



Digital Glasgow
2002 Household Survey



CONTENTS	PAGE
1. Introduction	3
2. Summary findings	4
3. The facts about digital technology	8
3.1 Awareness of all digital technologies	8
3.2 Previous and current use of all digital technologies	10
3.3 Home access and use	12
3.4 Desire to improve knowledge of ICT	14
4. ...especially computers	15
4.1 Number and location of computers in the home	15
4.2 Frequency of computer use	15
4.3 Computer access points	16
4.4 Nature of computer use	18
4.5 Future interest in the computer	19
4.6 Barriers to computer use	20
4.7 Spontaneous reasons for not using a computer	21
4.8 Prompted reasons for not using a computer	23
4.9 Factors that may encourage computer use	24
4.10 Computer skills and training	25
5. and the internet	27
5.1 Frequency of internet use	27
5.2 Internet access points	28
5.3 Nature of internet use	29
5.4 Future interest in the internet	30
5.5 Barriers to internet use	30
5.6 Spontaneous reasons for not using the internet	31
5.7 Prompted reasons for not using the internet	32
5.8 Factors that may encourage internet use	33
5.9 Attitudes to the internet	34
5.10 Impact of the internet	37
6. Conclusions	40
Appendix 1 Demographic, location, employment, education and other key factors which influence computer and internet activity	41
Appendix 2 Research aims and objectives	48
Appendix 3 General population and research	50
Survey process and characteristics	52



1. INTRODUCTION

- This report is the result of research commissioned by Scottish Enterprise Glasgow's Learning City team in December 2001. The purpose of the research was to measure awareness of, access to, skills in, and desired support for Information and Communications Technology (ICT) by individuals in a representative sample of households in the city of Glasgow.
- From the total sample of 2,000 interviews, an insufficient number was achieved in some Social Inclusion Partnership (SIP) areas to enable appropriate analysis and comparison between areas. Therefore a further 147 interviews were carried out in certain SIP areas so that results could be compared. Wherever SIP results are referred to in the report, they are derived from the SIP base of 2,147 respondents.
- All interviews were conducted in-home by Market Research UK Ltd over a three week period between the end of December 2001 and mid January 2002. A quasi-random sampling approach was used and each interview lasted about 20 minutes using a pre-agreed and piloted structured questionnaire. (Further details on methodology, aims and objectives are provided in the appendices to this report).
- While the personal computer (PC) and the internet are the main focus, data on a wide range of other digital technologies and products has also been collected.
- The survey compares household areas and thematic groups covered by the SIPs and non-SIPs, which is a broadly representative sample of the city's population.
- The results will be used by Scottish Enterprise Glasgow to measure progress towards digital inclusion and lifelong learning in the city in the course of the next few years.

2. SUMMARY FINDINGS

- The Digital Glasgow 2002 Household Survey (2,147 quasi random in-home interviews by Market Research UK Ltd) has found that Glasgow is a technologically aware city but most of its residents do not use, nor have the skills to use, technologies like the computer and the internet.
- 37% of the city use a computer, and 30% use the internet, at home.
- This internet at home penetration rate is 9% lower than the UK average, 8% lower than the EU average and 28% lower than the US average.
- Respondents from SIP areas have comparable awareness, access and attitudes to ICT as those in non-SIP areas.
- The most digitally connected are students in further or higher education. They are six times more likely to use the internet than people with no qualifications.
- Someone in work is four times more likely to use the internet than someone who is long term unemployed.
- Those less connected include people living alone, carers, the long-term unemployed, the sick and disabled, those with no formal qualifications, the over 55s, especially the retired, and people living in accommodation rented from the local authority or a housing association.
- A third of the population has no interest in the internet.
- Nearly half describe their computer skills as non-existent but nearly four in ten would like to attend formal computer training to improve their skills.
- The PC is clearly the preferred method of internet access for the vast majority of consumers. Digital television and WAP mobile phones are rarely used.
- Sending e-mails and searching for flight and holiday information are the most popular activities on the internet but there is little use of government services.
- Not owning a computer and the cost of telephone calls are the main barriers to the internet at home.
- A quarter of the city's population does not have a conventional telephone in their homes.
- 71% believe there is a need for public internet access but less than 10% actually use public facilities.
- Three quarters of the population agree that computers and the internet are now an important part of everyone's life but over half believe that it will not improve the lives of people in their area.
- Educational achievement, skills, attitudes (motivation and interest), income, jobs, good health, housing tenure, household composition, web content, family/community networks, and technology awareness are likely to have as much influence as increased access, in narrowing the digital divide between the connected and the disconnected.

Awareness and access

- Products like the mobile phone, personal computer (PC), internet, satellite TV and cable TV all have very high awareness ratings but, with the exception of the mobile phone, this does not translate into high use.
- 98% have heard of the mobile phone and 58% have one at home. About three in every four have heard of digital cameras, DVD and Playstation 2.
- Only a third are aware of broadband internet access and e-learning.
- More than half of the city does not currently use a computer anywhere and two thirds of Glaswegians do not use the internet.
- Access to PCs (37%) or the internet (30%) in the home is 9% lower in Glasgow than across the UK (Office for National Statistics – April 2002).
- In a separate report, Ofcom reported home PC access levels of 52% in the UK and home internet penetration of 45%. In comparison, average internet penetration in European Union countries stands at 38% (e-Europe Benchmarking study) and in the United States, the home internet figure is 58% (Department of Commerce: A Nation Online).
- Usage of ICT is significantly lower than awareness in most instances (except mobile phone and conventional phone).
- Nowadays, 44% use PCs but because only 17% of respondents could not think of anywhere they could access a computer, this suggests that non usage is a much more complex issue than simply not having access.
- Some access points have high awareness but low usage. For example, 32% are aware of access in a library yet only 3% use this source.
- Of those who have access to a PC in the home, 57% use it daily and 25% weekly. The average number of hours used is 9.6 per week.
- PCs are used for a very wide range of purposes including e-mail, internet, hobbies and children's homework.
- The primary barrier among non-users is cost/expense (62%). This barrier is more significant amongst many of the sub groups expressing greatest interest in future use, such as:
 - Social Inclusion Partnership (SIP) area residents
 - families with children at home
 - those at home looking after family
 - short-term unemployed
- Another common barrier among non-users is a lack of interest (52%) – this is mainly an issue for older and retired respondents. Similarly 42%, mainly the retired, feel they have no need for ICT. Furthermore, a quarter feel they are too old to start. Age is therefore a key issue.

- The other key barrier among non-users is a lack of knowledge about using a computer (25%) or not knowing anything about it (27%). This type of response is more common among the permanently sick/disabled and long term unemployed.
- Among non-PC users 30% would be interested in using a PC in the future. These respondents are the most easily motivated and include under 55s, families with kids at home, employed/students/short term unemployed and have at least 'O'/Standard Grades.
- For internet users, access is mainly from home (66%). The average number of hours online per week is 5.7.
- The internet is used primarily to send and receive e-mails but a wide range of uses is recorded.
- Barriers to using the internet are very consistent with the barriers to using a computer.
- Among non-internet users, 29% expressed some degree of interest in using the internet in the future.

Skills and attitudes

- Few people feel they have good ICT skills – 45% describe their computer skills as non-existent and a further quarter describe themselves as beginners. Despite this respondents expressed no strong desire to improve their knowledge. Indeed almost half of those wanting to learn more are already users wishing to develop their skills – another key issue.
- A high proportion of the sample, 43%, have no desire to improve their ICT knowledge. Those who do wish an improvement are often from SIP areas, under 55 years or with some level of qualification. The desire to improve knowledge is mainly focused on the PC or internet.
- 7 in 10 feel that computer skills are not essential to their work and 6 in 10 feel that those skills will not be essential to getting on in their job or getting a new job.
- Almost a third have had formal training and 40% have been shown how to use the internet/PC informally by friends/family. It is notable that 38% are interested in formal training and 37% would like informed advice from local people in their area.
- From a prompted list, the most motivating factors for encouraging computer or internet usage relate to free computers, software, access or lessons. Most non-users are not easily motivated to increase their usage – some of the prompted suggestions hold low level appeal but may have some value if well targeted e.g. advice or training by local people in local venues (13%).

- Certain segments of this research audience seem untouched by and uninterested in the development of ICT, including the elderly, long term unemployed and disabled/sick. However, there are opportunities to engage with some segments of the study sample such as:
 - those living in SIP areas
 - families with children at home
 - those at home looking after family
 - short-term unemployed
- The research demonstrated that most of the respondents expect the impact of the internet over the next few years to be far-reaching and significant, particularly in relation to education and employment. However, these respondents feel that “the full impact of computers and technology will benefit the next generation” (67%).
- There is not a strong belief that such technology would be greatly beneficial – less than half thought that “developments in Information and Communications Technology will improve my life generally” and just over half feel “computers are anti-social and take away interactions with other human beings”.
- Some key sub groups do not see ICT as an influence on their lives. Most often those respondents are not economically active and are less inclined to improve their awareness, knowledge and digital technology skills. This is particularly true of the long-term unemployed, permanently sick/disabled, benefit claimants and the retired.

3. THE FACTS ABOUT DIGITAL TECHNOLOGY

Sections 3, 4 and 5 of this report contain the main findings, including an analysis of some key issues.

This first section deals generally with all the digital technologies surveyed, including awareness and access to personal computers (PCs) and the internet.

The other two sections take a closer look at Glasgow's relationship with the PC and internet, with a specific emphasis on attitudes and skills.

3.1 Awareness of all digital technologies

- All 19 technology products and services, prompted to assess respondents' level of awareness, are listed in the table over (figure 1). Some of the main awareness results from this Digital Glasgow survey are compared with those from a UK-wide study for the Department for Education and Employment (DfEE) in August 2000 (figure 2).
- The findings of these two studies are broadly comparable although it is clear from recent UK-wide surveys from the Office of National Statistics (April 2002) and Oftel (November 2001), that increased awareness has led to increased PC and internet ownership and use.
- The Digital Glasgow survey has found that awareness of technology in the city generally is good. The most commonly recognised products in this research are mobile phone (98%), telephone (96%), PC (96%) and the internet (93%). Cable TV (92%) and satellite TV (90%) also receive high scores.
- Similarly the vast majority of respondents recognise e-mail, Playstation, Playstation 2, DVD, digital camera and Gameboy.
- Awareness of e-learning (34%) and broadband internet access (36%) are much lower than the other technologies shown in the chart over.

