TOMORROW'S WORLD
INTRODUCTION

This report presents the findings of a quantitative survey carried out on behalf of *eircom* Ennis Information Age Town by Behaviour & Attitudes during June 2001.

The overall objectives of the research were to establish levels of household ownership and individual usage of PC's, the Internet and a range of new technology options in Ennis Urban District and its suburbs.

We also wished, where possible, to make comparison with national or international benchmarks. The ultimate objective was to assess the knock-on effects of an initiative in which all households in the area were offered a subsidised PC.

RESEARCH METHOD

The overall plan for the project was to select a representative sample of households within Ennis Urban District and its suburbs which would serve as the basis for establishing levels of household ownership of selected appliances. As a second stage, the plan was to select a sample of individuals living within those households to question them about their personal use of new technology.

The basic sampling frame adopted for the project was the up-to-date electoral register for Ennis Urban District and its environs. 80 separate starting addresses where selected with equal probability, distributed throughout the electoral register. These were then plotted on up-to-date maps of the area to check for sample spread and coverage of recently developed estates. Interviewers then called to the selected households and used a random route selection procedure from there to make effective contact with a minimum of 5 households per starting address.

Interviewers were required to make contact with a responsible adult within each of the 402 selected households to complete the stage one questionnaire. This was effectively an audit of ownership levels of particular types of appliances. Within each household a list was then made of all household members aged 9 and upwards. These listings were stratified into four age groupings as follows-

- 9-12
- 13-17
- 18-54
- 55+

Individual respondents were then selected from these listings, using a Kish selection grid. The individuals selected in this manner were the subject of the Stage 2 interviews. A total of 563 individual interviews were completed in this manner.

All interviewing on the project was carried out between 22nd of May and 18th June by trained members of the Behaviour & Attitudes fieldforce working under supervision. Our normal quality control checks were applied.

Copies of the questionnaires used for both the household and individual interviews are included as an appendix to this report.

NOTE ON REPORT FORMAT

Following on from this introduction, we present a brief resume of the key findings from the research. This is then followed by a more detailed commentary, supported by relevant charts and summary tables. The commentary itself divides into two parts:-

- Household Data. The information contained in this section is derived from the 402 household interviews completed on the project.
- Individual data. Here the results derive from the 563 individual interviews with people living in the selected households. This part of the report is divided into a number of sub-sections, reflecting the more extended nature of the questionnaire for this part of the study.

The report is then completed by the following technical appendices

Appendix A = Analysis of Sample

Appendix B = Household Questionnaire

Appendix C = Individual Questionnaire

SUMMARY & CONCLUSIONS

The main findings of this study can be summarised as follows:-

HOUSEHOLD DATA

- Household formation and re-location is continuing at a pace in Ennis. 12% of householders are living in their present location for only 1 year. This is more marked for the 17% of houses that comprise rented accommodation.

- 79% of homes qualified for the subsidised computer scheme.

- 85% of those eligible took advantage of the scheme.

- Those who did not take a computer either were not interested (38%), already had one (19%) or were concerned about running costs (13%).

- Levels of ownership of all types of telecommunications and computer equipment in Ennis are high. Levels of PC and Internet access are more than twice the national average. Household penetration of PC's is about 80% higher than in the two most developed areas – Dublin and the mid East.

- Among houses with computers, almost all use their PC's (97%). In these households with an Internet connection the Internet is used (at least occasionally) in 95% of cases.

- The average estimate of household usage per week is:-

  PC 8.5 hrs

  Internet 5.2 hrs

PERSONAL DATA

- 72% of people in PC owning houses use their PC at least occasionally.

- Half of those (36%) use it on most days of the week.

- 52% use their PC at home on at least a weekly basis. 23% do so at work and 21% at school or college.

- 77% use the Internet at least occasionally. 64% do so at least once a week.
  - 51% use the Internet weekly from home
  - 18% use the Internet weekly from work
  - 17% do so weekly from school or college

- Ennis people are significantly ahead of national and international benchmarks in their frequency of use of the Internet; suggesting that one of the main objectives of the development of the *eircom* Ennis Information Age Town has been achieved.

- The largest volume of Internet usage is simply to maintain contact with friends and relatives.

- Other important uses are:-
  - Hobbies
  - Entertainment
  - Study

- Games
- News
- Work

- Shopping on the Internet is at a low level, but comparable with national levels (11%).

- The major potential for growth in Internet usage is also in the area of general contact with friends and relatives. Internet only accounts for 17% of activity in this area; the balance being by phone, fax or letter.

- Four in ten household members in Ennis have had some formal computer or Internet training.

- The specific courses used are varied and there are considerable differences between demographic groups. Those with Third Level education tend to have had more advanced courses. People who completed their education earlier tend to have had more basic training only.

- This, of courses, reflects in current usage levels.

- There is also evidence of quite a lot of informal 'coaching' in computer usage, particularly between family members.

- Perhaps as a result, skill levels are remarkably high by conventional benchmarks.

- Individual usage levels are as follows
  - Internet 3.7 hours per week
  - Other PC 8.3 hours per week

- Usage is highest among adult males with Third Level education.

- Most people seem to be reaching a plateau but there is evidence of some further growth prospects.
  - 21% think their usage will increase in future
  - 12% expect it to decline

- The main barrier to increased usage is simply time availability.

- 90% of Ennis residents consider '*eircom* Ennis Information Age Town Project' a good idea. Their reasons for this are two-fold:-
  - a sense of individuals benefiting personally
  - and the community benefiting economically

- 83% feel that Ennis benefits from its status as Ireland's Information Age Town.

