Annex A: Qualitative sub-group summary

Introduction

In late 2008, the Communications Consumer Panel commissioned Opinion Leader to conduct deliberative research to understand better the likely future needs of consumers and what policy and regulation may be required to meet these. A key finding from this research was that broadband at home was seen as increasingly 'essential' and a 'right' on par with utilities for some in the groups. 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 specifically to broadband at home. This follow-up qualitative and quantitative research is reported in full within the main body of the report.

This document is an annex to main report outlining the qualitative research in particular. Annex B gives greater detail on the quantitative research.

This annex pulls out key sub-group differences from the qualitative research such as:
- Between those with broadband at home and those without
- Between the age groups – 18-24, 25-39, 40-64, 65+
- Between different lifestages – pre-children, with children at home, empty nesters
- Between different socio-economic groups – ABC1, C2DE
- Between different locations – such as urban and rural locations, and broadband 'notspots

In general, the main differences found within these sub-groups relate to perceived importance of broadband currently. A level of consensus between all sub-groups was reached in the discussions that it will become essential to have broadband at home in the not-too-distant future. A broad level of support was also indicated for the principle of access for all: most people across all sub-groups agree that ensuring network coverage and media literacy are appropriate areas for government intervention. Opinions differ about retail subsidies, but this is less linked to demographics or geography, and more to individual differences in attitudes to welfare.

Methodology

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 A1 below:

Figure A1: Qualitative sample

Location	Age	SEG	Rural/urban	Whether 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
London (Bexleyheath)	25-39	ABC1	Urban	Mix of those with and those without
London (Bexleyheath)	40-64	C2D	Urban	Mix of those with and those without
London (Purley)	18-24	ABC1	Urban	Mix of those with and those without
London (Purley)	18-24	C2DE	Urban	Mix of those with and those without
Plymouth (Plymstock)	18-39	E	Rural	Mix of those with and those without
Plymouth (Plymstock)	65+	E	Rural	Mix of those with and those without

Summary of overall findings

The overall summary of findings below provides a reference point for the qualitative findings showing sub-group differences that follow.

Current importance and use

On average, broadband at home is currently on the cusp between being useful and being vital – it is seen to provide benefits for those who have it but not yet as significantly disadvantaging those who don't, either because it is possible to access broadband elsewhere or access services and activities offline.

For some broadband at home is already essential – this is more likely to be those who already have broadband at home, and those without broadband who live in 'notspot' areas or who have children under 16 at home.

From a broader societal perspective, some groups are perceived by others potentially to derive particular benefits from having broadband at home – these include families with

school aged children and groups who may be physically isolated – such as older people, disabled people and those living in rural and remote areas.

Importance of broadband is because it is a means to an end – the internet is valued for the information it provides and activities it facilitates, 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.

There are many perceived advantages associated with conducting these sorts of activities over the internet – being quicker, easier and more flexible than traditional channels is top-of-mind amongst these.

Future importance and use

Broadband at home expected to become essential for individuals and society in the not-too-distant future – the tipping point is expected when people are disadvantaged or miss out if they do not have ready access to broadband.

Views on access for all and role of government

There is broad support for the principle of access for all – this is in light of the perceived growing importance of the broadband and the links made between access and social mobility.

Government involvement in broadband is seen as appropriate and to be on a par with, or more important than, a range of other communications services – there is broad support for the government intervening to ensure people can get access to broadband where they live and endorsement of the media literacy agenda; views on retail subsidies are more mixed but the least controversial groups would be older people, those who have difficulty leaving the house because of mobility and children from low income families.

A role for industry is also identified – commercial providers, such as computer manufacturers and ISPs, are spontaneously identified as having a part to play in providing consistent coverage across the UK and bringing down costs.

Managing the downside of a technologically-led future is still a priority – 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.

Those with and without broadband at home

Those with broadband at home

Current importance and use

Whether or not an individual has broadband at home is a key factor influencing both how important it is to themselves, and their attitude to how important it is to society. Those with broadband at home tend to regard having it as being particularly important, often referring to 'not being able to live without it'.

Those with broadband at home tend to be heavier and more confident users of the internet. They tend to use the internet more than both those with dial-up at home and those who do not have any form of internet access. Some participants are such heavy users that they find it difficult to pick out the individual activities and services they use the internet for, saying that they "do everything" or "control their whole lives" on the internet.

Those with broadband at home use the internet for a number of different services and activities, the main differences from those without broadband at home being not only that they are able to access activities requiring higher connection speeds, such as video streaming and music downloads, but also that they are able to make more extensive use of lower-speed activities, such as email.

Future importance and use

Those with broadband at home are confident that in-home broadband access will become more important within the next 2-5 years to both themselves and to society as a whole. They point to the numbers of people who now have broadband access and the increasing tendency, not least on the part of Government, to move services, information and activities online and to offer or advertise primarily internet points of contact (for example, putting a website address on advertising rather than a phone number). Looking back at how far this shift has come over the past 2-5 years, they infer that it will become at least as much, or more, important over the next 2-5 years. There are, however, also those who do not think that it is possible for the internet to become any more important, because it is already so vital.

Views on access for all and role of government

There is a consensus that ensuring access for all by providing or co-ordinating network coverage is an important role for government. Ensuring that everyone has the skills and confidence necessary to get and use broadband is also thought to be an important area for government intervention – however, many of those with broadband feel that there is already a lot available in terms of courses and some of them have personally attended these.

Retail subsidies provided by government are more controversial across the board. Participants' attitudes towards these depend a great deal on their attitudes towards the

welfare state and means testing. However, if retail subsidies were to be provided then there is far less controversy over providing them to low-income families and those with limited mobility (some older or disabled people).

Those without broadband at home

Current importance and use

Those without broadband access at home (i.e. those without any internet access or those with dial-up only) fall into two groups: those who are happy with not having access and those who aspire to having it (or, in the 'notspot' groups, being geographically able to get). In keeping with the finding that whether or not an individual has broadband access influences their attitude towards its importance, those who are happy not to have it tend to view it as a luxury. They have little interest in using the internet and are happy with offline alternatives, are very light users for whom dial-up suffices, or have prioritised other things such as satellite television over broadband. A few are heavier users of broadband but have a convenient alternative access point (friend's house, a very local library or work).

Among those who are not happy with not having broadband, there is a stronger view that broadband is important. The strongest views are to be found among those in 'notspot' areas, many of whom view broadband as an essential utility to which they are being denied access. Other people who do not have broadband and are not happy about it tend to be those who cannot afford to have it. Those who only have dial-up at home do not tend to use the internet as often as those who have broadband: for some this is because their usage is driving their service (they are light users so do not think it worth subscribing) but for most the service limitations and speed are driving the extent of their usage and preventing them for using it as often as they need or would like to.

Services and activities that those without broadband would like to use broadband for include leisure (eBay, email attachments, music downloads etc.) but also work and essential personal activities such as online tax filing.

Future importance and use

Among those without broadband there is also a broad consensus that it will become necessary to have broadband at home within the next 2-5 years, although for those who do not already have the internet this feeling is less strongly expressed than for those who have dial-up access already. Among those who have dial-up, those in 'notspot' areas (many of whom already think broadband is essential) believe very strongly that it will become even more essential over the next 2-5 years. Again, this is driven by a perception that services and information are migrating online.

Views on access for all and role of government

As with those who have broadband, there is a consensus that ensuring access for all by providing or co-ordinating network coverage is an important role for government, and unsurprisingly this was particularly important to those in the 'notspot' groups. Again, ensuring that everyone has the skills and confidence necessary to get and use broadband is also thought to be important. As among those with broadband, retail subsidies attract more controversy and attitudes towards these depend a great deal on attitudes towards the welfare state and means testing. Among those without broadband in the 'notspot' areas, however, views on retail subsidies are much more positive and most are in favour. Again, there is less controversy over subsidising low-income families and older or disabled people with mobility difficulties.

Age

18-24

Current importance and use

The youngest age group is typically extremely confident with the internet and typically say it is "essential" or "very important", with a particularly high importance being placed on it by the young urban groups. There are a few exceptions who do not feel it is vital to have home access, but this tends to be because they are heavy users at work and spent little time at home because of the demands of work and socialising. However, in the main, those who do not have the internet at home aspire to getting it.

This group has grown up with the internet to a far greater extent than the other age groups (although they still feel that the internet was less a part of their lives when they were growing up than it is for children currently of school age). Many people within the 18-24 age group manage their entire lives on the internet. This group typically uses the internet most heavily for communication and entertainment, with webmail and social communication sites, and entertainment sites such as YouTube, being frequently named. Shopping and banking are also important to this group, as are hobbies and interests. Those who are studying at university are particularly likely to count the internet as essential, as they say that they would not be able to access lecture notes, communications from lecturers, course administrators and working groups without it: it is felt that university courses require internet access.

Future importance and use

Those in the 18-24 age group also believe broadband access at home will become essential in the next 2-5 years, although for many it is personally essential now. As with those with broadband, this is driven by two factors. Firstly, participants consider how the importance of broadband to themselves has increased over the past 2-5 years and extrapolate this to the future. Secondly, they perceive that more and more is being done online and that offline alternatives are declining.

Views on access for all and role of government

Those in the 18-24 age group agree that ensuring network coverage in all areas of the country, and ensuring that everyone has the skills and confidence necessary to get and use broadband, are appropriate areas for Government intervention. Retail subsidies are more controversial, however, subsidisation of low-income families and older or disabled people who are housebound are least controversial. Those in full-time education add students to the groups identified as the most "deserving" targets of government help to access the internet.

25-39

Current importance and use

This group is also particularly confident with the internet and also typically say it is "essential" or very important. This group often uses the internet heavily at work as well as at home. It is used for the same purposes as the 18-24 age group, but more often for transactions and additionally to help children with homework. Personal importance is increasing among those who have children (this age group is also more likely to use it for other tasks associated with children, for example to book family holidays, look up medical information in the middle of the night, or browse parenting forums). In common with the next age group up, those who are juggling work and family life tend to use it to carve themselves out more time, for example to save a shopping trip, and therefore tasks such as shopping and banking are heavily carried out. Those who do not have the internet at home either aspire to getting it or think that it will become necessary for them to get it. They appear to be slightly less likely than either the older or the younger age groups to use the internet for hobbies, which is in keeping with the finding that this age group is likely to use the internet as a functional, time- and money-saving tool.

This group has also to some extent grown up with the internet, and this influences the degree to which it is considered to be part of their lives. The internet is felt to be particularly important to school-age children, both by those who do have children of this age and those who do not.

Future importance and use

As with the 18-24 age group, this group believes that broadband access at home will become essential in the next 2-5 years, although again, for many it is personally essential now. Again, they believe that more and more is being done online and that offline alternatives are declining.

Views on access for all and role of government

The 25-39 age group thought that government should ensure that everyone can access broadband, no matter where they live in the UK. Ensuring everyone has the skills and confidence needed to access broadband at home is also thought to be an important area for government action. Again, retail subsidies are more controversial and depend on participants' views of benefits and the issue of subsidisation, but as with other groups low-income families and older people or people with disabilities who are housebound are felt to be the most appropriate targets of such help if it is to be given.

40-64

Current importance and use

This group is generally less confident with the internet than the younger age groups. Although a number of individuals describe themselves as very or quite confident, many also say they are not very or not at all confident. Some individuals in this group who use the internet are able to do so only with help, for example from a partner or younger relative. This group also contains some internet 'refusers', who are happy using offline alternatives or who positively prefer them. Some of those who do not have broadband at home aspire to getting it, but there is also a view that they will probably have to get it to keep pace with the modern world and with family and friends. Lack of confidence and concerns about security are two factors preventing those who do not have broadband access from getting it (as are other factors such as cost).

This age group uses similar sites to the younger age groups. Those who are comfortable with the internet use it heavily for shopping and banking, and it is also used to help children with homework (younger children with help, older children without), and for hobbies. Indeed, for some in this age group, particularly those who do not work and are fairly new to the internet, using the internet in itself is viewed as a hobby and an interest in its own right. Among those who have children who have moved away, the internet is an important means of keeping in touch with the family and particularly grandchildren. Some people also use the internet as a means of keeping an eye on, or delivering practical help to, parents living elsewhere.

Future importance and use

Again, participants in this age group believe it will become essential to have broadband at home within the next 2-5 years. At the older end of this age group, some participants think that having the internet at home might become more important to them within the next 2-5 years not only because they expect it to become more important to society, but also because they thought it will become more important to them personally as they got older and less mobile. However, others do not anticipate this, sometimes because they feel that the internet has passed them by or that they are 'too old' for it.