FIGURE 1: PROMPTED AWARENESS OF ALL TECHNOLOGIES

	SE GLASGOW January 2002 %
Mobile phone	98
PC / personal computer	96
Conventional telephone	96
Internet	93
Cable TV	92
Satellite TV	90
E-mail	86
Playstation	84
DVD	78
Gameboy	75
Playstation 2	74
Digital camera	74
Other games console	56
Internet banking	55
Dreamcast	53
Internet access via WAP phone	50
Internet Service Provider or ISP	47
Broadband internet access	36
e-learning	34
None of these	*
Don't know	*
BASE	2,000

* less than 1%

Base: (All respondents)

Source: Market Research UK Ltd, January 2002

FIGURE 2: COMPARISON OF PROMPTED AWARENESS OF ALL TECHNOLOGIES – SE GLASGOW AND DfEE

	SE GLASGOW January 2002 %	DfEE August 2000 %
Mobile phone	98	98
PC / personal computer	96	94
Internet	93	95
Internet access via WAP phone	50	35
BASE	2,000	4,039

Base: (All respondents)

Source: Market Research UK Ltd, January 2002

- In many instances awareness of technologies is lower amongst retired and older respondents, especially those aged 65+ years. This is particularly true for internet related technologies such as e-mail and internet access via WAP phone. Awareness of computer games, DVD and digital camera is generally lower among the over 55s.
- Those who are long term unemployed, people renting from the local authority or housing association, or in receipt of benefit, also tend to have lower awareness of the technologies mentioned.

- Families with children at home often have higher awareness than the total sample for technologies such as WAP phone, internet access, e-mail, computer games, DVD, ISP and broadband internet access. This would suggest that the presence of children in the home has a positive effect on awareness of ICT. Conversely those living alone usually have lower awareness than the total population for those technologies.
- Ethnic minorities have comparable (or better) awareness than the total sample, except in relation to computer games.
- As we might expect, there is a tendency for more frequent computer and internet users to have better awareness of most of the prompted technologies. Those with a higher / further educational qualification also have better awareness whilst those with no formal qualifications have poor awareness.
- Living in those parts of the city designated as Social Inclusion Partnership (SIP) areas does not affect awareness levels.

3.2 Previous and current use of all digital technologies

- If we compare respondents' current use of digital technologies to previous experience, it is clear that fewer people now use those technologies than used to. Also, even though there is very good awareness of most technologies, this does not translate into a similarly high rate of use.
- Only in the case of the conventional telephone is usage comparable with awareness. In most other instances experience of using a technology is a lot lower than awareness of a technology. However, some technologies are more comparable than others. 73% of the respondents say that they have used a mobile phone in comparison with the 98% who have awareness of them. Experience of ever using a mobile phone is slightly higher in SIP areas.
- Usage of PC (56%), internet (46%) and e-mail (39%) stands at around half of the total population (ever used). However, experience of ever using ISP, broadband internet access, internet banking or e-learning is much lower. Similarly only 10% have ever used internet access via a WAP phone.
- Four in ten respondents have ever used cable TV and a similar proportion (35%) have ever used satellite TV. Satellite TV experience is higher in SIP areas, 39% compared with 29% in non-SIP areas. Almost three in ten have ever used a DVD and a fifth have experience of ever using a digital camera.
- Previous experience of computer games varies between the prompted platforms. Dreamcast only shows 10% usage while Playstation has the highest level of usage at 38%.
- The proportion of each product and service used nowadays is listed in the second column of figure 3 over. For comparison, these are shown alongside technology products and services ever used by respondents. This illustrates that the percentage of people currently using each of the technologies (except the conventional phone) is significantly lower than the proportion that have ever used these same technologies.

FIGURE 3: EXPERIENCE OF EVER USING TECHNOLOGIES COMPARED WITH THOSE USED NOWADAYS

	Ever Use %	Use Nowadays %
Conventional telephone	91	79
Mobile phone	73	61
PC / personal computer	56	44
Internet	46	37
Cable TV	41	29
E-mail	39	31
Playstation	38	22
Satellite TV	35	22
Gameboy	30	14
DVD	28	19
Playstation 2	22	11
Other games console	21	9
Digital camera	19	10
Internet Service Provider or ISP	19	14
Internet access via WAP phone	10	6
Dreamcast	10	4
Internet banking	9	6
Broadband Internet access	8	5
e-learning	5	3
None of these	1	4
Don't know	1	2
BASE	2,000	2,000

Base: (All respondents)

Source: Market Research UK Ltd, January 2002

- As could reasonably be expected, those technologies which do not have a high recognition factor are also those with lower rates of use. Furthermore, those sub groups of the sample with lower or poor awareness of technologies have less experience of using, and are less likely to use, technologies now. These low user sub groups, as shown in figure 4, include:
 - the retired, those aged 55+ (especially 65+),
 - people living alone,
 - those with no formal qualifications,
 - those in receipt of benefit,
 - the long term unemployed,
 - people renting from the local authority or a housing association.

FIGURE 4: USAGE AMONG LOW USER SUB GROUPS

	Total Sample %	Retired %	Living Alone %	No formal Qualification %	Receiving Income Benefit %	Long Term Unemployed %	Rented housing (LA/HA) %
Mobile phone	73	38	55	59	59	70	67
PC	56	18	37	30	39	40	45
Internet	46	11	32	21	29	22	34
E-mail	39	7	27	14	23	22	28
BASE	2,000	423	541	920	651	166	1,181

Base: (All respondents)

Source: Market Research UK Ltd, January 2002

- In some SIP areas, technology use is lower e.g. Gorbals, Greater Easterhouse and Greater Govan. However, on the whole it is comparable with non-SIP areas.
- Females typically have more experience than males in using PCs (61% and 51% respectively), and also the internet, mobile phone, e-mail and cable TV. In most of the other segments, use of technology is comparable between males and females – except for satellite TV where male use is slightly higher. It is interesting that, although higher numbers of females use these ICTs, among male users usage is more frequent.

3.3 Home access and use

- Which of the 19 technologies currently used by respondents are accessed mainly in their own homes? The answer appears to be all of them. Indeed the majority of ICT use occurs in the respondents' own homes. This is an issue that may require further consideration, especially for people unfamiliar with digital technology. Actions designed to increase exposure to technology, in particular outside the home, could help make the digital world more relevant to those without home access.
- The difference between those with home access and those without is clear. 37% of the respondents use a PC in their own home in comparison with 44% who use the technology "these days". From this we can deduce that only 7% use a PC outside the home. This is slightly higher than (but comparable with) the 2001 Scottish Household Survey where 33% of households were reported to have a PC (in the last quarter).
- PCs in the home are concentrated among people less than 55 years old, and are highest among the 35-44 age band (58%).
- The same pattern is evident from internet penetration figures. This survey indicates that 30% of respondents have internet access at home, of which 46% are 35-44 year olds. This result is better than the 2001 Scottish Household Study findings where 25% of households had internet access (in the last quarter) and similar to the penetration rates identified for Scotland in the OfTel study (Consumers' Use of the Internet - November 2001).
- However, the 30% Glasgow penetration rate is well behind the UK average rate of internet access in the OfTel study (45%) and the Office of National Statistics (April 2002) Expenditure and Food Survey (39%).

- In this Digital Glasgow study, access to PC, internet and e-mail in the home is typically lower for people renting from the local authority or a housing association, those receiving benefit, single person households, and those with poor qualifications. It is particularly high amongst those who are employed, students and families with children at home.
- Mobile phone access at home is slightly different. This peaks at 72% among those aged under 45 years compared with 58% for the total sample. There is also a higher incidence for females than males (62% and 54% respectively).
- Home access to cable and satellite TV is less influenced by age and gender. This is higher among families, quite consistent across employment status (except retired people who are low users) and higher among more frequent PC and internet users.
- Living in a SIP area does not have a major impact on the likelihood of having ICT access in the home. However, some SIP areas such as Gorbals, Greater Easterhouse and Govan have poorer home ICT access than others.

FIGURE 5: ALL TECHNOLOGY USED IN RESPONDENTS' HOMES COMPARED WITH PREVIOUS AND CURRENT USE (ANYWHERE)

	Ever use %	Use nowadays %	Use nowadays at home %
Conventional telephone	91	79	74
Mobile phone	73	61	58
PC / personal computer	56	44	37
Internet	46	37	30
Cable TV	41	29	26
Internet access via WAP phone	10	6	5
E-mail	39	31	24
Playstation	38	22	21
Satellite TV	35	22	20
Gameboy	30	14	13
DVD	28	19	17
Playstation 2	22	11	10
Other games console	21	9	8
Digital camera	19	10	8
Internet Service Provider or ISP	19	14	11
Dreamcast	10	4	3
Broadband Internet access	8	5	3
Internet banking	9	6	5
e-learning	5	3	2
None of these	1	4	6
Don't know	1	2	2
BASE	2,000	2,000	2,000

Base: (All respondents)

Source: Market Research UK Ltd, January 2002



3.4 Desire to improve knowledge of ICT

- It is important to consider (regardless of usage or experience of using) whether the respondents would like to improve their knowledge of the types of technology being discussed.
- Overall 43% of the sample have no interest in improving their knowledge of any of the technologies that are prompted. In terms of characteristics these respondents are usually aged over 55 years, in receipt of benefit, from single person households, long term sick / disabled and without qualifications. Lone parents are slightly more likely to want to improve their knowledge of PCs, internet and e-mail.
- Interest in improving ICT knowledge is often higher in SIP areas. For example, 35% of those living in SIP areas express an interest in improving knowledge of PCs compared with 27% of non-SIP respondents.
- As figure 6 shows, there is some interest in improving knowledge of ICT but these are mainly of computers (32%) and the internet (23%). Almost half (42%) of those wishing to improve their PC knowledge are current PC users and the same is true for the internet (39%). For the other technologies mentioned, only a small proportion of the sample demonstrate an interest in developing their own knowledge.
- The desire to improve knowledge of the prompted technologies diminishes with age. Typically those aged 55 and over are not interested in developing their knowledge. The presence of children in the home appears to have a positive impact on the desire to know more about ICT, especially PC (45%), internet (32%) or e-mail (15%). Usually those wanting to learn / know more, have some level of qualification such as Standard / 'O' Grades or Highers.

