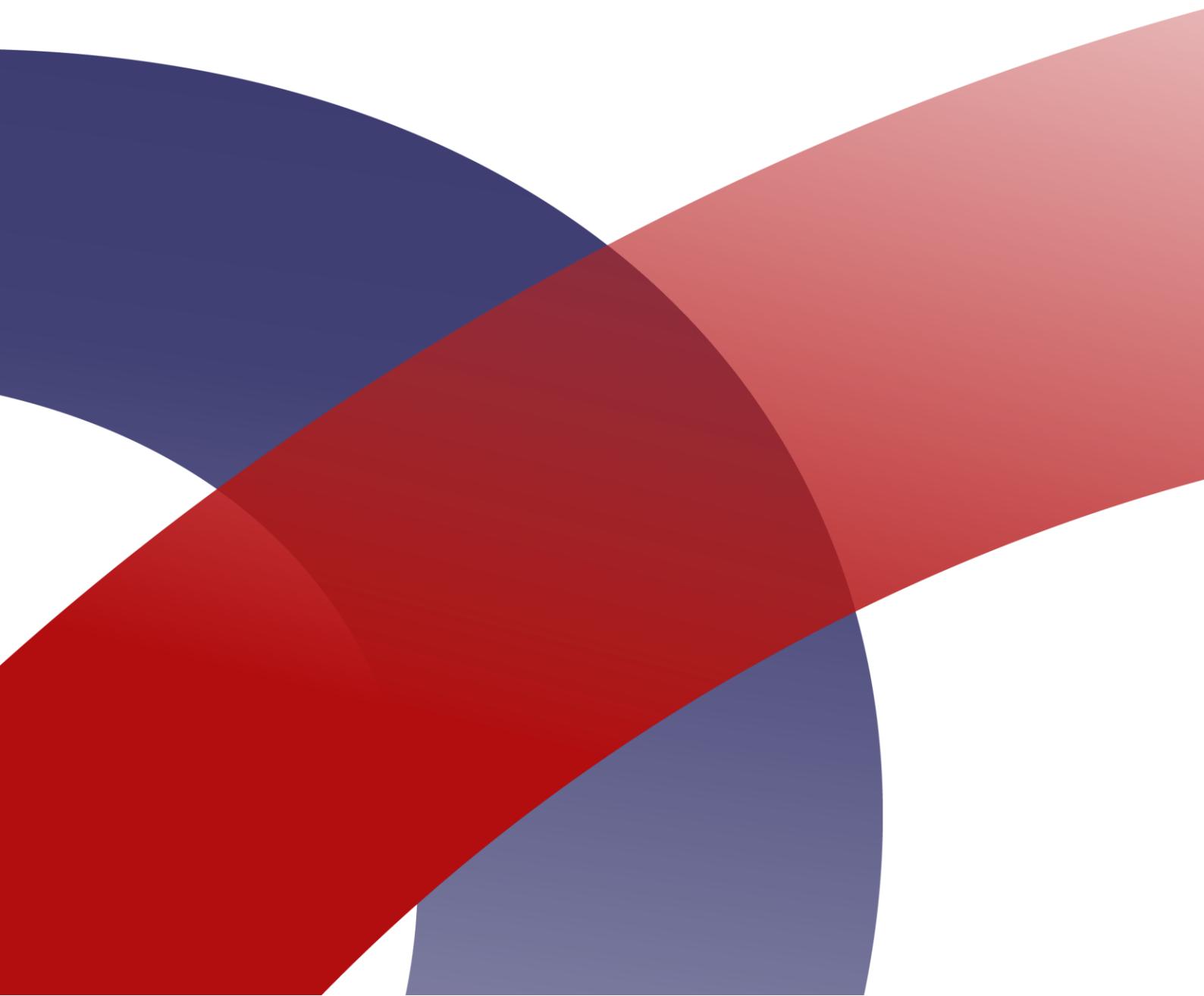
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1. BROADBAND STAKEHOLDER GROUP FOREWORD



1.1. BROADBAND STAKEHOLDER GROUP FOREWORD

The provision and take-up of internet connectivity is correctly seen as delivering significant private, economic and societal benefits. It has led to the creation of new and innovative services and applications, created efficiencies and helped increase the sustainability of our public services, and fundamentally changed the amount of information that is at our finger tips at any one moment. Used well, it has helped reinforce people's independence and control over their lives. That is not to say that the internet has not created or amplified existing social ills and posed challenges to traditional business models, regulators and policy makers alike – far from it. But our view, as you may expect it to be, is that the internet has been an unashamed good.

From this starting point and in our increasingly hyper-connected, always on¹, world it is easy to assume that everyone either is or wants to be online. This report is an important corrective to that assumption. Indeed, 8.4% of adults in the UK have never used the internet, with an additional 1.6% of adults not having used it recently². We know that there are some underlying trends; you are less likely to use the internet if you are unemployed, over the age of 65, disabled or in a lower income household. These indicate underlying issues of cost or confidence. However, half of those who do not have an internet connection state that the reason that they do not use it is that they do not want it³.

We commissioned ComRes to undertake this primary research to explore at greater depth the rationale behind this reluctance to use the internet, particularly why they chose not to use the internet and whether there were potential actions or interventions that may shift people into adopting the internet.

ComRes undertook both qualitative and quantitative research targeting both those who do not use the internet and those who have recently moved online. Of those who are offline, 75% felt that they did not miss out by not using the internet, with 79% believing that they were unlikely to use the internet in the future. Indeed, half (51%) felt proud that they did not use the internet. In spite of this, a third (33%) of people had asked others, particularly family members, to do something online on their behalf.

When prompted, security, safety and privacy concerns were cited as concerns amongst non-users with 76% citing this, closely followed by lacking the required skills (70%) and no interest in online services (70%).

Whether this is a problem depends on what the overarching question is. In simple terms, if we want to deliver a positive outcome for consumers then we have been relatively successful – we are delivering an increasingly enhanced experience for consumers at a generally flat price⁴. However, if we ask whether there is a wider societal and public policy issue of needing near universal levels of internet access in order to ensure continued access to government services, then arguably we have a problem and one that looks difficult to solve.

¹ The TouchPoints research shows that 62% of people say they could not live without their mobile phone (rising to 78% among 25–34s), 55% never turned their mobile phone off (also highest among 25–34s, at 71%) and half (50%) felt th https://www.ofcom.org.uk/_data/assets/pdf_file/0022/117256/CMR-2018-narrative-report.pdf

² <https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/bulletins/internetusers/2018>

³ https://www.ofcom.org.uk/_data/assets/pdf_file/0021/105438/uk-internet-online.pdf

⁴ In 2012, average household spend on fixed and mobile voice/data was £86, rising to £87 in 2017.
https://www.ofcom.org.uk/_data/assets/pdf_file/0022/117256/CMR-2018-narrative-report.pdf

Indeed, when asked if television access was required to be through the internet by 2022, more than a third of non-users (37%) say that they would want to get an internet connection if TV was distributed via the internet by 2022. Whilst it is encouraging that television access could serve as an incentive for getting some offliners connected, when one considers the age demographic of non-users and their tendency to access television services it highlights the challenge that two thirds of non-users would still not get an internet connection. It also serves to highlight the difference between having internet connectivity for a specific use case – in this instance television services – and being comfortable and able to navigate additional online services. This will also be the case when voice services are moved to all-IP as the Publicly Switched Telephone Network (PSTN) is retired – it is not clear that non-users would take the opportunity that this intervention presents to use other internet services.

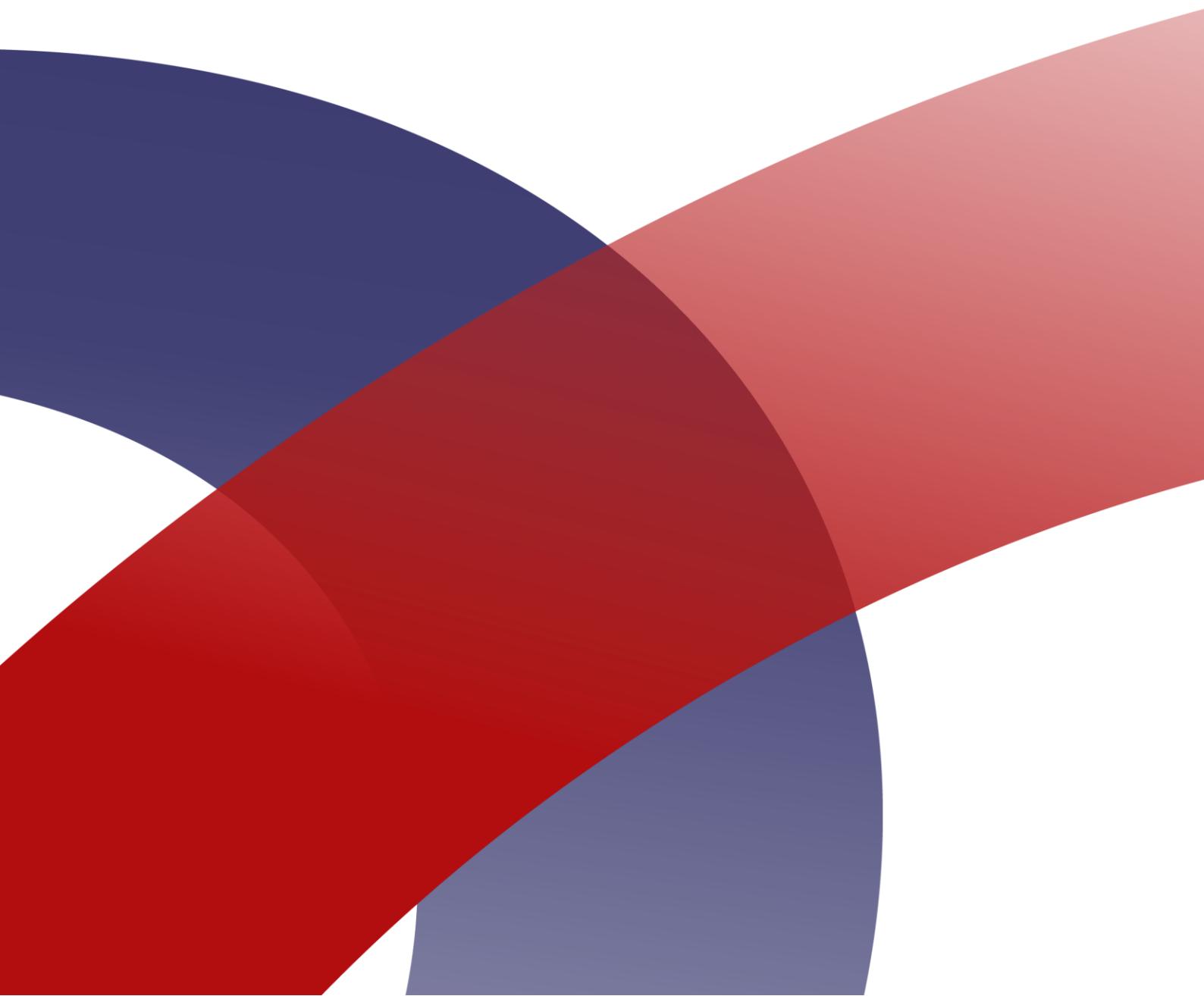
If the motivation of shifting services online – be they government or television services – is no silver bullet for all of this group, then there is little encouragement to be found in the schemes aimed at boosting skills and providing a pathway to building confidence in using the internet. 90% of those who had recently moved online had not heard of any such scheme. Additionally, it was clear that family members felt more comfortable having family and friends support them in learning how to use the internet with 85% trusting them to a great or some extent.

Given the difficulty in shifting those who do not use the internet online it is necessary to ask where we as society should draw the line. Digital government services – and indeed customer services in general – are cheaper, and through increased adoption of technology, can often be more efficient and easier to use than traditional channels.

Is it enough that everyone who want to go online are able to? For the population as a whole we are nearing this point – whilst not forgetting that 17% of disabled non-users said that there were physical barriers to going online, nor that there is a cohort of non-users who are interested in using at least some current internet services. Or should it be that everyone who is able to go online should be online? These are important questions that are outside of the scope of this report, but it is worth considering the implication of the last view. Someone may be physically and mentally capable of being online, but if one of their only face to face interactions is at the Post Office or bank, then is it in society's long-term interests to force them online for these services?

The Broadband Stakeholder Group

2. METHODOLOGY



2.1. PROJECT AIMS

With extending access to superfast broadband placed at the forefront of the UK Government's digital strategy, and increasing smartphone and app usage allowing people to stay connected on-the-go, personal internet use has proliferated rapidly since the early-2000's; it is estimated that 90% of households in Great Britain had access to the internet in 2018, up from 55% in 2005.¹

Nevertheless, there remains a small proportion of the population who are not connected to the internet in today's increasingly digital world, thereby precluding them from accessing a variety of benefits and services. The Broadband Stakeholder Group (BSG) wished to undertake primary research with this group to understand the barriers preventing people who are currently digitally excluded from adopting broadband connectivity, and what the drivers might be for moving them online and increasing online use once they have done so.

The research will explain the specific barriers people face, whether cultural, behavioural, financial or otherwise, and identify which digital brands and content would be most trusted in helping move people online, as well as which services would be most appealing once people are online.

The findings from the research will add to the evidence base around the issue of digital exclusion and identify potential ways in which to tackle it.

2.2. DEFINITIONS OF NON-USERS AND RECENTLY ONLINE USERS

For the purposes of this research, the following definitions were used to categorise non-users and those who had recently moved online:

- **Non-users:** those who do not have an internet connection set-up at home / do not use the internet elsewhere.
- **Recently online-users (qualitative research):** those who have had the internet installed in their home / begun using the internet for the first time in the last 12 months.
- **Recently online-users (quantitative research):** to achieve an adequate incidence rate among this group, for the quantitative research these individuals were defined as those who have had the internet installed in their home / begun using the internet for the first time in the last 18 months.

2.3. IN-DEPTH INTERVIEWS

In June and July 2018, ComRes conducted a total of 11 30-minute in-depth telephone interviews, comprising of 8 non-internet users and 3 among those who had recently moved online.

¹ Office for National Statistics, *Internet access– households and individuals, Great Britain: 2018* (7 August 2018)

2.4. SURVEY METHOD AND SAMPLE

ComRes conducted a telephone survey with **992 UK adults aged 18+** who were either non-users of the internet, or had recently begun using the internet within the last 18 months, between the 26th September and 22nd October 2018. In terms of the responses achieved, no respondents were aged under 45.

	Total	Non-users	Recently online users
N =	992	952	40
Gender			
Male	399	386	12
Female	593	566	27
Age			
45–64	101	96	5
65+	891	856	35
Social Grade			
AB	114	109	5
C1	173	165	8
C2	143	140	3
DE	500	481	19

Please note that * indicates a low base size and that these results should be treated with caution.

2.5. KEY DRIVERS ANALYSIS

A Key Drivers Analysis was used to investigate the relationship between non-users' attitudes towards internet use and the individual variables tested in the quantitative research. This type of analysis is helpful in prioritising which variables have the greatest impact on consideration of using the internet. More specifically, two separate Key Drivers Analyses were conducted to explore:

- The factors driving agreement with the statement 'there are no online services I would be interested in / I have no use for it' (Q11a).
- The factors driving being likely to use the internet in the future (Q3).

Data from questions 4, 5, 7, 9, 11 b-n, and 13 were included in the linear regression model as independent variables. This model is used to find the best linear combination of the independent variables to predict the value of the dependent variables (Q11a or Q3). Please find the full questionnaire in the appendix of this report.

3. LIFE WITHOUT THE INTERNET



3.1. DAILY LIFE WITHOUT THE INTERNET AND PERCEPTIONS OF BEING ONLINE

Both the qualitative and quantitative research showed that, generally speaking, non-internet-users do not feel like they are missing out by not being online.

The qualitative interviews began by scoping out the daily routine of those who do not currently use the internet, as well as how they carry out specific tasks such as shopping or managing their personal finances. Although conducted with only a small sample, these interviews nevertheless point to a number of underlying attitudes and behaviours which are important for giving a broader context to why some might be resistant to moving online.