SECTION ONE

HOUSEHOLD DATA

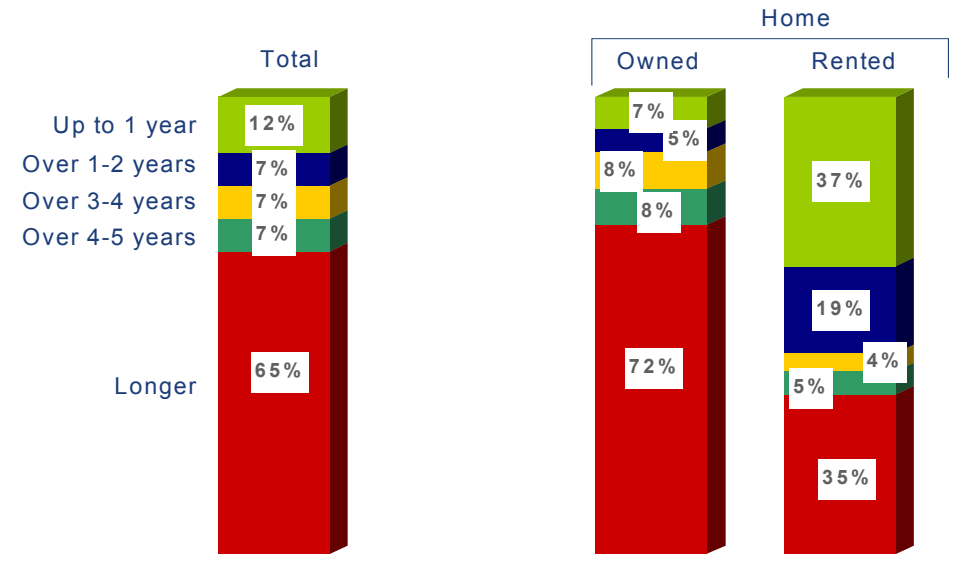
In this section of the report we present the findings as they relate to household data. We begin by examining whether or not people qualified for the initial distribution of home computers and whether they availed of that offer. We then look at current levels of ownership of telecommunications, computer and entertainment appliances. Finally we look at reported household usage of these.

1.1 What proportion of households qualified?

In planning the study we were very conscious of the fact that Ennis is a fast expanding town and, as a consequence, a certain proportion of households which now exist would not have qualified for the original distribution scheme for home computers.

To allow for this fact, we questioned people, at the outset, about how long their current household had been in existence. The pattern of results is summarised below

DURATION OF RESIDENCE (All Households)

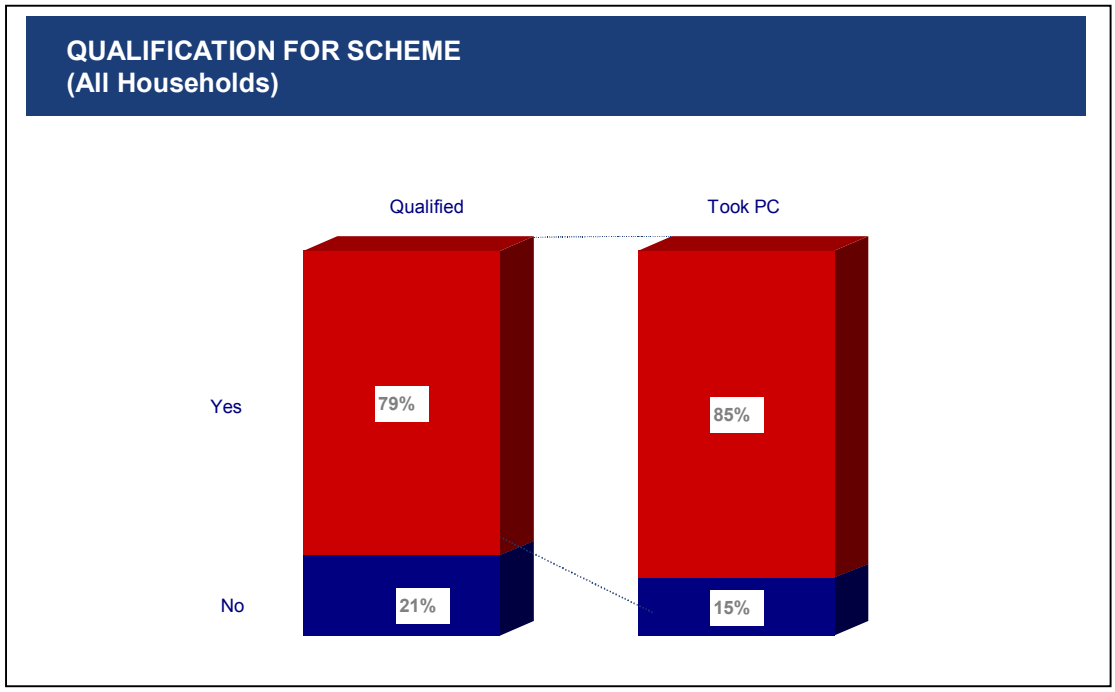


Percentages do not add exactly to 100% because of rounding of percentages

It can be seen that a third of all homes in the area have been in existence, in their present form, for less than five years. As many as 12% have been formed for the first time in the past 12 months.

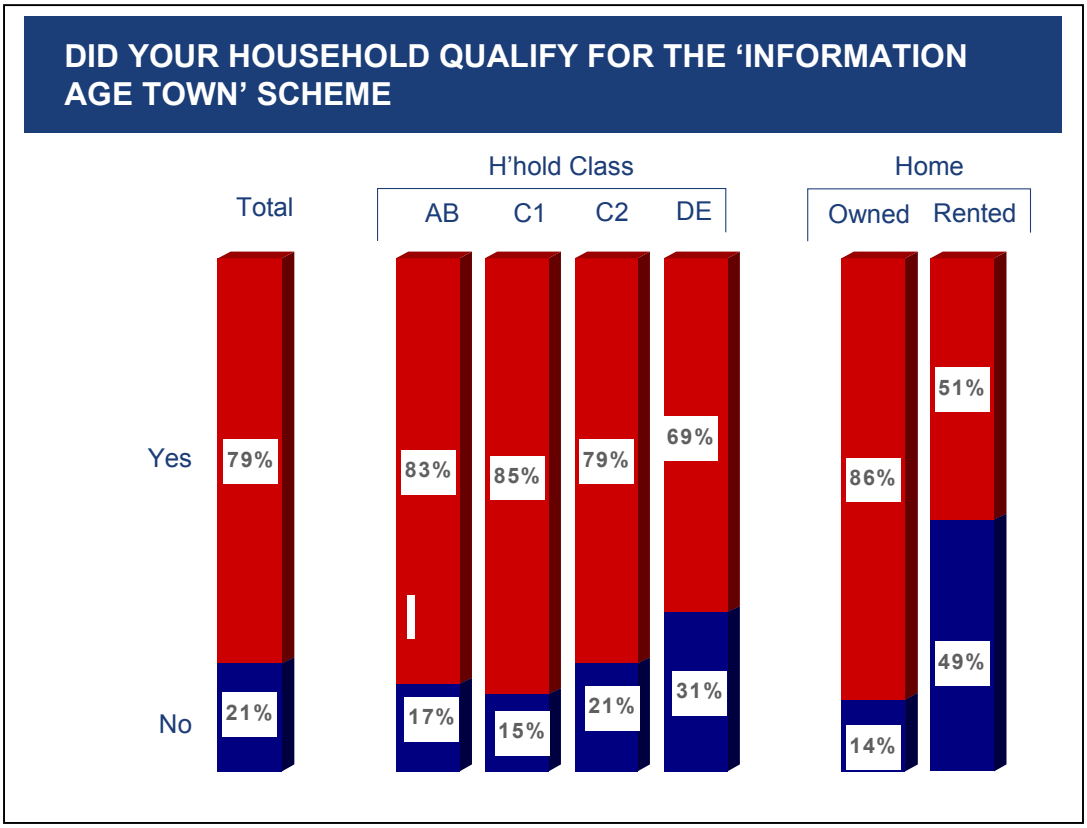
Not surprisingly, there is a marked difference in the pattern for owned and rented accommodation. More than half of all households where the accommodation is rented have been formed in the past two years.