FIGURE 6: ALL TECHNOLOGIES - DESIRE TO IMPROVE KNOWLEDGE OF

	%
PC / personal computer	32
Internet	23
Gameboy / Playstation / Playstation 2 / Dreamcast / Other game	12
E-mail	10
Conventional telephone	7
Mobile phone	7
Internet Service Provider or ISP	5
Broadband Internet access	5
Internet banking	5
Digital camera	4
DVD	4
e-learning	4
Internet access via WAP phone	4
Cable TV	3
Satellite TV	2
None of these	43
Don't know	9

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

4. ESPECIALLY COMPUTERS

- The initial questions that are addressed in this section of the report were asked only of those who have a PC at home (739 people). It is worth noting that these respondents commonly are under 54, home owners, with a family, mainly employed or students, and have some educational qualifications.

4.1 Number and location of computers in the home

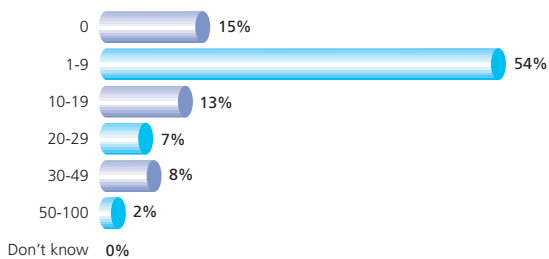
- Initially these respondents were asked how many computers they have at home. The vast majority (91%) have one. A further 6% have two computers and 2% have three or more PCs at home.
- Most of these computers are PCs (89%). A small proportion are Apple Mac computers (5%). The majority of the remaining respondents do not know what type of computer they have (usually older respondents).
- The respondents then were asked where the computers are in their home. The largest single proportion (55%) have a computer in their bedroom. It is also common for respondents to have the computer in a study or spare room (21%) or in the lounge / living room (17%). A minority have their computer in another room in their house.

4.2 Frequency of computer use

- The same respondents were asked how often they use their computer (except for games). The largest proportion of those interviewed use their computer daily (57%) with a further 25% using their PC at least once a week. It is rare for respondents to use their computer less often.
- The less frequent users tend to be older. Males are more likely to be daily users than females (61% and 53% respectively). Single people are less likely to have a PC but those who do are frequent users with 65% using it daily. Students (69%) and employed people (60%) also are high users.
- In the DfEE study, 55% of those who use a computer use it daily and a further 29% use it once a week. These results are very similar to those found in Glasgow.
- The respondents were also asked how long they had spent using their computer in the last 7 days (again excluding games). Only 15% of the respondents have not used their computer at all (usually older / retired).
- Most of the respondents have used their computer between 1 – 9 hours (54%). However, some particularly high users are recorded, with 8% using their computer for between 30 – 49 hours and 2% using their computer for between 50 – 100 hours.
- The mean number of hours used is 9.6 for the total sample. Males have a higher average of 11 hours a week. Those aged under 45 years average around 10 hours weekly compared with under 8 hours for those aged 45 – 64 years.
- Again those living alone recorded high usage averaging almost 13 hours a week.

- Males tend to have a higher mean weekly usage figure – 11 hours compared with 8.5 hours for females.
- Playing games on a PC or mobile phone is not very popular with respondents. The vast majority (72%) have not spent any time playing games on a computer or mobile phone in the last 7 days.
- The mean number of hours spent playing games is 2.25 hours among game players.
- Most of the respondents who have spent time playing games on a PC or mobile phone have done so for 9 hours or less (19%). These respondents are typically under 25 years, male or female and frequent PC users (11+ hours in the last week).

FIGURE 7: TOTAL HOURS SPENT USING A COMPUTER IN THE LAST SEVEN DAYS (EXCLUDING GAMES)



Base: 739 (Those who have a PC at home)

Source: Market Research UK Ltd, January 2002

4.3 Computer access points

- All of the respondents were asked a series of questions that identified the range of places where they could access a computer nowadays. A comparative chart, listing all access points actually used, is shown in the figure below. They were also asked what they would like to use a computer for and about any barriers to access.

Potential points of access:

- The respondents' own homes are the most widely identified potential point of access (37%). A further 32% think they could have access at a community library / learning centre and 30% could have access in another person's home.
- A fifth of respondents have potential access through work and a similar proportion have an opportunity to access through their college / university.
- Other access points - internet cafes, schools and government offices – are also identified. It is interesting to note that 17% of the respondents do not think they have potential access to a computer through any of these sources. This is especially true of over 55s, males (20%) rather than females (13%), single person households (24%), retired (28%), long term sick / disabled (26%) and the unemployed (25%).

Actual points of access:

- The respondents were asked about the computer access points that they actually use nowadays.
- The key finding here is that half of the sample (58%) does not use any of these sources to access a computer. Again these people are often aged 65+ (92%), male (63%), single person households (73%), retired (90%), long term sick / disabled (80%) or long term unemployed (81%).
- It is most common for respondents nowadays to access a computer from their own home (34%). It is also quite popular to access a computer through work (16%). Such access is clustered around 25-54 year olds and homeowners.
- Less than 10% of the respondents access a computer through college / university (8%) or another person's home (7%).
Other sources of access are used very infrequently.
- It is interesting to note, that while there is 32% recognition of the community library / learning centre as a potential point of access, only 3% turn that recognition into actual practical use.

FIGURE 8: POTENTIAL POINTS OF ACCESS TO A COMPUTER COMPARED WITH POINTS OF ACCESS ACTUALLY USED

	Potential %	Actually Use %
Home	37	34
Community Library and Learning Centre	32	3
Another person's home	30	7
Work	21	16
College / university / other educational / training institution	18	8
An internet café / shop – run by a private company / organisation	16	2
An internet café / shop – don't know who runs it	11	1
School	5	2
Training Room – run by a local development company	5	*
Training Room run by a community group / voluntary organisation	5	*
Public internet access point	4	1
Government office / premises	3	1
Local Government Office / premises	2	1
None of these	17	-
Don't know	9	58

* less than 1%

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

4.4 Nature of computer use

- Figure 9 shows there are a very wide range of activities the respondents would like to use a computer for. The first column shows activities they would like to use a computer for (spontaneous) compared with what they actually use it for (prompted) in Column 2.

Preferred computer use

- 15% of respondents would like to use their computer for their hobbies or personal interests. 13% would like to develop computer skills, 13% would use it for information and research and 12% for e-mail. Just over one in ten respondents also would like to use their computer to work from home and the same proportion would like to use it to help their children with homework and general knowledge.
- A wide range of other reasons they would like to use a computer for are mentioned including shopping on-line, accessing services for general entertainment such as playing DVDs, and to vote in an election.

Actual computer use

- In comparison the respondents were also asked what activities they currently (actually) use a computer for. The most common responses were for e-mail (22%) and to gather information and research from the internet (24%).
- It is also quite common for the respondents to use a computer to develop their computer skills or learn new skills for employment (15%), to produce newsletters, type letters etc. (15%) or to use in the workplace (13%).
- It is interesting to note that at present almost 6 in 10 respondents don't currently use a computer for any of the suggested activities.

FIGURE 9: ACTIVITIES PEOPLE WOULD LIKE TO USE A COMPUTER FOR COMPARED WITH ACTUAL USE

	Would like to use %	Actually use for %
Hobbies / personal interests	15	16
Developing your own computer skills / learning new skills for employment	13	15
Internet – information and research	13	24
E-mail	12	22
Working from home	11	11
Helping children with homework / general knowledge	11	8
Helping children develop computer skills	9	7
Other shopping – e.g. books, music, clothes, etc / holiday / flight information and tickets / cinema and concert tickets	8	9
As a television / playing DVDs / watching movies	8	8
Playing games	8	10
Producing newsletters/posters, typing letters, making cards and organising household finances	7	16
Internet – chat rooms	7	7
Using DVDs / watching movies	7	7
To vote in elections	7	1
Grocery shopping	6	2
Using electronic (CD, DVD) reference materials (e.g. dictionaries, encyclopaedias, training guides)	6	9
Access banks / financial services	6	6
Access health services	6	2
Access health information	6	3
Work – at a workplace / premises	6	13
Personal homework / college work	5	7
Access Local Authority or Government services	4	3
Other	*	*
None of these	35	59
Don't know	22	2

* less than 1%

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

4.5 Future interest in the computer

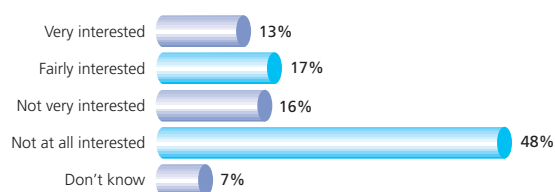
- From the total sample, 1,124 respondents (56%) don't use a PC now. These respondents were asked a series of questions relating to their interest in using computers in the future and their suggestions for things that might encourage computer usage.
- Overall, three in ten of these (non-user) respondents are either very or fairly interested in using a computer in the future. These respondents represent the most easily motivated group and are characterised in a number of ways:
 - under 55 years (especially under 35s),
 - families with children at home,
 - employed / students / short term unemployed,
 - have at least Standard / 'O' Grade qualification.