Views on access for all and role of government

Ensuring consistent network coverage across the UK and media literacy to make sure everyone is able to access broadband at home is felt to be an important role for government by this group. Again, retail subsidies are more controversial and owe much to individuals' views of the welfare state in general, but as with other groups participants would be more accepting of subsidies being paid to low-income families and older or disabled people who are housebound.

65+

Current importance and use

As with the previous age group, levels of confidence in the 65+ group are much lower than the younger age groups, with many saying they are not very or not at all confident with using the internet. However, as with the 40-64 age group there are also some who were enthusiastic users and advocates of the internet. As with the previous age group, some only able to surf the internet with help, and there are also some internet 'refusers', who are happy using offline alternatives such as visiting the bank or going to the shops – this is a more common view where people have time on their hands, for example because they do not work or have retired. As with the previous age group, lack of confidence and concerns about security are factors preventing some of those who do not have internet access from getting it (as are other factors such as cost). In addition, this group is more likely to find dial-up adequate for their needs.

People aged 65+ who use the internet are utilising it for similar purposes than other age groups, however less extensively (this was also a finding in the quantitative research).

Future importance and use

As with the older end of the 40-64 age group, the 65+ age group thinks that having broadband at home will become more important within the next 2-5 years primarily because they expect more societal importance to be placed on it, meaning that it will become increasingly difficult to do things offline. A few also envisage greater importance because they expect that their own personal mobility may decrease. However, in the quantitative research, older people (particularly those who don't currently have broadband at home) are least likely to anticipate an increase in future importance, some commenting that they feel they are 'too old' and will be left behind.

Views on access for all and role of government

As with the other age groups, the broad principle of access for all is accepted, geographically and in terms of ensuring media literacy, but views vary according to individual views about the welfare state and means testing. Those in lower socio-economic groups who are aged 65+ are particularly vociferous about their desire not to be means-tested and the stigmatisation of being so.

Life stage

Pre-children

Current importance and use

Those who are pre-children tend to be younger and therefore the specific findings for this group are very similar to the 18-24 and 25-39 age groups. These groups tend to spend more time socialising and be heavy users of social networking sites. They are often also heavy users of the internet at work. This group contains a lot of people studying at university – students feel that the internet is absolutely vital for their courses as it is used by tutors to circulate lecture notes and communicate about their courses.

Future importance and use

Those at the pre-family life stage believe that broadband access at home will become essential for everyone over the next 2-5 years (for many it is personally essential now), because they believe there is an increasing assumption that people will do things online, and this is a trend they believe will continue.

Views on access for all and role of government

Participants in the pre-family group agreed that government should ensure access for all, both by ensuring overall broadband coverage of the UK and by ensuring that everyone has the skills and knowledge necessary to use it. Retail subsidies are again more controversial, apart from for low-income families and those who are housebound. Although the pre-family group do not of course have their own children, they still spontaneously identify schoolchildren as a group for whom the internet is particularly important – based on both their own observations of younger people's usage of the internet and their own experience of needing it in full-time education.

With children

Current importance and use

Families, especially those combining work with family life, tend to use the internet to buy themselves time in a busy schedule, and so the internet is used for time-saving tasks such as banking and booking holidays, but also for a succession of small tasks such as buying a birthday cake for a children's party or purchasing school uniform. The internet is also felt to be important to access information at unpredictable times, such as when children are ill. Likewise, parenting forums are also used by this group. For those with children but who do not work, the internet is thought to be an important potential window on the outside world.

This group often also has older parents and the internet can also be of use for those who need to take an increasing role in caring for older relatives, for example by allowing them to access the information necessary to help them change their doctor or dentist.

Those with children in full-time education particularly stress the importance of the internet to families and have the internet at home wherever possible. Those who do not have the internet at home (generally because of the cost of hardware or access) either use it elsewhere, such as a grandparent's house or library, or make do on an ad hoc basis according to whether or not they have time to find the child an alternative point of access. It is felt that schools expect parents to have the internet and that children are frequently marked down if they produce their work entirely by offline means.

Although parents are aware that the alternative of accessing the internet at internet cafes does exist in theory, in practice this only works for a few – most likely to live in towns and close enough to the library to allow their children to go there unaccompanied. For those who live further away, the library is not a feasible alternative unless the child is old enough to be fairly independent. The practicalities of accompanying a child to the library after the parent had finished work – going to the library, waiting for a computer to become available, and possibly managing younger siblings while they wait for the child to finish – are felt to make this not a real option. Moreover, those who live rurally might not have a communal access point within easy reach.

Future importance and use

There is agreement among those with children that broadband access at home, although they already view it as important or essential, will become even more important over the next 2-5 years, both because services and activities are perceived to be migrating online and because they think it will become even more important to schools, which might start communicating with parents and pupils online (for example by marking work or giving tests online).

Views on access for all and role of government

As with other groups, parents agree that the government should ensure everyone is able to access broadband in terms of both coverage and knowledge. However, again the issue of retail subsidies draws controversy according to existing individual opinions on the welfare state, with those who are housebound and children being perceived as more worthy recipients – this controversy over retail subsidies persists even among those who have children but cannot afford internet access, some of whom, for example, think the money could be better spent on funding services such as the NHS and caring.

Post-children

Current importance and use

The post-children age group largely maps onto the older end of the 40-64 age group and the 65+ age group. Therefore the findings are similar, and this group contains both those who are extremely confident with using the internet and those who either are not confident at all or are not confident to use it without help. A key life-stage factor driving use of the internet among this age group is the desire to keep in touch with children who have moved away, and particularly grandchildren. This is done through social networking sites, email and Skype. There are also those who speak of the desire to keep in touch with the modern world, including the internet, in order to keep up to date with their children and grandchildren and understand the things that are important to them.

Future importance and use

As with other groups, those post-children believe broadband access at home will become more essential in the next 2-5 years as it will become increasingly difficult to do things offline. As this group maps onto the older age group, the post-children group also think the internet is likely to become more important to them as they get older and their mobility declines.

Views on access for all and role of government

Again, there is a high level of agreement that ensuring everyone in the country has broadband available in their area and has the skills and knowledge necessary to access are appropriate areas for government intervention, but less agreement in the area of retail subsidies (although lower-income families and those who are housebound are again generally agreed to merit subsidisation if given). As this group maps onto the older age group, the finding for the 65+ group that there is opposition to the idea of means testing from those in lower socio-economic groups also applies here.

Socio-economic group

ABC1

Current importance and use

Those in the ABC1 socio-economic group (those in office-based, professional or managerial jobs) appear more confident in using the internet than those in lower socio-economic groups, in part because they tend to be more likely to have it at home and so use it more often, and also because they are more likely to have access to it at work. Those who are not very or not at all confident with using the internet in the ABC1 group are usually older.

Younger ABC1s (those in the 18-24 and 25-39 age groups) are particularly likely to think the internet is "essential", as are ABC1s living in "notspots". ABC1s are not more likely to access any specific sites or carry out any different activities on the internet, with the

exception of work tasks (many also work from home some of the time so may carry out some of these activities there as well).

Future importance and use

The ABC1 group believe that broadband access at home is likely to become essential in the next 2-5 years, although many already think it is essential to them personally. As with other groups, this is based on a perception that services and activities are moving online and that those who do not have broadband access will therefore be penalised.

Views on access for all and role of government

Those in the ABC1 group believe that it should be possible for everyone to be able to get access to broadband in their local area, and that this is an appropriate area for government intervention. Similarly, ensuring that everyone has the skills and confidence necessary to access the internet is also thought to be an important area for government to examine, although some stress that it is already possible to access courses and also that people should be able to learn from their family and friends. Again, there are very mixed views on retail subsidies arising from individual views on the welfare state, with those who have difficulty leaving the house because of mobility, with children from low-income families being the least controversial potential recipients. However, those ABC1s in "notspot" areas are very much in favour of subsidisation for those who need it, reflecting the importance they assign to broadband access. They argue that subsidies are available for many other things such as council tax which they do not feel are necessarily more important than broadband access.

C2DE

Current importance and use

Those in the C2DE socio-economic group (those in skilled or unskilled manual jobs and those who are dependent long term on state benefits) tend to be less confident with using the internet, possibly because they are less likely to use it extensively at work or even have access to it (however, those who are self-employed in trades may use the internet at home for work purposes.)

Although this group still think that broadband is important, they tend to place a slightly lower importance on it than the ABC1 group. In part, this is driven by those who are unable to afford it. These people are used to prioritising absolute essentials such as food and power to make the most of a limited budget, and therefore are used to "making do" or finding alternatives such as access at other people's houses or libraries.

Future importance and use

There is agreement among the C2DE group that in-home broadband access will increase in importance over the next 2-5 years, again driven by the increasing move to provide services

online and reduction of offline alternatives, and the perception that people risk being penalised if they use offline alternatives.

Views on access for all and role of government

There is agreement among the C2DE group that in-home broadband access will increase in importance over the next 2-5 years, again driven by the increasing move to provide services online and reduction of offline alternatives, and that people risk being penalised if they do not have broadband. Again, ensuring consistent network coverage and that people can access the skills, knowledge and confidence necessary to use broadband are thought to be important areas for government intervention, but there is less consensus on retail subsidies depending on existing individual views of the welfare state and means-testing. Those in the C2DE socio-economic group, particularly older people and those in the E group, were especially concerned about means-testing. If retail subsidies are to be given, low-income families and those who have difficulty leaving the house because of mobility are the least controversial potential recipients.

Areas with broadband and "notspots"

As the groups were selected to include both those with and without broadband access at home, there are few discernible differences between the groups caused by greater or lesser numbers of participants having broadband. Groups were selected broadly to reflect local take-up of broadband but as broadband penetration is relatively high, this tended to be a difference of two or three participants. Therefore, the main difference is between areas where broadband is available and where it is not yet available.

Areas with broadband

Current importance and use

In-home broadband access is currently felt to be important for most (although there are some who are happy with dial-up or no internet access) and essential for some, most likely to be those with children. It is also felt to be important for people who find it difficult to leave the house. Young urban ABC1s are most likely to find broadband "essential".

Future importance and use

Those in areas where there is broadband think that in-home broadband access is likely to become essential over the next 2-5 years as services migrate online. As more people get broadband access it is felt that the expectation is that people will have it, and offline alternatives will then reduce in accessibility.

Views on access for all and role of government

The view of those in areas with broadband is that everyone should have the right to access broadband no matter where they live, and that this should be co-ordinated by government to

make sure all areas have adequate coverage. Participants in areas with broadband also think that government should make sure that everyone is able to access the skills, knowledge and confidence necessary to get and use broadband at home. The area of retail subsidies is more controversial, with some being very much in favour and others being against, depending on their pre-existing views of the welfare state. If Government is to provide retail subsidies to anyone, low-income families and those who are housebound are the least controversial candidates for such assistance.

'Notspots'

Current importance and use
'Notspot' groups differ markedly from the generality of respondents. Those in the 'notspot' groups, especially those in the ABC1 socio-economic group who are only debarred from the internet on geographical grounds, feel very strongly indeed that broadband internet was an essential utility that was being denied to them. They say that this is affecting them on a number of counts: they are not able to use the internet for things like forms, eBay, downloading pictures or listening to music as the investment of time it takes is too great. Some people have such slow internet speeds that they are unable to access even fairly low-tech uses of the internet such as email.

The fact that with dial-up the phone is unable to be used at the same time also frustrates people – both because it interrupts their internet use and because it means that they are wholly unable to access things requiring both internet and telephone, such as technical support.

This group feels strongly that broadband access is essential at the moment – again, especially for schoolchildren and those who are housebound, but also for everyone. For example, a respondent whose business involved filing tax returns is required to do it as there is no alternative, and at the moment this is close to impossible.

Mobile internet access is certainly not a replacement for those in 'notspot' areas as these locations also tend to have poor mobile reception. Although it is possible to get a broadband speed in a 'notspot' area using mobile internet, reception is patchy and intermittent so the actual usability is limited. This underlines the importance of individuals being able to access fixed broadband.

Future importance and use
Although those in 'notspot' areas generally believe in-home broadband access to be essential already, they also see it as becoming more important over the next 2-5 years.

Views on access for all and role of government

Those in 'notspot' areas strongly support the broad principle of access for all, especially geographically – this is both on a practical basis and in terms of the general principle of equality. Those in 'notspot' areas point out that they are paying the same in taxes 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 (the fact that this analogy is drawn even though most people see water and electricity as more important is perhaps helped by the fact that 'notspot' areas are more likely to be those where some people in very outlying areas may be living outside the networks for other utilities such as gas).