Against this background it is not too surprising to find that a sizeable proportion of households did not qualify for the original distribution of PC's. Furthermore, not all of those who qualified actually availed of the offer as can be seen here



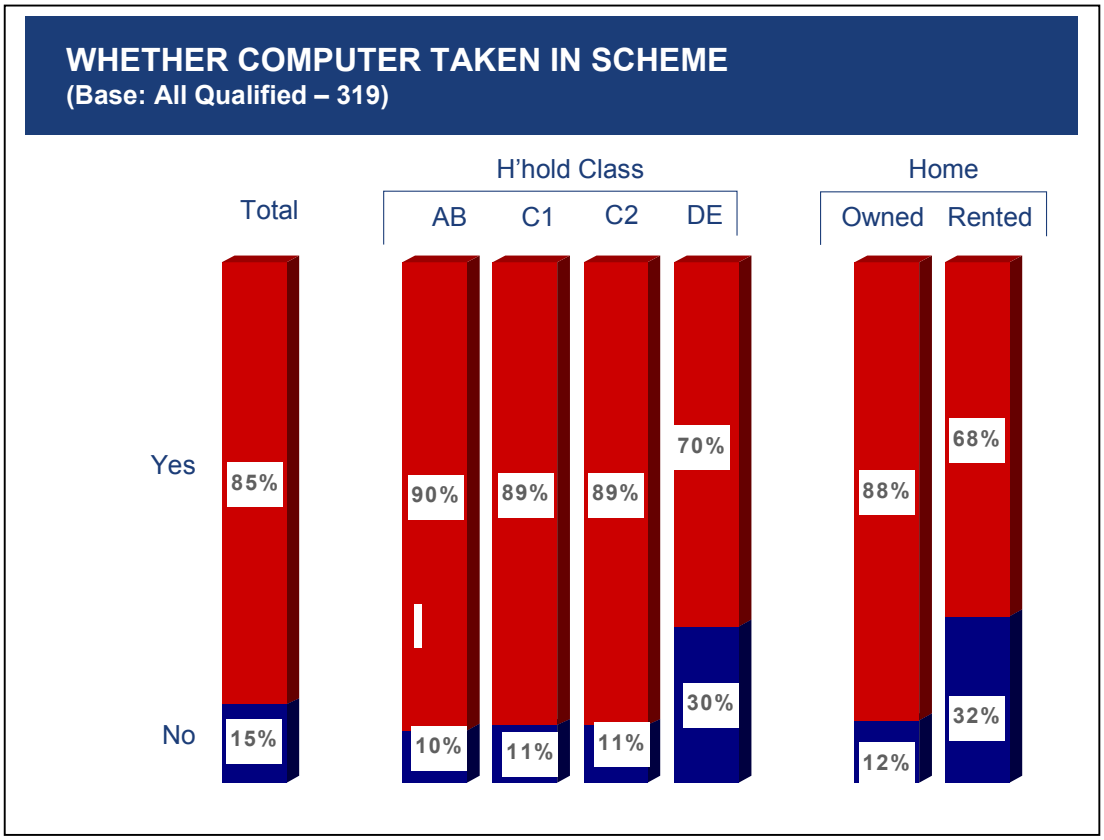
In summary about 8 in 10 households now in existence qualified at the outset and about 85% of those (or just under 7 in 10 households in total) actually took up the offer.

The following chart looks at qualification levels, distinguishing between households of different socio-economic backgrounds and between owned and rented accommodation.



It can be seen that households where the head of household was from a professional (AB) or white collar (C1) background were more likely to qualify than were those from working class backgrounds (C2 equates with skilled working class and DE with unskilled working class households). However there is a much bigger gap between owned and rented accommodation, as one might expect: reflecting the higher turnover in occupancy in these households.

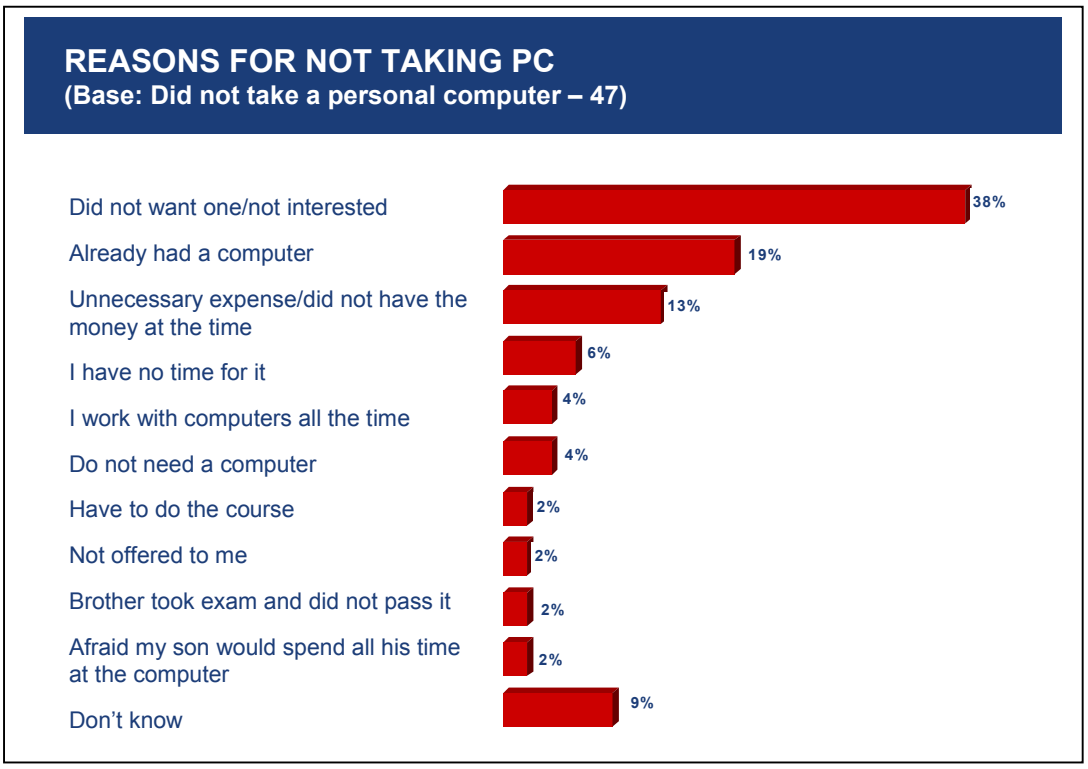
A similar pattern of difference is evident in the levels of taking up the offer, where people did qualify