FIGURE 10: INTEREST FROM MOST MOTIVATED GROUPS

	Total %	25-34s %	Families kids at home %	Employed %	Standard / O Grades %
Interested / Very Interested	30	49	46	50	57
BASE NUMBER	1,124	171	160	264	189

- Respondents living in SIP areas are slightly more interested in using a computer in the future, 33% compared with 24% from a non-SIP area.
- In the DfEE Study, a similar proportion expressed an interest in using computers in the future (28%).

FIGURE 11: INTEREST IN USING A COMPUTER IN THE FUTURE



Base: 1124 (Those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

- However, if Glasgow wishes to become a truly inclusive, learning and digital city, there will be concern that almost half of the 56% non-computer users are not at all interested in using a computer.

4.6 Barriers to computer use

- All respondents were asked about the barriers to using a computer more often (or for the first time). The statistics are shown in the table that follows. The most frequently noted barrier is not owning a computer (27%) and a lack of time to be able to use a computer more (21%). Those quoting a lack of time as a barrier are often family households (38%), employed (34%), aged 35-44 years (32%) and homeowners (29%).
- A reasonable proportion of the respondents also found that the price of the equipment is prohibitive (14%). Price is a particular barrier to under 25s (23%), private renters (20%), ethnic minorities (29%), lone parents (24%) and the short term unemployed (32%). A similar proportion have no interest in accessing information from a computer (14%). This is especially true of over 55s.
- A small proportion (10%) are uncertain about their own ability to learn the skills that they would require to operate a computer. Similarly, a further 5% feel there is a need for them to improve their skills or keyboard skills and 3% said that they do not have anyone to teach them how to use the computer.
- 6% can't be bothered to find out more about computers and 5% do not see the relevance of using a computer.

FIGURE 12: PERCEIVED BARRIERS TO USING A COMPUTER

	%
Do not own a computer	27
Lack of time to be able to use it more	21
Have no interest in accessing information via the internet	14
Price of equipment	14
Unsure of ability to learn the required skills	10
Can't be bothered to find out more about computers	6
Do not see the relevance of using a computer	5
Need to improve skills / keyboard skills	5
Lack of interest in technology	4
Other	17
Don't know	23

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

4.7 Spontaneous reasons for not using a computer

- The respondents who don't use a PC now were asked why they don't use one and gave a spontaneous response. Most commonly the respondents state that they can't afford to purchase a computer (37%). This is often true among families with children (47%), ethnic minorities (43%), employed people (45%), students (46%), looking after home / family (51%) and short term unemployed (57%). It is also more evident among those living in SIP areas, 40% compared with 32% from non-SIP areas.
- A similar proportion (33%) simply feel that there is no need for them to have a computer. These people are very often over 55 years or retired (51%).
- Almost a fifth describe themselves as not computer literate. This figure is slightly higher for ethnic minorities (24%) or those who are permanently sick / disabled (34%).
- Those living in SIP areas (43%) are more likely to see no need for a PC than those in non-SIP areas (28%). The same is true of retired people (51%).
- A further 13% state that they do not have access to a computer any more. This suggests they may have some experience of computers at some previous point but not now. The reasons for this, like most of these attitudinal issues, may need to be tested further at a future time.

FIGURE 13: SPONTANEOUS REASONS FOR NOT USING A COMPUTER

	%
Cost/can't afford it	37
No need for a computer	33
Not computer literate / don't know how to use one	19
Do not have access to a computer (any more)	13
No time / too busy	7
Not got round to it	3
Someone else in the household uses it	2
Not interested	2
Too old	2
Other	1
Don't know	9

Base: 1124 (those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

- The same respondents who don't use a PC were asked to justify the spontaneous responses shown in the previous chart. The largest single proportion, almost half of the respondents, say that they simply are not interested and that using a PC holds no appeal for them. This sentiment applies to over half of those aged over 55 years.
- Around a fifth of the sample say that they don't have a computer and a similar proportion feel that they can't afford a PC (especially in SIP areas).
- For around a fifth of the respondents (21%) the main reason for not using a PC is that they feel they are too old.
- A number of other reasons for not using a PC are given by the respondents and these can be seen in the table below.

FIGURE 14: JUSTIFICATION OF REASONS FOR NOT USING A PC

	%
Not interested / doesn't appeal	45
Too old	21
Don't have a computer	20
Cannot afford it	18
Do not need to use a computer	13
Too complicated	7
No time / too busy	3
Other	1
None	4
Don't know	7

Base: 1124 (those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

4.8 Prompted reasons for not using a computer

- Those respondents who don't use a PC now were then given a list of statements that other people had made about not using a computer and asked whether these applied to them.
- 52% of those respondents are not interested in using a computer. This figure almost exactly mirrors the 51% of non-users who had no interest in using the internet. A further 42% have no need for a computer. Such respondents are often retired.
- A similar proportion state that they couldn't afford to buy the equipment (44%) and a further 18% feel it is too expensive. Cost is more of a barrier for families with kids, those at home looking after family, lone parents or short-term unemployed.
- A lack of knowledge about using a computer is also a problem for 25% who say they don't know anything about it and 27% who say they don't know how to use one. These fears are particularly strong among the permanently sick / disabled and long term unemployed (43% and 37% respectively).
- Age would also appear to be a barrier to some with 25% feeling that they are too old to start. In fact, 34% of those aged 55 – 64 years and 55% of those aged 65+ agree with this statement.

FIGURE 15: BARRIERS: PROMPTED REASONS FOR NOT USING A COMPUTER

	%
I'm not interested in it	52
I cannot afford to buy the equipment	44
I have no need	42
I do not know how to use it	27
I don't know anything about it	25
I'm too old to start	25
It is too expensive	18
I haven't got the time	13
It is far too complicated for me	11
I can do my work without it	4
I'd be scared to use it	4
I do not know how to get started	4
I do not have anyone to show me how to use	3
I don't know anyone to show me how to use	1
I would need children's help	1
None / no reason	*
Don't know	6

* less than 1%

Base: 1124 (those who don't use a PC now)

Source: Market Research UK Ltd, January 20

4.9 Factors that may encourage computer use

- The respondents who don't use a PC now were asked what type of factors would encourage them to use a computer. 51% of the sample feel there is nothing that could be done to encourage computer usage and a further 11% are unsure what type of action would encourage them to use a computer. These respondents are mainly aged 35 years or over and usually over 55 years. Often they are long term unemployed or permanently sick / disabled.
- It would appear that free machines and software (23%) or free lessons (18%) are the most motivating factors. Free machines/software is particularly appealing for under 25s (44%). Similarly the short term unemployed (53%) find free machines appealing whereas free lessons have broader appeal to the under 55s. Respondents from SIP areas find free machines appealing, 27% compared with 13% from non-SIP areas.
- A small proportion (13%) feel that advice or training by local people in local venues might also encourage them to use a computer.
- A minority (9%) feels that cheaper machines or software would make a difference and 6% think that cheap lessons might make a difference. Another option that appeals to 7% is laptop computers on loan.

FIGURE16: FACTORS THAT MAY ENCOURAGE COMPUTER USE

	%
Free machines / software	23
Free lessons	18
Advice or training by local people in local venues	13
Cheaper machines/software	9
Laptop computers on loan	7
Cheap lessons	6
If have to use for work	4
If need one for children / school work	4
Make them easier to use	4
Someone to teach me at home	4
More spare time to spend on it	3
Make them more widely available / easily accessible	3
Computer helpline	3
To understand what my children are doing on the computer	1
Other	*
None	51
Don't know	11

*less than 1%

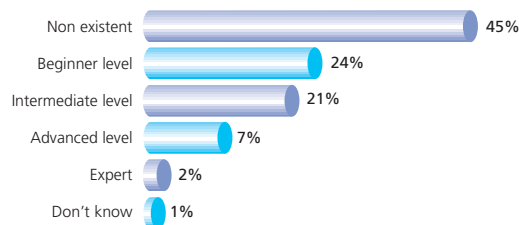
Base: 1124 (those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

4.10 Computer skills and training

- In this section we will consider the respondents perceptions of their own computer skills and their previous computer training, if any.
- Almost half of the respondents feel that their computer skills are non-existent (45%). This is not true of younger people – only 20% of under 25s use this description. However, 65% of 55 – 64 year olds and 86% of those aged 65+ say this.
- Males (51%) are more likely than females (40%) to describe their skills as non-existent. Furthermore, 58% of those looking after home / family and 67% of long term unemployed feel this way about their computer skills.
- Around a quarter describe their computer skills as being Beginner level and a further 21% feel they are of Intermediate level.
- Respondents from families with children tend to view themselves as Beginners.
- Only 7% feel that they have Advanced level computer skills and 2% would describe themselves as Experts.

FIGURE17: RATING OF OWN COMPUTER SKILLS

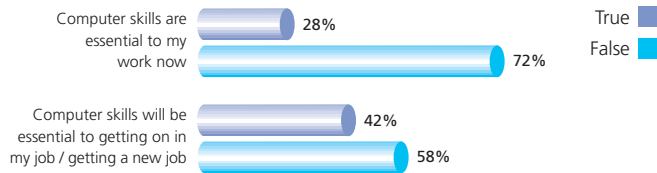


Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- The respondents were asked a couple of questions about the importance of computer skills in relation to their work or accessing a job in the future. 28% of the sample feel that computer skills are essential to their work now. This is true of 47% of the employed sample and 63% of students.
- The respondents see computer skills as important to progress in their jobs or to access a new job (42%). This belief is especially relevant to the short-term unemployed (58%) and students (74%).
- Respondents' experiences of training in computers or the internet are also polarised.
- Two in every five people have been shown how to use a computer or the internet informally by friends or family (40%). Typically they are under 45 years old, female (46% compared with 34% males) or from families with kids (53%).

