

Chapter 1

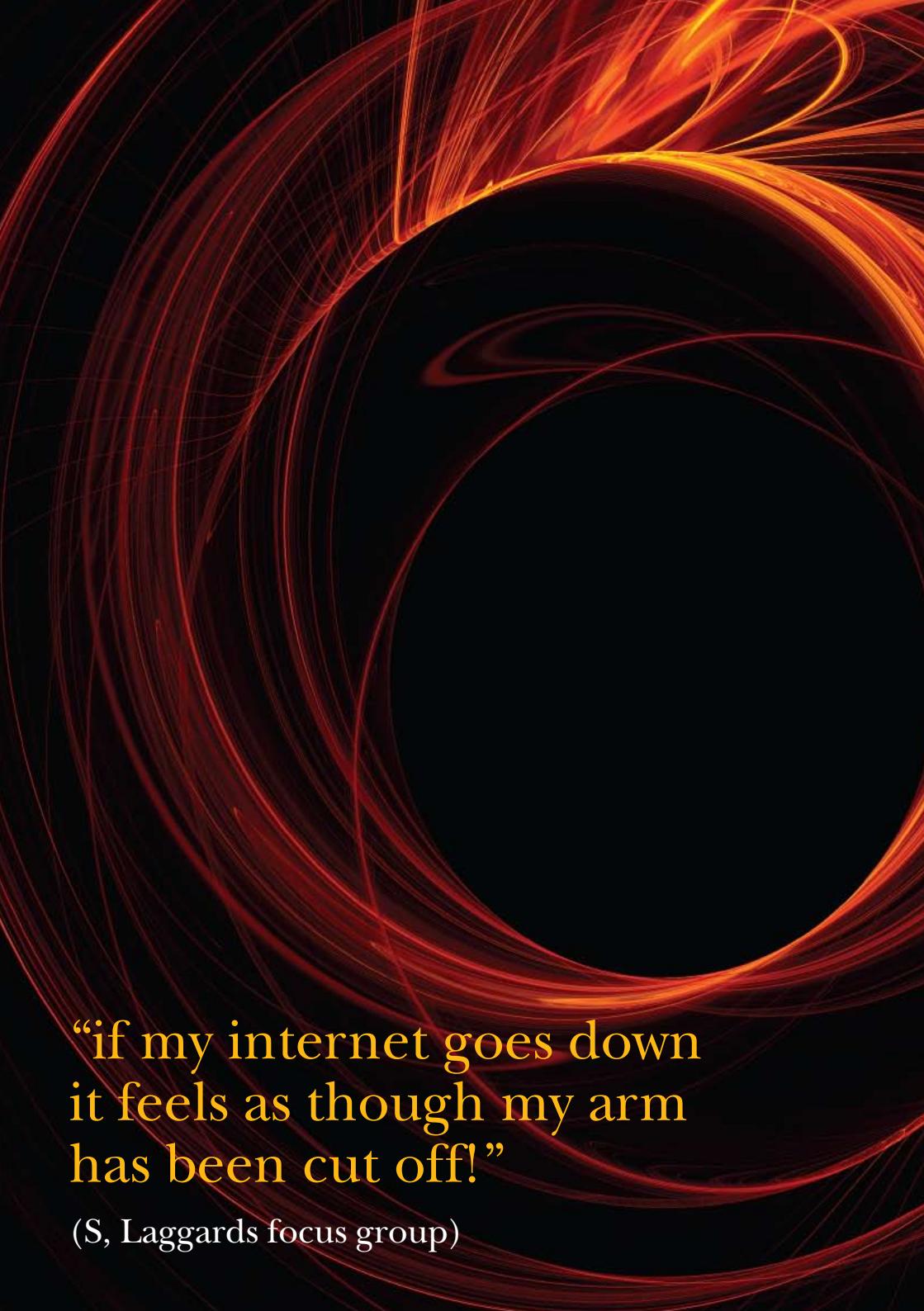
The ubiquity of
the internet

“T’internet is my best
friend after the other
half, of course”

(C, Laggards focus group)

OLSWANG





“if my internet goes down
it feels as though my arm
has been cut off!”

(S, Laggards focus group)

Our quantitative and qualitative research is all carried out online, so everyone in our survey base has use of a computer and the ability to access the internet.

More or less all respondents surf the web and use email for recreational purposes, with 86% of all respondents spending at least an hour a week surfing or searching the internet and 65% spending at least an hour a week emailing (see Figure 3-8(a) overleaf).

Perhaps more surprising, however, are the similarities across our different segments as regards the time spent on these activities, with our technophobe Laggards having adopted internet usage as regular behaviour - *“if my internet goes down it feels as though my arm has been cut off!”* (S, Laggards focus group)

While 89% of the Tech Vanguard spend at least an hour each week surfing, this drops just slightly to 84% amongst Laggards. It is only when you look at higher volumes of usage that differences become more significant – with 57% of the Tech Vanguard spending five hours or more per week surfing, as compared with 34% of Laggards².