It is clear that, in addition to having a lower level of awareness of qualifying in the first place, people from unskilled working class backgrounds are more likely to have turned down the offer to begin with. 3 in 10 unskilled working class households fall into this category.

It is clear also that people living in rented accommodation have a higher rejection level, even when they did qualify.

The main reasons for turning down the offer of a PC are summarised below:-

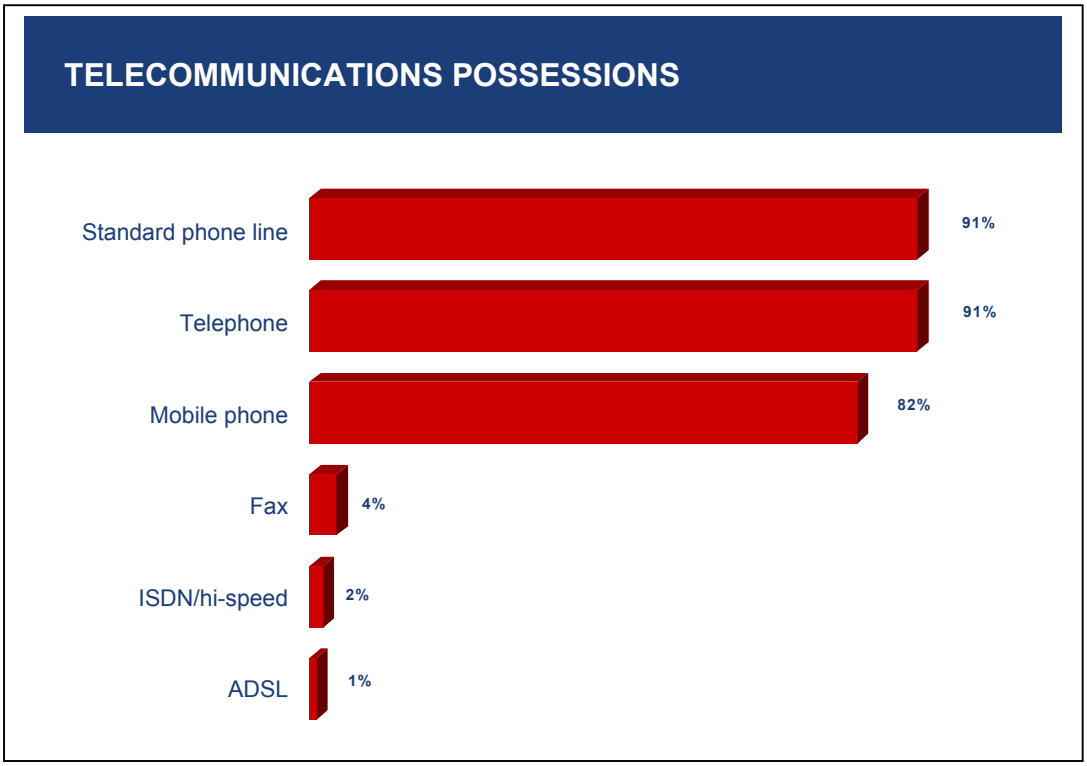


The sample base is obviously quite small here but it seems clear that the main reasons for rejecting the offer are that people were simply not interested, that they already had a computer in their homes or that they saw it as an unnecessary expense. In other words, although the acquisition of the PC was subsidised, some households had concerns about the ongoing running costs would also be encountered.

1.2 Current Household Possessions

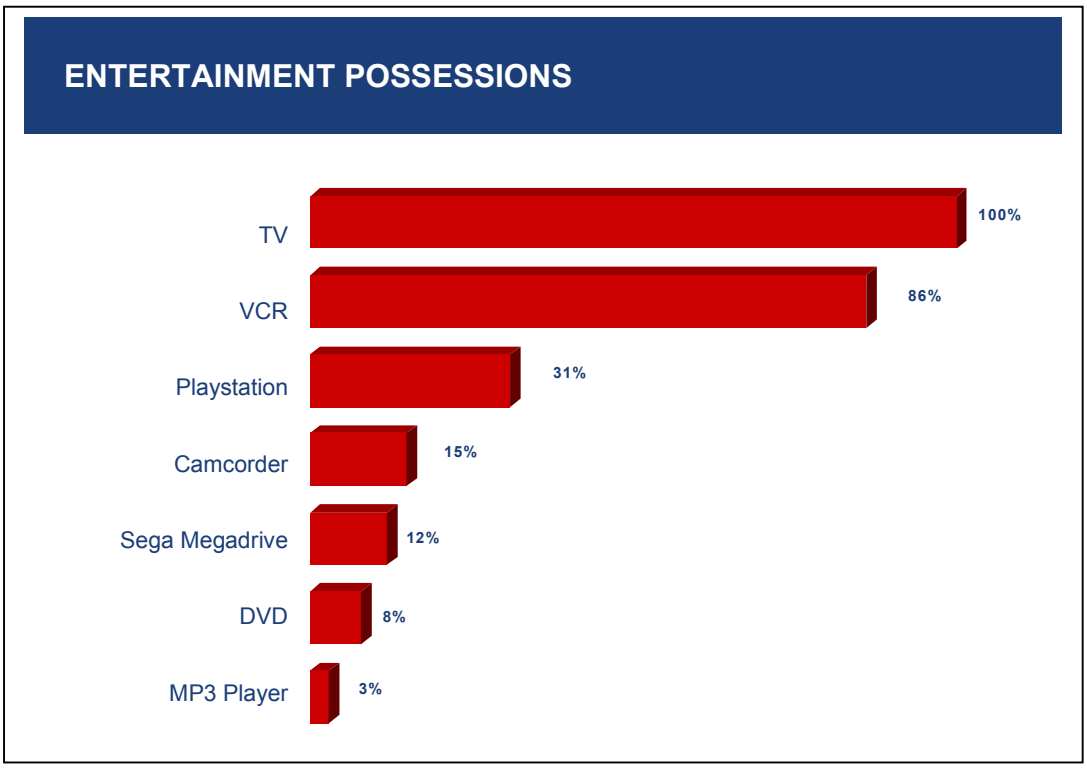
One of the core objectives of the study was to establish reliable benchmarks for household ownership of various categories of appliances.