FIGURE 18: PERCEPTIONS OF COMPUTER SKILLS IMPORTANCE



Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- Around a third of the respondents (32%) have attended a formal computer or internet training course. 68% are aged under 45 years, 44% are employed and 72% are students. This contrasts with the 13% of those with no formal qualifications who have attended a computer or internet training course.
- Although 66% of the total sample have not attended any formal computer or internet training, 38% of the full sample are interested in attending a formal training course to develop their skills. Those individuals tend to have previous experience of the technology, be aged under 45, male (57%), have a family with children (52%) and employed (48%).
- A similar proportion (37%) would like to have informed advice on using a computer or the internet from local people in their area. Again this is more appealing to under 45s, carers looking after their home or family (43%) or short-term unemployed (58%).

FIGURE 19: EXPERIENCE OF TRAINING ON COMPUTERS / INTERNET

	AGREE %	DISAGREE %	DON'T KNOW %
a. I have attended a formal training course related to computers or internet use	32	66	2
b. I have been shown how to use a computer or the internet informally by friends or family	40	57	2
c. I would like to attend a formal training course to develop my skills related to a computer or the internet	38	56	6
d. I would like to have informed advice on using a computer or the internet from local people in my area	37	57	6

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

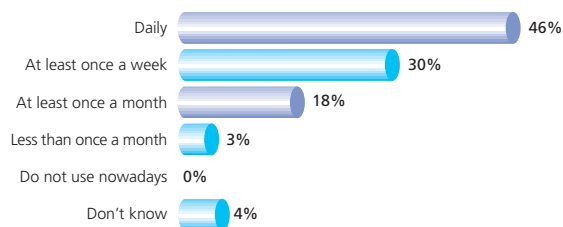
5. ...AND THE INTERNET

- In this section we consider the use of, and barriers to, internet (and e-mail) access. It is interesting to note that, of the 601 internet users, almost all use a personal computer to access the internet and very few use digital television and WAP phones.

5.1 Frequency of internet use

- Internet users (30% of all respondents) were asked how frequently they use the internet. Almost half use the internet daily (46%) and a further 30% use it at least once a week.
- Men tend to be more frequent users, 56% using it daily in comparison with 37% of females.
- By comparison, internet use in the DfEE study is slightly less frequent with 35% of the survey using it daily and a further 41% using it once a week.

FIGURE 20: FREQUENCY OF INTERNET USE

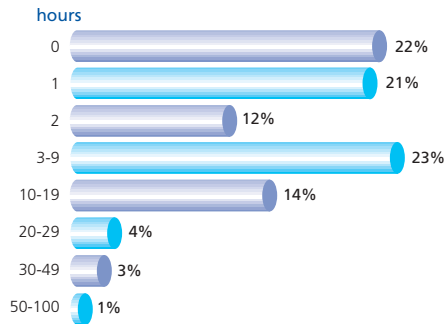


Base: 601 (Internet/Email Users)

Source: Market Research UK Ltd, January 2002

- The 601 internet users in this study were asked about the number of hours they had spent on the internet in the last 7 days. Just over a fifth of the respondents had not used the internet in that period.
- Most of those who had used the internet had used it for 1–2 hours (33%) or 3–9 hours (23%). It is unusual for respondents to have used the internet for 10 or more hours in the last 7 days.
- The mean number of hours used is 5.7 hours. Mean use is higher for 25–44 year olds (over 5.6 hours) and males (6.9 hours).

FIGURE 21: NUMBER OF HOURS SPENT ON INTERNET IN LAST SEVEN DAYS



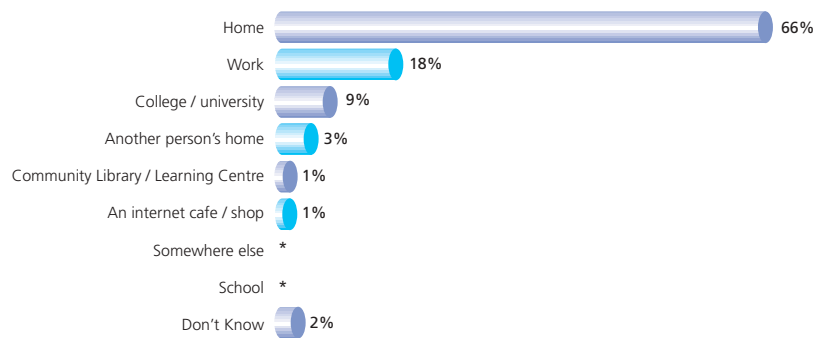
Base: 601 (Internet/Email Users)

Source: Market Research UK Ltd, January 2002

5.2 Internet access points

- Two thirds of internet access comes from the home. This form of access is more common in family households (74%) but the under 25s use college / university more often.
- Almost a fifth of respondents access the internet at work and 9% of all internet users go online at college / university.
- 1% access the internet in a community library / learning centre most often while another 1% use an internet café.

FIGURE 22: INTERNET ACCESS POINTS USED MOST OFTEN



*= Less than 1%

Base: 601 (Internet/Email Users)

Source: Market Research UK Ltd, January 2002

5.3 Nature of internet use

- The vast majority of users (88%) use the internet to send or receive e-mails.
- Most also use it for at least one other purpose, as shown in the table below. Accessing information for work or for some type of study or learning are popular activities. Similarly the internet is often used to find out about goods and services. It is also common for respondents to get information about their hobbies or personal interests and to gain information about holidays, flights and tickets, etc.
- Shopping on the internet is quite commonly undertaken and this is largely non-grocery shopping.
- Under 25s use the internet in a different way with more emphasis on study / learning / seeking employment and downloading music.

FIGURE 23: NATURE OF INTERNET USE

	SE GLASGOW %	DfEE AUGUST 2000 %
To send or receive e-mails	88	70
Information for study/learning	47	38
Holiday/flight information and tickets	47	-
Hobbies/personal interests	47	-
Finding out about goods/services	46	38
Information for work	42	45
Other shopping (e.g. books, music, clothes)	39	-
Information for school/college	37	26
Playing/downloading games	34	-
Looking for jobs/work	30	26
Cinema/concert tickets	29	-
Listening to/downloading music/MP3s	28	-
Weather / travel information	22	35
Chat rooms/ICQ/IRC/Usenet	22	-
Personal banking, financial and investment activities	20	-
Information about your health	19	-
Local, national or international news	19	-
Help for your child's work at school/college/university	16	-
Learn new skills for employment	15	-
Using or accessing government/official services	12	-
Access health services	10	-
Grocery shopping	9	-
Access local authority services	9	-
Access Government services	8	-
Access health information	8	-
To vote in elections	4	-
Other	*	-
Don't know	2	-
BASE	601	1,494

* less than 1%

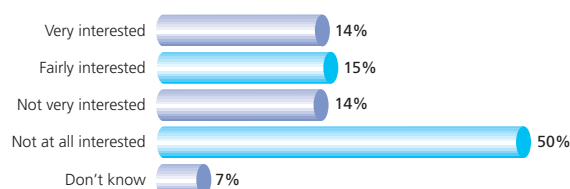
Base: 601 (Internet / E-mail Users)

Source: Market Research UK Ltd, January 2002

5.4 Future interest in the internet

- The highly significant and key finding is that 64% of all non-users of the PC (1,124 people) are not interested in using the internet in the future.
- Of those, 50% are not at all interested. 29% expressed some interest in using the internet which is similar to the DfEE study in August 2000.
- This mirrors future intentions and attitudes to computers among the non-user group, and it strongly indicates that respondents' attitudes to computers and the internet are very closely linked.
- Interest in using the internet is highest for people under 55. The under 25s are particularly keen with almost half expressing an interest. Similarly respondents from family households are also more interested (44%) with employed people (at 23%). Interest is higher in SIP areas, 31% against 25% from non-SIP areas.
- In comparison, 30% of non-users from the DfEE study expressed an interest in future internet use.

FIGURE 24: INTEREST IN USING THE INTERNET IN FUTURE



Base: 1124 (Those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

5.5 Barriers to internet use

- All of the respondents (2000) were asked a series of questions in order to consider the barriers to using the internet more frequently.
- The most significant barrier, for 34%, is not owning a computer.
- In addition, the price of using the internet is seen as a barrier, with 20% concerned about the cost of telephone calls and 18% worried about the price of equipment. Price is of greatest concern to under 35s, ethnic minorities, lone parents and the short term unemployed. Those who live in a SIP area (22%) are more concerned about the price of equipment compared with 12% who live in a non-SIP area.
- A lack of time and interest are also critical (15% and 16% respectively). Lack of time is higher among families with kids (24%) and working respondents (22%). Lack of interest is more prevalent among the retired (22%) and permanently sick / disabled (33%).

- There is also a reasonable degree of uncertainty among the respondents. In some instances this uncertainty relates to not knowing how to get the best from the internet (6%) or how to find things (4%). Other respondents say they don't know very many people who have e-mail addresses (3%) and others are uncertain where to get access to a computer (2%). This tends to support a lack of knowledge and understanding about the internet.

FIGURE 25: BARRIERS TO USING THE INTERNET MORE

	%
Do not own a computer	34
Cost of telephone calls	20
Price of equipment	18
Lack of interest in what is available via the internet	16
Lack of time to be able to use it more	15
Need to improve surfing skills	7
Unsure of how to get the best from the internet	6
Don't understand concept of Internet	6
Don't know how to find things	4
Other	26
None	16
Don't Know	3

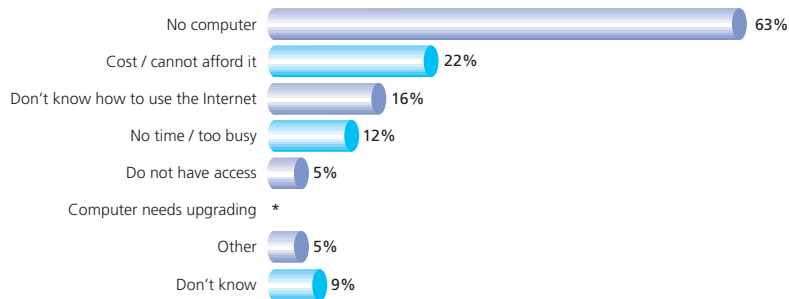
Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

5.6 Spontaneous reasons for not using the internet

- The group of non-PC users (1124) was asked spontaneously what their reasons for not using the internet were. 63% say the main reason they do not use the internet at home is because they do not have a computer.
- Cost is seen as a barrier to just over a fifth of the sample. This is a particular barrier for the under 35s, those looking after their home / family and unemployed respondents. This response is more common in SIP areas, 26% compared with 14% in non-SIP areas.
- In addition, lack of knowledge and understanding about using the internet is a barrier spontaneously mentioned by 16% of the sample and a further 12% state that they have no time and are too busy to use the internet.