People in notspot areas understand that it is not cost-effective for all companies to cover all areas in the country, but believe that a suitable area for government intervention could be to co-ordinate broadband companies and oblige them to cover the whole country between them. The importance which this group ascribes to broadband, and their experience of being denied access through circumstances outside their control, strongly influences their attitude to retail subsidies. They are firmly of the opinion that these would be necessary to some people who will need help to access the internet, and that whatever it takes to make sure everyone could get in-home broadband access should be done. Again, however, attitudes towards the welfare state influence attitudes over whether government is the right source of these subsidies: and some suggest that it would be more appropriate for broadband companies to cover the financial cost of subsidisation. If the government were to subsidise, those on low incomes, especially families, and those who have difficulty leaving the house because of mobility issues are felt to be the most "deserving" recipients.

Rural and urban areas

Rural areas

Current importance and use

The internet is felt to make an important contribution to the rural economy. It enables those who are geographically isolated to trade on an equal level to those in towns – for example, farmers can sell products such as cheese to a wider audience. It is also felt to benefit the rural economy by mitigating the impact of animal diseases such as blue tongue and foot and mouth by enabling animal trading to take place on the internet rather than requiring the physical movement of animals around the country. It also allows rural jobseekers greater access to jobs in a variety of areas, rather than having to move around job centres they may live a distance from.

Mobile internet access is seen to be an issue in rural areas because of patchy or poor mobile reception. It is therefore less likely to be used by these groups, even bearing in mind that other respondents find mobile internet has its problems. Additionally, using alternative

access points such as libraries is felt to be less feasible for those living in rural areas as the cost and time involved in doing so is thought to be too great. Both these factors underline the importance of individuals being able to access fixed broadband in their local area. As mentioned, those living in 'notspots' generally strongly feel that broadband access is currently essential.

Future importance and use

Those living in rural areas believe that in-home broadband access will become essential within the next 2-5 years, because the migration of services online and the reduction of online alternatives will mean that individuals are penalised if they do not have it. Those living in rural areas are particularly unlikely to feel that communal access points such as libraries present a valid alternative as it can often be inconvenient to access them owing to distance.

Views on access for all and role of government

Those living in rural areas are in favour of ensuring access to all by providing consistent broadband overage across the country and making sure that everyone has the skills, knowledge and confidence necessary to access the internet, with those in 'notspot' areas particularly strongly in agreement. The area of retail subsidies was less clear-cut (although those in 'notspot' areas are more strongly in favour of them). Again, attitudes depend on individual views of the welfare state and means-testing. Again, those who are housebound and low-income families appear to be the least controversial recipients of any potential financial support.

Urban areas

Current importance and use

For those in urban areas, in-home broadband access is currently felt to be important for most, and essential by some, particularly those with children and young urban ABC1s. However, there is a slight lack of empathy with those who cannot currently get broadband access evident in a couple of the groups, possibly based on lack of experience of being denied access themselves.

Future importance and use

It is felt that in-home broadband access will become essential over the next 2-5 years, as services, information and activities move from offline to online and the expectation becomes that people will have access to the internet at home. It is felt that, as this happens, those who do not have broadband access will be penalised.

Views on access for all and role of government

Co-ordinating network coverage of broadband is felt to be an appropriate area for government intervention. Participants also feel that ensuring everyone has the confidence, skills and knowledge to get and use broadband at home is a suitable role for government.

As with the other groups, agreement or disagreement with retail subsidies depends on attitudes towards the welfare state, but is least controversial for low-income families and those who have low mobility.

Annex B: Quantitative profiling data and extra analysis

The tables in this section give further information on the profile of respondents, and on the subgroup differences for key questions. These tables are too unwieldy for the main report but are presented here for reference.

Socio-demographic profile – unweighted and weighted

The table below shows the unweighted and weighted profiles of the sample. Quotas are set to ensure that the sample is as representative as possible of the UK population as a whole. The achieved quotas are then compared to the UK population and weighting applied where necessary to make the sample as representative as possible.

Gender	Unweighted	Weighted
Male	46%	49%
Female	54%	51%
Age		
16-24	11%	15%
25-44	35%	35%
45-64	31%	31%
65+	23%	20%
SEG grade		
AB	21%	20%
C1	26%	30%
C2	21%	22%
DE	32%	28%
Urbanisation		
Rural	15%	14%
Non-rural	85%	86%
Nation		
England	84%	84%
Scotland	9%	9%
Wales	5%	5%
Northern Ireland	2%	3%*
Ethnicity		
White	90%	90%
Ethnic minority group	10%	10%
Children under 16 at home		
Yes	34%	34%
No	66%	66%

*Indicates small base size (n<100)

Technological profile - Weighted

This table shows answers to questions relating to use of and feelings about technology.

1. Internet used in last 12 months-asked of total sample (2043)	
Yes	75%
No	25%
2. Confidence with using internet – asked of those using internet in last 12 months only (1527)	
Very confident	60%
Quite confident	29%
Not very confident	9%
Not at all confident	1%
Don't know	1%
3. Internet at home – asked of total sample (2043)	
Broadband at home	70%
Dial up at home	3%
No internet	27%
4. Type of broadband at home – asked of those with broadband at home only (1433)	
Fixed broadband	91%
Mobile broadband	9%
5. Reason for not having broadband at home – asked of those with dial up at home and no internet only (610-multi-code question)	
Cost	22%
Access	28%
Interest & Usage	50%
Knowledge/Concerns	11%
Other	17%
Don't know	4%
6. Likelihood of getting broadband in the next 6 months – asked of dial up and no internet only (610)	
Very Likely	9%
Likely	8%
Unlikely	10%
Very unlikely	67%
Don't know	6%
7. Feelings about Technology – asked of total sample (2043)	
I try to keep up with technology	
Agree strongly	23%
Tend to agree	39%
Neither agree nor disagree	11%
Tend to disagree	15%
Disagree strongly	10%
Don't know	2%
Technology has no part to play in my life	
Agree strongly	6%
Tend to agree	11%
Neither agree nor disagree	8%
Tend to disagree	26%
Disagree strongly	47%
Don't know	2%
I never really feel comfortable with new technology products and services	
Agree strongly	9%
Tend to agree	22%

Neither agree nor disagree	13%
Tend to disagree	25%
Disagree strongly	29%
Don't know	2%
I am confident that I can work any new technology product that comes along	
Agree strongly	21%
Tend to agree	33%
Neither agree nor disagree	11%
Tend to disagree	20%
Disagree strongly	13%
Don't know	2%
I am happy to let someone else take charge of new technologies for me	
Agree strongly	18%
Tend to agree	30%
Neither agree nor disagree	14%
Tend to disagree	21%
Disagree strongly	16%
Don't know	1%
When using technologies I worry that I may break something	
Agree strongly	9%
Tend to agree	21%
Neither agree nor disagree	12%
Tend to disagree	28%
Disagree strongly	28%
Don't know	2%
The pace of change of technology is too fast for me	
Agree strongly	14%
Tend to agree	24%
Neither agree nor disagree	12%
Tend to disagree	25%
Disagree strongly	24%
Don't know	1%
I am as knowledgeable about new technology as the next person	
Agree strongly	17%
Tend to agree	30%
Neither agree nor disagree	14%
Tend to disagree	25%
Disagree strongly	13%
Don't know	1%
I encourage my friends and family to make better use of technology	
Agree strongly	20%
Tend to agree	36%
Neither agree nor disagree	20%
Tend to disagree	15%
Disagree strongly	7%
Don't know	2%

*Indicates small base size (n<100)

Questions regarding current activities and expected future importance of these (Q1a-1c-Asked of all those who have used the internet in the last 12 months - 1527)

Information – specific activities used and prioritised
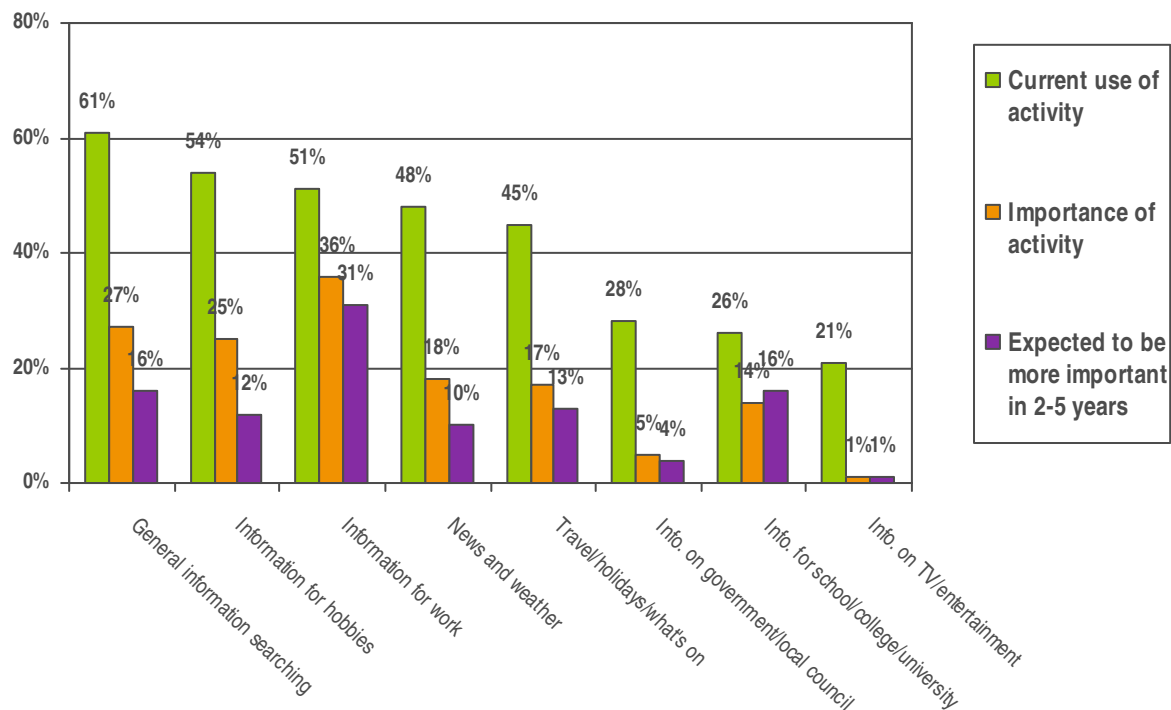
Q1a: "Can you please tell me from this list the types of things you currently do using the internet?" / Q1b: "Which of these activities and services are most important to you?" Q1c "And which of these do you think will become more important to you in the next 2-5 years? Base: All those who have used 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.

Communication – specific activities used and prioritised
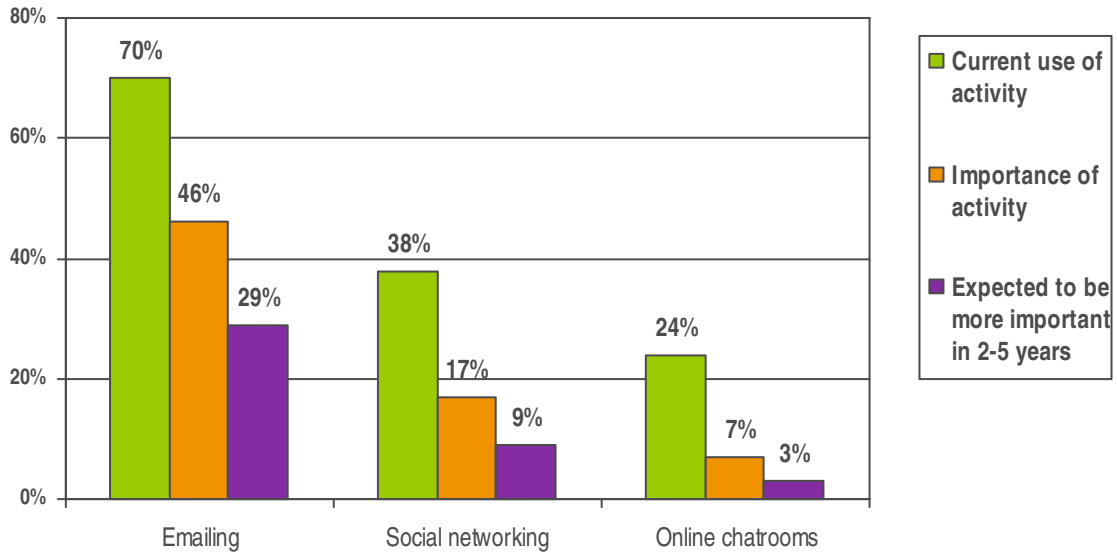
Q1a: "Can you please tell me from this list the types of things you currently do using the internet?" / Q1b: "Which of these activities and services are most important to you?" Q1c "And which of these do you think will become more important to you in the next 2-5 years? Base: All those who have used 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.

Transactions – specific 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.

Entertainment – specific 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.