The position in relation to telecommunications possessions is as follows:



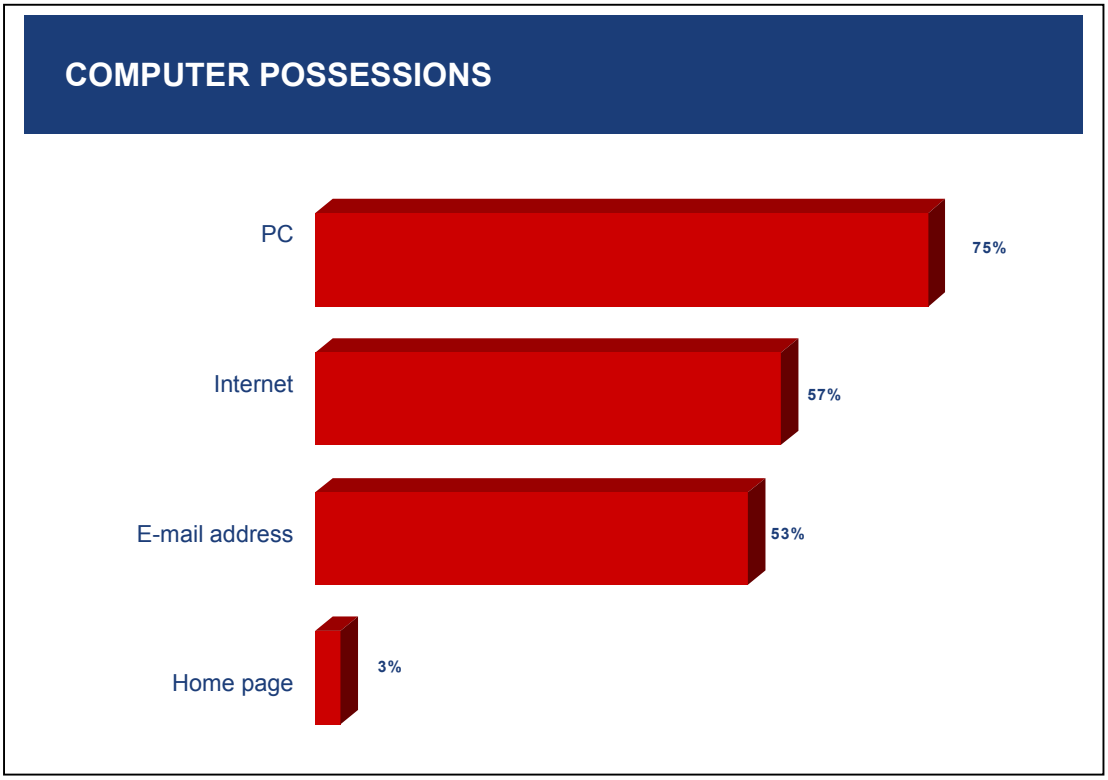
It can be seen that greater than 9 households in 10 in the area have a standard telephone line and more than 8 in 10 households have at least one mobile phone in the household. Ownership of the other listed items is at a low level: perhaps not surprisingly.

Ownership of entertainment appliances is also high as is evident here:



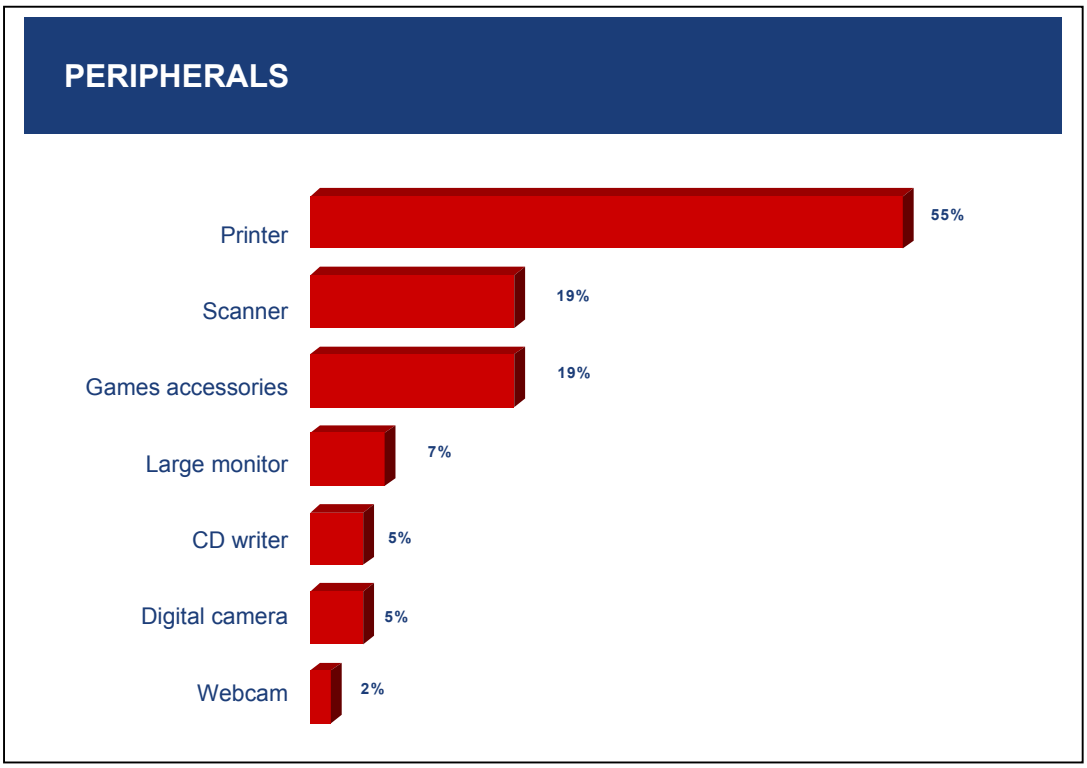
All households claim to have a TV while 86% claim to have a VCR. Claimed levels of ownership of Playstation and Sega Megadrive are also high. While there are no reliable estimates of national ownership of camcorders and DVD's it does seem to be the case that the reported levels of ownership here are high.