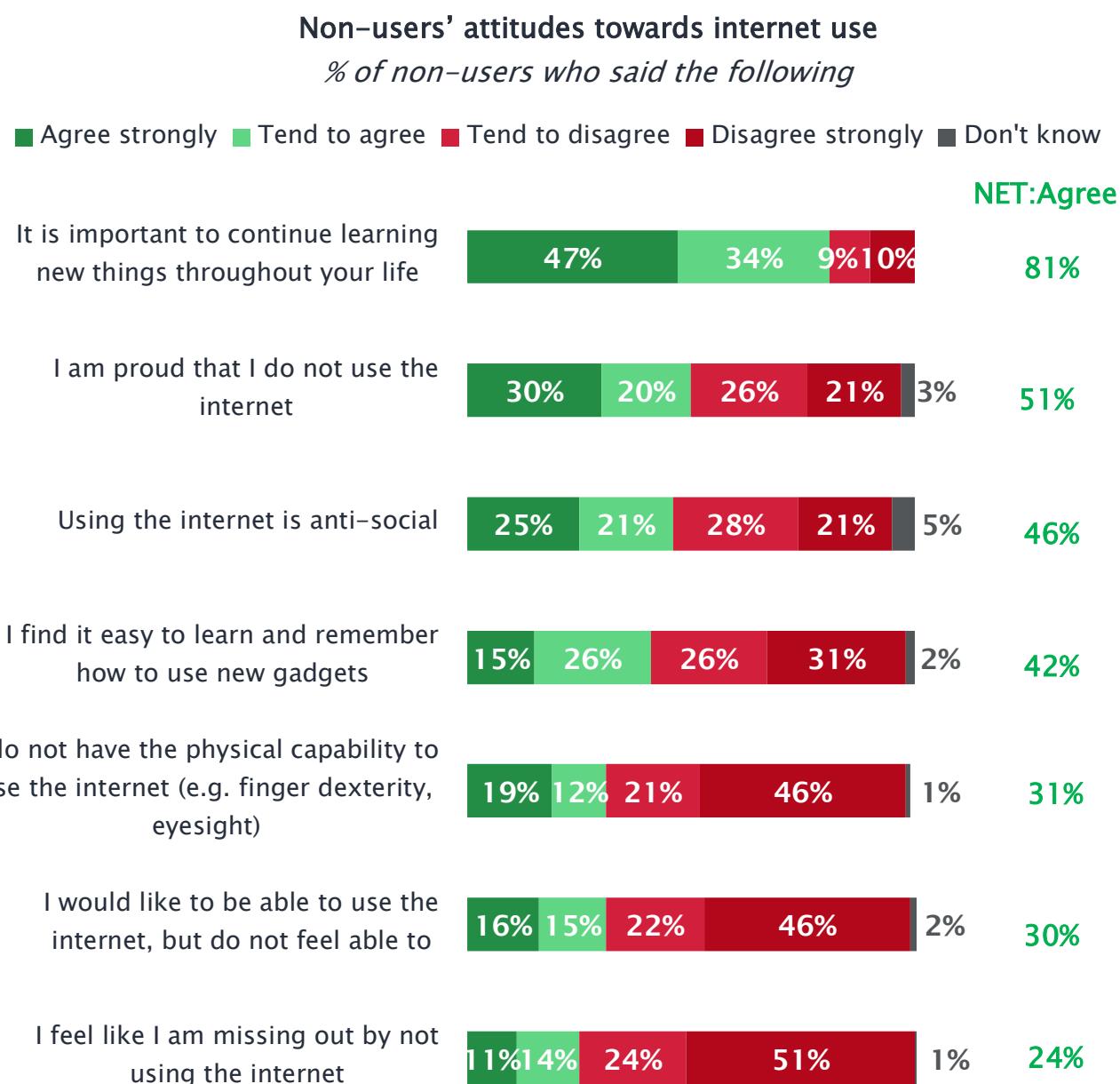


Figure 1: Q1. Please tell me to what extent you agree or disagree with each statement. Base: All non-users (n=952)

N.B. Chart excludes statement 'I have no interest in using the internet'

Firstly, most interviewees conveyed that they were proud of their independence and that they make a point of getting ‘out and about’ to do things for themselves.

This perhaps goes some way in explaining why, despite the vast majority agreeing that it is important to continue learning new things throughout your life (81%), the quantitative research found that half of the non-users (51%) surveyed say they are proud that they do not use the internet. Together these findings suggest there is an underlying feeling among some non-users that the internet would impinge on their perception of themselves as an active, independent person. Further to this, the qualitative interviews suggest that engagement with other forms technology is limited. Multiple interviewees watch the TV for leisure, but only via Freeview, while mobile phones tend to only be used for phone calls or simple texts.

"I'm always out and about. I don't stop in. Even in the winter, I go out every day...I don't much want to become a couch potato or anything like that. You've got to move yourself as the years creep on you."

Male, 71, Not online

"I'm more of an outdoor person myself, so I harp on to my own children about their children about the great outdoors and how they should be getting outdoors and not stuck inside, watching TV or playing on these games that they play on nowadays."

Female, 54, Not online

Secondly, stemming from this sentiment, time spent doing things that would be typically be made quicker and ‘easier’ by using the internet is built into their daily routine and social life.

For example, going out shopping with friends or visiting their local bank branch are activities interviewees said they enjoy doing, and therefore do not see a reason to do via the internet. Similarly, the quantitative research found that approaching half (46%) of non-users surveyed say that using the internet is anti-social – although a similar proportion (49%) disagree with this – which indicates that for some there could be a social aspect to doing things without the internet. Some interviewees also cited practical reasons for not using the internet for certain tasks such as shopping, because of wanting to try on clothes before they buy them.

"I usually meet my friend each day and we go out, we have some lunch and have a look around the shops."

Female, 69, Not online

"I mean, I don't think I'd want to go shopping on the Internet because I like going looking around at the special offers and what new thing they've got and it's just a bit boring sitting looking at a computer for doing your shopping."

Male, 63, Not online

Similarly, most interviewees do not see themselves as experiencing any significant barriers to communicating with friends and family without the internet. While a few noted that they do not see some of these people as often as they might like, most have an immediate social network which they are in contact with regularly either through meeting up in person, or catching up on the phone.

"I have a sister so I speak to her regularly and I have quite a big circle of friends. So, I'm in contact with them quite a lot on the phone. I try to make time in the evenings to ring around some of my friends."

Male, 63, Not online

If certain tasks do need to be completed online, some look to family and / or friends to do this for them.

Does anyone do anything online on your behalf?

% of non-users who said the following

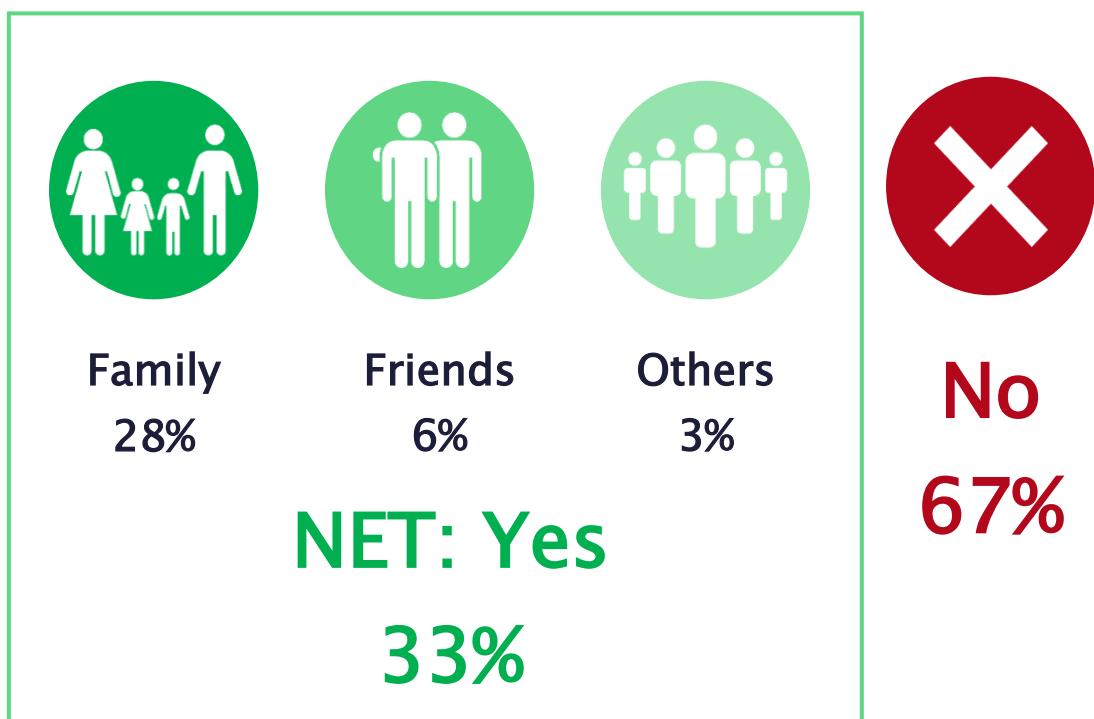


Figure 2: Q12. Thinking about any services or tasks which might require you to use the internet, does anyone do anything online on your behalf? Base: All non-users (n=952)

Some interviewees mentioned that family and friends have done things for them online when needed (or indeed, they would ask them to do so if this situation were to arise), which is corroborated by the finding that a third (33%) of non-users surveyed say that someone does something online on their behalf, usually family members (28%).

Most non-users interviewed have no prior experience of using the internet or a computer / device. Coupled with the fact that they are content with how they currently go about their daily lives, they therefore found it difficult to picture what services or features would be useful to them even if they didn't have explicitly negative views of the internet in general. A lack of confidence or digital skills reinforces this perception that it would be easier to continue to do things without the internet.

It is important to acknowledge that the quantitative research shows that there is a significant minority (30%) that would like to be able to use the internet but don't feel able to. However, as shown by Figure 3, two thirds say that it would take longer for them to do day-to-day tasks on the internet (64%). This confirms the findings of the qualitative interviews which indicated that most non-users assume that as they don't know how to use the internet currently, it is easier to continue doing things without it; moreover, they are generally content to do so. They may also be influenced by a lack of confidence or skills in using the internet, illustrated by the fact that only a minority say they find it easy to learn and remember how to use new gadgets (42%), while three in ten (31%) say they don't have the physical capability to use the internet. The prevalence of such barriers will be examined in the subsequent sections of this report.

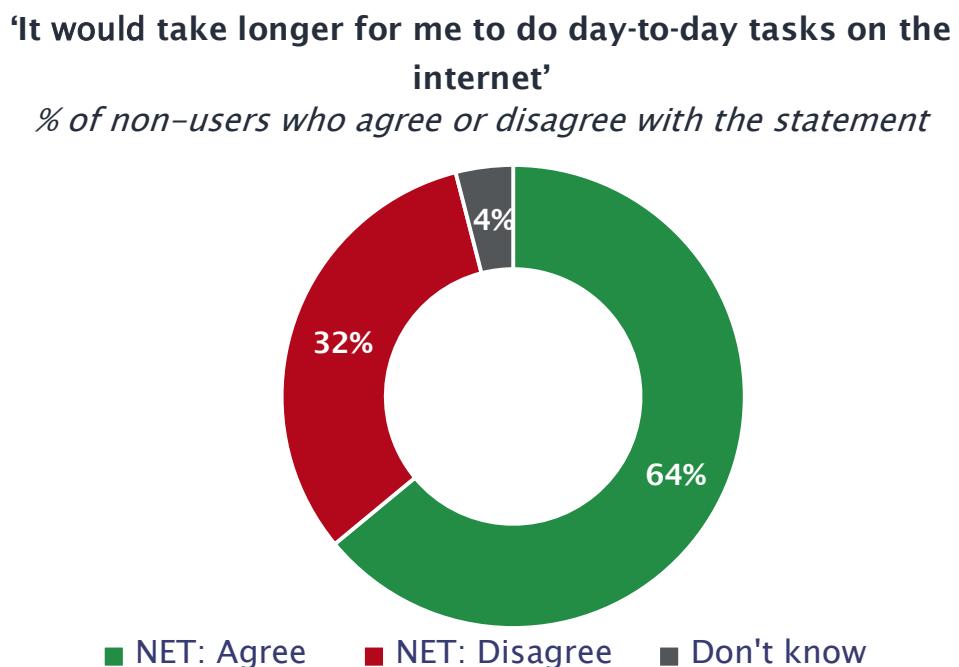


Figure 3: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you? Base: All non-users (n=952)

"It would take me longer to work out how to open the thing on my phone than it would to just open my diary."

Male, 63, Not online

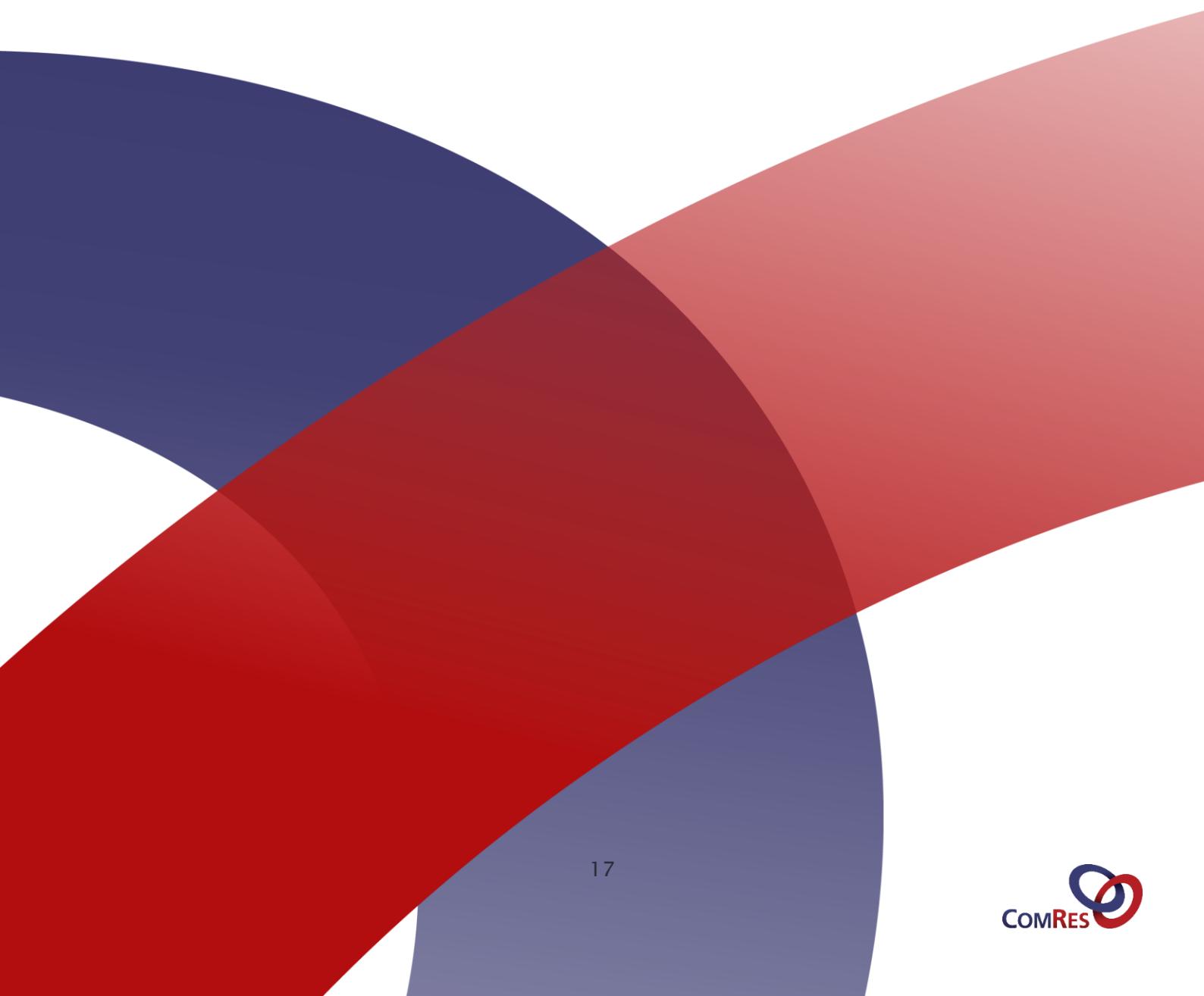
"There's nothing that they [internet users] can do that I can't do. I can go into my bank and I can do my banking, I can go clothes shopping...I like simplicity and I think it's too much like hard work... what you've never had, you don't miss. I don't feel like in my life that I am totally missing out on something."