Civic participation – specific 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
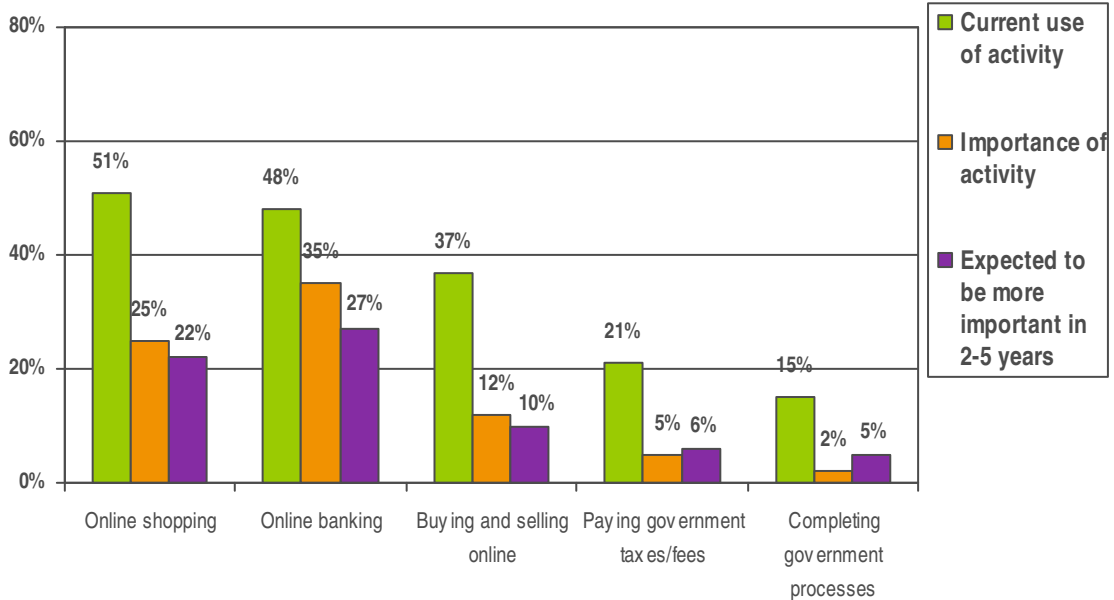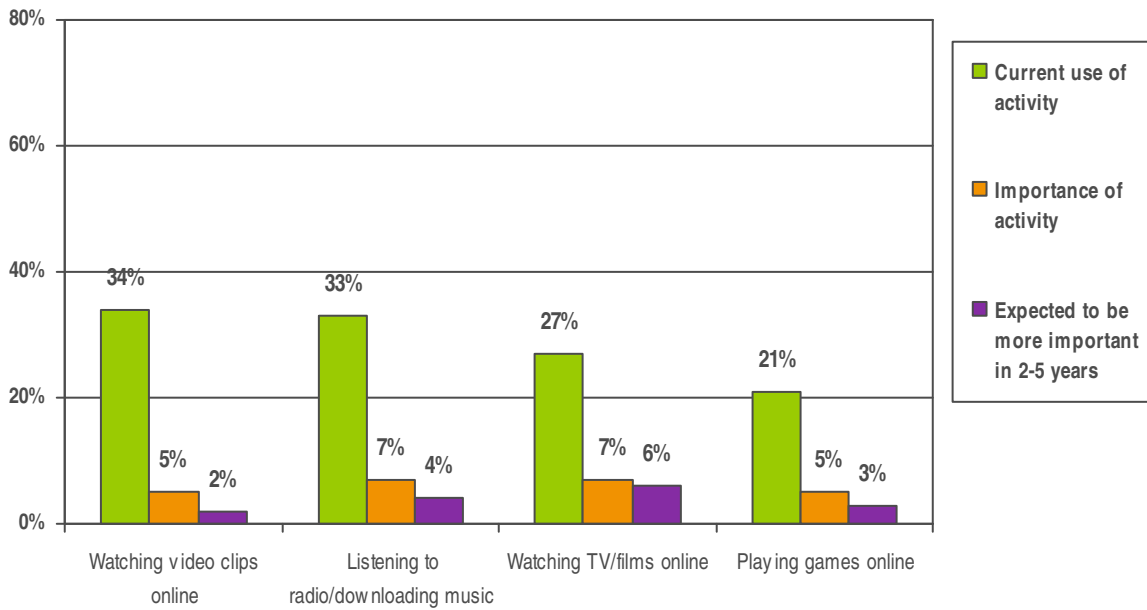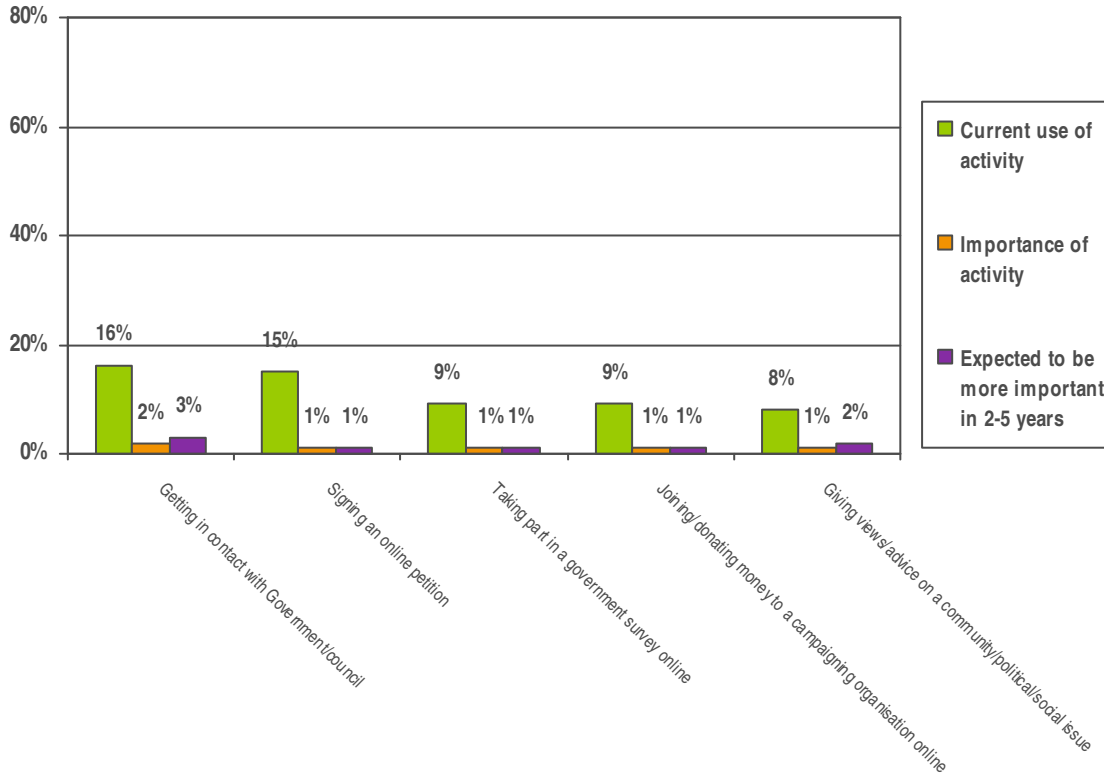*you think will become more important to you in the next 2-5 years? Base: All those who have used*

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.

Significant differences to questions regarding support for universal provision (Q12-Asked of all respondents - 2043)

This table shows the full sub-group differences for the questions regarding universal provision. Where the proportion of respondents in a particular subgroup giving a particular answer is significantly higher or lower than the total, this is indicated. For example, if a cell in the DE column was highlighted in pink, this would mean that the DE socio-economic group would be more likely to give that answer than the rest of the population.

"It should be possible for everyone to get broadband at home even if they have a low income"

It should be possible for everyone to get broadband at home even if they have a low income	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
Agree strongly	32%	37%	19%	34%	34%	33%	28%
Tend to Agree	42%	42%	40%	43%	41%	44%	39%
Neither agree nor disagree	13%	11%	17%	12%	13%	13%	14%
Tend to disagree	7%	6%	11%	8%	7%	6%	8%
Disagree strongly	3%	1%	5%	3%	3%	2%	3%
Don't know	3%	2%	9%	1%	3%	2%	8%
Total agree	74%	80%	59%	76%	75%	77%	67%
Total disagree	10%	7%	16%	11%	10%	8%	11%

It should be possible for everyone to get broadband at home even if they have a low income	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
Agree strongly	32%	33%	41%	33%	14%	41%	27%
Tend to Agree	42%	41%	40%	43%	44%	38%	43%
Neither agree nor disagree	13%	13%	11%	11%	18%	11%	14%
Tend to disagree	7%	8%	5%	8%	10%	6%	8%
Disagree strongly	3%	3%	2%	2%	5%	2%	3%
Don't know	3%	3%	2%	3%	10%	3%	4%
Total agree	74%	73%	80%	76%	57%	79%	71%
Total disagree	10%	10%	7%	10%	15%	7%	11%

It should be possible for everyone to get broadband at home even if they have a low income	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
Agree strongly	32%	28%	33%	39%	36%
Tend to Agree	42%	44%	41%	42%	46%
Neither agree nor disagree	13%	14%	13%	11%	10%
Tend to disagree	7%	8%	7%	6%	6%
Disagree strongly	3%	4%	2%	1%	2%
Don't know	3%	2%	4%	1%	
Total agree	74%	72%	74%	81%	82%
Total disagree	10%	12%	10%	8%	9%

It should be possible for everyone to get broadband at home even if they have a low income	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
Agree strongly	32%	41%	35%	41%	14%
Tend to Agree	42%	39%	44%	31%	41%
Neither agree nor disagree	13%	11%	11%	11%	18%
Tend to disagree	7%	5%	6%	9%	11%
Disagree strongly	3%	1%	2%	4%	6%
Don't know	3%	3%	1%	4%	10%
Total agree	74%	80%	79%	72%	56%
Total disagree	10%	6%	8%	13%	17%

Broadband access for all: Consumers' views on the importance of broadband internet at home

It should be possible for everyone to get broadband at home even if they have a low income	Total	With broadband, under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
Agree strongly	**32%**	39%	23%	27%	10%
Tend to Agree	**42%**	41%	52%	39%	40%
Neither agree nor disagree	**13%**	11%	15%	14%	19%
Tend to disagree	**7%**	6%	6%	9%	12%
Disagree strongly	**3%**	2%		4%	7%
Don't know	**3%**	2%	5%	6%	12%
Total agree	**74%**	80%	75%	66%	50%
Total disagree	**10%**	7%	6%	14%	19%

"It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home"

It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
Agree strongly	**32%**	38%	20%	35%	37%	32%	25%
Tend to Agree	**47%**	49%	43%	50%	46%	51%	44%
Neither agree nor disagree	**11%**	8%	18%	8%	10%	10%	15%
Tend to disagree	**4%**	3%	8%	4%	4%	3%	6%
Disagree strongly	**1%**		3%	1%	1%	1%	2%
Don't know	**5%**	2%	8%	1%	2%	3%	7%
Total agree	**79%**	87%	63%	85%	83%	83%	69%
Total disagree	**5%**	3%	11%	6%	5%	4%	8%

It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
Agree strongly	32%	32%	39%	34%	18%	38%	29%
Tend to Agree	47%	50%	47%	50%	42%	47%	47%
Neither agree nor disagree	11%	9%	9%	9%	20%	9%	13%
Tend to disagree	4%	5%	3%	4%	8%	3%	5%
Disagree strongly	1%		1%	1%	4%	1%	2%
Don't know	5%	3%	2%	2%	9%	2%	4%
Total agree	79%	82%	86%	84%	60%	85%	77%
Total disagree	5%	5%	4%	4%	11%	4%	7%

It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
Agree strongly	32%	27%	33%	38%	34%
Tend to Agree	47%	51%	47%	50%	50%
Neither agree nor disagree	11%	13%	11%	8%	12%
Tend to disagree	4%	5%	4%	3%	3%
Disagree strongly	1%	3%	1%		1%
Don't know	5%	1%	4%	1%	1%
Total agree	79%	78%	80%	88%	84%
Total disagree	5%	8%	5%	4%	3%

Broadband access for all: Consumers' views on the importance of broadband internet at home

It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
Agree strongly	32%	40%	36%	31%	18%
Tend to Agree	47%	47%	51%	45%	42%
Neither agree nor disagree	11%	8%	9%	13%	19%
Tend to disagree	4%	3%	3%	4%	9%
Disagree strongly	1%			2%	4%
Don't know	5%	2%	1%	4%	9%
Total agree	79%	87%	86%	76%	60%
Total disagree	5%	3%	3%	7%	13%

It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
Agree strongly	32%	39%	24%	25%	15%
Tend to Agree	47%	49%	55%	48%	36%
Neither agree nor disagree	11%	8%	13%	13%	23%
Tend to disagree	4%	3%	4%	7%	10%
Disagree strongly	1%			2%	5%
Don't know	5%	2%	4%	5%	12%
Total agree	79%	87%	79%	73%	51%
Total disagree	5%	3%	4%	9%	15%