FIGURE 26: SPONTANEOUS REASONS FOR NOT USING THE INTERNET AT HOME



*=Less than 1%

Base: 1124 (Those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

5.7 Prompted reasons for not using the internet

- The respondents who don't use a PC were given a list of possible reasons for not using the internet and asked which applied to them. The most frequently given response was that they are not interested in using it (51%).
- Again the cost is seen as being a barrier with 41% saying they can't afford to buy the equipment and a further 20% stating it is too expensive. This is more common in SIP areas.
- As we have seen before, a lack of knowledge and understanding is also key with 28% saying they don't know how to use it and a further 29% saying they don't know anything about it.
- Another major reason for people not using the internet is that some feel they are too old to start (23%).

FIGURE 27: PROMPTED REASONS FOR NOT USING THE INTERNET

	%
I'm not interested in it	51
I cannot afford to buy the equipment	41
I don't know anything about it	29
I do not know how to use it	28
I'm too old to start	23
It is far too expensive	20
I have no need	15
I haven't got the time	7
It is far too complicated	7
I don't know how to get started	5
None	1
Other	9
Don't Know	5

Base: 1124 (Those who don't use a PC now)

Source: Market Research UK Ltd, January 2002

5.8 Factors that may encourage internet use

- The respondents were given a list of possible factors that could encourage them to use the internet and asked which would have a positive effect on their internet use.
- A third of the respondents state that they aren't interested in any of the suggestions provided. This sub group is predominantly composed of the over 55s and retired.
- In line with the factors that would motivate general computer use it would appear that free access (48%) and free lessons (29%) are the most motivating factors. However, 23% of the sample feel that cheaper access would also be motivating and 11% feel the same about cheap lessons.
- A fifth of the respondents feel that, if they have more spare time to use it, they would be more interested in accessing the internet.
- A slightly smaller proportion feel that e-mail, used as a cheap and quick communication tool to contact others, might also be something of interest to them.
- Other factors tend to hold less appeal for the respondents. However, a small proportion think that internet use would be encouraged if they needed to use it for part of their job or part of their children's school work. The desire for information about a range of different subject areas is also motivating to these respondents.

FIGURE28: FACTORS THAT MAY ENCOURAGE INTERNET USE

	%
Free access	48
Free lessons	29
Cheaper access	23
More spare time to spend on it	20
E-mail to communicate quickly and cheaply with others	17
If I needed to use it as part of my job	16
Cheap lessons	11
If I wanted / needed to get information on job vacancies	11
If I needed it for children's school work	10
If I wanted / needed to get information studying / learning	10
If it is easier to use	9
Training courses to help get a job / a better job	9
If I wanted / needed to get information for work	8
If I wanted / needed to get information for school / college	8
If it is more widely available	7
Cheaper prices for items like books or records or travel	7
Computer games	7
To understand what my children are doing on the computer	6
If I wanted / needed to get information about health	6
Internet helpline	6
Local technology advice surgeries	6
If I wanted / needed to get information about my family tree	5
If I wanted / needed to get information about my favourite football or other sporting team	5
Up to the minute news	5
Up to the minute weather / travel information	5
If I wanted / needed to get information about my neighbourhood	4
Help in producing my own website	3
Other	1
Not interested in any of these	32
Don't know	3

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

5.9 Attitudes to the internet

- The total sample of respondents was asked to agree or disagree with a series of statements about the internet in order to develop a greater appreciation of their attitudes towards it.
- The respondents are divided in their response to the statement "It is now possible to feel secure when buying over the internet". Overall 28% of the respondents agree with this statement and 31% disagree. A further 34% are uncertain how secure such purchases would be. People aged over 55 years are slightly less inclined to feel secure than others.

- The largest proportion of the sample disagree with the statement “I expect to use the internet more for shopping in the future” (44%). Again strongest disagreement comes from the over 55s whereas families, employed people and students are most likely to expect to use the internet more for shopping.
- Most of the respondents (57%) agree that they have “strong concerns regarding the availability of unsuitable materials such as pornography on the internet”. Females have more concerns than males (65% to 49%) and 48% of under 25s agree with the statement.

FIGURE 29: ATTITUDES TO THE INTERNET

	Strongly Agree %	Agree %	Neither /Nor %	Disagree %	Strongly Disagree %	Don't Know %
It is now possible to feel secure when buying over the internet	7	21	7	19	12	34
I expect to use the internet more for shopping in the future	8	22	7	25	19	19
I have strong concerns regarding the availability of unsuitable material – such as pornography on the internet	27	30	10	10	3	19

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- Current internet and e-mail users have higher agreement with statements a and b, as can be seen in the next table. The mean scores run from 1 to 5, where 1 is agree strongly and 5 is disagree strongly.

FIGURE 30: ATTITUDES TO THE INTERNET AMONG INTERNET / E-MAIL USERS

	Users Mean Scores %	Non-Users Mean Scores %
a) Now possible to feel secure when buying over the internet	2.8	3.5
b) Expect to use the internet more for shopping in future	2.6	3.9
c) Have strong concerns about the availability of unsuitable material	2.1	2.1
BASE	769	1,231

- Computers and the internet are seen by the respondents as being an “important part of everyone’s life” (46% agreement with this statement).
- There is also a strong feeling among respondents that “in the future it would be far easier and quicker to get access to the services and information that they would need via the internet” (69%).
- It is interesting to note that half of the respondents (51%) intend “to improve their skills and understanding of using a computer”.

- However, of some concern is the finding that 30% of the respondents state that they would “like to learn more but do not know where to go to get help or advice”. This is higher in areas such as the East End (36%), Glasgow North (43%), Gorbals (44%) and Greater Govan (45%), all areas with existing access to computer and internet facilities.
- It is also of concern that for 41% of the total sample “the cost related to the computer and the internet make it impossible for them to become involved”.

FIGURE 31: ATTITUDES TOWARDS COMPUTERS AND INTERNET

	Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Don't Know %
Computers and the internet are now an important part of everyone's life	19	57	13	6	7
In the future it will be far easier and quicker to get access to the services and information I will need via the internet	17	52	9	5	17
I definitely intend to improve my skills & understanding of using a computer	13	38	19	20	10
I would like to learn more but don't know where to go to get advice / help	7	23	35	28	8
The costs related to computer & the internet make it impossible for me to get involved	9	32	26	23	11

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- The respondents were asked to agree or disagree with a series of statements about computers and the internet in relation to the present time. Over two thirds of the respondents (69%) say that they “worry about the amount of personal information that can be held on computers about me”.
- Similarly 71% agree that there is a “need for public access to the internet”.
- Over half of the respondents are in agreement that “computers are anti-social and take away interaction from other human beings”.
- It is interesting that almost half of the respondents (47%) feel that “computers and technology give people more control over their lives”.
- Almost half of the respondents disagree that “developments in Information and Communications Technology will make my employment more secure”
- Almost half of the respondents think “developments in Information and Communications Technology will improve my life generally”. However, 40% of the sample disagree with this statement.

FIGURE 32: THE PRESENT

	Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Don't Know %
There is a need for public access to the internet	20	51	11	6	13
I worry about the amount of personal information that could be held on computers about me	20	49	16	10	6
Computers are anti-social and take away interaction with other human beings	10	42	27	13	9
Computers & technology give people more control over their lives	10	37	30	6	18
Developments in Information and Communications Technology will make my employment more secure	9	28	32	15	16
Developments in Information and Communications Technology will improve my life generally	9	37	28	12	14

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

5.10 Impact of the internet

- Finally in the last part of the study, the respondents were asked how big an impact they thought the internet was going to have in the next few years and the impact in ten years time.
- In the next few years, the respondents expect that the internet will have the biggest impact on the education of school pupils (87%) and the development of skills for employment (70%).
- About half of the sample also feel that it will have a big impact on keeping in touch with friends and family, accessing health services and information/local government services. Respondents, however, are divided about its impact on buying goods and services and improving future employment prospects.
- About a quarter of respondents overall think it will have no impact on improving the lives of people in their area or of their age, or improving future employment prospects.
- Generally the internet is expected to have a more positive than negative impact on Glasgow in the next few years, as the table over shows.

FIGURE 33: EXPECTED IMPACT OF THE INTERNET IN NEXT FEW YEARS

	Big Impact %	Little Impact %	No Impact %	Don't Know %
The education of school pupils	87	6	2	5
Developing of skills for employment	74	14	4	8
Keeping in touch with friends / family	50	24	16	9
Access health services / information	46	27	9	18
Accessing local government services / information	45	28	10	17
Buying goods and services	44	28	18	10
Improving your future employment prospects	44	22	24	11
Improving the life of people your age	37	28	24	12
Improving the lives of people in this area	28	32	23	18

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- Respondents were also asked to agree or disagree with a series of future statements about the internet in 10 years time.
- Most respondents feel that “everyone will need computer skills to get a job” (72%). There is also very strong agreement with the statement that “people will be working more from home” (73%).
- Over two thirds of the respondents feel that “new technology could open up the way to help those who are at a disadvantage in society”.
- A similar proportion feel “the full impact of computers and technology will benefit the next generation”.
- Over six in ten respondents agree that “every household will have a computer”.
- A similar proportion feel that people will be “able to use computers to vote in elections”.
- There is slightly less agreement with the statement “most people will use computers for shopping”, 41% agreeing.
- And finally, only 37% agree that “everyone will use a computer to access their bank”.