Female, 54, Not online

The immediate findings of both the quantitative and qualitative research therefore provide important context for understanding the decision not to use the internet by non-users, and why only a quarter of those surveyed say they feel as though they are missing out (24%) by not using the internet. Having never used the internet in a sustained way, they do not readily see the opportunities to complete daily tasks online or the benefits of doing so. Rather, activities such as going shopping or visiting the bank are simply a part of their daily routine, and they appear to take pride in doing things ‘for themselves’.

This is not to suggest that non-users necessarily have negative views of the internet, or that they would not find the internet useful for certain tasks. Indeed, a significant minority would like to be able to use the internet but do not feel they can (30%), while half (49%) disagree it is antisocial. Nevertheless, it is important to consider this context when communicating how the internet would make a tangible difference to non-users’ daily lives.

4. BARRIERS TO USING THE INTERNET



4.1. INTEREST IN USING THE INTERNET

Interest in the internet is low among non-users, with the clear majority (70%) of those surveyed saying that there are no services on the internet that they would be interested in / that they have no use for it.

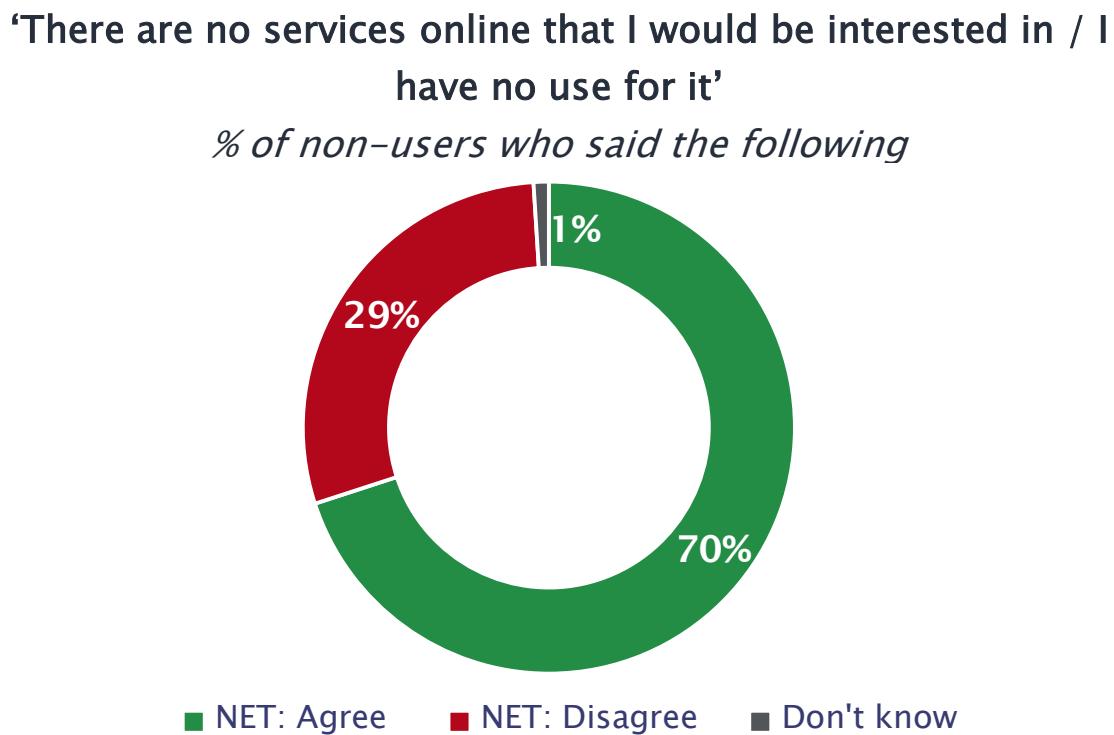


Figure 4: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you?

Base: all non-users (n=952)

The results indicate that older survey respondents are more likely than those who are younger to agree with this statement (71% 65+ vs. 58%* 45–64), as are women compared to men (73% women vs. 65% men). Those living in London are less likely than those living elsewhere to agree with this statement (56%* London vs. 74% NET: North of England, 71% NET: South of England and 74% NET: Wales, Scotland and Northern Ireland).

In line with the above, only a small minority (12%) have expressed any interest in getting the internet installed.

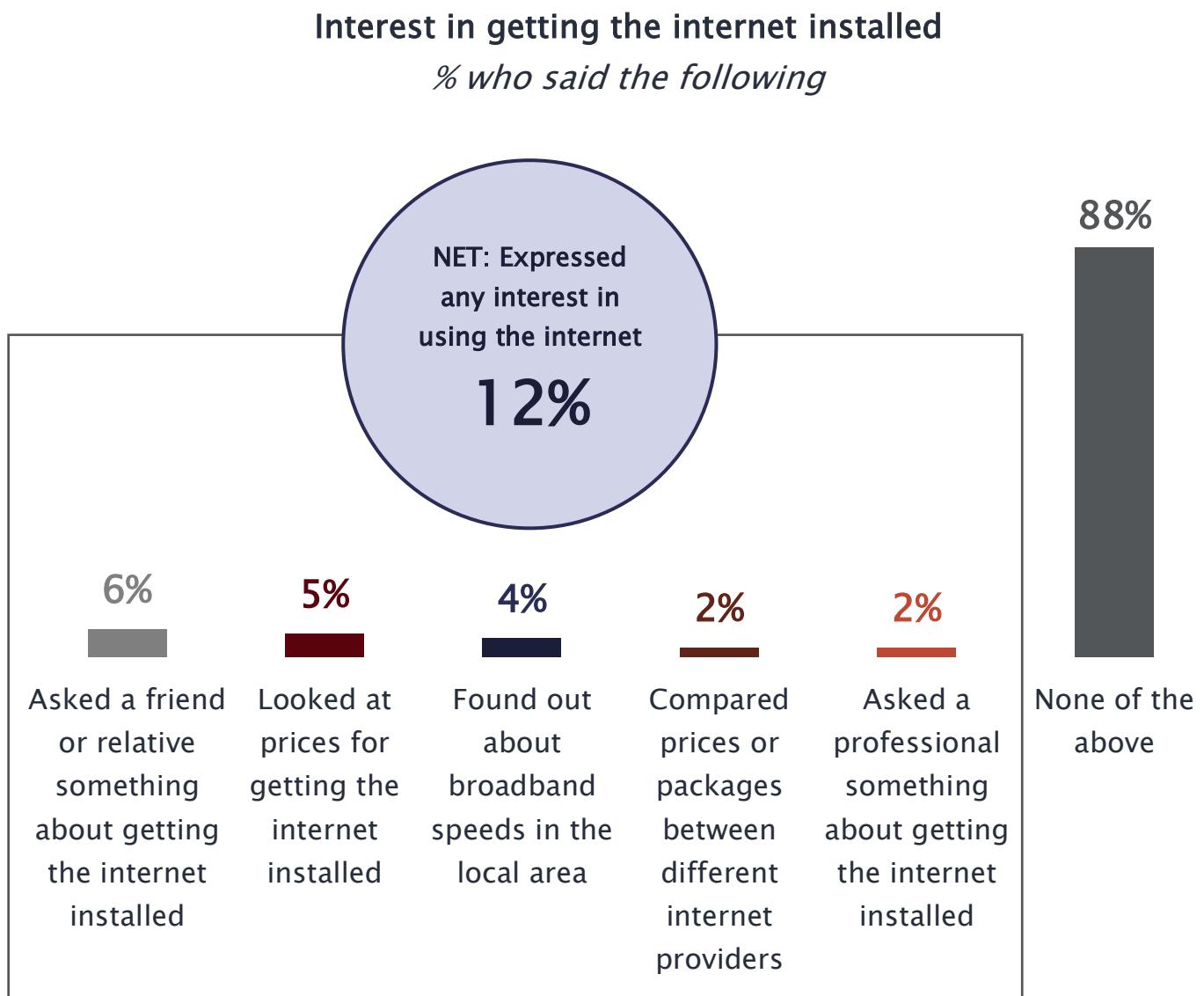


Figure 5: Q2. Which, if any, of the following have you done? Base: All non-users (n=952)

Asking a friend or relative something about getting the internet installed is the action most commonly taken (6%). Notably, those non-users with a disability are slightly more likely than those without one to have shown any interest in getting the internet installed (15% disabled non-users vs. 10% non-disabled non-users).

Concurrently, the vast majority of non-users (93%) say that they are unlikely to start using the internet in the future.

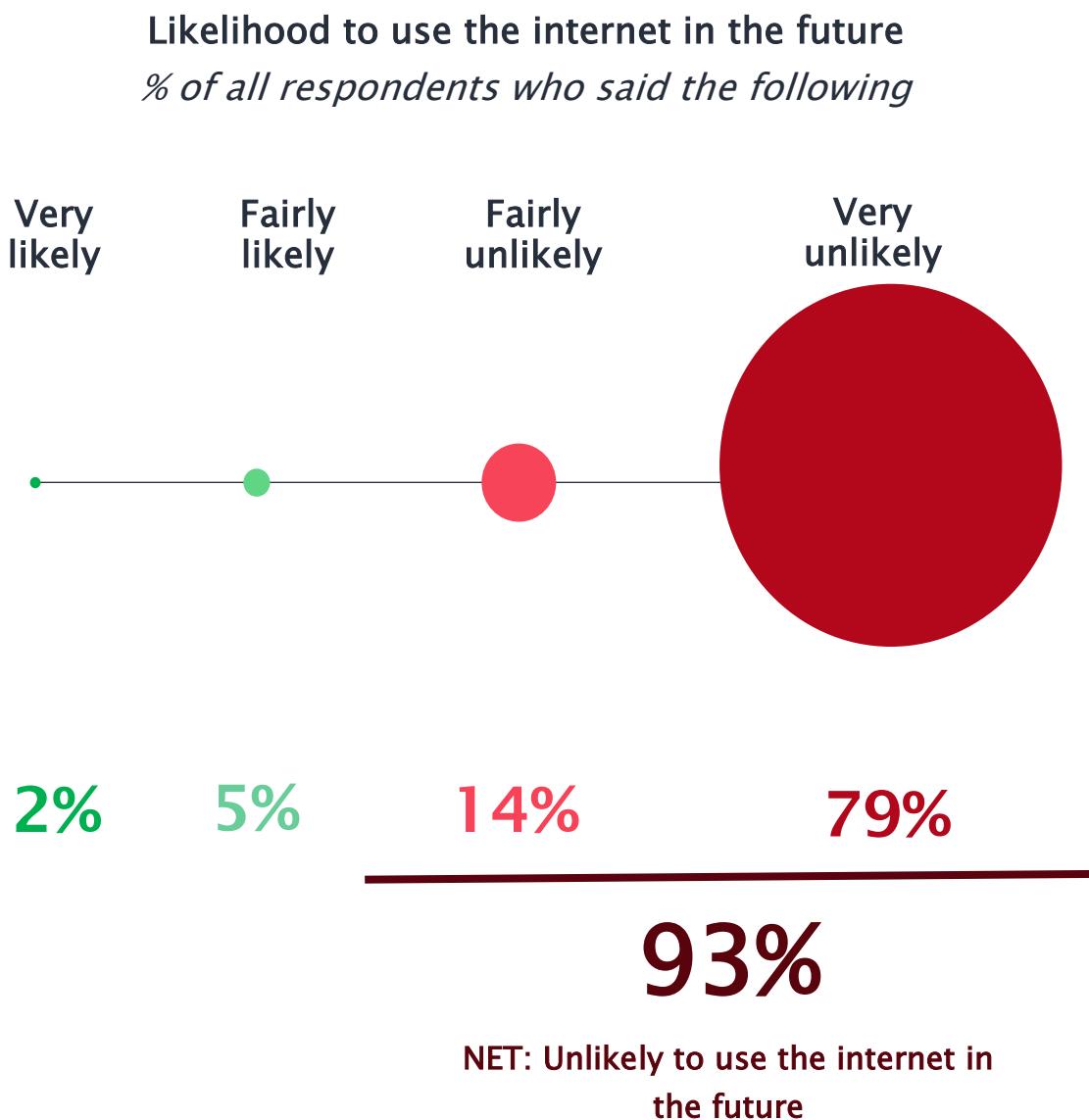


Figure 6: Q3. How likely or unlikely are you to start using the internet at some point in the future? Base: all non-users
(n=952)

This sentiment is particularly strong, with eight in ten (79%) saying that they are very unlikely to use it at some point in the future. In line with the demographic differences in levels of interest in the internet, older respondents are also significantly more likely than those who are younger to say that they are unlikely to use the internet at some point in the future (95% 65+ vs. 78% 45–64). Notably, the proportion who say they are likely to use the internet at some point in the future rises to one in five (22%) among those aged 45–64, compared to only 7% overall.

4.2. OVERVIEW OF BARRIERS TO USING THE INTERNET

When asked openly, being uninterested in using the internet or uncertain that it will be of any benefit to them is by far the reason most commonly given by non-users for not being online (60%).

Barriers to using the internet (spontaneous) *% of non-users who said each of the following*

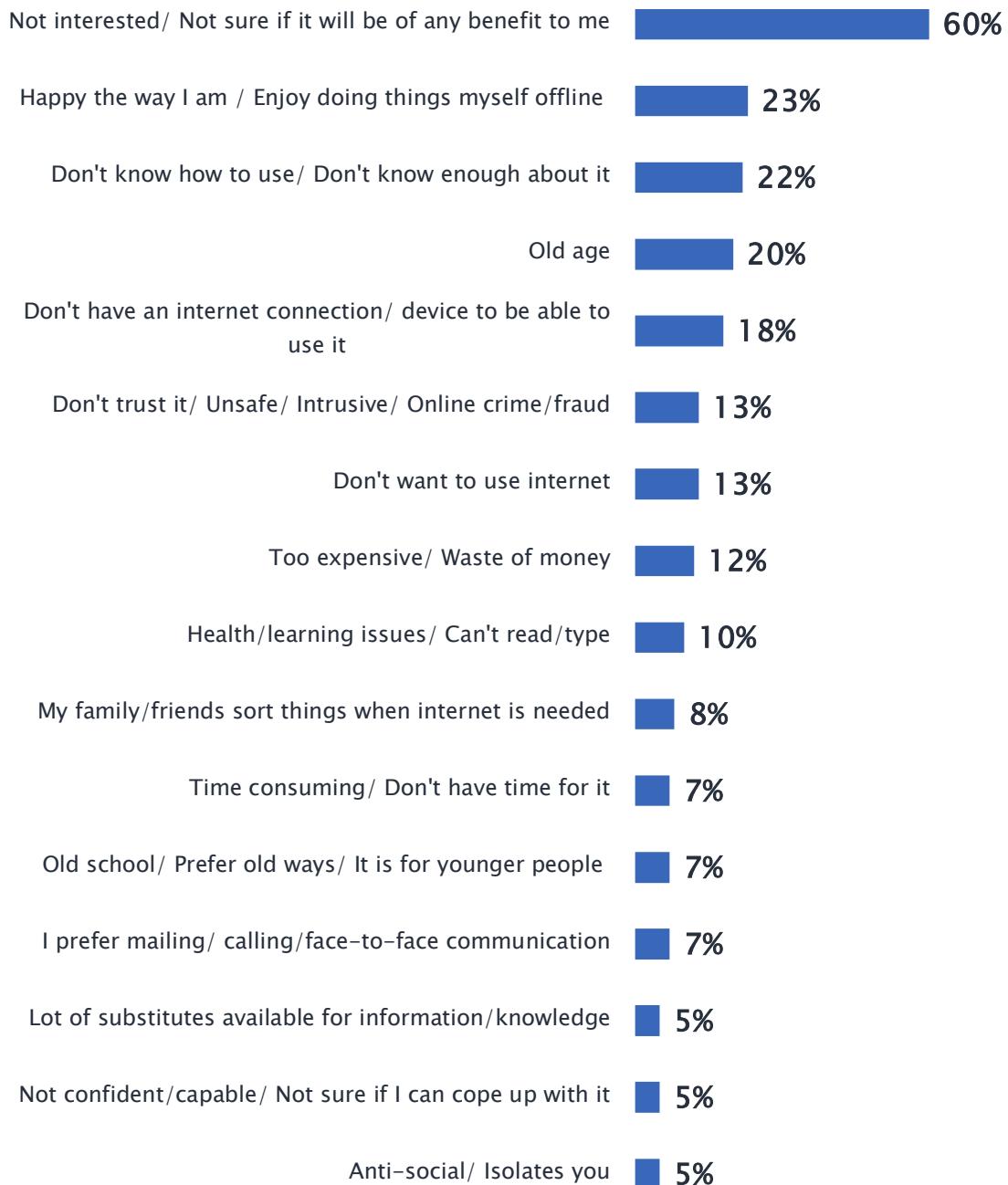


Figure 7: Q9. For what reasons do you not use the internet? Base: All non-users (n=952)

N.B. Showing all responses 5% <

Further to exploring which reasons for not using the internet are top-of-mind, a range of barriers to using the internet were tested, and non-users are most likely to agree that they have concerns about internet safety, security or privacy (76%) of the statements tested, with three in five (60%) strongly agreeing with this statement.