"It should be possible for everyone to get broadband internet at home, no matter where they live"

It should be possible for everyone to get broadband internet at home, no matter where they live	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
Agree strongly	46%	53%	29%	50%	49%	48%	36%
Tend to Agree	39%	38%	41%	38%	35%	42%	40%
Neither agree nor disagree	9%	6%	14%	6%	10%	6%	11%
Tend to disagree	3%	2%	5%	4%	3%	1%	3%
Disagree strongly	1%	0%	2%	1%	1%		1%
Don't know	2%	1%	8%	1%	2%	2%	8%
Total agree	85%	90%	70%	89%	85%	90%	77%
Total disagree	4%	2%	7%	5%	3%	2%	5%

It should be possible for everyone to get broadband internet at home, no matter where they live	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
Agree strongly	46%	51%	53%	47%	25%	53%	42%
Tend to Agree	39%	38%	37%	40%	41%	38%	39%
Neither agree nor disagree	9%	7%	6%	7%	16%	5%	10%
Tend to disagree	3%	2%	2%	3%	5%	2%	3%
Disagree strongly	1%	1%	0%	0%	3%	0%	1%
Don't know	2%	2%	2%	3%	9%	2%	4%
Total agree	85%	89%	90%	87%	67%	91%	81%
Total disagree	4%	2%	2%	3%	8%	2%	5%

Broadband access for all: Consumers' views on the importance of broadband internet at home

It should be possible for everyone to get broadband internet at home, no matter where they live	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
Agree strongly	46%	44%	46%	54%	50%
Tend to Agree	39%	40%	39%	38%	39%
Neither agree nor disagree	9%	10%	8%	6%	7%
Tend to disagree	3%	3%	3%	2%	3%
Disagree strongly	1%	1%	1%	0%	0%
Don't know	2%	1%	4%	0%	1%
Total agree	85%	84%	84%	92%	89%
Total disagree	4%	5%	3%	2%	4%

It should be possible for everyone to get broadband internet at home, no matter where they live	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
Agree strongly	46%	54%	52%	46%	25%
Tend to Agree	39%	38%	38%	39%	42%
Neither agree nor disagree	9%	5%	7%	8%	16%
Tend to disagree	3%	1%	2%	3%	5%
Disagree strongly	1%	0%	0%	1%	3%
Don't know	2%	2%	1%	3%	10%
Total agree	85%	92%	89%	85%	67%
Total disagree	4%	1%	3%	4%	8%

It should be possible for everyone to get broadband internet at home, no matter where they live	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
Agree strongly	46%	54%	40%	37%	19%
Tend to Agree	39%	37%	47%	43%	39%
Neither agree nor disagree	9%	6%	9%	10%	20%
Tend to disagree	3%	2%	2%	3%	6%
Disagree strongly	1%		%	1%	4%
Don't know	2%	1%	2%	5%	12%
Total agree	85%	91%	87%	80%	58%
Total disagree	4%	2%	2%	4%	10%

"Everyone should have the right to be able to get broadband internet at home"

Everyone should have the right to be able to get broadband internet at home	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
Agree strongly	42%	47%	29%	45%	46%	43%	35%
Tend to Agree	39%	38%	42%	37%	36%	44%	41%
Neither agree nor disagree	10%	8%	15%	10%	11%	8%	12%
Tend to disagree	3%	3%	4%	5%	3%	3%	3%
Disagree strongly	2%	1%	2%	3%	1%	1%	1%
Don't know	2%	2%	7%	1%	2%	2%	7%
Total agree	81%	86%	72%	82%	82%	86%	76%
Total disagree	5%	4%	6%	7%	5%	4%	4%

Broadband access for all: Consumers' views on the importance of broadband internet at home

Everyone should have the right to be able to get broadband internet at home	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
Agree strongly	42%	48%	50%	41%	25%	50%	38%
Tend to Agree	39%	39%	36%	41%	42%	37%	41%
Neither agree nor disagree	10%	9%	8%	10%	17%	8%	12%
Tend to disagree	3%	1%	3%	4%	5%	3%	4%
Disagree strongly	2%		1%	2%	2%	1%	2%
Don't know	2%	2%	2%	2%	8%	2%	4%
Total agree	81%	88%	86%	82%	67%	86%	79%
Total disagree	5%	1%	4%	7%	8%	3%	6%

Everyone should have the right to be able to get broadband internet at home	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
Agree strongly	42%	38%	43%	49%	41%
Tend to Agree	39%	41%	39%	38%	44%
Neither agree nor disagree	10%	14%	10%	8%	9%
Tend to disagree	3%	4%	3%	2%	5%
Disagree strongly	2%	2%	2%	1%	1%
Don't know	4%	1%	4%		
Total agree	81%	79%	82%	88%	85%
Total disagree	5%	6%	5%	4%	6%

Everyone should have the right to be able to get broadband internet at home	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
Agree strongly	42%	50%	45%	45%	26%
Tend to Agree	39%	36%	39%	40%	43%
Neither agree nor disagree	10%	8%	9%	11%	16%
Tend to disagree	3%	3%	3%	1%	5%
Disagree strongly	2%	1%	2%	1%	2%
Don't know	4%	2%	1%	3%	8%
Total agree	81%	87%	85%	84%	69%
Total disagree	5%	4%	5%	2%	7%

Everyone should have the right to be able to get broadband internet at home	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
Agree strongly	42%	49%	33%	36%	21%
Tend to Agree	39%	37%	47%	44%	40%
Neither agree nor disagree	10%	8%	15%	13%	18%
Tend to disagree	3%	3%	3%	2%	6%
Disagree strongly	2%	1%	%	1%	4%
Don't know	4%	1%	2%	4%	11%
Total agree	81%	86%	80%	80%	61%
Total disagree	5%	5%	3%	3%	10%

	Significantly more likely than average		Significantly less likely than average

Q12-"To what extent do you agree or disagree with the following statements; It should be possible for everyone to get broadband at home even if they have a low income; It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home, It should be possible for everyone to get broadband internet at home, no matter where they live, Everyone should have the right to be able to get broadband internet at home

Base: All respondents (2043 total – 16-24 304, 25-44 707, 45-64 627, 65+ 404, AB 415, C1 607, C2 441, DE 580, with children under 16 at home 692, without children under 16 at home 1351, rural 279, non-rural 1764, very/quite confident using the internet 1360, not very/not at all confident using the internet 149,with broadband & with children at home under 16 579, with broadband & without children at home under 16 854, without broadband & with children at home under 16 113, without broadband & without children at home under 16 498, with broadband & under 65 1305, with broadband & 65+ 127, without broadband & under 65 333, without broadband & 65+ 277.
Bases less than 100 indicated highlighted in yellow and bases less than 50 not shown

Significant differences relating to importance of Government action on broadband internet provision compared to other communication services (Q13-Asked of all respondents-2043)

This table shows the full sub-group differences for the questions regarding the importance of Government action on broadband internet provision compared to other communication services. Where the proportion of respondents in a particular subgroup giving a particular answer is significantly higher or lower than the total, this is indicated. For example, if a cell in the DE column was highlighted in pink, this would mean that the DE socio-economic group would be more likely to give that answer than the rest of the population.

Importance of Government action on broadband internet compared to landline telephone services

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
More important	**20%**	24%	10%	24%	25%	16%	15%
The same	**36%**	41%	26%	35%	38%	41%	32%
Less important	**36%**	29%	50%	36%	32%	34%	40%
Don't know	**8%**	6%	14%	5%	5%	8%	13%

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
More important	**20%**	26%	25%	17%	11%	24%	18%
The same	**36%**	37%	42%	39%	22%	41%	34%
Less important	**36%**	30%	25%	38%	55%	27%	40%
Don't know	**8%**	7%	7%	7%	13%	8%	8%

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
More important	**20%**	15%	21%	24%	15%
The same	**36%**	33%	37%	42%	38%
Less important	**36%**	45%	34%	29%	42%
Don't know	**8%**	7%	8%	5%	5%

Broadband access for all: Consumers' views on the importance of broadband internet at home

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
More important	**20%**	25%	23%	14%	9%
The same	**36%**	41%	41%	41%	22%
Less important	**36%**	27%	31%	28%	55%
Don't know	**8%**	6%	5%	17%	13%

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
More important	**20%**	24%	20%	13%	7%
The same	**36%**	42%	33%	34%	16%
Less important	**36%**	28%	40%	41%	62%
Don't know	**8%**	6%	7%	13%	16%

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	Internet used in the last week	Internet used in the last month*	Internet used in the last year*	Internet used but not in the last 12 months*	Internet never used
More important	**20%**	24%	20%	16%	18%	8%
The same	**36%**	41%	42%	34%	30%	21%
Less important	**36%**	29%	37%	44%	45%	55%
Don't know	**8%**	6%	1%	7%	7%	15%

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	Terrestrial TV only	Any multichannel TV	Access to mobile phone and landline	Access to mobile phone only	No mobile phone
More important	20%	15%	19%	21%	21%	9%
The same	36%	25%	37%	38%	39%	21%
Less important	36%	45%	36%	34%	27%	57%
Don't know	8%	15%	8%	7%	13%	14%

Is Government action on broadband internet at home more important, the same or less important than Government action on landline telephone services	Total	Ethnicity : White	Ethnicity : BME	England	Northern Ireland*	Scotland	Wales
More important	20%	19%	29%	21%	24%	15%	11%
The same	36%	36%	34%	37%	15%	40%	36%
Less important	36%	38%	18%	34%	53%	43%	45%
Don't know	8%	7%	19%	9%	8%	3%	9%

Importance of Government action on broadband internet compared to mobile telephone services

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
More important	**21%**	26%	11%	29%	23%	18%	17%
The same	**41%**	43%	34%	38%	44%	47%	34%
Less important	**28%**	24%	35%	27%	26%	26%	30%
Don't know	**10%**	7%	19%	5%	7%	9%	19%

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
More important	**21%**	19%	23%	26%	13%	23%	21%
The same	**41%**	42%	48%	37%	32%	44%	39%
Less important	**28%**	30%	22%	28%	34%	25%	29%
Don't know	**10%**	9%	7%	9%	21%	8%	12%

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
More important	21%	23%	21%	26%	26%
The same	41%	40%	41%	45%	36%
Less important	28%	29%	27%	24%	31%
Don't know	10%	9%	11%	5%	7%

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
More important	21%	24%	27%	16%	10%
The same	41%	45%	42%	44%	32%
Less important	28%	24%	25%	30%	36%
Don't know	10%	7%	6%	10%	22%

Broadband access for all: Consumers' views on the importance of broadband internet at home

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
More important	**21%**	25%	29%	16%	6%
The same	**41%**	44%	34%	37%	31%
Less important	**28%**	24%	25%	32%	38%
Don't know	**10%**	6%	12%	15%	25%

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	Internet used in the last week	Internet used in the last month*	Internet used in the last year*	Internet used but not in the last 12 months*	Internet never used
More important	**21%**	26%	27%	10%	16%	8%
The same	**41%**	43%	45%	45%	33%	32%
Less important	**28%**	24%	24%	35%	35%	37%
Don't know	**10%**	6%	4%	10%	16%	23%

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	Terrestrial TV only	Any multichannel TV	Access to mobile phone and landline	Access to mobile phone only	No mobile phone
More important	**21%**	15%	21%	24%	16%	7%
The same	**41%**	35%	41%	42%	38%	36%
Less important	**28%**	31%	28%	26%	34%	30%
Don't know	**10%**	19%	10%	8%	12%	27%

Is Government action on broadband internet at home more important, the same or less important than Government action on mobile telephone services	Total	Ethnicity: White	Ethnicity: BME	England	Northern Ireland*	Scotland	Wales
More important	**21%**	21%	29%	22%	22%	18%	15%
The same	**41%**	41%	39%	41%	36%	46%	35%
Less important	**28%**	29%	12%	26%	30%	29%	43%
Don't know	**10%**	9%	20%	11%	12%	7%	6%

Importance of Government action on broadband internet compared to digital terrestrial TV, i.e. Freeview

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	With broadband at home	Without broadband at home	AB	C1	C2	DE
More important	27%	33%	13%	34%	33%	22%	20%
The same	36%	37%	33%	34%	37%	42%	33%
Less important	27%	23%	37%	26%	22%	28%	31%
Don't know	10%	7%	17%	6%	8%	9%	16%

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
More important	27%	29%	32%	30%	13%	30%	25%
The same	36%	35%	41%	34%	31%	38%	35%
Less important	27%	29%	20%	27%	37%	24%	29%
Don't know	10%	6%	7%	9%	19%	8%	11%