FIGURE 34: EXPECTATION FOR 10 YEARS TIME

	Strongly Agree %	Agree %	Disagree %	Strongly Disagree %	Don't Know %
The full impact of computers & technology will benefit the next generation	25	42	20	6	8
Everyone will need computer skills to get a job	21	51	14	6	8
Every household will have a computer	15	48	21	6	10
People will be working more from home	15	58	11	4	13
New technology could open up the way to help those who are at a disadvantage in society	14	55	11	4	16
People will be able to use computers to vote in elections	13	47	10	6	23
Everyone will use a computer to access their bank	9	28	36	12	16
Most people will use computers for shopping	8	33	33	13	13

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002



6. CONCLUSIONS

Digital Glasgow, the 2002 Household ICT Survey, was commissioned by Scottish Enterprise Glasgow primarily to measure the scale and nature of household inclusion in (and exclusion from) the digital technology world but also to give direction with indicators to measure future action. The baseline picture has been comprehensively painted – but the results show that much work is needed to make the digital world available and relevant for all.

For the majority of Glaswegians, full inclusion in the digital world will not be possible until a range of barriers has been overcome. The cost of access, primarily to computers as the preferred method of access to the internet, remains a significant barrier.

Of equal concern is the high percentage of people who do not have any IT skills and are not at all motivated to engage with ICT. So also is the view that ICT is of no interest or relevance to most people's lives. This is encapsulated in the statistic that four in five Glasgow consumers know where to access a computer - but nearly three in five choose not to use them.

How does Glasgow compare to other parts of the UK? In terms of awareness, Glasgow scores as highly as anywhere. However, comparison with recent UK-wide studies from the ONS and Ofcom suggests that the city has some way to go to match higher rates of both computer and internet access and use in London, the South East and the North West. It has even further to go if it is to become as globally connected as households in Europe and the US.

Not surprisingly, the “digitally connected” in Glasgow – people in employment and those who are studying in further and higher education – have a more positive view of the digital world than the “digitally disconnected” – sub groups such as the long term unemployed, disabled, carers and others.

Narrowing the divide between people and communities who are digitally connected and those who are not is a key issue. As this survey shows, the divide significantly is not just about access. Indeed educational achievement, skills, confidence, motivation, interest, income, jobs, good health, housing tenure, household composition, family/community networks and behaviour are equally, if not more, important.

Many Glaswegians have never logged on to the e-world – and many others may join them if the issues identified in this report are not tackled more vigorously. If Glasgow wishes to be a truly digital, inclusive and learning city, then its performance in narrowing the gaps between the connected and disconnected must remain as high a priority as increasing computer and internet growth, in business, in education, in the community and at home.

APPENDIX 1 DEMOGRAPHIC, LOCATION, EMPLOYMENT, EDUCATION AND OTHER KEY FACTORS WHICH INFLUENCE COMPUTER AND INTERNET ACTIVITY

- The profile of respondents has been summarised in terms of demographics, SIP area, employment status, home ownership, bank accounts, qualifications and health problems or disabilities which may affect computer and internet activity. Further detailed information is available separate from this report.
- For each of the key people groups we have shown PC & internet access in terms of those who use it nowadays (and not the alternative, lower measure of only those with PC and internet access in their own homes).

1 Demographics

- The following chart details respondents' age groupings. A wide range of age groupings is represented within the sample.
- Generally the over 55s have lower awareness and interest in ICT with those under 45 years representing the most motivated group.

FIGURE A: AGE AND USE OF PC/ INTERNET NOWADAYS

	Total %	Use PC %	Use Internet %
16 – 24	15	59	53
25 – 34	18	53	44
35 – 44	19	65	57
45 – 54	16	48	39
55 – 64	13	26	22
65+	18	8	6

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- 51% of respondents were male and 49% female. In most instances there are limited differences between the sexes. Females tend to have slightly higher usage of PCs (49% females vs 39% of males), internet (40% of females and 34% of males) or e-mail. However, men tend to be more frequent users of the internet and 56% of male internet users access it daily in comparison to 37% of females.
- Almost one third of the respondents have children under 16 in the household (31%). The presence of children in the home has a positive impact on awareness and uptake of ICT. In fact 61% of households with children use PCs and 51% use the internet nowadays.
- Overall, 9% of the total sample are lone parents. This group has comparable awareness of ICT and are motivated to learn more. However, they also have slightly lower current usage figures for key products such as PC, internet or e-mail.

- In terms of ethnicity, 97% of the sample is white, a further 1% is Pakistani and smaller proportions describe their ethnic status as Black African, Chinese or Other Asian. This is in line with the local population. Ethnic minority findings are largely comparable with the total sample, with 59% using PCs and 49% using internet nowadays.
- However it is interesting to compare some of these statistics with those reported by Ofcom in a UK-wide study published in January 2002. Internet penetration (the percentage of homes connected) in the UK is 45% compared to the 30% found in this study. There is also a higher rate of PC ownership (52%) than in Glasgow (37%). Across all age sub groups, both studies conclude that people aged 35-44 have the highest PC and internet connection rates. Anyone over 55 has much lower connectivity although there is a significantly higher number of "senior surfers" in the Ofcom study (25%) compared to 6% in Glasgow.

2 Social Inclusion Partnerships (SIPs)

- From the total sample of 2,000 interviews, an insufficient number was achieved in some SIP locations to enable appropriate analysis and comparisons between areas. Therefore a further 147 interviews were carried out in certain SIP areas so that results could be compared. The following chart has a base of 2,147 for that reason. Wherever SIP results have been referred to in the report, they are derived from the base of 2,147 respondents.
- As interviewing is evenly distributed across the city's wards to ensure representativeness, the sample of 2,000 interviews does not contain a standard number of interviews in each SIP. Therefore booster interviews were carried out only where necessary to ensure a minimum sample of 100 interviews in every SIP.
- In most instances respondents from SIP areas have comparable awareness, access and attitudes to ICT as those in non-SIP areas. However, some SIP areas have lower awareness, access and motivation. In particular, those included Greater Govan, Gorbals, Greater Easterhouse and East End. It is worth noting that these SIPs tend to have an older demographic profile than others. Indeed in some SIP areas (Castlemilk, Drumchapel and Glasgow North) there is a higher proportion currently using PC or internet than in non-SIP areas.
- Overall, 70% of the respondents from the 2,147 sample are from a SIP area. The breakdown below shows the percentage of interviews in each SIP area.
- A full data set for each of the SIP areas has been produced separately and can be inspected on request.

FIGURE B: SIP AREA AND USE OF PC / INTERNET NOWADAYS

	Total %	Use PC %	Use Internet %
Castlemilk	5	60	53
Drumchapel	5	54	45
East End	10	41	37
Glasgow North	8	53	50
Glasgow Smaller Areas	8	65	50
Gorbals	5	28	24
Greater Easterhouse	7	26	24
Greater Govan	8	29	16
Greater Pollok	9	43	41
Milton	5	49	42
Not in SIP	30	47	41

Base: 2147 (All respondents and booster)

Source: Market Research UK Ltd, January 2002

3 Employment / Unemployment

- Overall 38% of the respondents are in some form of employment. In line with the population construction, over a fifth are retired and almost 10% students. Of the total sample 30% are not employed. Of those, 11% are carers, 11% unemployed and 8% sick or disabled.
- By comparison, the Glasgow Labour Market Statement, using the International Labour Organisation definition, put unemployment in September 2001 at 12%. Results from Greater Glasgow Health Board's Health and Wellbeing Population survey are also comparable.
- The following table details the respondents' employment status.

FIGURE C: EMPLOYMENT STATUS

	%	Glasgow City %**
Full-time employment	27	30
Part-time employment	9	7
Self employed	2	-
Retired	21	22
Student	9	10
Not employed – carers (looking after home / family)	11	10
Not employed – permanently sick / disabled	7	15
Not employed – temporarily sick / disabled	1	
Not employed – short term unemployed (less than 6 months)	3	7
Not employed – long term unemployed (more than 6 months)	8	
Refused to answer	1	-

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

** Data derived from Greater Glasgow Health Board's 1999 Health and Wellbeing Population Survey

- Employment status is a clear indicator of inclusion in ICT. People in full, part-time or self employment and students, have the highest levels of awareness, usage and positive attitudes. Carers looking after family members and the short-term unemployed, tend to have reasonable awareness and positive attitudes but lower usage. The retired and the permanently sick/disabled have lowest awareness and seem unwilling to get involved in the digital world. The long-term unemployed similarly indicate lower awareness and usage.
- In the next table we can see what proportion of these sub groups use the PC or internet nowadays.

FIGURE D: EMPLOYMENT STATUS AND USE OF PC / INTERNET NOWADAYS

	Use PC %	Use Internet %	Base Number %
Employed	66	57	773
Retired	11	8	423
Student	85	79	175
Carers	32	24	224
Permanently sick / disabled	21	18	137
Short term unemployed	34	30	77
Long term unemployed	23	13	186
Total sample	44	37	2000

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- The following table details the benefits and allowances that the respondents stated they received. Over a quarter are in receipt of Housing Benefit (27%), with a further 24% receiving Council Tax Benefit and 23% receiving Income Support. 11% did not wish to state whether they received any benefits and allowances.

These figures illustrate the reliance of a majority of respondents (52%) on the benefits system. Indeed official government statistics suggest that these figures may be understated. The impact of a lack of income on the inclusion (and exclusion) of those respondents in ICT is clear.

FIGURE E: BENEFITS / ALLOWANCES

	%
Income Support	23
Housing Benefit	27
Council Tax Benefit	24
Job Seeker's Allowance	3
Incapacity Benefit	6
Severe Disablement Allowance	1
Attendance Allowance	1
Disability Living Allowance	5
Disability Working Allowance	*
Invalid Care Allowance	2
Working Family Tax	2
Widow's Benefits	2
None of these	48
Refused to answer	11
Don't know	*

* = Less than 1%

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- Receipt of benefits is an influencing factor characterised by lower access and interest in ICT. As one would expect, cost of purchasing and running a PC and internet is a barrier.
- The following chart shows how receipt of benefit affects use of PC and internet.