Barriers to using the internet (prompted)

% of non-users who agree or disagree with each statement

■ Agree strongly ■ Tend to agree ■ Tend to disagree ■ Disagree strongly ■ Don't know
NET: Agree

I have concerns about internet safety, security or privacy

60% 16% 8% 15% 1% 76%

I do not know how to use it / do not have the skills

47% 23% 11% 18% 1% 70%

There are no services online that I would be interested in / I have no use for it

49% 21% 14% 15% 1% 70%

It would take longer for me to do day-to-day tasks on the internet

40% 24% 13% 18% 4% 64%

I don't know how to get started

41% 20% 13% 24% 2% 61%

I am concerned about accidentally accessing harmful or illegal content

38% 17% 14% 29% 3% 54%

My family / friends do things for me online

24% 25% 16% 33% 4% 49%

It is too expensive / is poor value for money

27% 21% 19% 18% 16% 48%

No one is there to teach me how to use the internet

29% 19% 20% 31% 1% 48%

It is difficult to learn

28% 19% 21% 25% 5% 47%

It is too late to learn

30% 16% 19% 34% 4% 46%

I am concerned I might break something (e.g. the computer / device) or do something 'wrong'

29% 16% 20% 34% 1% 45%

It is anti-social to use the internet

26% 18% 28% 24% 4% 44%

Previous experience of using the internet / a computer has put me off

16% 11% 24% 42% 7% 27%

Figure 8: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you?

Base: All non-users (n=952)

This is followed by seven in ten (70%) agreeing that they don't know how to use the internet or don't have the skills. Further to this, around half agree with a number of other statements relating to barriers to internet use, including those relating to accidentally accessing harmful or illegal content (54%), cost / value for money (48%) or it being too late to learn (46%). It is therefore apparent that non-users perceive multiple barriers to accessing the internet.

A Key Drivers Analysis was conducted in order to gain a more precise view of which of the range of factors included in the quantitative research were acting as barriers to internet use. This is a particularly useful technique in analysing the importance of variables drawn from multiple different questions, or where it is difficult to discriminate between variables which respondents appear to be equally likely to select (as seen in figure 8). Agreement with the statement 'there are no services online that I would be interested in / I have no use for it' can be understood as a proxy for disinterest in using the internet. On this basis, the Key Drivers Analysis shown in figure 9 below highlights which factors were important drivers of this perception among non-users.

Of all the factors tested, concerns about internet safety, security or privacy have the strongest impact on agreement with the statement that 'there are no services online that I would be interested in / I have no use for it' at 16.8%. This is also the factor most likely to be selected of all those highlighted as important by the Key Drivers Analysis.

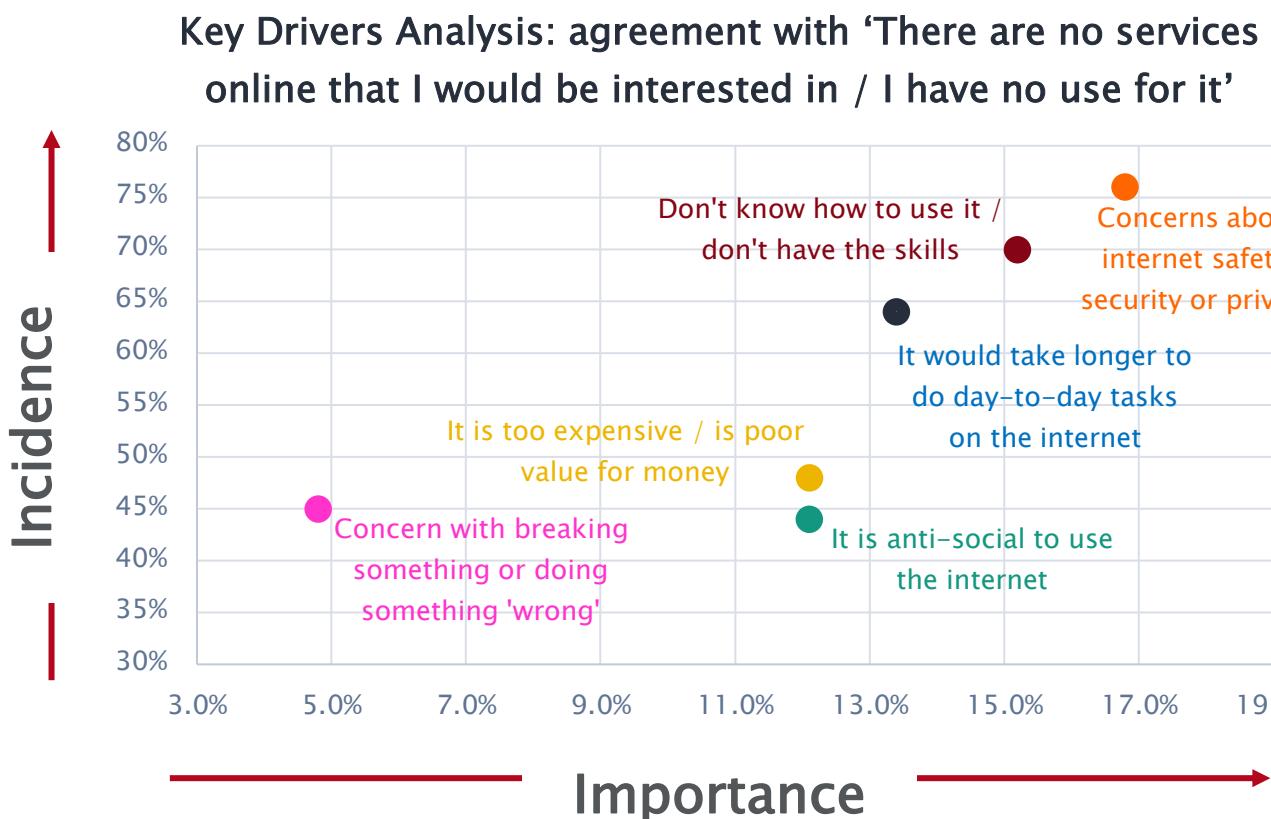


Figure 9: Key Drivers Analysis of agreement with Q11a. 'There are no services online that I would be interested in / I have no use for it'. Model explains 40% of all variance. Please refer to the methodology section of this report for full detail on the variables included within the analysis.

Not knowing how to use it or not having the skills (15.2%) or thinking that it would take longer to do day-to-day tasks on the internet (13.4%) are secondary drivers of disinterest in the internet, both of which also see a relatively high incidence (70% and 64% respectively).

Although a relatively low proportion of non-users agree that the internet is too expensive / poor value for money (48%) or that it is anti-social to use the internet (44%) when comparing all barriers in figure 8, these emerge as having a moderate impact on being disinterested in using the internet.

4.3. CONCERN ABOUT INTERNET SECURITY, SAFETY OR PRIVACY

When asked openly about the reasons for not using the internet, 13% spontaneously cited concerns about internet security or online crime. When prompted, three quarters (76%) agree that they have concerns about internet safety, security or privacy, and this is the strongest driver of disinterest in the internet as shown by figure 9 above.

'I have concerns about internet safety security or privacy'

% of non-users who agree or disagree with the statement

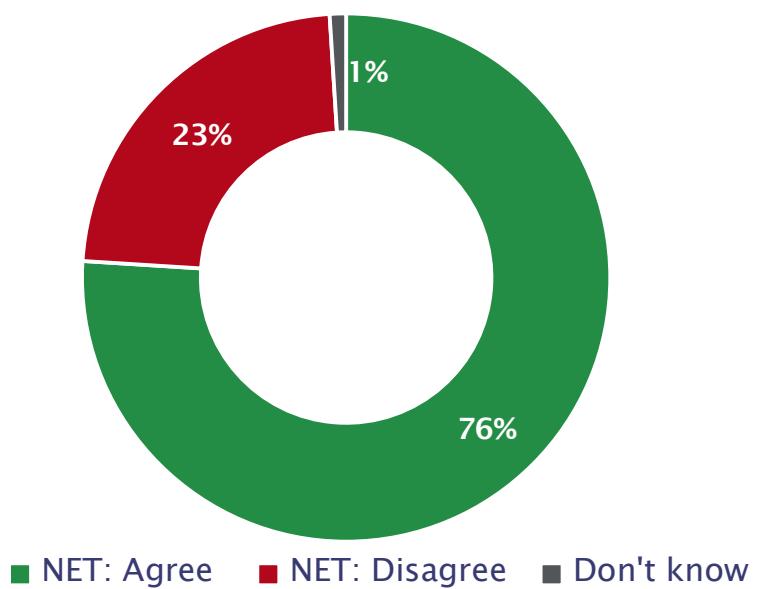


Figure 10: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you?

Base: All non-users (n=952)

Younger non-users are more likely than their older counterparts to spontaneously give this as a reason for not using the internet (20% 45–64 vs. 12% 65+), although there is no significant difference by age when prompted about this concern (77% 45–64 vs. 75% 65+). Intuitively this could suggest that there is a higher level of awareness of cyber security issues – and moreover the recent, high-profile examples of this – among those who are younger.

Among the non-users interviewed, internet security and privacy were also often mentioned as reasons to distrust, and therefore not to use, the internet. Such concerns were usually expressed in terms of hacking and having their personal information and data stolen, although a couple interviewees said they feel the internet is fundamentally intrusive and threatens their privacy in general.

As explored in more detail below, concern about internet security and a lack of digital skills are mutually reinforcing, as the qualitative interviews indicate that non-users are worried that they would be at even

greater risk of being a victim of hacking or online crime because of their lack of understanding of how the internet works.

"They can get people's bank details, can't they, these thieves and that? Where, I think, doing online banking could be dangerous, if they can get your details. I'd be a bit, you know, worried, because I always think these criminals, they're not thick, they've very clever, aren't they?"

Female, 69, Not online

Research conducted among those who have recently moved online confirms the importance of internet security and privacy as a barrier to internet use. Among those surveyed, more than four in five (85%*) say that they have concerns about internet safety, security or privacy.

The three interviewees who had recently moved online echoed this sentiment. Although they had positive views on the internet in general and had been using it for communication and information searching, concerns regarding cybersecurity persist and limit their use of the internet. None of these interviewees use internet banking, while two of them do not shop online, and say this is because they are worried that they will be a victim of 'hacking' and believe there is a risk their financial details will be stolen. Moreover, they assume that they won't need to use the internet for such tasks in their lifetime, and would only be willing to learn how to do so as a last resort.

"I don't want to be doing anything to do with money online because you've got to give them bank details and things like that. As I said to you, no doubt one day, we'll just have to do everything that way [but] how many more years have I got?"

Male, 75, Recently online

"[My family] keep on talking about bugs and stuff coming down, 'Don't touch that, Mum, because you may download something. Don't press that underlined word,' and all...So, for me, it's like a big, scary animal. It's just a part of my age group, I think, that we're very cautious and we're frightened of things happening that we've done wrong, getting the viruses coming down."

Female, 70, Recently online

4.4. LACK OF DIGITAL SKILLS

The Key Drivers Analysis also highlighted a lack of digital skills as well as perceiving that it would take longer to do day-to-day tasks without the internet, as two barriers which have a relatively high impact on not having an interest in using the internet. A majority of non-users surveyed agree with each of these statements, while a significant proportion of non-users appear to experience a range of other barriers relating to digital skills.

Attitudes towards digital skills and the internet

% of non-users who agree or disagree with each of the following

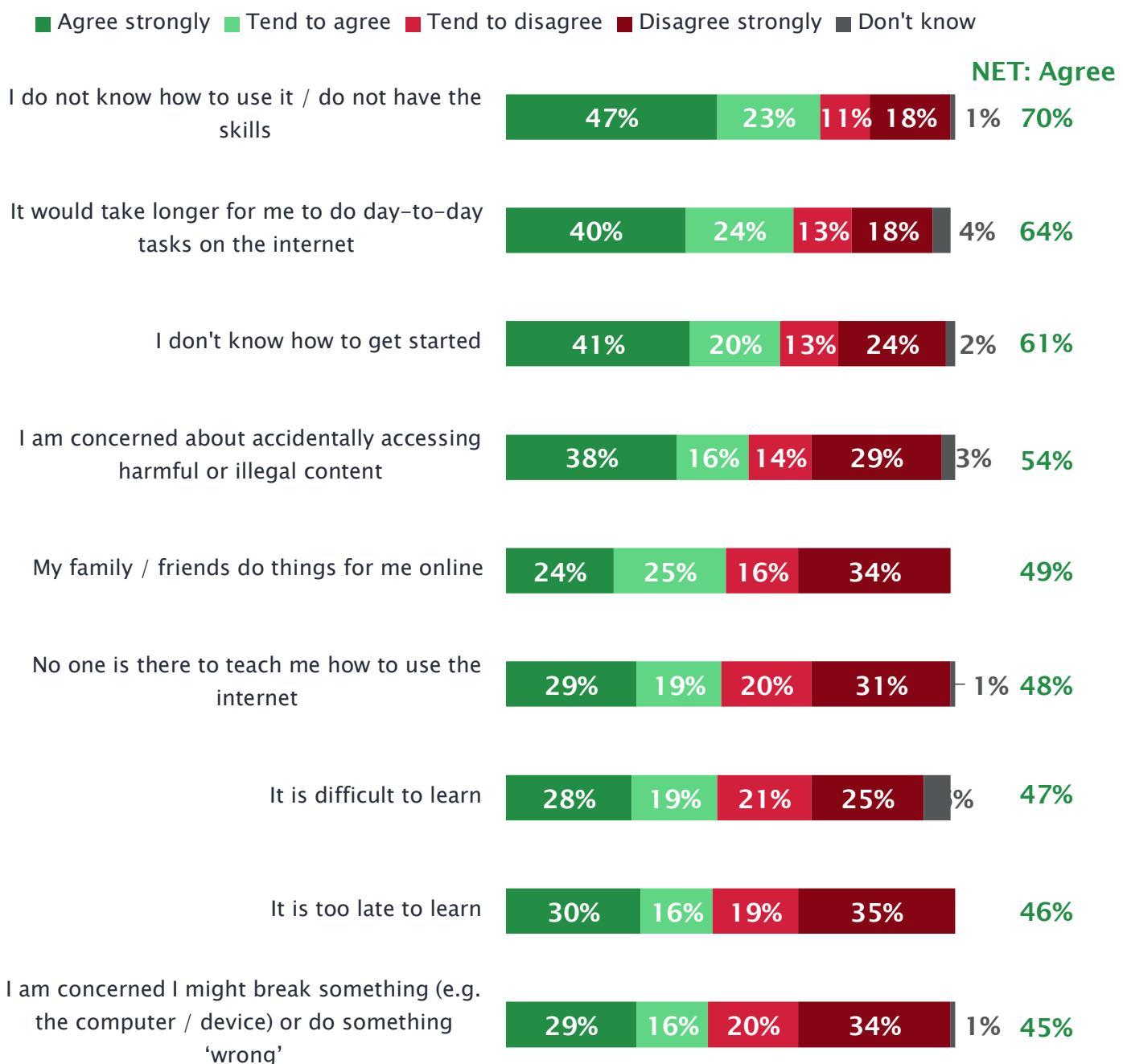


Figure 11: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you?