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
More important	27%	22%	28%	34%	23%
The same	36%	35%	36%	39%	34%
Less important	27%	33%	26%	22%	33%
Don't know	10%	10%	10%	5%	10%

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
More important	27%	33%	34%	17%	12%
The same	36%	37%	38%	43%	31%
Less important	27%	22%	23%	31%	39%
Don't know	10%	8%	6%	9%	19%

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
More important	27%	34%	23%	16%	9%
The same	36%	38%	36%	37%	28%
Less important	27%	22%	29%	34%	41%
Don't know	10%	6%	11%	13%	22%

Broadband access for all: Consumers' views on the importance of broadband internet at home

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	Internet used in the last week	Internet used in the last month*	Internet used in the last year*	Internet used but not in the last 12 months*	Internet never used
More important	27%	34%	31%	13%	17%	10%
The same	36%	38%	35%	36%	35%	31%
Less important	27%	22%	29%	43%	36%	39%
Don't know	10%	6%	5%	8%	12%	21%

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	Terrestrial TV only	Any multichannel TV	Access to mobile phone and landline	Access to mobile phone only	No mobile phone
More important	27%	20%	27%	29%	26%	12%
The same	36%	30%	36%	37%	35%	32%
Less important	27%	30%	27%	26%	29%	35%
Don't know	10%	20%	10%	8%	11%	21%

Is Government action on broadband internet at home more important, the same or less important than Government action on digital terrestrial TV, i.e. Freeview	Total	Ethnicity: White	Ethnicity: BME	England	Northern Ireland*	Scotland	Wales
More important	27%	27%	27%	28%	25%	21%	18%
The same	36%	36%	32%	36%	35%	41%	36%
Less important	27%	28%	19%	26%	25%	33%	37%
Don't know	10%	9%	21%	10%	15%	5%	9%

Importance of Government action on broadband internet compared to postal services/other door to door deliveries

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	With broad-band at home	Without broad-band at home	AB	C1	C2	DE
More important	**15%**	17%	11%	19%	18%	11%	13%
The same	**28%**	32%	16%	23%	31%	32%	24%
Less important	**50%**	45%	62%	54%	47%	50%	52%
Don't know	**7%**	5%	11%	4%	5%	7%	11%

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	16-24	25-44	45-64	65+	With children under 16 at home	Without children under 16 at home
More important	**15%**	22%	16%	14%	11%	17%	15%
The same	**28%**	31%	35%	27%	13%	33%	25%
Less important	**50%**	40%	42%	54%	66%	43%	54%
Don't know	**7%**	7%	6%	5%	10%	7%	7%

Broadband access for all: Consumers' views on the importance of broadband internet at home

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	Rural	Non Rural	Very/quite confident with the internet	Not very/Not at all confident with the internet
More important	15%	10%	16%	18%	12%
The same	28%	22%	28%	34%	22%
Less important	50%	61%	49%	45%	62%
Don't know	7%	6%	7%	4%	4%

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	With broadband, with children under 16 at home	With broadband, without children under 16 at home	Without broadband, with children under 16 at home	Without broadband, Without children under 16 at home
More important	15%	16%	18%	18%	9%
The same	28%	34%	31%	27%	14%
Less important	50%	43%	47%	44%	66%
Don't know	7%	6%	5%	10%	11%

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	With broadband, Under 65	With broadband, 65+	Without broadband, under 65	Without broadband, 65+
More important	15%	17%	18%	14%	7%
The same	28%	33%	22%	22%	9%
Less important	50%	44%	54%	54%	71%
Don't know	7%	5%	6%	9%	13%

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	Internet used in the last week	Internet used in the last month*	Internet used in the last year*	Internet used but not in the last 12 months*	Internet never used
More important	**15%**	17%	15%	16%	16%	9%
The same	**28%**	33%	29%	20%	17%	13%
Less important	**50%**	45%	55%	57%	61%	66%
Don't know	**7%**	5%	1%	7%	7%	13%

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	Terrestrial TV only	Any multichannel TV	Access to mobile phone and landline	Access to mobile phone only	No mobile phone
More important	**15%**	13%	15%	15%	19%	11%
The same	**28%**	21%	27%	28%	34%	16%
Less important	**50%**	56%	51%	51%	37%	61%
Don't know	**7%**	11%	7%	6%	9%	12%

Broadband access for all: Consumers' views on the importance of broadband internet at home

Is Government action on broadband internet at home more important, the same or less important than Government action on postal services/other door to door deliveries	Total	Ethnicity: White	Ethnicity: BME	England	Northern Ireland*	Scotland	Wales
More important	**15%**	15%	19%	15%	18%	18%	15%
The same	**28%**	26%	38%	29%	18%	22%	19%
Less important	**50%**	53%	23%	49%	57%	57%	59%
Don't know	**7%**	6%	19%	7%	7%	3%	7%

	Significantly more likely than average		Significantly less likely than average

Q13: "Please tell me whether you think that Government action on broadband internet at home more important, the same or less important than Government action in these other areas; landline telephone services; mobile telephone services; digital terrestrial TV, i.e. Freeview; postal services/other door to door deliveries."

Base: All respondents (2043 total – 16-24 304, 25-44 707, 45-64 627, 65+ 404, AB 415, C1 607, C2 441, DE 580, with children under 16 at home 692, without children under 16 at home 1351, rural 279, non-rural 1764, very/quite confident using the internet 1360, not very/not at all confident using the internet 149,with broadband & with children at home under 16 579, with broadband & without children at home under 16 854, without broadband & with children at home under 16 113, without broadband & without children at home under 16 498, with broadband & under 65 1305, with broadband & 65+ 127, without broadband & under 65 333, without broadband & 65+ 277, Internet used in the last week 1395, internet used in the last month 72, internet used in the last year 59, internet used but not in the last 12 months 53, internet never used 452, with terrestrial TV only 220, any multichannel TV 2007, access to mobile phone and landline 1594, access to mobile phone only 229, no mobile phone 220, ethnicity: white 1832, ethnicity BME 207, England 1712, Northern Ireland 57, Scotland 174, Wales 100).

Bases less than 100 highlighted with an asterisk (*) and bases less than 50 not shown

Annex C: Research materials

Recruitment/Screener questionnaire for qualitative research

Recruitment Questionnaire (Future of Communications Stage 2)

My name is X and I work for a research company called Opinion Leader. We are currently setting up discussions with people across England, Scotland and Wales to consider a range of issues around the future of communications services and technology. This is being done on behalf of the Ofcom Consumer Panel which is an independent research and policy advisory body on consumer interests in telecommunications, broadcasting and spectrum markets. This panel advises Ofcom, the communications regulator. The discussions will help government, regulators and industry better understand the views of consumers on a range of issues and of their future needs. By taking part you will also gain a better understanding of how the communications market works. The discussions will last approximately 2 hours and will take place in your local area in the evening on ……….. at …………. with about 7 other people. The session will be a mixture of discussions and activities and you would receive **£40** as a thank you for taking part. We would also like you to complete a short task before coming along to the group discussions.

<u>SELECTION QUESTIONS</u>

Q1   Have you or any member of your family or close friends been employed in any of the following occupations?

Advertising	Market Research
Marketing	Public Relations/Media
Journalism	Internet/website desgn

IF YES TO ANY OF THE ABOVE – CLOSE

Q2   What is the occupation of the main income earner in your household? *(Code and record exact occupation)*

1	A	
2	B	
3	C1	
4	C2	
5	D	
6	E	

Exact occupation……………………………………………………….

RECRUIT ACCORDING TO SPEC

Q3 Which of the following would you say best describes where you live?

		Urban
A city or large town		
The outskirts of a city or town (suburbs)		
A big or small country town		
A village		Rural
A home outside a village or a farm		

RECRUIT ACCORDING TO SPEC

Q4 And what is your age? *(Tick age band and record exact age)*

1	18-24	
2	25-39	
3	40-64	
4	65-75	
5	75+	

Exact age…………….

RECRUIT ACCORDING TO SPEC

Q5 Record gender

1	Male	
2	Female	

HALF TO BE MEN, HALF TO BE WOMEN

Q6a Do you have an internet connection **at home**? If yes, which of these methods does your household use to connect to the Internet?

Options:
- **Broadband connection:** Always on, high speed connection. Tends to be ADSL through a phone line or cable service. Can also be through satellite (not a TV satellite dish). Allows you to make telephone calls at the same time as using the internet, you may use a wireless connection. Can also be through satellite (not a TV satellite dish).
- **Mobile broadband:** Broadband through a mobile network – via a dongle (NB NOT the same as being able to access it through a mobile handset)

- **Dial-up access:** Connection through a phone line, where the computer has to dial a connection every time you want to use the internet. Also called narrowband
- **ISDN line**: – mid speed access, allows you to make telephone calls at the same time as using the internet but is not as fast as broadband

1	Yes – have broadband at home (home connection via ADSL, cable, satellite, mobile broadband dongle)	Recruit to broadband access quota	
2	No – I only have dial-up/ISDN at home	Recruit to broadband non-access quota	
3	No – I do not have Internet access at all at home	Recruit to broadband non-access quota	
4	I have an internet connection but am not sure whether or not it is broadband, ISDN or dial-up	Ask them to check and then recruit to correct quota	
5	I do have broadband but only via my mobile phone **handset**	Recruit to broadband non-access quota	

RECRUIT ACCORDING TO SPEC. BOTH THOSE WHO ONLY HAVE DIAL-UP/ISDN AND THOSE WHO DO NOT HAVE THE INTERNET AT ALL CAN COUNT AS NON-BROADBAND USERS.

Q6b And do you personally use the internet at all? If yes, where is this?

1	Yes – use at home		
2	Yes – but ONLY use it outside the home e.g. work, library		
3	No – do not use the internet at all		

Q6c (internet users only – Q6b=1 or 2) Please tell me the approximate number of minutes you think you spend online each day

………………………….

MONITORING QUESTIONS

This concludes the recruitment questions (other than the questions on previous group attendance). However, we also need to monitor other information at the recruitment stage and therefore we need to ask several other questions. Participants will not be selected on the basis of these questions **but they will be necessary at the analysis stage.** We therefore need to collect this information now. *Respondents will not be considered to be correctly recruited unless all the below questions are answered.*

Q7 Could you please tell me which of the following best describes the type of phone you use at home?

1	Landline phone(s) only, with no mobiles at home	
2	Mobile phone(s) only, with no landlines at home	
3	Both mobile(s) and landline(s) at home	

(Monitoring question only)

Q8 Could you please tell me, for each of the following statements describing your attitude towards new technology, how strongly you agree or disagree with them?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
A. Technology generally makes life better						
B. I try to keep up with technology						
C. I know I don't get the most out of the products I have						

D. I am confident that I can work any new technology product that comes along						
E. I am quite happy to let someone else take charge of these technologies for me						
F. The pace of change of technology is too fast for me						
G. I am as knowledgeable about these technologies as the next person						
H. I encourage my friends and family to make better use of technology						
I. I never really feel comfortable with new technology products and services						

(Monitoring question only)

Q9   (Broadband **users** <u>only</u> – Q6=1) What sort of broadband do you use at home? *Tick all that apply*

1	Fixed broadband (through a phone line or cable). If the computer has to be attached to the cable and you can't access it around the house you have fixed broadband.	
2	Wireless broadband (but through a phone line or cable). If you can access the internet from around the house but you can't access it outside then you have wireless broadband.	

3	Mobile broadband (broadband accessed through a dongle or device plugged into the computer). If you have to plug a card or stick into the computer to access the internet, and you can take it around with you, then you have mobile broadband.	
4	Satellite broadband	
5	Broadband accessed through a mobile phone handset	

(Monitoring question only)

Q10 (Broadband **users** only – Q6=1) And how much do you use your broadband connection? *Write in approx number of minutes spent online each day)*

……………………………………………………

 (Monitoring question only)

Q11 (Broadband **users** only – Q6a=1) And can you tell me what speed of access you have?
(NB People may not know the answer to this – fill in only if they know or can find out.)
Write in answer

……………………………………………………

 (Monitoring question only)

Q12 (Broadband **non-users** only – Q6=2,3,4) Can I just ask the reason you don't have broadband? (Do not read out, tick all mentioned)

1	It is too expensive/cost	
2	It's not available/I don't think it is available in my area	
3	Don't use the internet enough	
4	Don't need fast speeds/happy with speed of current connection	
3	Anything else (please write in)	

 (Monitoring question only)

RESPONDENT DETAILS AND PREVIOUS GROUP ATTENDANCE

Q13 Have you ever attended a market research group discussion?

Yes		Ask Q14
No		Go to Q16

Q14 When did you last attend a market research group discussion or interview?