FIGURE F: BENEFITS AND USE OF PC / INTERNET NOWADAYS

	Use PC %	Use Internet %	Base Number
Receive Income Related Benefit	26	19	651
Receive Disabled / Illness Benefit	23	18	228
Total Sample	44	37	2000

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- Clearly those in receipt of benefit are less likely to use the PC and internet nowadays.

4 Housing tenure

- Just over a third of the respondents are home owners and a further 59% rent from their Local Authority or Housing Association.

- A higher proportion of home owners (61%) and private renters (55%) use a PC nowadays compared with 33% of people renting from Glasgow City Council or a Housing Association. This also applies to internet access.
- Only a quarter of City Council tenants own a PC and less than one in five have internet access at home. In comparison, nearly three in five homeowners have a PC and nearly half of them have internet access at home.

5 Bank accounts

- Almost half of the respondents have a bank or building society current account and a further 54% have a savings account. A lower proportion of the sample also have credit cards (29%) or shop or store cards (19%).
- Given the relatively high cost of PCs, credit cards are recommended by many suppliers as the most secure and effective payment method. With a low take-up of credit cards especially in SIPs, this may be another barrier to the purchase of computers for the home.

6 Educational achievement

- Almost half of the respondents have no formal qualifications (46%), a further 21% hold at least one Standard Grade or 'O' Grade, and 13% have further or higher education qualifications.
- According to the Autumn 2001 Labour Force Survey, only 26% of the Glasgow City population have no qualifications and a higher proportion have a Degree/Higher Degree (27%).

FIGURE G: FINAL QUALIFICATIONS

	%
No formal qualifications	46
Standard Grades or 'O' Grades	21
Highers	8
Vocational Qualifications e.g. SCOTVEC / SQA	4
Trade Qualifications e.g. City & Guilds	5
HNC / HND	6
Degree / Honours Degree / PhD	7
Other	2
Don't know	1

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

- People without any formal qualifications are clearly disenfranchised from the digital world. This sub group generally are less interested in finding out more or developing ICT knowledge and skills.

- On the other hand, all of the degree qualified respondents have 100% recognition of PCs and the internet. They also are six times more likely to use the internet nowadays than someone without any qualifications.
- The next table demonstrates that a lack of, or low level of, qualifications has a strong impact on PC and internet use nowadays.

FIGURE H: QUALIFICATIONS & USE OF PC/INTERNET NOWADAYS

	Use PC Nowadays %	Use Internet Nowadays %	Base Number
No formal qualifications	20	14	920
Standard / O Grades	56	45	427
Highers / A levels	75	71	160
Vocational / Trade	51	49	193
Higher / Further	85	80	254
Total Sample	44	37	2000

Base: 2000 (All respondents)

Source: Market Research UK Ltd, January 2002

7 Health problems / disabilities

- Of the total sample, 17% have health problems / disabilities expected to last more than a year but only 3% have a disability that would affect their use of a computer. The same proportion state that their poor eyesight would make it difficult to use a computer.
- Almost two thirds of respondents with long term health problems / disabilities feel that the health problem affects the kind, or amount, of paid work that they might be able to undertake.
- Health problems / disabilities do not appear to have a major impact on awareness, access or attitudes to ICT.
- However actual use of the PC and internet nowadays by people with health problems / disabilities is very low.

APPENDIX 2 RESEARCH AIMS AND OBJECTIVES

Aims

- This study aimed to establish a baseline picture of Glasgow residents' awareness, access, skills and support for Information and Communications Technology (ICT).
- The information recorded here indicates the scale and nature of inclusion in, (and exclusion from), the digital technology world. Scottish Enterprise Glasgow will use the data to produce an action plan, with measurable annual indicators, to plot progress towards the vision of a digital, inclusive, and learning city.

Research Objectives

- The main objective is to survey a representative sample of households throughout Glasgow and measure current awareness (including understanding and attitudes), access, skills and support for ICT.

i) Awareness

- Define the scope of "awareness of ICT",
- Measure the level of awareness and interest in ICT throughout the city,
- Measure the level of awareness and interest in local or citywide ICT initiatives,
- Measure individual attitudes towards, and perception of the value of, ICT.

ii) Access

- Measure access to and use of ICT, especially the internet,
- Assess attitudes towards, comfort with and use of the internet, including differences in use between men and women and different age groups,
- Identify the barriers to access and use ICT, and suggest ways of resolving these barriers,
- Measure the impact of educational achievement, age and household composition on the adoption of ICT, especially the internet.



iii) Skills

- Measure current IT skill levels,
- Assess the level of confidence and motivation of individuals to engage positively with ICT and suggest ways in which this could be improved,
- Measure scale and nature of ICT learning and training, current and future.

iv) Support

- Identify the scale and nature of support received by householders in becoming more comfortable and fluent in the technology,
- Identify the desire for further support,
- Assess whether there is sufficient guidance and support to access relevant and interesting internet content.

Furthermore, the study set out to: -

- Identify other key issues that arise from the data,
- Highlight geographical and thematic (disability, ethnicity, etc) differences where appropriate to do so,
- Compare the results with secondary data, where available and appropriate.

APPENDIX 3 GENERAL POPULATION AND RESEARCH

Method

- A quasi-random sampling approach (random walk) was adopted for the in-home interviews.
- This approach was employed to provide an appropriate balance between the higher costing, pre-selected sampling technique often favoured by academics, and the less statistically accurate (and therefore less expensive) quota controlled sampling methodology, often favoured by commercial organisations.
- Sample points in each of the 80 wards were randomly drawn in advance from the Postal Address File. Within each sample point each interviewer was given a random address point to start interviewing. This is where each interviewer attempted the first interview, thereafter they followed a set of rules to locate other addresses. The interviewers requested an interview at every 5th address in the street, alternately turning left and right into other streets wherever they were encountered. This ensured a random sample.
- The interviewing was scheduled to cover three time bands; weekday daytimes, weekday evenings and weekends, to ensure an appropriate mix of working and non-working respondents were included.
- A system of three call-backs was incorporated for those addresses where no one was at home when the interviewer first called, or, where an appropriate person for interview normally resided but was not in residence at that time.
- The “next birthday” selection technique was employed by interviewers to ensure the achieved sample was a representative balance in terms of age and gender.
- Market Research UK notified local Police and Authorities about interviewing dates and locations. All respondents were left a leaflet, thanking them for taking part, explaining why the surveys were conducted and giving them the telephone number of our office and the Market Research Society in London, in case reassurance was required.

Sample Structure

- A sample of 2000 interviews was carried out randomly to generate a representative sample. In order to provide comparisons between SIP and non-SIP areas a booster sample of interviews was required.
- Extensive analysis of sub groups such as ethnic minorities, disabled, long term unemployed etc. has been provided in a tabular format under separate cover.

Questionnaire Design

- The questionnaire was produced in collaboration with Scottish Enterprise Glasgow. After the initial briefing meeting, Market Research UK Ltd, designed a draft questionnaire adopting where appropriate the harmonised concepts and questions for similar social surveys which have been developed by the Office for National Statistics. This facilitated comparison of the results with other government surveys. Where appropriate such comparisons are shown and discussed in this report.
- Each interview lasted just over 20 minutes.
- A short pilot study was undertaken in order to test the questionnaire's length and structure.

Fieldwork Team & Quality Control

- Market Research UK manage their own in-house fieldwork team with all interviewers operating to Interviewer Quality Control Scheme standards (IQCS). This is the highest accreditation of fieldwork quality control available within the market research industry.
- A comprehensive briefing was carried out with interviewers prior to fieldwork commencing.
- On completion of each week's batch of interviewing, 10% of each interviewer's quota of full interviews were backchecked by Head Office staff. They would telephone the respondent to ensure that key facts were recorded correctly during the interview, prompt material was used, the interviewer was courteous and showed their I.D. Card and a Thank You leaflet was issued.

Data Analysis

- A Research Executive was responsible for the preparation of the coding frame from a list of open-ended responses.
- Market Research UK's in-house data processing and analysis team conducted all survey analysis on this project. Based in their Group Head Office in Glasgow, they were responsible for running a number of range and logic checks on data to ensure its validity.
- In addition to the data generated in this survey a number of other sources of information and reports were also consulted for contextual or comparison reasons. These included:
 - Consumers' use of the internet (Ofcom - Nov 2001),
 - Expenditure and Food Survey (Office of National Statistics - Apr 2002),
 - ICT Access & Use (Department for Education and Employment - Jan 2001),
 - Scottish Household Study (Scottish Executive - 2001),
 - A Nation Online (US Department of Commerce - Feb 2002),
 - e-Europe Benchmarking report (Commission of the European Communities - Feb 2002).

Survey Process and Characteristics

Title Digital Glasgow – 2002 Household Survey

Sponsor Scottish Enterprise Glasgow

Researcher Market Research UK Limited

Survey date December 2001 – January 2002

Method A quasi-random sampling approach (random walk) was adopted. All interviews – average length 20 minutes - took place in respondents' own homes using a questionnaire designed by Market Research UK in conjunction with Scottish Enterprise Glasgow.

Sampling The core sample size was 2,000. In addition, another 147 booster interviews were conducted in a number of Social Inclusion Partnership Areas to enable a more statistically reliable comparison between areas.

Accuracy levels For the total sample of 2,000 interviews, using a 95% confidence interval, the margin for error would be a maximum of +/- 2.2%.

Survey instruments Copies of the survey brief and questionnaire used in the survey are available on request from the Learning City team at Scottish Enterprise Glasgow.

Survey incentives No financial or other incentive was offered to respondents.

Response rate A total of 18,256 households were approached to achieve the target of 2,000 interviews. This was a response rate of 1 in 9.

Feedback Feedback on this report is positively encouraged by e-mailing either donald.macphee@scotent.co.uk or shirley.davison@scotent.co.uk

Scottish Enterprise Glasgow
Atrium Court
50 Waterloo Street
Glasgow G2 6HQ
Telephone. 0141 204 1111
Facsimile. 0141 248 1600
E-mail. seglasgow@scotent.co.uk
Website. www.scottish-enterprise.com