In light of the project subsidising the cost of PC's to all households in the area in the not too distant past, it is not surprising to see that almost three quarters of homes in Ennis and environs claim to have a PC currently.



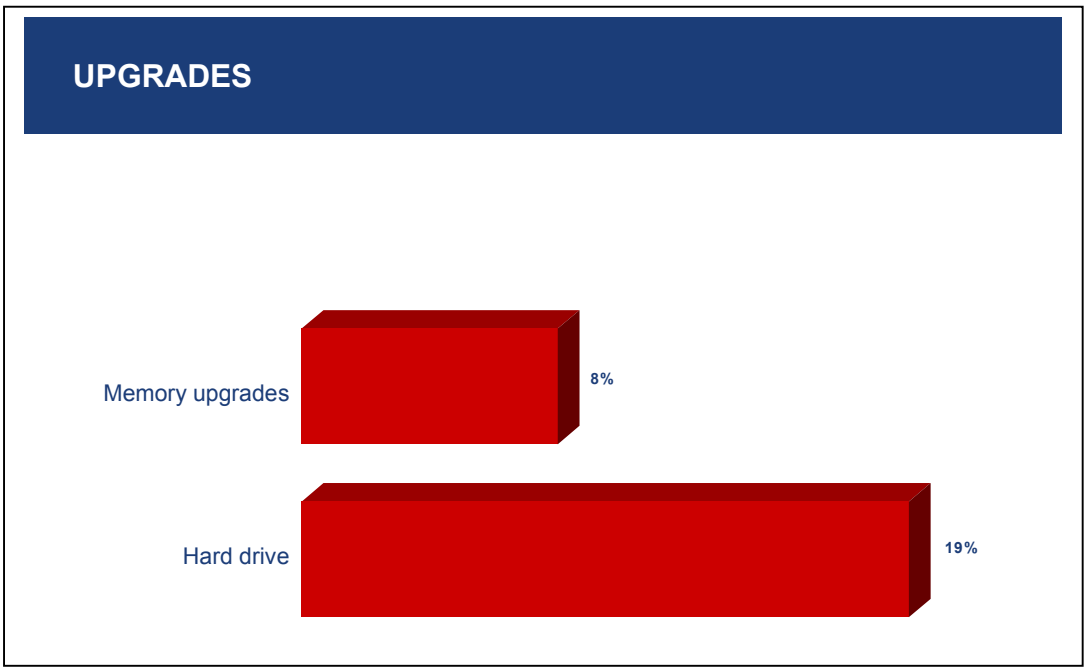
Almost 6 in 10 claim to have an Internet connection and more than half an email address. 3% of households claim to have a home page.

The reported ownership levels of peripherals are summarised below



A printer is the most widely available peripheral although it is interesting to see that as many as 1 household in 5 claims to have a scanner.

The final chart in this “set” records levels of ownership of upgrades.



1.3 Household Usage Patterns

In a later section of this report we examine how individuals within each of the selected households use PCs and the Internet. Given the two-stage interview approach, it was also possible to make an estimate of household usage of computer appliances. The overall position is summarised here:

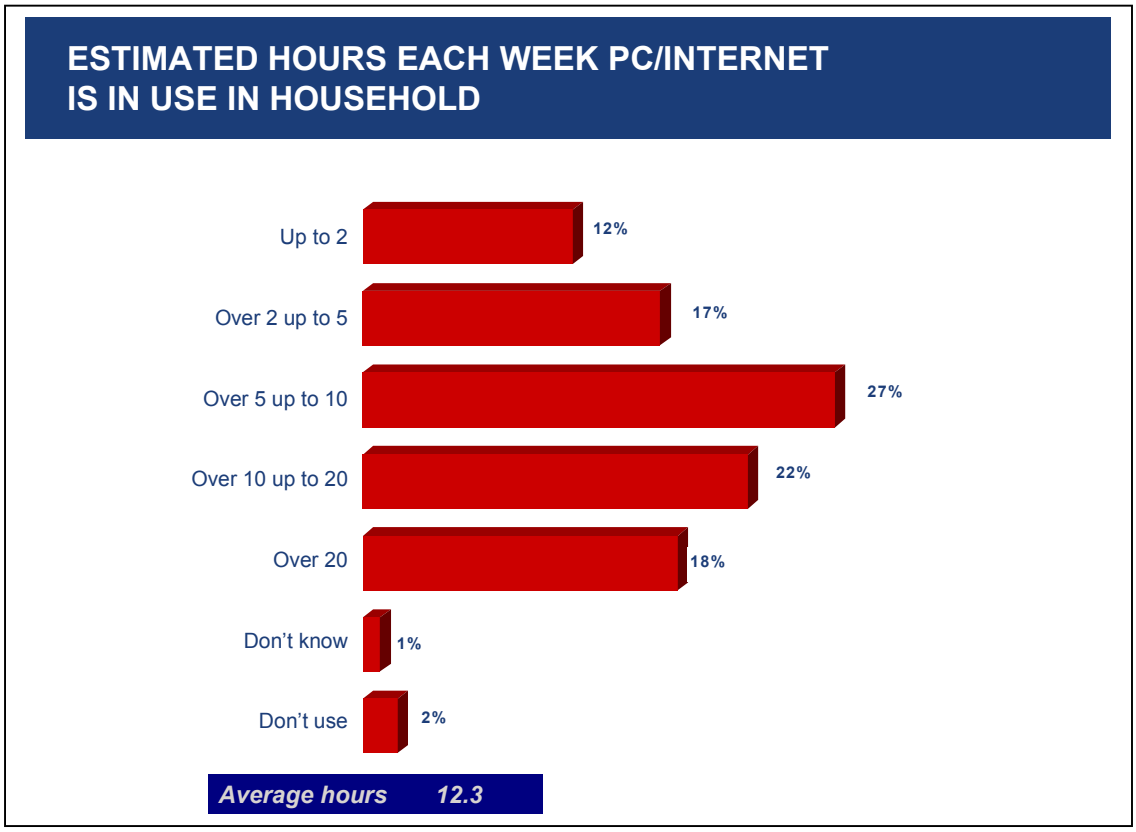
HOUSEHOLD USAGE PATTERN

	PC	Internet
None used	3%	5%
People using (Average)	2.43	2.17
Days used per week	4.38	3.45
Hours per week	8.5	5.2

In 97% of homes where a PC exists, somebody in that household uses it at least occasionally. The average number of users per household is 2.4. The average number of days that the PC is used is just over 4 per week and the average number of hours usage is estimated at approximately 8.5 hours per week.