In the last 12 months		CLOSE
12 – 18 months ago		Ask Q15
Over 18 months ago		Ask Q15

IF DISCUSSION ATTENDED IN LAST 12 MONTHS – INTERVIEW MUST BE CLOSED

NO MORE THAN 2 RESPONDENTS IN EACH GROUP SHOULD HAVE ATTENDED A DISCUSSION/INTERVIEW IN THE LAST 12-18 MONTHS

Q15   **What were the subjects discussed in the group(s) that you attended?**

DO NOT RECRUIT IF ATTENDED A DISCUSSION ON THE INTERNET.

CLASSIFICATION SECTION

Can I just check a few details with you please:

Q16 Which of the following best describes your ethnic background?

White British		Indian	
White Irish		Pakistani	
Any other white background		Bangladeshi	
Mixed - White and Black Caribbean		Any other Asian Background	
Mixed - White and Black African		Caribbean	
Mixed - White and Asian		African	
Any other mixed background		Any other Black background	
Chinese		Any other background not listed (please write in below)	

PLEASE ENSURE AT LEAST 2 BME PARTICIPANTS PER GROUP (DEPENDING ON LOCATION)

Q17   Do you work full or part time?

FULL TIME (30HRS+)	
PART TIME (18-29 HRS)	
FULL TIME EDUCATION	
PART TIME EDUCTION	
NOT WORKING	
RETIRED	

Thanks for giving me that information. The discussion group will be held on …. ……at ……… and will last approximately two hours. Give out PRE-TASK and ask participant to complete before coming along to the group. This is important and won't take long to complete – only 5 minutes

<u>CONTACT DETAILS</u>

NAME:

ADDRESS:

TEL NO:

INTERVIEWER'S DECLARATION:

I DECLARE THAT NO MORE THAN 2 PEOPLE IN THIS GROUP KNOW EACH OTHER AND THAT THIS IS A TRUE RECORD OF AN INTERVIEW WHICH HAS BEEN CONDUCTED WITH A RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE

INTERVIEWER'S SIGNATURE …………………………… DATE ………………..

Participant pre-task used in the qualitative research

Your name:
Location of your group:

Task

Thank you for agreeing to take part in these group discussions on behalf of Ofcom, the communications regulator. Before the group discussion, we would like you to answer the below question. This is not a test! Please write down as many things as possible that you can think of.

Question: What developments in the last 10 years have helped you in your life?

Write your answer here…

Discussion guide used in qualitative research

Ofcom Consumer Panel
Future of Broadband
Discussion Guide

2 hours

Research aims:
To explore in more detail the hypothesis that access to broadband internet at home is seen as an 'essential' service by ascertaining:

(a) How widespread is the belief that broadband is important to citizens and consumers, now and in the future

(b) For those who see it be an 'essential service', what is driving this attitude?

- And what level and type of service is seen to be important? Specifically broadband speed, fixed line vs. mobile
- For those that do not – what is driving their attitudes?

(d) What role, if any, do people think government should play in ensuring universal access?

(c) How important is public funding on this seen to be compared to other public services

(e) If and how do views vary depending on certain demo/attitudinal characteristics?

1. **Introduction and warm up (10 minutes):**

> *Participants to fill in name on front sheet of an **individual questionnaire** – explain that we will be revisiting this at various points during the discussion to make sure we capture individual responses to questions*
>
> - Initial moderator explanations: independence, confidentiality, not test, permission to record, topic is developments that have helped people in their lives
> - Introductions (5 minutes): First name, a bit about yourself (e.g. where you live, are you working/studying/retired, who live with and age of any children in household),
> - Ask respondents about their pre-task: What development have you chosen that has helped you in your life
>   - Where internet is mentioned, probe why it was chosen, what difference it has made to people's lives e.g. what can they do now that they couldn't before

2. Role and importance of the internet currently (45 minutes)

*Participants to complete **section 1** on their individual questionnaires about internet use and access:*
- *Whether used internet/accessed online services in last month*
  - *(If not) whether they have accessed it in the past year/ever*
  - *(If they do) How regularly they use it? (daily, weekly, less often)*
  - *(Both) How confident they feel using it? (scale as omni qre)*
  - *Where do they use it - work/home/other*
  - *Through which devices – computer, mobile phone, games console, TV etc.*
  - *Whether have access at home*
  - *What type of access at home - dial up vs. broadband, and if broadband, whether fixed (through router, cable or satellite) or mobile (through a dongle or card) connection*
- *Those who have not used internet/accessed online services in past month, why not? (whether access, affordability, confidence, interest/need issue)*
  - *Whether expect to use more in the future and what would help them use it?*
- *Those who don't have internet at home, why not?(access, affordability, confidence, interest/need)*
  - *Whether expect to get at home in the future and what, if anything, would help them access it?*

- Show of hands:
  - Who has used the internet/accessed online services in last month
  - Those with internet access at home and, of these, those with broadband at home
- Quick initial discussion about levels of confidence with using the internet – how confident, confidence compared to others in household

Complete section 2 of questionnaire
For internet users in last month: *What you have used the internet for recently (e.g. in the last week or month). Prompt participants to think about all information, communication/social activities, entertainment/leisure activities, services/ transactions they have accessed or done online*

For non-internet users and those without the internet at home: *Things that you would like to use the internet for or could do more of or do more easily if you had the internet at home. Prompt participants to think about all: information, communication/social activities, entertainment/leisure activities, services/transactions and "having your say" that could be accessed or done online,*
(prompt sheet for moderator)

- Individuals to report back and moderator to flipchart mentions thematically
  - Probe specifically for any other public services that have not already been mentioned e.g. any government information accessed, or processes or payments made online
  - Probe for civic activities e.g. giving political/community views, paying government taxes or fees, getting in contact with government or council
  - Probe: which of these services/activities are **most important overall**? Which regard **as essential**?

- ASK ALL: How important is speed/bandwidth to using/accessing these activities/services?
    - Probe people's understanding of broadband vs. dial-up differences and extent to which people with internet at home know what speed/bandwidth they have
    - ***Provide a simple definition of broadband: a broadband connection is a high-speed internet connection. It is always on and allows you to make telephone calls at the same time as using the internet.***
    - Does this definition change the perceived importance of BB (including amongst non-users)?

- ASK ALL: How important is the type of connection for using/accessing these activities/services?
    - E.g. type of access – fixed vs. mobile access
        - If participants say they have mobile access, probe to establish whether they mean through a laptop with a dongle or card, or whether they mean through their mobile phone handset
    - E.g. type of device - computer (desk top or laptop), TV, games console, mobile phone

Give out task sheet 1
Smaller group task: *Consider the flip chart of different activities/services etc. that can be accessed via the internet from previous discussion and identify:*
- *(a) Underlying reasons why this is important/ beneficial*
- *(b) Whether this benefits everyone equally or if there are groups in society that particularly benefit?*
    - *Moderator to run through this exercise with whole group using one of the activities mentioned previously to start off exercise*
    - *Provide examples of types of groups we are interested in e.g. young people, old people, disabled people,, people from non-English speaking backgrounds, people who use specific government services e.g. job seekers*

- Groups to report back underlying benefits and groups who could particularly benefit
- Probe: Which of these benefits is most important? Which would regard as **essential**?
- Are there any groups that could miss out if they don't get help to access/use the internet – which groups?

- *Participants to complete **section 3** of individual questionnaire – how important is broadband internet to you personally, how important do they think it will be in 2-5 years' time*

- Discuss responses in the round, probing the reasons why the internet is important to people individually
    - Show of hands – how important individually
    - Take time to let participants explain how important and why it's important/not important in their own words as their language is important
    - Probe what participants would liken the importance of the BB internet at home to – what other services of similar importance
    - If BB at home regarded as important individually/to society, probe **what content/services/activities driving the view**, that it is important

- Explain that in the next section we will be thinking about the near future, 2-5 years time)

(5 minutes spare)

3. Future importance of broadband and potential role of government (20 minutes)

- How important expect access to broadband internet to <u>you personally</u> in 2-5 years time – same as now, or more or less important? If more important – is this significantly more? Why/in what ways?
- How important expect broadband internet to be to <u>society generally</u> in 2-5 years time – same as now, or more or less important? If more important – is this significantly more? Why/in what ways/for whom? How far do they think it will become difficult to get by without broadband in the future?
  - Again, make sure we capture the language used to describe the importance or non-importance
    - Probe what they would liken the importance of BB internet at home to

Give out task sheet 2
Small group task to brainstorm what sorts of activities and services they expect people will be using the internet for in 2-5 years' time
- *Prompts – what activities will be routinely undertaken online which aren't currently and which services will be more/only delivered online?*

- Small groups to report back and moderator to flipchart mentions thematically
- Discuss in the round the main changes expected in terms of what people will be doing online vs. offline in the future, what role the internet will play in people's lives overall, their attitudes to and confidence with the internet etc.

4. Universal access and potential role of government (40 minutes)

*Participants to complete **section 4** of the questionnaire: Agree/disagree statements e.g. People miss out, should be possible for everyone to access no matter financial circumstances/confidence, and government should help ensure that everyone can access*

- Discuss responses to statements in the round – why agree/disagree?
- If agree: Which content/services/activities are seen as particularly important/essential and are driving participants' views that there should be universal provision
- If agree, are there specific groups for whom it is particularly important to have access to broadband? Are there specific groups who would miss out if they didn't get help to access broadband?
- (If universal provision is seen as desirable), how ensure everyone can access/use the internet? Who (which individuals/organisations) should be involved and in what way?
- What - if any - role should **government** specifically play? Is it important, and if so how important, for **government** to ensure that everyone can access broadband internet at home? Why/why not? If government support should be provided, who should be entitled to it?

Give out task sheet 3
Lay strategist smaller group task:
- *Imagine you are advising the government on the issue of access to broadband internet at home. What would you recommend them to do, if anything? Why would you recommend this?*

- *If you think that government should do something in this area, what should it be?*
  - *Examples in Access and Inclusion questionnaire are: half price computer, £5 discount on monthly cost for internet, pre-pay internet via a fixed telephone line, easy to use internet device, safe internet environment, free training on how to use the internet, free telephone helpline for technical support*
  - *Also probe about role of government in ensuring access to (reliable and high enough speed) BB wherever you live (reliable and high enough speed)*
  - *If financial support should be provided, who should be entitled to it?*

- Smaller groups to present back their recommendations for discussion in the round
  - Probe: What sort of service should be provided – e.g. fixed or mobile (is mobile seen as a substitute or as additional and why)?

- Overall, how important is it for government to ensure that money and resources go towards this area compared to on other services. Show list of services and gauge whether money/resources going towards BB is more/same/less important than each. List to include:
  - *Landline telephone service*
  - *Mobile phone services*
  - *Digital terrestrial TV services (e.g. Freeview)*
  - *Postal services e.g. post offices and door to door deliveries*
  - *Utilities (e.g. water)*

Thanks and close
INCENTIVES – sign in sheet

Individual questionnaire used in qualitative research

65

Individual Questionnaire

Name	
Location	
Date	
Code (office use only)	

Individual questionnaire used in qualitative research

Section 1

1. Have you used the internet or accessed any online services at all in the past month?

Yes	
No	

2. If not, why?

3. And have you used the internet in the past year?

Yes	
No, not within the past year	
No, I have never used the internet at all	

4. How confident, if at all, would you say you are with using the internet?

Very confident	
Quite confident	
Not very confident	
Not at all confident	

5. If you <u>have</u> used the internet in the past month, how often do you access online services on average?

Daily	
Weekly	
Less than once a week	

6. If you do use the internet, where do you tend to use it? (please tick all that apply)

At work	
At home	
Library	
Other (please specify)	

7. If you do use the internet, through which devices do you tend to access it? (please tick all that apply)

Computer / laptop	
Mobile phone	
Games console	
Television	

8. Do you have internet access at home?

Yes	
No	

9. If you do, which of the following types of connections do you have?

Dial up	
Fixed broadband (through router, cable or satellite)	
Mobile broadband (through a dongle or card)	

10. If you do <u>not have broadband access at home (if you do not have the internet at all or if you have dial-up)</u>, why not?

11. If you do not have internet access at home, or if you only have a dial-up connection, do you think you are likely to get broadband access in the future?

Yes	
No	

12. What, if anything, would help you to get broadband access at home?

Section 2

If you use the internet (at all)…

> What have you used the internet for in the past week?

If you don't have broadband access at home (if you don't have internet access at all or if you just have a dial-up connection)…

> Can you think of anything you could do, or do more easily, if you had access to broadband?

Section 3

1. (If you have broadband at home) How do you currently feel about having broadband at home?

It's essential/I wouldn't be without it	
It is important/I value it highly	
It is nice to have but not vital	
It's not particularly important to me	
I don't value it at all	

2. (If you don't have broadband at home – if you don't have the internet at all or if you just have dial-up) How do you feel about not having broadband at home? Please choose the statement that best describes how you feel.