The Laggards even appear to spend more time emailing than the Kids³ – probably indicating (and as evidenced by previous years' results) that instant messaging through services such as MSN Messenger and message boards on social networking sites are the communications media of choice for the youngest demographic. One Kid answered *“just MSN”*, when addressing a focus group thread about which websites (other than music, TV and games sites) he used, with MSN and Bebo being the only two services receiving spontaneous mentions among this particular group.

² See Annex, Figure 3-3(b)

³ See Annex, Figure 3-2(b)

It is clear from the focus group discussions that time spent surfing the web is deployed in different ways by the different demographic segments. However, all groups emphasised the value of the internet both as a communications medium (whether for sharing photos or keeping contacts around the world) and as an information resource. While the Kids are hanging out on MSN and Bebo, Mainstream users are much more likely to be on sites such as eBay, BBC and moneysavingexpert.com.

One Laggard summed up perfectly how the web met her own needs and personal interests: *“there is so much information on it – and I can play bridge with people all around the world anytime day or night.”* (R, Laggards focus group)

Once we move away from the core internet activities of emailing and surfing, we begin to see a more marked separation between the Tech Vanguard and the Laggards. While many Laggards shop and bank online, many others choose not to do so⁴, and 60% choose not to use social networking sites⁵. This choice is influenced by several factors - *“I steer clear of Facebook type things – I don’t trust the Government”* (A, Laggards focus group) - being just one view.

When we consider the online audio and audiovisual worlds (a key focus for our survey), many Laggards are equally wary of or, at best, indifferent to the use of the PC and/or the internet for this type of activity. As will be seen, the behaviour and attitudes of the Laggards with regard to online audiovisual media is markedly different from that of the other groups, with participants in even our Mainstream focus groups appreciating the ability to find TV programmes online that they missed when broadcast.

There is some evidence to suggest that, for certain Laggards, this is simply a lifestyle decision - *“I don’t like my time to be governed by the TV and if I miss something then fine. I wouldn’t be bothered to download it and watch it later.”* (T, Laggards focus group)

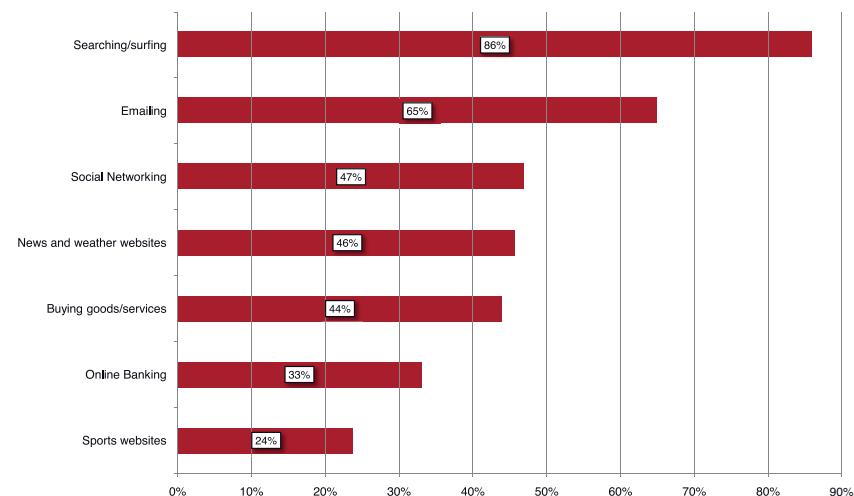
However, it also appears that some Laggards perceive a clear demarcation between, on the one hand, the PC/internet as a communications medium and information resource and, on the other, those devices in the home which are to be used for entertainment activities. This is, for example, borne out by the more limited use made by the Laggards (compared with the other demographic segments) of the PC as a device to playback music which has been copied from a CD⁶, considered in more detail in Chapter 5 of this Report.

Consequently, the high usage of the PC and internet for “traditional” activities by the Laggards does not itself signify any likelihood of this group taking up the new forms of content consumption which are offered by convergence (and which, as we will see, are already being adopted by the other groups): *“I just see my PC as a place to use the internet and don’t bother watching TV on it.”* (T, Laggards focus group)

Figure 3-8(a)

Excluding your use of the internet for work-related activities, how much time per week do you spend using the internet for each of the following (not including use of the internet to find or watch/listen to TV programmes, movies or music)?

Consolidated responses for all activities – percentage viewing for at least one hour per week.
Base: All respondents.



⁴ See Annex, Figures 3-1(b) and 3-7(b)

⁵ See Annex, Figure 3-6(b)

⁶ See Annex, Figure 9-4(b)