Base: All non-users (n=952)

Seven in ten (70%) agree that they don't know how to use / don't have the skills to use the internet, while two thirds (64%) think that it would take them longer to do day-to-day tasks using the internet, each of which are among the most important drivers of not being interested in using the internet.

The perception that it would take longer to complete day-to-day tasks is more prevalent among older respondents (65% 65+ vs. 54%* 45–64), as is the view that it is too late to learn how to use the internet (48% 65+ vs. 33%* 45–64). As discussed earlier in this report, these views were commonly expressed in the interviews with non-users. They tended to see it as easier to simply carry on 'as they are' without the internet as there wouldn't be a need to for them to learn how to use it within their lifetime.

Both the qualitative and quantitative research highlighted some of the deeper perceptions and difficulties which inform these views:

Too complicated or difficult to learn

- Many non-users see it simply as being too complicated or difficult to learn how to use either the internet and / or the devices need to access it. Indeed, one in five (22%) non-users surveyed spontaneously mentioned that they don't use the internet for this reason, while half (47%) agree that it is too difficult to learn how to use the internet when prompted.
- Both the qualitative and quantitative research suggests that this is strongly linked to age. One in five (20%) non-users surveyed cite age as a reason for not using the internet (although it should be noted that this falls to 2%* among those aged 45–54). Interviewees also commonly mentioned that in contrast to most people, they didn't have to use the internet earlier in their lives and as such did not learn how to when they perceived themselves to be more capable of doing so. Many said they are now too old to understand how it works and think they would struggle to retain the skills if someone were to teach them, something which one user says they find 'embarrassing' and 'annoying'.

"I think maybe if I was younger, but I'm 69 next month, and I couldn't be bothered, do you know what I mean? It's like my grandson that's sixteen says, 'Well, you've not been brought up with technology, Nana.' It's true, the boy's young, but I don't think I could get into it."

Female, 69, Non-user

"[My friend will] show me and show me and show me and show me, and by the time I get home I've forgotten most of what he has told me about it. So, it's all embarrassing and annoying."

Male, 71, Non-user

- This in turn exacerbates concerns that if they were to try and use the internet, that they would break something or do something 'wrong', something which just under half of survey respondents are concerned about (45%), although this is less pronounced among those who are younger (34%* 45–64 vs. 46% 65+). As mentioned previously, this intersects with other concerns about internet security and privacy, as they worry that they could put themselves at risk.

"It's, like, finding your way around, sort of thing. I just think to myself, 'Oh, if I press the wrong button, I'll clear everything off."

Female, 54, Not online

The experiences of those who have recently moved online provide further insight into the importance of the lack of digital skills as a barrier to being interested in using the internet or to widening the number of things that it is used for.



Figure 12: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you? Base: Recently online (n=40*)

Seven in ten (70%) agree that it is difficult to learn, much higher than the proportion of non-users who said the same (47%). Similarly, those who have recently begun to use the internet are more likely to disagree than agree that they have found the internet easy to use (60%* vs. 40%* respectively). This suggests that those who have recently moved online continue to find using the internet difficult.

The three interviewees who had recently begun using the internet also expressed similar doubts over their digital skills. Family members were instrumental in helping to get the internet set up and teaching them basic functions. Nevertheless, these individuals recall the process of learning how to use the internet being difficult and, moreover, are still getting to grips with its different functions. This appears to limit the ways in which they use the internet as they aren't confident enough to use it for what they perceive as more complex tasks, such as shopping or banking.

This poses a question for broadband providers, device manufacturers, and those involved in designing online platforms over how, once new users have the internet installed, they can support these users in entrenching digital skills to ensure that they feel able to make use of the full range of services it has to offer.

"I am learning all the time. I'm obviously not terribly good at it. I don't know an awful lot about it. I'm just finding my way round it."

Female, 76, Recently online

"My grandchildren used to come over. They started me off so they used to come over after school and say, 'Right, come on, Nan. We're going to teach you how to use this.' It's been a slow process, so I'm still not very skilled, but it at least allows me to communicate with them on Skype... they keep saying to me, 'Nan, use this, and do that. You're doing it okay,' and I can do it while they're here, but for me, it's still difficult because I forget things."

Female, 70, Recently online

Lack of confidence and / or external support

- Following on from the perception that it would be too difficult to learn how to use the internet, the majority of non-users (69%) are not confident in being able to teach themselves how to use the internet, with half (48%) saying that they are very unconfident in their ability to do so.



Figure 13: Q13. If you had to use the internet to carry out some of your usual tasks, how confident or unconfident would you be about teaching yourself how to use it? Base: All non-users (n=952)

- Men are more likely than women to feel confident about their ability to teach themselves to use the internet (35% men vs. 29% women).
- This lack of confidence means that non-users are likely to need significant support in learning how to use the internet. Certainly, three in five (61%) say they don't know how to get started on the internet while half say that there is no one to teach them how to use the internet (48%).
- In the survey, non-users were also asked to imagine a scenario where all television access would be through the internet by the year 2022. More than a third say that they would want to get an internet connection set up (37%), but respondents are 10 times as likely to say that they would need support doing this (34%) as they are to say that they would not need any support (3%). Without families or friends supporting them through this journey, transitions that involve purchasing of devices and/or establishing an internet connection may prove too daunting for some.
- This also emerged from the qualitative interviews; when asked what they would do if they had to do certain tasks online, such as shopping and banking, most participants immediate reaction was that they would have to get someone else to do this for them, or find another way of doing this offline, rather than learning how to do it themselves using the internet.

"I wouldn't have the first clue on where to go on how to start. I suppose, I'd go to friends or I'd go to my children and ask them 'where do I go to start with it?'"

Female, 54, Not online

"I end up asking [my son] to do it for me because I just haven't got the patience to do all this here, because I don't know what I'm doing... [but] if someone showed me how to do it, you know, I'd be able to pick it up soon enough."

Female, 61, Not online

"[My friends] tried to show me how to type my letter myself and, in the end, I just said, 'Oh, just do it,' because it was taking me ages to do it... they'd show me three

or four times and then they'd get fed up and just do it for me. So, I'd just let them do it. Leave it to the experts."

Male, 63, Not online

Physical barriers to using the internet

- Overlapping with the issues mentioned above with regards to age, it appears that some non-users also experience physical barriers to using the internet. Interviewees often doubted whether they would be physically able to use a device, such as learning how to use a keyboard.
- This barrier appears to be particularly pertinent for those who are disabled. Half (47%) of non-users surveyed have a disability or health condition that limits their day-to-day activities. When asked openly, around one in five (17%) disabled non-users cited physical barriers as a reason for not using the internet, something which is primarily driven by those with a physical disability (18%) as opposed to one which is non-physical (8%). Similarly, disabled non-users are significantly more likely than their non-disabled counterparts to spontaneously mention that it is too complicated or difficult to learn how to use the internet (27% vs. 17% respectively).
- A key implication of this is that broadband providers and those who manufacture devices which are compatible with the internet need to consider how devices could be adapted to make them user-friendly for those who would find using a small screen and / or dexterous typing difficult. Function specific devices such as those that work just for video calling, or – potentially – just for banking, might also help to overcome some of the difficulties around using devices.

"Well, I shake for one thing... As it is, the way these things are shaped, I couldn't touch a keyboard sort of thing."

Female, 72, Not online

4.5. COST AND VALUE FOR MONEY

One in ten (12%) non-users spontaneously cite cost or value for money as a reason for not using the internet, while half (48%) agree that the internet is too expensive / poor value for money when prompted.

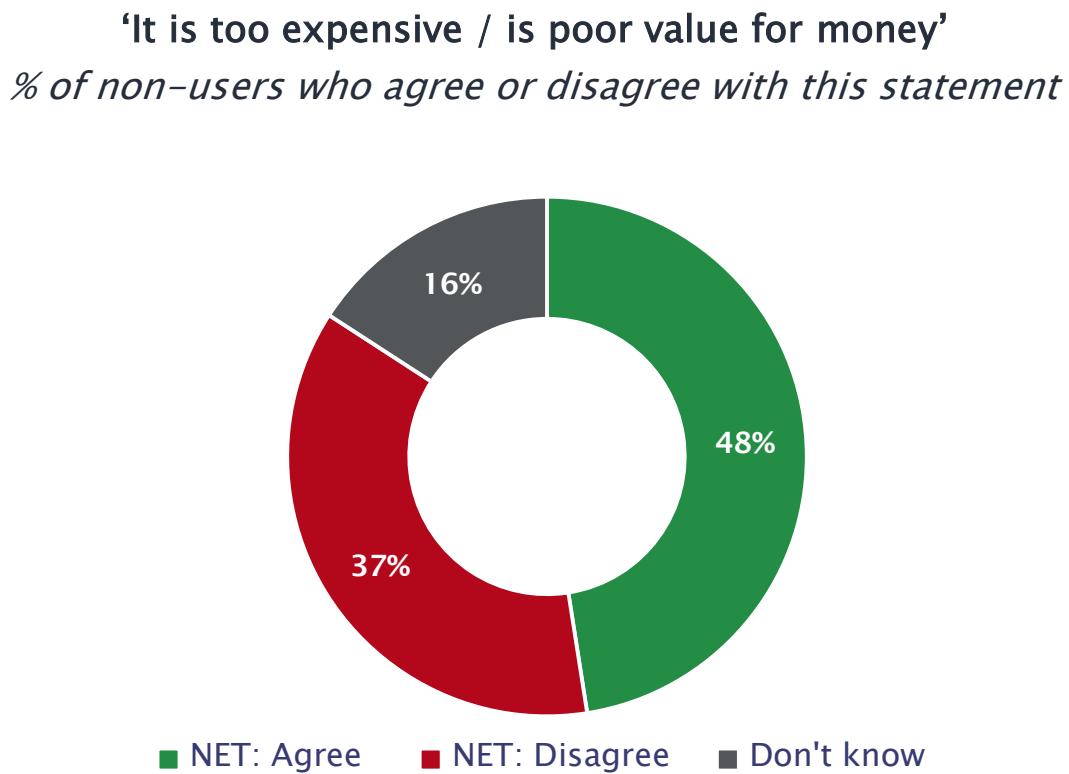


Figure 14: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you?

Base: all non-users (n=952)

Two in five (37%) disagree with this statement. Notably, around one in seven (16%) say they don't know whether they agree or disagree with this statement which perhaps indicates a lack of awareness among some of the price of getting the internet installed.

Younger respondents are more likely than their older counterparts to spontaneously mention cost / value for money as a reason for not using the internet (26%* 45–64 vs. 10% 65+), as are those from the lowest social grade (15% DE vs. 6% AB).

"The only concern would be how much it was going to cost me. I don't know. I'm sure you can't get these things [devices] for nothing and it's another bill which you'd have to pay. I don't know whether you pay monthly or yearly but that would be a consideration because, as I was saying, when you're a pensioner... you're on limited [income]."

Male, 86, Not online

"I see them on the telly on Currys and PC World and they're always a few hundred pounds for fold-up lap computers and I don't think I'd want to spend that just to write a letter."

Male, 71, Not online

In qualitative interviews, most non-users did not usually mention cost explicitly as a reason for not using the internet. This is most probably due to their low awareness of the internet in general and the process of getting it installed, as well as the cost and availability of devices. Nevertheless, the findings of these interviews do offer further insight into how this acts as a latent barrier to use, in terms of not believing that the internet would offer good value for money in particular.

As discussed earlier in this report, the non-users interviewed found it difficult to think of tasks they would find the internet useful for. Although interviewees know why their friends and family find they internet useful, they nevertheless struggle to think of how the internet would benefit them *personally*. They can only see themselves using the internet in a narrow way, such as shopping for food, and ultimately prefer to go out and do such tasks themselves. These views suggest that cost acts a barrier to using the internet in that they do not see either the broadband connection, or the device needed to use it, as worth the investment for the limited way in which they see themselves using it.

4.6. BEING 'ANTI-SOCIAL'

Just over two in five non-users (44%) agree that it is anti-social to use the internet, while half (52%) disagree.

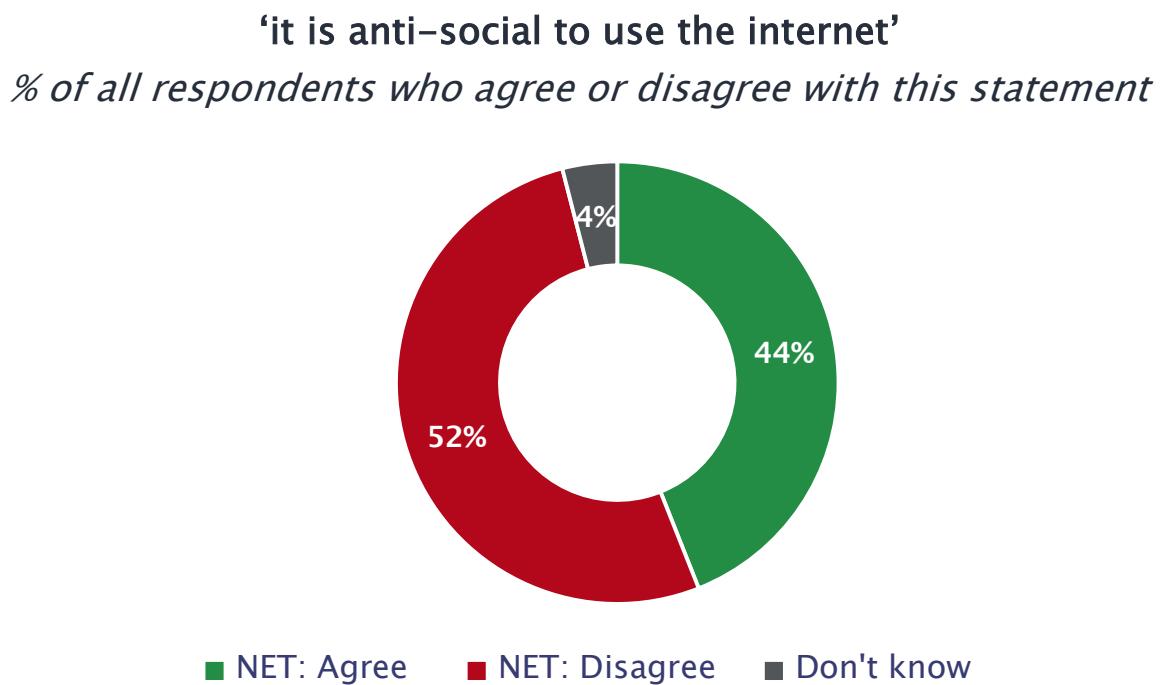


Figure 15: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you?

Base: all non-users (n=952)

As with cost and value for money, the perception that using the internet is anti-social was not consistently mentioned as a reason for not using the internet in the qualitative research, but it is nevertheless among the key drivers of the view among non-users that there would be no services that they would be interested in or that they have no use for it.

As discussed in section [3.12.1](#), aside from a few explicit criticisms of the amount of time people appear to spend on their phones, this sentiment was expressed most clearly by participants in the way they framed themselves as having an active lifestyle and as enjoying getting ‘out and about’ to do tasks which might otherwise be done online.

“I think when they’ve got these phones with all these apps and things and they’ve never got their head out of the bloody phone. They’re just constantly looking at the phone and banging into people in the street and stuff. I think, ‘Get your head up. You might be missing something.’”

Male, 63, Not Online

5. TACKLING DIGITAL EXCLUSION

5.1. INTEREST IN THE INTERNET

Some non-users are interested in using the internet, in the right circumstances and with the right kind of support.

In the quantitative survey, it is significant that a quarter of those surveyed indicate that they have an interest in using the internet (25% disagree that they have no interest). Around the same proportion feel like they are missing out by not using the internet (24%). Similarly, almost a third of respondents agree that they would like to use the internet, but do not feel able to do so (30%).