Where an Internet connection exists, 95% of households claim to use their internet at least occasionally. The average number of users per households is just over 2. The Internet is used on average every second day and the total number of hours utilised per household is estimated at just over 5 hours per week.

Combining data for both PC and the Internet we see the following reported pattern of usage by households in Ennis.

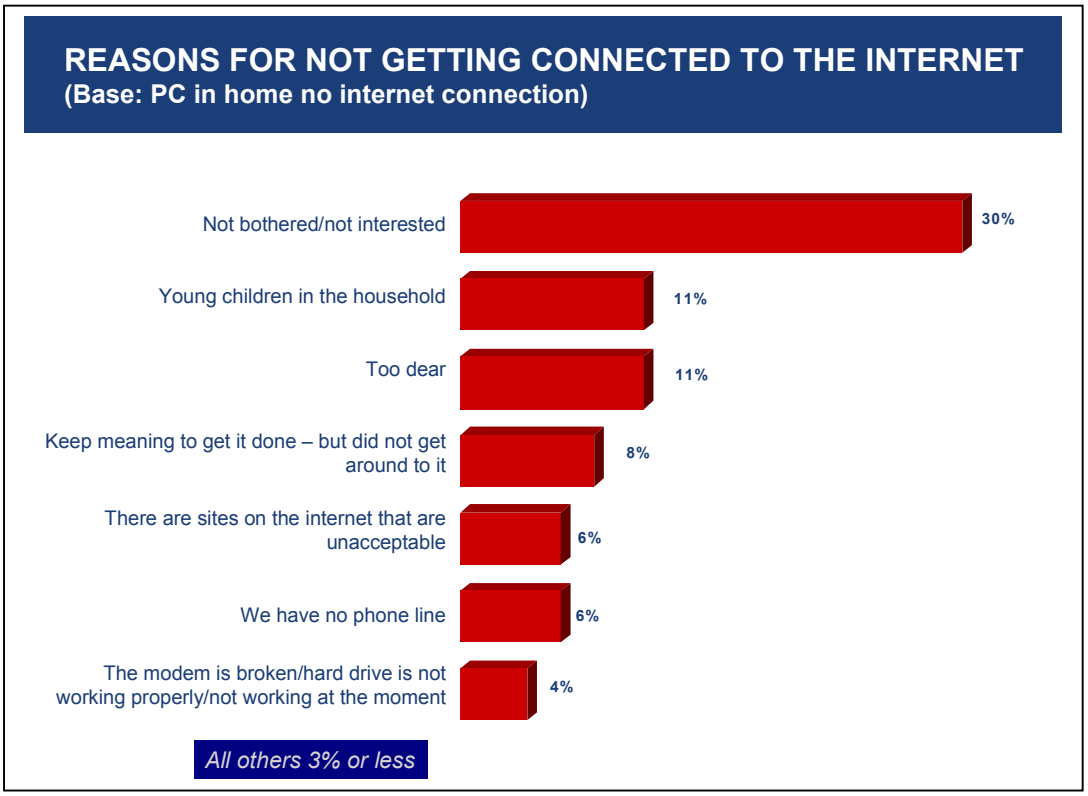


Percentages do not add exactly to 100% because of rounding of percentages

The typical household in Ennis uses a PC (for either Internet or other applications) for somewhere in the range of 5 to 10 hours per week.

As we saw earlier, the vast bulk of households with an Internet connection tend to use it. The main underutilisation of the Internet therefore comes from the approximately 1 in 4 PC owners who have not opted for getting connected to the Internet in the first place.

Their main reasons for resisting getting connected are set out below



It can be seen that their reasons are an amalgam of lack of interest on the one hand or concerns about costs and the impact on young children on the other.