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	

3. (Whether you have broadband or not) How important do you expect having broadband at home could be to you in 2-5 years' time compared to now?

Much more important than now	
Somewhat more important that now	
Same importance as now	
Less important than now	

4. Why do you say this?

Section 4

Now thinking about how important having broadband at home is for society generally, to what extent do you agree or disagree with the following statements?

	Agree strongly	Tend to agree	Neither agree nor disagree	Tend to disagree	Disagree strongly
People could miss out on important information, services and activities by not having broadband internet at home					
It should be possible for everyone to get broadband internet at home, even if you have a low income					
It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home					
It should be possible for everyone to get broadband internet at home, no matter where they live					
Everyone should have the right to be able to get broadband internet access at home					
Government should help people who need it to get broadband internet access at home					

Group tasks used in qualitative research

Group Task Sheet 1

Thinking about the discussion so far on the different activities and services that can be accessed on the internet, please discuss the following questions in your groups:

---

1. Why are these activities and services important?

---

2. Do the activities and services accessed on the internet benefit everyone equally or are there particular groups in society that benefit more or less than others?

Group Task Sheet 2

What types of activities and services do you expect people will be using the internet for in 2-5 years' time?

New things that may be offered online

Things that are done online at the moment that may become more common in 2-5 years' time

Things that may only or mainly be offered online

Group Task Sheet 2

Group Task Sheet 3

Imagine you are advising the Government on the issue of access to broadband internet at home. Do you think they should do anything to make sure everyone can access it? Why?

If you think they should do something to make sure everyone can access it, what?

And if you think they should do something, who should benefit?

Quantitative questionnaire

INTERNET

<div style="border:1px solid black">

ALL ADULTS AGED 16+ SECTION ANSWERED --- 01 ASK Q1

</div>

ASK THOSE WHO HAVE USED INTERNET IN LAST 12 MONTHS (TAKEN FROM PDINTERNET CODES 01-04). OTHERS GO TO Q2 FILTER

Q.1a **SHOWCARD INTERNET1** Can you please tell me from this list the types of things you currently do using the internet? **CODE ALL THAT APPLY**

Q.1b **SHOWCARD INTERNET1 AGAIN** Which of these activities and services are important to you? CODE A MAXIMUM OF 5 DISPLAY ALL CODED AT Q.1A

Q.1c **SHOWCARD INTERNET1 AGAIN** And which of these do you think will become more important to you in the next 2-5 years? **CODE A MAXIMUM OF 5**

	Q1a	Q1b	Q1c
FINDING INFORMATION			
Information for **work, job or business**	01	01	01
Information for **school, college or university homework**	02	02	02
Information for my **hobbies and interests**	03	03	03
News and weather sites or information	04	04	04
Information on **government or local council services** (e.g. library opening times or your nearest GP)	05	05	05
On **travel/holidays/what's on** in local area	06	06	06
Information on TV programmes or other entertainment	07	07	07
Generally searching for information (e.g. surfing)	08	08	08
COMPLETING TRANSACTIONS			
Online **banking and bill paying**	09	09	09
Online **shopping**	10	10	10
Buying and selling goods online (e.g. ebay)	11	11	11
Completing **government processes** (e.g. filling in an online tax return or registering for Child Tax Credits online)	12	12	12
Paying **government taxes or fees** (e.g. paying income, council or road tax online)	13	13	13
COMMUNICATION			
Sending and receiving email	14	14	14
Using online **chat rooms, blogging, instant messaging**, etc	15	15	15
Using **social network sites** (e.g. facebook, MySpace, etc)	16	16	16
ENTERTAINMENT			
Watching **TV programmes or films** online (e.g. BBC i-player, 4 on demand)	17	17	17
Watching **video clips** online (e.g. You Tube, etc)	18	18	18
Listening to the **radio/music** online or down-loading music	19	19	19
Playing **games** online	20	20	20
GETTING INVOLVED OR HAVING YOUR SAY			
Taking part in a **government survey or consultation** online	21	21	21
Getting in contact with a Government department or your local council online (e.g. to ask a question, report a problem or make a complaint)	22	22	22

Broadband access for all: Consumers' views on the importance of broadband internet at home

Joining or donating money to a campaigning organisation online
(e.g. Friends of the Earth, Amnesty international or the NSPCC --------------------------23--------------23---------23
Signing an **online petition** --24--------------24---------24
Giving **your views or advice on a community, political or social**
issue online (e.g. by blogging or voting in an online poll) --------------------------------25--------------25---------25

None of these--26--------------26---------26
Don't know--27--------------27---------27

ASK THOSE WITH BROADBAND AT HOME (PD BROADBAND CODE 01). OTHERS GO TO Q5
Q.2   **SHOWCARD INTERNET2** I am going to read out a series of statements, followed by several services. Which of the statements
best describes how you currently feel about having access to each service at home? READ OUT CODES, ROTATE STARTING SERVICE

	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	Don't know
Broadband internet at home	01	02	03	04	05	06
Landline at home	01	02	03	04	05	06
Mobile phone coverage	01	02	03	04	05	06
Digital TV reception, i.e. access to TV channels other than 1-5)	01	02	03	04	05	06
Postal service/other door-to-door deliveries	01	02	03	04	05	06

Q.3   You said that broadband internet access at home was (insert code text selected at Q2). Why do you say this?

Q.4   How important do you expect having broadband internet at home will be to you in 2-5 years time compared to now?

Much more important than now----------------------------01
Somewhat more important than now--------------------02
Same importance as now---------------------------------03
Less important than now----------------------------------04
Don't know---05

ASK THOSE <u>WITHOUT</u> BROADBAND AT HOME (PD BROADBAND CODE 02).
OTHERS GO TO Q12 FILTER
Q.5   Do you have a dial-up internet connection at home, or is there no internet connection at your home?

Dial-up connection--01
No internet connection at home-------------------------02

Q.6   Why don't you have broadband internet at home? DO NOT PROMPT, TICK ALL THAT APPLY

COST
It is too expensive--01
I can't justify the cost of it / I need other things more--02
I don't want to sign a 12 month contract--03
I can't afford a computer---04

ACCESS
I don't have a computer---05
I am planning on moving house---06

I am satisfied with using the internet at work/elsewhere-- 07
I am satisfied with using the internet on my mobile phone --- 08
I am not sure if it is available in my area --- 09
I don't want the children to access the internet --- 10

INTEREST & USAGE
I am not interested in the internet--- 11
I would not use it enough -- 12
I don't need it 13
I don't have time to use it/I'm too busy --- 14
It's not for people of my age --- 15

KNOWLEDGE/CONCERNS
I don't really know what it does-- 16
I don't know where to get it from -- 17
I don't know how to use a computer --- 18
I'm not sure what I would do if it breaks--- 19
I am worried about security / ID theft / Bank fraud/privacy issues--- 20
There is too much immoral content on the internet --- 21

Other   --- 22
Don't know   --- 23

Q.7   How likely, if at all, are you to get broadband internet at home within the next 6 months?

Very likely ----------------------------------- 01
Likely --- 02
Unlikely -------------------------------------- 03
Very unlikely ------------------------------- 04
Don't know ---------------------------------- 05

Q.8   **SHOWCARD INTERNET2 AGAIN**. Which of the statements best describes how you currently feel about having access to each service at home? **READ OUT. ROTATE STARTING SERVICE**

	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	Don't know
Landline at home	01	02	03	04	05	06
Mobile phone coverage	01	02	03	04	05	06
Digital TV reception i.e. access to TV channels other than 1-5	01	02	03	04	05	06
Postal service/other door-to-door deliveries	01	02	03	04	05	06

ASK ALL WHO HAVE NEVER USED THE INTERNET AND/OR DO NOT HAVE BROADBAND AT HOME (PD INTERNET CODE 06 OR PD BROADBAND CODE 02)
CAPI INSTRUCTION: SHOW BOTH INTROS IF RESPONDENT QUALIFIES FOR BOTH

SHOW INTRO (a) FOR THOSE WHO HAVE NEVER USED THE INTERNET ONLY: (PD INTERNET CODE 6)
Q.9   The internet enables computers from around the world to connect with each other and provides people with information, services and entertainment through websites, most of which is free. Many different things can be done on the internet, for example finding information for work or school, banking and bill paying, shopping, chatting to other users, watching TV and commenting on social issues. THEN CONTINUE TO INTRO BELOW]

SHOW INTRO (b) FOR ALL WITHOUT BROADBAND AT HOME: (PD BROADBAND CODE 2)
        Broadband internet means that the broadband connection is always on, internet access is high speed, and you can make telephone calls at the same time as using the internet.
        How do you currently feel about not having broadband at home? Please choose the statement that best describes how you feel about this

SHOWCARD INTERNET3 ASK ALL WITHOUT BROADBAND AT HOME

Broadband at home is an essential service that I am currently without --- 01
Broadband is an important service that I would value highly but am currently without ----------------------------- 02
It would be nice to have broadband at home but I don't think it is vital that I get it----------------------------------- 03
Having broadband at home is not particularly important to me --- 04
Having broadband at home is not important to me at all --- 05
None of these --- 06
Don't know --- 05

Q.10   Why do you say that?

ASK THOSE WITHOUT BROADBAND AT HOME (PD BROADBAND CODE 02). OTHERS GO TO Q12
Q.11   How important do you expect having broadband internet at home could be to you in 2-5 years time
         compared to now?

Much more important than now---------------------------------- 01

Somewhat more important than now---------------------------- 02
Same importance as now --- 03
Less important than now -- 04
Don't know -- 05

Broadband access for all: Consumers' views on the importance of broadband internet at home

ASK ALL
Q.12   **SHOWCARD INTERNET4** Now 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. First… - do tend to agree or disagree with this and is this strongly or slightly? Next… **READ OUT. ROTATE LIST.**

	Agree strongly	Tend to agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Don't know
People could miss out on important information, services and activities by not having broadband internet at home	01	02	03	04	05	06
It should be possible for everyone to get broadband internet at home even if you have a low income	01	02	03	04	05	06
It should be possible for everyone to gain enough skills and confidence to get and use broadband internet at home	01	02	03	04	05	06
Having broadband internet at home makes it easier to access information, services and activities	01	02	03	04	05	06
It should be possible for everyone to get broadband internet at home, no matter where they live	01	02	03	04	05	06
Everyone should have the right to be able to get broadband internet access at home	01	02	03	04	05	06

ASK ALL
Q.13   I'd like to know 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. **READ OUT. ROTATE LIST**

	Government action on broadband Is more important than…..	Government action on broadband the same importance as…	Goverment action on broadband less important than….	Don't Know
Landline telephone services	01	02	03	04
Mobile telephone services	01	02	03	04
Digital terrestrial TV, i.e. Freeview	01	02	03	04
Postal services e.g. post offices and door-to-door deliveries	01	02	03	04

Now just a few questions to help us analyse the results.

ASK THOSE WHO HAVE USED INTERNET IN LAST 12 MONTHS (PDINTERNET CODES 01-04). OTHERS GO TO Q15 FILTER

Q.14   Overall, how confident, if at all, are you with using the internet?

Very confident ------------------------01
Quite confident------------------------02
Not very confident--------------------03
Not at all confident -------------------04

Don't know--------------------------05

ASK THOSE WITH BROADBAND AT HOME (PD BROADBAND CODE 01). OTHERS GO TO Q16
Q.15   What type of broadband connection do you have at home? **READ OUT. CAN MULTI-CODE**

Fixed **Broadband** ADSL through a phone line or cable service – always on, high speed access, allows you to make voice calls at the same time as using the internet, you may use a wireless connection--01

Broadband through a mobile network – connecting via a USB stick or dongle---------------------------------02

Don't know---03

ASK ALL:
Q.16   SHOWCARD INTERNET5 Thinking about technology more generally, and not just the internet, to what extent do you agree or disagree with each of the following statements about technology? READ OUT. ROTATE LIST

	Agree strongly	Tend to agree	Neither agree nor disagree	Tend to disagree	Disagree strongly	Don't know
I try to keep up with technology	01	02	03	04	05	06
Technology has no part to play in my life	01	02	03	04	05	06
I never really feel comfortable with new technology products and services	01	02	03	04	05	06
I am confident that I can work any new technology product that comes along	01	02	03	04	05	06
I am quite happy to let someone else take charge of new technologies for me	01	02	03	04	05	06
When using technology I worry I might break something	01	02	03	04	05	06
The pace of change of technology is too fast for me	01	02	03	04	05	06
I am as knowledgeable about new technology as the next person	01	02	03	04	05	06
I encourage my friends and family to make better use of technology	01	02	03	04	05	06