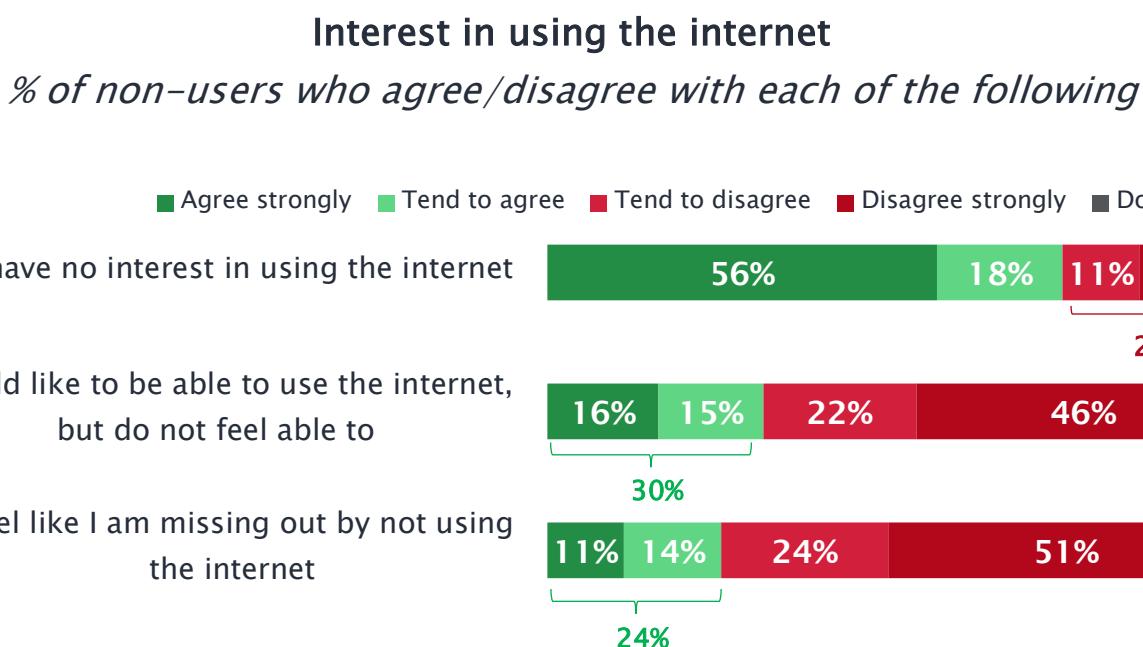


Figure 16: Q1. Please tell me to what extent you agree or disagree with each statement... Base: All non-users (n=952)

There are some signs that younger non-users are more likely to show interest in the internet than those who are older. For example, two in five respondents aged 45–64 disagree that they have no interest in using the internet (38%), compared to a quarter (24%) of those aged 65+. A similar proportion of non-users aged 45–64 agree that they would like to be able to use the internet, but do not feel able to (44%), which is true of only three in ten non-users aged 65+ (29%).

Disability is another factor which might make a non-user more likely to show interest in using the internet. A third of those reporting a physical or non-physical disability that limits day to day activities saying they would like to be able to use the internet, but do not feel able to (34%). This is a higher proportion than non-users with no limiting health condition or disability (27%).

This suggests that there are a significant cohort of current non-users who are open to the idea of using the internet – should the circumstances be right for doing so, and if the necessary support or adjustments were to be available.

Some non-users may not have given the internet much thought – and may be unaware of the range of potential benefits it could offer.

Despite the interest shown by a minority of respondents, the previous section of this report indicates that most non-users appear to be quite happy with this status, at least for the time being. They are therefore unlikely to have considered the potential benefits of the internet.

However, that is not to say that these individuals may not be open to persuasion. During the qualitative interviews, attitudes towards the internet appeared to shift in a few cases when questions prompted a deeper consideration of how useful different internet services might be.

Clearly these kinds of non-commercial one-on-one discussions are an effective mechanism to move non-users online by encouraging them to consider the range of applications that an internet connection might have, and how someone like them might actually make use of it. With many non-users apparently not giving the internet any consideration at all, a conversation with a trusted friend, family member or other impartial source might act as a starting point for future consideration.

“...[I have come to a] realisation that being stupid or stubborn, I am missing out what I would probably enjoy.”

Male, 86, Not online

5.2. NETWORKS AND TRUST

Connecting with friends and family can provide a clear pull factor to drive some non-users online

For some, contact with family and friends is an appealing feature of having the internet. Though some may already use phones for text messaging, a third of non-users feel that using the internet to share messages or photos with family and friends would be useful to them (33%). A quarter (26%) say the same of using video chat with family or friends.

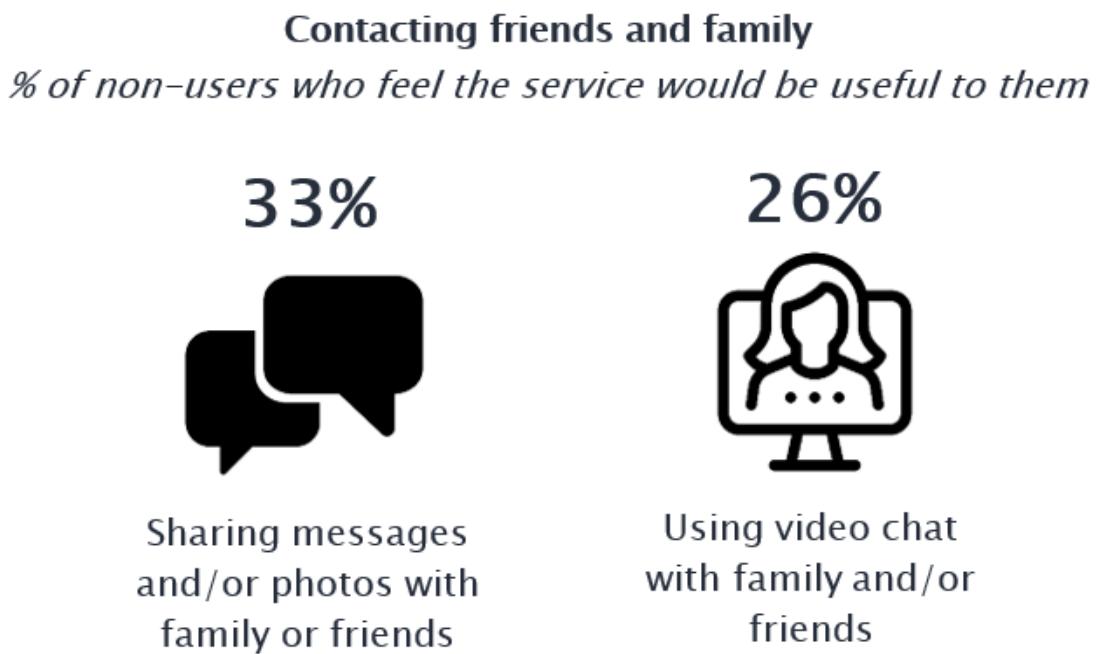


Figure 17: Q7. If you were able to use these services, how useful or not do you feel each of these would be to you?

Base: All non-users (n=952)

The experiences of those who have recently moved online provides further insight into the importance of contact with family members as a driver of starting to use the internet.

Contact with friends and – in particular – family is one aspect of internet use those that had starting using the internet in the last 18 months seem keen to embrace. The majority of those ‘recently online’ in the survey say that sharing messages or photos with family and friends would be useful (70%*), and a considerable number said the same of video chat (43%*). Three in ten are even using social media to communicate with friends or family (28%*). However, a lower proportion are using video calling (18%*), suggesting a gap remains between perceptions of video calling to be useful and actually using it.

Nevertheless, for a couple of interviewees who had recently gone online, video contact with friends and family was a clear draw for getting the internet. This is especially the case when relatives have moved abroad, and for a few interviewees this scenario came through as a strong motivator to get an internet connection.

“One of the big things is that one of my daughters lives in New Zealand and my two best friends, one lives in Spain and one’s in South Africa, so it was very difficult to keep in touch having the odd phone call and things. Now, it’s instant communications...I’ve been on Facebook to my mate in Spain about a couple of things twice today already.”

Male, 75, Recently online

“It’s been a slow process, so I’m still not very skilled, but it at least allows me to communicate with them on Skype... If I hadn’t got family, I don’t think I would have [gone online]... It wouldn’t have been necessary in my life.”

Female, 70, Recently online

“The most important thing why I’ve got it is I can speak to my son in America and be in touch with him within seconds.”

Female, 76, Recently online

Family and friends can play an important role as trusted advisors when it comes to learning about the internet, and they continue to provide support even after someone has gone online.

Very few non-users (12%) have taken any active steps related to getting the internet installed (see Section 3.2; Figure 5), and when asked who they would trust to help them learn how to use the internet, the vast majority of non-users said family (85%). Family is cited slightly more often than friends (79%), and far ahead of the other most trusted organisations: charities (61%), local public sector organisations (53%) and digital content providers (50%).

Trust in individuals and organisations to support learning how to use the internet

(% of non-users who said the following)

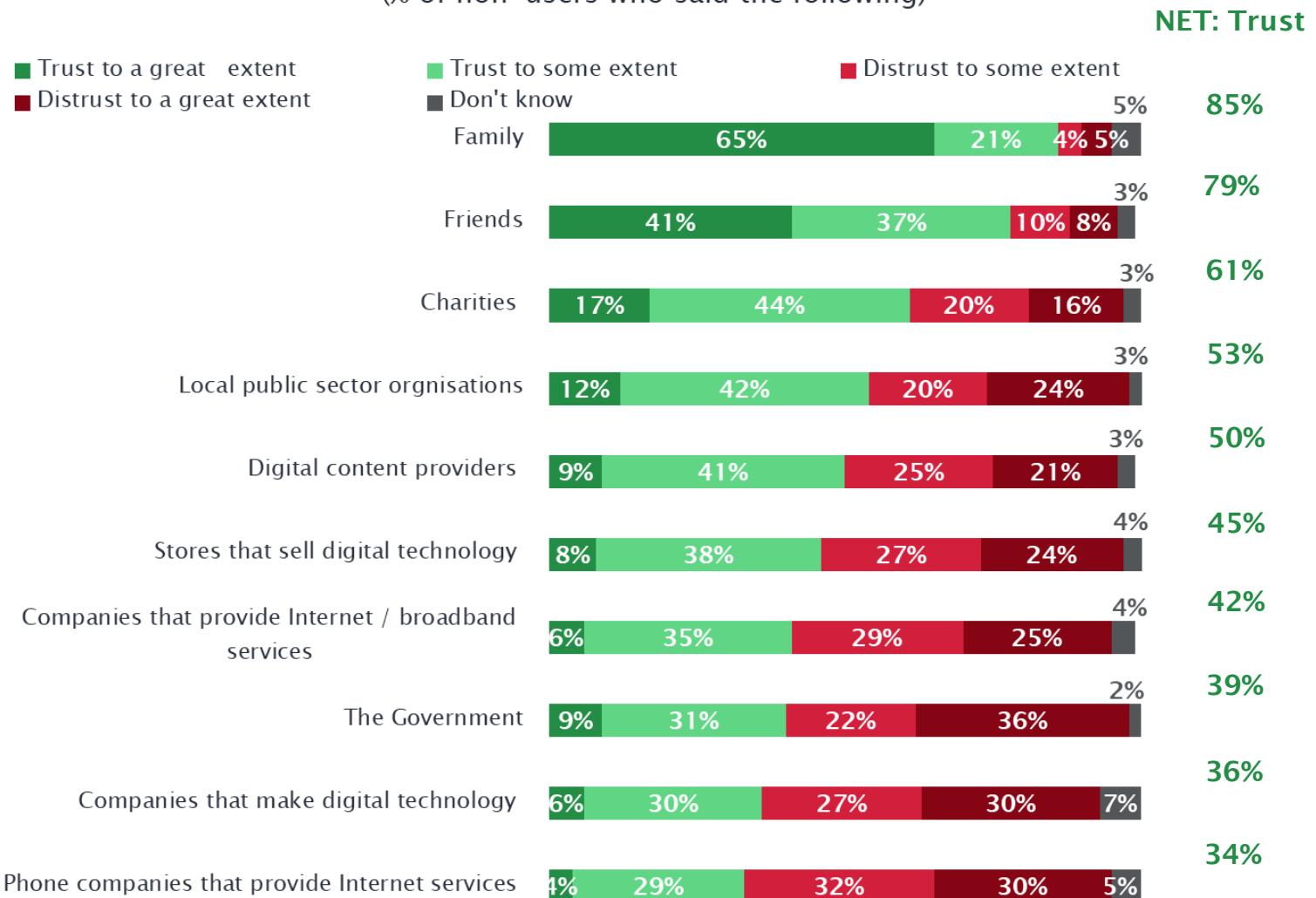


Figure 18: Q14. And to what extent would you trust the following individuals or organisations to help you learn how to use the internet? Base: All non-users (n=952)

Half of non-users agree that family/friends do things for them online (49%), and this support does not end when a non-user does go on to establish an internet connection. The vast majority of those with a recent internet connection say they have help from family/friends to do things online (80%).

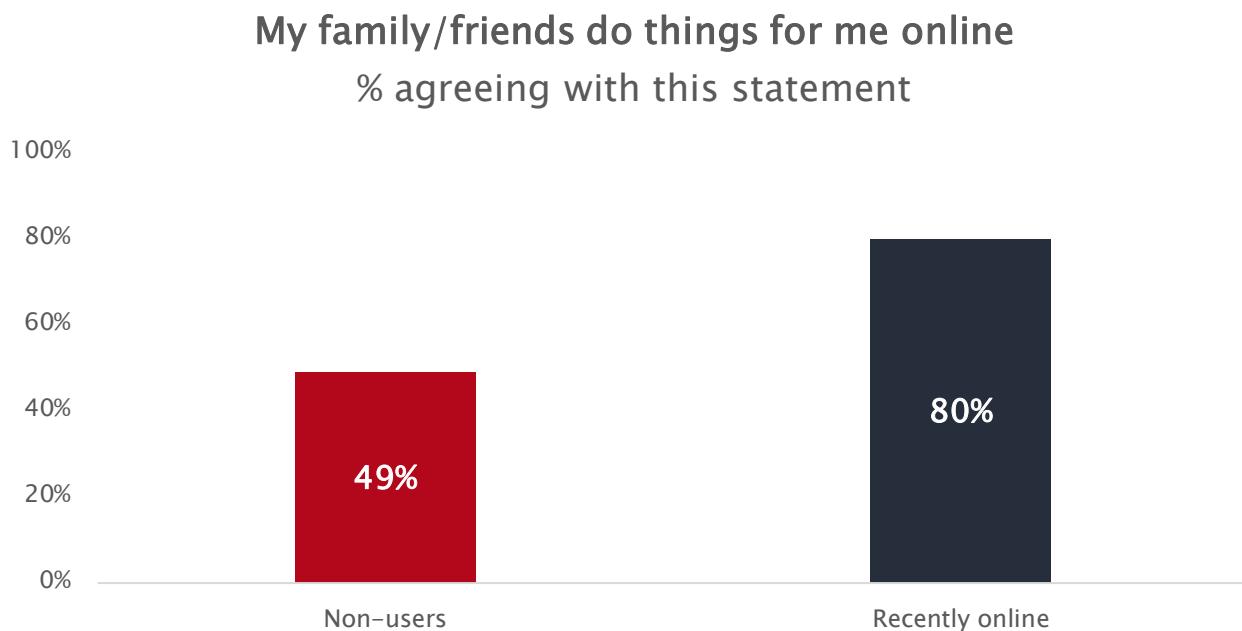


Figure 19: Q11. To what extent do you agree or disagree that the following statements about the internet apply to you? My family / friends do things for me online. Base: all non-users (n=952), all recently online (n=40)

Considering that almost half of non-users say there is no one there to teach them how to use the internet (48%), it becomes clear families and friends are often instrumental in helping relatives to set up an internet connection as well as in helping them learn basic computer and internet skills.

"If I had it, I'd get my son or my daughter to come round and just sit with them for a night and... Just talk me through it a bit. Then I'd probably try and find out things myself."

Female, 61, Non-user

"My daughter did it all for me [setting up Facebook and other apps]. She made up all the passwords, and I just put them down in my telephone book..."

Female, 76, Recently online

Working with families may help to tackle digital exclusion

Being able to contact their family is one of the main attractions of using the internet for non-users. This may be mutual, as younger family members may also find benefit in older relatives being connected to the internet so they can be reassured that all is well via messenger, email or video call.

There is therefore an argument that organisations seeking to promote internet use may have some success working through family or friend networks, particularly as there is some evidence that connection to close family is a key factor in adopting internet practices amongst older non-users. This approach may garner more success than engaging with non-users directly. Partnering with families and friends could include having an offer to add an older relative to an existing internet package, or could

perhaps involve working with existing social networks to demonstrate simple internet-based tools in a group situation. Supporting family members or friends with teaching materials or incentives may also help to reaffirm existing behaviours that help diminish digital exclusion.

It is important that this support is framed appropriately and does not simply result in a dependence on friends and family to undertake tasks. One in ten of those with a recent internet connection (13%) say that family/friends doing things for them online was one of the main reasons they had not got the internet before.

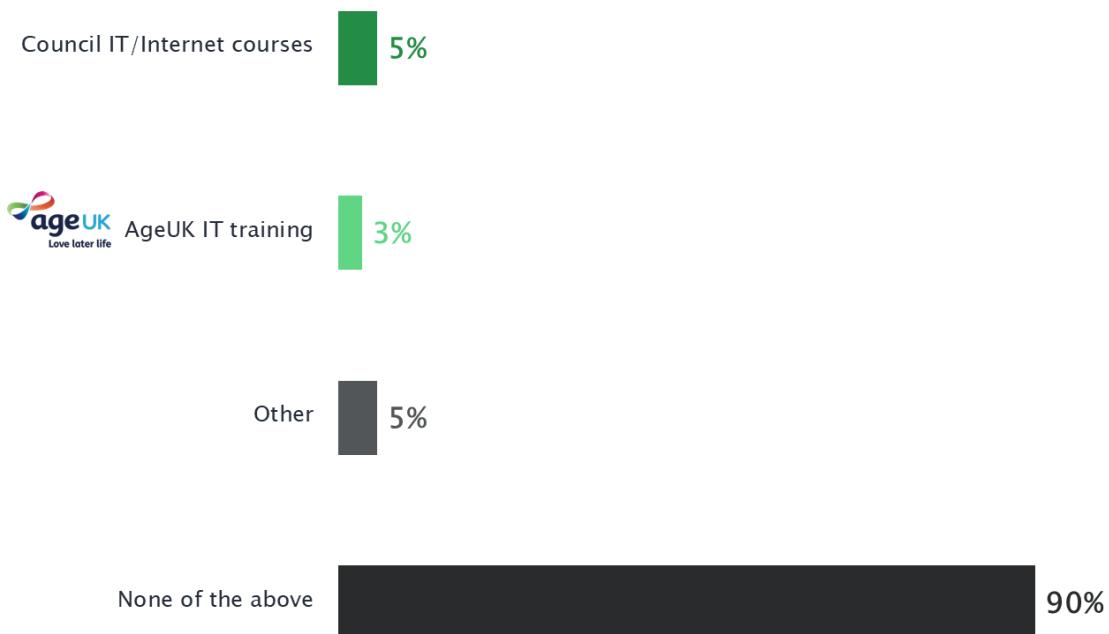
There are large numbers of non-users who are confident in their ability to learn digital skills, but awareness of existing internet skills programmes does not appear to be widespread.

Section 3.5 covers some of the issues around the lack of digital skills, but the survey does not find *all* non-users are lacking the ability or confidence to learn how to use the internet. Almost half (46%) disagree that it is too difficult to learn how to use the internet, for example. Almost a third (31%) of non-users say they are confident they could teach themselves how to use the internet to carry out some of their usual tasks (albeit only 6% of non-users are very confident they could do this). For those with the physical capability, confidence and willingness to learn, existing schemes (or family support – see Section 4.3) may still play a role.

However, awareness of schemes appears to be low. When asked about awareness of schemes to build IT or internet skills – unprompted – none of the 40 recently online internet users mentioned schemes such as Learn My Way or Barclays Digital Eagles. One participant could recall hearing about AgeUK IT training, and a couple had heard about council-run courses.

Awareness of schemes that aim to build IT or internet skills

(% of recently online who have heard of each of the following)



*Q8. Which, if any, schemes that aim to build IT or internet skills can you recall hearing about? Base: All recently online (n=40)***

Given there may be a considerable swathe of non-users who are not put off by the challenge of learning digital skills, promotion of these schemes through appropriate channels may have some success. However, given evidence elsewhere pointing to a potential reluctance to engage with external support, the adaptation of schemes to work in partnership with families, friends or even existing community groups may garner greater success.

5.3. INDEPENDENCE

Encouraging the learning of digital skills to promote long-term independence may have some impact for those with an active lifestyle at present

Another barrier to using the internet, identified in Section 2, is related to independence. Many non-users feel a sense of pride in not using the internet (51%), and some regard the internet as anti-social (46%) (Figure 1). A quarter of non-users (23%), when asked why they do not use the internet said – unprompted – that they are happy the way they are and being able to manage without it.

Some interviewees spoke of the importance of ‘getting out and about’ and valuing their independence and human connections. These interviewees often viewed using the internet as the antithesis of this. Taking the bus to go to the bank, or walking to the shops, are certainly activities to be encouraged for physical and mental wellbeing. Where individuals are living happy and healthy lives at present, it may seem unnecessary to promote the learning of internet skills.

Nevertheless, there are several factors that might lead to a sudden change in circumstance. A change in physical health that affects mobility; the loss of a partner; relatives moving away; or even the closure of a bank branch might rapidly leave someone with more limited options or freedom.

Encouraging the learning of internet skills, and establishing an internet connection *before* any of these situations occur may therefore increase independence in the long run. Making this case – sensitively – may encourage consideration of how internet use can actually benefit independent and sociable lives.

Evidence from the few interviewees who had started using the internet over the last year supports this. Whilst these interviewees were not by any means using the wide range of tools and resources that the internet can offer (for example, none were online banking or regularly shopping online) the ability to connect with others, or conduct basic searches for information was seen as aiding, rather than hindering their independence.

“Because I lost three of my family to cancer a couple of years back, all of a sudden, I had nobody there, so that’s when it became very important for me to learn something, and you know, because I obviously didn’t have the people around me that I could call on any more... It’s given me more freedom as far as I’m now reaching the outside world instead of sitting in four walls as a disabled, single person.”

Female, 70, Recently online

5.4. SERVICE OFFERINGS

General information seeking on the internet has appeal for some non-users.

When asked what services they might be interested in using, a quarter of non-users said 'general information seeking' (27%). This was one of the most common answers and the majority of those recently online also report doing general information seeking (e.g. Google searching) (63%), suggesting it is one of the key attractions of the internet. Listening to the radio (19%) and online shopping (18%) also came out relatively high, but half of respondents failed to see any use in any of the services listed (50%). The perceived lack of usefulness of internet services is higher amongst those not in employment (51% vs 35% of those employed) and older non-users (52% of those 65+ vs 31% aged 45–64).

Interest in online services

% of non-users who selected each of the following

General information seeking (e.g. Google search) 27%

Listening to the radio 19%

Online shopping (for clothes, food etc.) 18%

Being able to choose different live TV content as it is broadcast 17%

Email 16%

Banking / paying bills 11%

Video calling (e.g. Skype, FaceTime) 10%

Social media (e.g. Facebook, Instagram) 7%

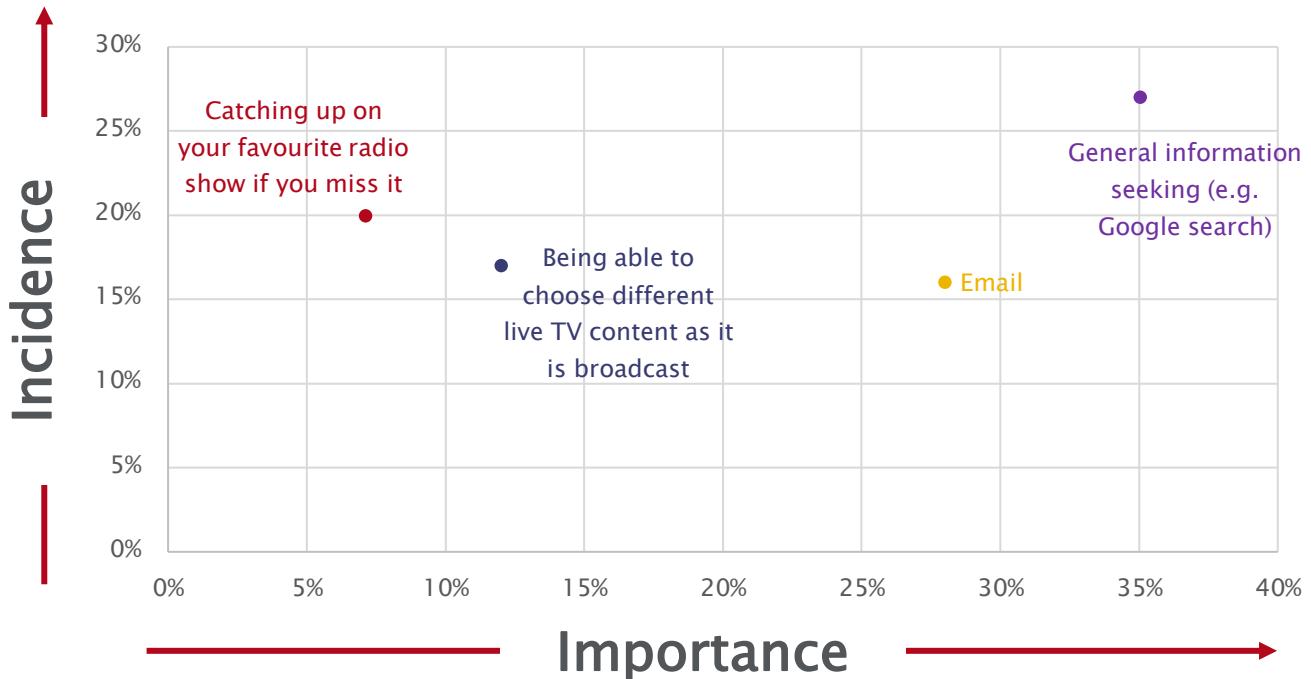
Nothing/ none of the above 50%

Figure 21: Q5. Imagining you were to ever use the internet, which of these online services would you be interested in using?

Base: All non-users (n=952).

General information seeking as a potential key service is supported by statistical analysis. The research looked at some characteristics of the 7% who said it is 'likely' that they will start using the internet at some point in the future, and using Key Drivers Analysis, a model was created to see what drives likelihood to go online. General information seeking is a relatively important driver. Therefore, those that say they are interested in general information seeking are more likely to say they are likely to go online at some point in the future.

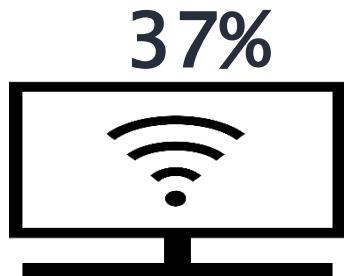
Key Drivers Analysis: interest/usefulness with 'How likely or unlikely are you to start using the internet at some point in the future?'



Key Drivers Analysis of usefulness/interest in internet services with Q3. How likely or unlikely are you to start using the internet at some point in the future? Model explains 33% of all variance and therefore results should be treated as indicative. Please refer to the methodology section of this report for full detail on the variables included within the analysis.

The same is true, to a lesser extent of email: though only 16% of non-users say that they are interested in email, there is a strong correlation between those interested and those who say they are likely to start using the internet in the future.

Movement of TV and radio services to being available solely online would be a driver for some non-users to establish an internet connection at home.



Would want to get an internet connection if all TV access was through the internet

Figure 32: Q6. Imagine a scenario where all television access would be through the internet by the year 2022. This means that to watch television people would need an internet connection to their television set, computer or other device. Which of the following statements best describes how you would feel in this scenario? Base: All non-users (n=952).

If all television access was required to be through the internet by 2022, a third of non-users say that they would want to get an internet connection set up (37%). This is more likely to be the case amongst those who are younger (51% 45–64 vs. 35% 65+)

When considering services that non-users might be interested in (Figure 21), beyond general information seeking (27%), services such as listening to the radio (19%) and being able to choose different live TV content as it is broadcast (17%) also rank relatively high. Being able to choose different live TV content holds more appeal for male non-users (24% of whom selected this) than female (12%). It also holds a strong correlation with likelihood to go online at some point in the future, suggesting that those interested in online-enabled TV services might be a strong indicator of latent interest in the internet.

There is also some interest in online streaming TV already, with three in ten non-users saying that they would find catching up on TV shows (e.g. on BBC iPlayer) or using Netflix useful (28%). Mirroring findings elsewhere, those 45–64 are more likely to feel that catch-up TV might be useful (40%) than those age 65+ (27%). One in five say that catching up on missed radio shows would be useful (20%), though there is a far narrower gap by age (24% aged 45–64 vs. 20% 65+).

Although benefits of being able to access TV and radio online are not *currently* causing the non-users surveyed to consider getting the internet installed, it should be noted that television is something which people value and access is ubiquitous across the UK without requiring an internet connection². Even so, two-thirds of non-users currently say that a full transition of television to the internet over a 3–4-year period would *not* encourage them to get an internet connection. However, as more services, such as television, become available exclusively online, and non-users can see the visible impact on their quality of life, maintaining television access may become a more important driver of internet adoption in the future.

As such, the television could help facilitate the transition online in the *future* as this likely to be one of the only electronic devices which non-users are familiar with. With lack of digital skills and the perception that investing in the internet would deliver low value for money acting as key barriers to internet use, further research could explore whether allowing people to connect to the internet via their

² In 2017 95% of UK households had a working TV set (Ofcom, *Communications Market Report*, 2 August 2018)

current television set would be effective in encouraging non-users to move online. However, there is a risk that this will only encourage non-users to move online for a specific service via a single device, while it does not address the other barriers to general internet usage highlighted in this report. These considerations therefore highlight that a wide range of strategies need to be considered.

5.5. SUMMARY OF DRIVERS

The table below summarises some of the factors that emerge from the evidence above. Those more likely to be open to using the internet might have some of the following individual, social or material characteristics:

Driver
Interest in the internet: seeing internet use as aiding (rather than undermining) independence; believing there are online services that might be useful ³
Belief that internet offers value for money
Confidence in ability to (learn how to) use a computer or smartphone; or already own and use a device that could be connected
Connection with friends and family is important ⁴
Access to close support of family or friends for the processes of choosing, buying and installing devices
Access to close support of family or friends (or other networks) for the process of learning and using the internet

Implications from the survey results and interviews suggests that, whilst possession of one or more of these characteristics may increase likelihood of going online, all of these factors may need to align in order for someone to make the jump and sign up to get the internet.

³ Those interested in general information searching or email may be the most inclined to get the internet at some point in the future. Were TV and/or radio to be online, this element would increase in importance for many.

⁴ Particularly the case if there is geographical distance between them and family/friends.

6. APPENDIX

6.1. TELEPHONE SURVEY QUESTIONNAIRE

SCREENING QUESTIONS

Thank you for your help with this survey. To start we just want to check that you are eligible to complete the survey.

S1. [ASK ALL] Do you have an Internet connection set up at home (e.g. WiFi or broadband)? [SINGLE CODE] DO NOT READ

- a) Yes
- b) No

S2. [ASK ALL] Do you use internet data (e.g. 3G or 4G internet) on any portable devices such as a phone or iPad? DO NOT READ

- a) Yes [SKIP TO S5 IF CODED A AT S1; SKIP TO S6 IF CODED B AT S1]
- b) No [SKIP TO S5 IF CODED A AT S1; CONTINUE IF CODED B AT S1]

S3. [ASK ALL S2=B] Do you use the internet (including email, apps or any websites) at all? READ OUT CODES

- a) Yes – on someone else's phone or iPad [SCREENOUT – THANK AND CLOSE]
- b) Yes – on someone else's laptop or PC [SCREENOUT – THANK AND CLOSE]
- c) Yes – at work [SCREENOUT – THANK AND CLOSE]
- d) Yes – in a public building such as a library or elsewhere [CONTINUE TO S4]
- e) None of the above RECRUIT AS NON-USER

S4. [ASK ALL S3=D] How often do you use the internet in a public building, or elsewhere?

- a) At least once every three months [SCREENOUT – THANK AND CLOSE]
- b) Less than once every three months RECRUIT AS NON-USER

S5. [ASK ALL WITH INTERNET ACCESS AT HOME; S1=A] Which of these comes closest to how often you use the internet via WiFi or broadband at home? [SINGLE CODE] READ OUT CODES

- a) Several times a day
- b) Daily
- c) Weekly
- d) Monthly
- e) Sometimes, but less than once a month [SCREENOUT IF CODED B AT S2 – THANK AND CLOSE]
- f) Never [SCREENOUT IF CODED B AT S2 – THANK AND CLOSE]

S6. [ASK ALL WITH INTERNET ACCESS ON A PORTABLE DEVICE; S2=A] How often do you use internet data on a portable device (e.g. 3G or 4G internet)? DO NOT READ - CODE TO LIST

- a) Several times a day
- b) Daily
- c) Weekly
- d) Monthly
- e) Sometimes, but less than once a month [SCREENOUT IF CODED E OR F AT S5 – THANK AND CLOSE]

S7. [ASK ALL WHO CODED A-D AT S5 OR A-B AT S6] When did you start using [INSERT FOLLOWING IF S5=A-D] the Internet at home [INSERT IF S6=A-B] (and) internet data on a device? [NB IF BOTH INSERT ‘and’ BEFORE ‘internet data’] DO NOT READ - CODE TO LIST

- a) Within the past 18 months
- b) More than 18 months ago [SCREENOUT – THANK AND CLOSE]
- c) Don’t know / can’t remember [SCREENOUT – THANK AND CLOSE]

S8. [ASK ALL S7=A] Before you started using the Internet at home/on your phone, did you use the internet (including email, apps or any websites) elsewhere? READ OUT CODES

- a) Yes – on someone else’s phone or iPad [SCREENOUT – THANK AND CLOSE]
- b) Yes – on someone else’s laptop or PC [SCREENOUT – THANK AND CLOSE]
- c) Yes – at work [SCREENOUT – THANK AND CLOSE]
- d) Yes – in a public building such as a library or elsewhere
- e) None of the above RECRUIT AS RECENTLY ONLINE

S9. [ASK ALL S8=D] Before you started using the internet at home/on your phone how often did you use the internet in a public building, or elsewhere? DO NOT READ - CODE TO LIST

- a) At least once a week [SCREENOUT – THANK AND CLOSE]
- b) At least once every few months but less than once a week [SCREENOUT – THANK AND CLOSE]
- c) Sometimes, but less than once every few months RECRUIT AS RECENTLY ONLINE

MAIN QUESTIONNAIRE

LIFESTYLES AND ATTITUDES TO TECHNOLOGY

Q1. [ASK ALL NON USERS] I am going to read you a number of statements. Please tell me to what extent you agree or disagree with each statement. [SINGLE GRID, RANDOMISE STATEMENTS] **READ OUT**

- i. Agree strongly
- ii. Tend to agree
- iii. Tend to disagree
- iv. Disagree strongly
- v. Don't know **DO NOT READ**

- a) I am proud that I do not use the internet
- b) Using the internet is anti-social
- c) I would like to be able to use the internet, but do not feel able to
- d) I do not have the physical capability to use the internet (e.g. finger dexterity, eyesight)
- e) I feel like I am missing out by not using the internet
- f) It is important to continue learning new things throughout your life
- g) I find it easy to learn and remember how to use new gadgets
- h) I have no interest in using the internet

Q2. [ASK ALL NON USERS] Which, if any, of the following have you done? [SINGLE] **READ OUT**

- a) Asked a friend or relative something about getting the internet installed
- b) Asked a professional something about getting the internet installed
- c) Looked at prices for getting the internet installed
- d) Compared prices or packages between different internet providers
- e) Found out about broadband speeds in the local area
- f) None of the above

Q3. [ASK ALL NON USERS] How likely or unlikely are you to start using the internet at some point in the future? [SINGLE, FIX SCALE] **READ SCALE**

- a) Very likely
- b) Fairly likely
- c) Fairly unlikely
- d) Very unlikely
- e) Don't know [DO NOT READ]

DRIVERS FOR USING THE INTERNET

Q4. [ASK ALL NON USERS] For what reasons, if any, do you think using the internet might be useful to you? [OPEN – OR ‘NO REASONS’] **TO BE CODED – PROBE FULLY**

Q5. [ASK ALL NON USERS] I'm going to read out a list of things that can be done online on the internet.

Imagining you were to ever use the internet, which of these online services would you be interested in using? [MULTICODE, RANDOMISE] READ OUT

- a) Listening to the radio
- b) Social media (e.g. Facebook, Instagram)
- c) Video calling (e.g. Skype, FaceTime)
- d) Email
- e) Being able to choose different live TV content as it is broadcast (e.g. news stories, sports tournaments)
- f) Banking / paying bills
- g) General information seeking (e.g. Google search)
- h) Online shopping (for clothes, food etc.)
- i) Nothing/None of the above **CODE BUT DO NOT READ**

Q6. [ASK ALL NON USERS] Imagine a scenario where all television access would be through the internet by the year 2022. This means that to watch television people would need an internet connection to their television set, computer or other device. Which of the following statements best describes how you would feel in this scenario? [SINGLE, FIX] **READ OUT**

- a) I would want to get an internet connection set up, and I would not need any support to do so
- b) I would want to get an internet connection set up, but I would need support doing this
- c) I would not want to get an internet connection set up
- d) Not sure **DO NOT READ**

Q7. [ASK ALL] I am going to read you a list of benefits associated with using the internet. **[IF NON-USER READ]** If you were able to use these services, how useful or not do you feel each of these would be to you? **[IF RECENTLY ONLINE READ]** how useful or not do you feel each of these is to you? **[SINGLE GRID, RANDOMISE STATEMENTS] READ OUT**

- i. Very useful
- ii. Fairly useful
- iii. Not very useful
- iv. Not at all useful
- v. Don't know **DO NOT READ**

- a) Being able to access better prices when shopping for things like clothes and food
- b) Being able to meet new people
- c) Catching up on your favourite TV show if you miss it (e.g. BBC iPlayer, Netflix)
- d) Catching up on your favourite radio show if you miss it
- e) Getting access to Government services (such as passport renewals or driving licenses) instantly (e.g. without queuing, postage or handling fees)
- f) Using video chat with family and/or friends
- g) Sharing messages and/or photos with family or friends

BARRIERS TO USING THE INTERNET

Q8. [ASK ALL RECENTLY ONLINE] Which, if any, schemes that aim to build IT or internet skills can you recall hearing about? [MULTI] **DO NOT READ OUT, CODE TO LIST**

- a) BBC Webwise
- b) AgeUK IT training
- c) Barclays Digital Eagles
- d) Learn My Way (UK Online)
- e) Discovery With Three
- f) Council IT/Internet courses
- g) Other [PLEASE SPECIFY – ALLOW MULTIPLE]
- h) None of the above [DNR]

Q9. [ASK ALL NON USERS] For what reasons do you not use the internet? [OPEN] **TO BE CODED – PROBE FULLY**

Q10. [ASK ALL RECENTLY ONLINE] You indicated earlier that you got access to the internet for the first time at some point in the last 18 months. What are the main reasons you did not get access to the internet before this? [OPEN] **DO NOT READ – TO BE CODED – PROBE FULLY, CODE TO LIST**

- a) There were no services online that I was interested in / I had no use for it
- b) I felt it was too difficult to learn
- c) I thought it was too late to learn
- d) I did not know how to use it / did not have the skills
- e) It was too expensive / was poor value for money
- f) My family / friends did things for me online
- g) It is anti-social to use the internet
- h) I would rather be doing other things
- i) No one was there to teach me how to use the internet
- j) I would break something or do something ‘wrong’ (e.g. the computer / device)
- k) It would take longer for me to do day-to-day tasks
- l) Previous experience of using the internet / a computer put me off
- m) I had concerns about internet safety / security
- n) I had concerns about privacy / intrusion
- o) Other [PLEASE SPECIFY]

Q11. [ASK ALL] To what extent do you agree or disagree that the following statements about the internet apply to you? [RANDOMISE, MULTICODE] **READ OUT**

- i. Agree strongly
- ii. Tend to agree
- iii. Tend to disagree

- iv. Disagree strongly
- v. Don't know **DO NOT READ**

- a) There are no services online that I would be interested in / I have no use for it
- b) It is difficult to learn
- c) It is too late to learn
- d) I do not know how to use it / do not have the skills
- e) I don't know how to get started
- f) It is too expensive / is poor value for money
- g) My family / friends do things for me online
- h) It is anti-social to use the internet
- i) No one is there to teach me how to use the internet
- j) I am concerned I might break something (e.g. the computer / device) or do something 'wrong'
- k) It would take longer for me to do day-to-day tasks on the internet
- l) Previous experience of using the internet / a computer has put me off
- m) I have concerns about internet safety, security or privacy
- n) I am concerned about accidentally accessing harmful or illegal content

Q12. [ASK ALL NON USERS] Thinking about any services or tasks which might require you to use the internet, does anyone do anything online on your behalf? (e.g. set up direct debit payments, book travel) [MULTICODE] **DO NOT READ, IF YES THEN PROBE FOR WHOM**

- a) Yes – family members
- b) Yes – friends
- c) Yes – others [PLEASE SPECIFY]
- d) No [EXCLUSIVE]
- e) Don't know

Q13. [ASK ALL NON USERS] If you had to use the internet to carry out some of your usual tasks, how confident or unconfident would you be about teaching yourself how to use it? **READ OUT** [SINGLE]

- a) Very confident
- b) Fairly confident
- c) Fairly unconfident
- d) Very unconfident

SOCIAL NETWORKS

Q14. [ASK ALL] And to what extent would you trust the following individuals or organisations to help you learn how to use the internet [IF RECENTLY ONLINE ADD: more effectively]? [SINGLE GRID, RANDOMISE STATEMENTS] **READ OUT**

- i. Trust to a great extent
- ii. Trust to some extent
- iii. Distrust to some extent

- iv. Distrust to a great extent
- v. Don't know **DO NOT READ**

- a) Family
- b) Friends
- c) The Government
- d) Charities (e.g. AgeUK)
- e) Stores that sell digital technology (e.g. Currys, PC world)
- f) Companies that make digital technology (e.g. Microsoft, Apple)
- g) Phone companies that provide Internet services (e.g. Three, Vodafone, EE)
- h) Companies that provide Internet / broadband services (e.g. Sky, BT, TalkTalk, Virgin)
- i) Local public sector organisations (e.g. county council)
- j) Digital content providers (e.g. BBC, ITV, Sky)

RECENTLY ONLINE

Q15. [ASK ALL RECENTLY ONLINE] Earlier you mentioned that you have started to use the internet in your home and/or on your phone within the last eighteen months. For what reasons did you start using the internet? [OPEN] **TO BE CODED, PROBE FULLY**

Q16. [ASK ALL RECENTLY ONLINE] To what extent do you agree or disagree with each of the following statements about using the internet? [SINGLE GRID, RANDOMISE STATEMENTS]

- i. Agree strongly
- ii. Tend to agree
- iii. Tend to disagree
- iv. Disagree strongly
- v. Don't know **DO NOT READ**

- a) It is often more convenient to use the internet
- b) I like that I can use the internet to do things from my own home
- c) I worry about spending too much time on the internet
- d) I am proud to use the internet
- e) Using the internet is anti-social
- f) I would feel like I am missing out by not using the internet
- g) It is important to continue learning new things throughout your life
- h) I find it easy to learn and remember how to use new gadgets
- i) I like to walk and use public transport as I get to meet lots of people
- j) I have found the internet easy to use
- k) I think that using the internet is expensive
- l) I have been more able to pursue hobbies because I have the internet set up

Q17. [ASK ALL RECENTLY ONLINE] Thinking about when you use the internet, how confident or unconfident are you in using the internet on your own without any help from others? [SINGLE, FIX]
READ OUT

- a) Very confident
- b) Fairly confident
- c) Fairly unconfident
- d) Very unconfident
- e) Don't know **DO NOT READ**

Q18. [ASK ALL RECENTLY ONLINE] Which of the following online services do you use? [MULTICODE, RANDOMISE LIST]
READ OUT

- a) Listening to the radio
- b) Listening to music
- c) Using social media to communicate with friends / family (e.g. Facebook, Instagram)
- d) Using video calling services with friends / family (e.g. Skype, FaceTime)
- e) Email
- f) Watching live TV
- g) Watching catch-up TV (e.g. BBC iPlayer, Netflix)
- h) Banking / paying bills
- i) General information seeking
- j) Price comparison
- k) Reading the news
- l) Checking the weather
- m) Using maps or planning routes
- n) Booking travel
- o) Using Government / local government / public services (e.g. paying council tax, claiming assistance or benefits)
- p) Online shopping (for clothes, food etc.)
- q) Other [OPEN] **INTERVIEWER TO RECORD ANSWER**

Q19. [ASK ALL RECENTLY ONLINE] To what extent would you recommend the internet to friends or family that are not online? [MULTICODE, RANDOMISE LIST]
READ OUT

- a) Definitely would recommend
- b) Probably would recommend
- c) Probably would not recommend
- d) Definitely would not recommend
- e) Don't know **DO NOT READ**

DEMOGRAPHICS

[ASK ALL] In which region do you live? [SINGLE] DO NOT ASK, CODE FROM SAMPLE

- a) East England
- b) East Midlands
- c) London
- d) North East
- e) North West
- f) Northern Ireland
- g) Scotland
- h) South East
- i) South West
- j) Wales
- k) West Midlands
- l) Yorkshire and Humber

D1. [ASK ALL] Do you identify...? [SINGLE CODE, DO NOT RANDOMISE] INTERVIEWER TO READ OUT 1-3
TOGETHER

- a) as Male
- b) as Female
- c) or in another way
- d) Prefer not to say DO NOT READ

D2. [ASK ALL] What is the highest educational level that you have achieved to date? If you are still in full time education, please give the educational level that you are currently working towards. [SINGLE, FIXED OPTIONS] DO NOT READ, CODE BACK TO LIST

- a) No formal education
- b) Primary school
- c) Secondary school / high school / NVQ levels 1 to 3, etc.
- d) Vocational training
- e) University undergraduate degree or equivalent professional qualification
- f) Postgraduate degree or higher
- g) Other [OPEN TEXT] INTERVIEWER TO RECORD ANSWER
- h) Prefer not to say

D3. [ASK ALL] Which of these best describes your own working situation? [SINGLE CODE] READ OUT

- a) Employed full time (30+ hours per week or more)
- b) Employed part time (8-29 hours per week)

- c) Employed part time (Under 8 hours per week)
- d) Not working
- e) Retired
- f) Homemaker
- g) Student / full time education
- h) Prefer not to say **DO NOT READ**

D4. Social Grade [USE 'GRADER']

D5. [ASK ALL] Does anyone else in your home use the internet?

- a) I live alone
- b) Yes
- c) No

D6. [ASK ALL] Please can you tell me your age? [SINGLE CODE] **DO NOT READ, CODE BACK TO LIST**

- a) Under 18 [SCREENOUT – THANK AND CLOSE]
- b) 18 – 24
- c) 25 – 34
- d) 35 – 44
- e) 45 – 54
- f) 55 – 64
- g) 65+
- h) Prefer not to say

D7. [ASK ALL] Do you have any disability or health condition that limits your day-to-day activities? It could include a physical disability or health condition (e.g. affecting your movement, balance, vision or hearing) or a non-physical disability or health condition (e.g. affecting thinking, remembering, learning, communications, mental health or social relationships). [SINGLE] **DO NOT READ, CODE BACK TO LIST**

- a) Yes
- b) No
- c) Prefer not to say

D8. [ASK ALL D7=A] Would you classify your disability or health condition as physical, non- physical or both? By physical we mean something that affects your movement, balance, vision or hearing etc. By non-physical, we mean something that affects your thinking, remembering, learning, communication, mental health or social relationships. [SINGLE, FIX] **DO NOT READ, CODE BACK TO LIST**

- a) Physical
- b) Non-physical

- c) Both physical and non-physical
- d) Prefer not to say



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