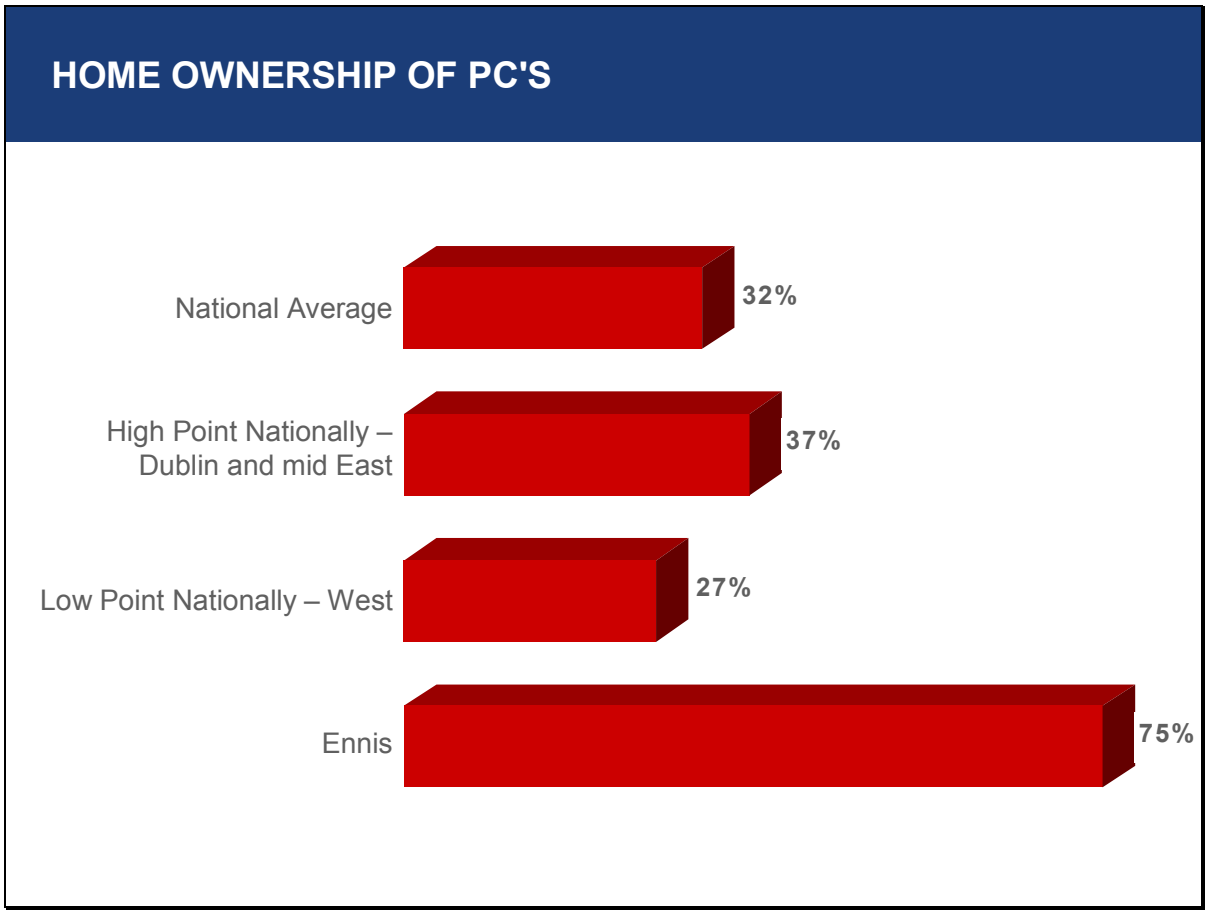
1.4 Ennis Vs. Benchmarks

Although there are many published reports on PC / Internet and telephony usage patterns, there are very marked disparities in collection methods which make comparisons difficult.

Some key comparisons can safely be made however.

a) Home Ownership of PC's

The quarterly National Household Survey for September – November 2000 provides the best benchmark. Comparing the Ennis Household data with this survey we see the following:



In short, household PC ownership in Ennis is more than twice the National Average. Household penetration of PC's is about 80% higher than in the two most developed areas – Dublin and the mid East.

b) Internet Connections

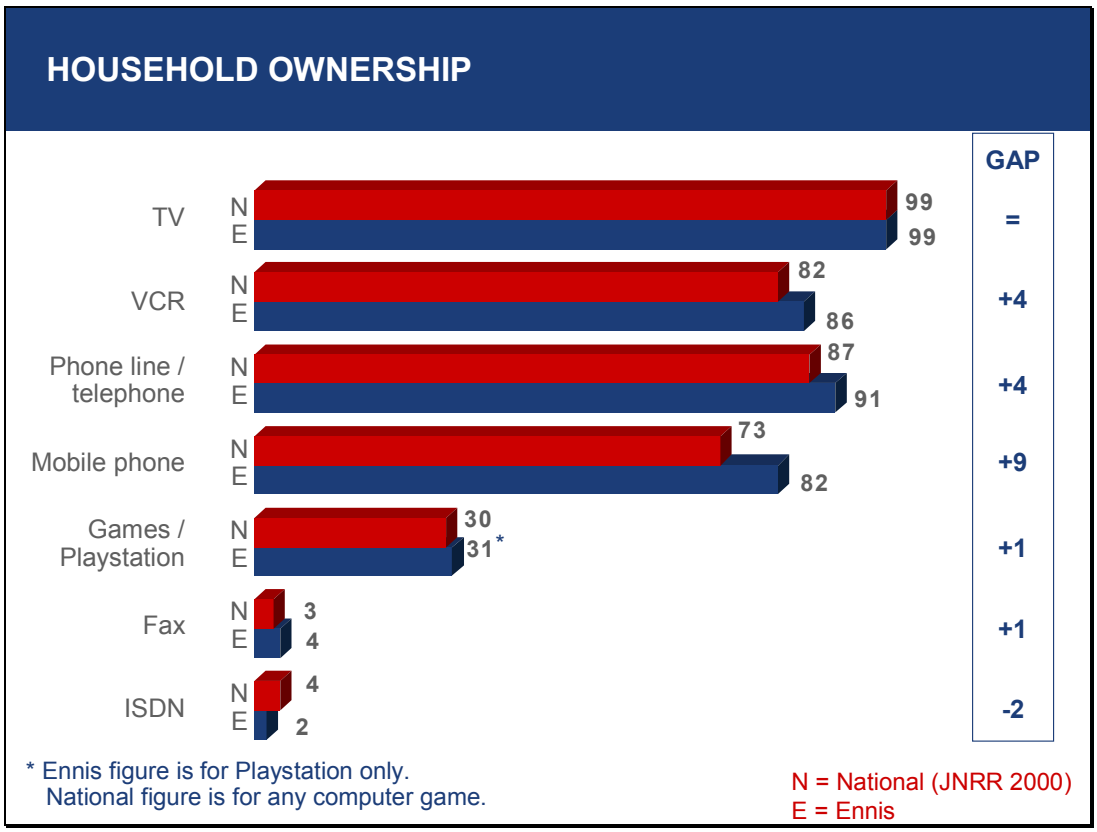
National Survey data suggests that 63% of all homes with a PC are connected to the Internet. In Ennis the connection rate to the Internet is above this level – 76%. Combined with the difference in household ownership of PC's that means that the number of houses with an Internet connection in Ennis is significantly higher than the National Average.

	Own a PC	Of whom have Internet Connection	% of all households with Internet connection
	%	%	%
National Average	32.4	63.0	20.4
Ennis	75.0	76.0	57.0

Here again the Ennis penetration level is more than double the National Average.

c) Other Technology Features

The National Readership Survey provides benchmarks of ownership for a number of other relevant home appliances.



Ennis is marginally ahead of the national average in VCR's and fixed phones but significantly ahead in access to mobile phones.

SECTION TWO
INDIVIDUAL DATA

In this section of the report we summarise findings derived from interviews with the 563 individuals contacted at the primary sample of households. This commentary divides into a number of sub-sections:-

- Personal use of PC's/The Internet
- Internet applications vs. Competitive Options
- Computer training
- Current levels of competence
- Likely future usage

2.1 Personal use of PC's

People in Ennis, as elsewhere, have a variety of options for using PC's nowadays: at home, at school/college or at work. The following chart summarises claimed frequency of use of a PC in any of these locations.

PERSONAL USE OF PC
(Base: All respondents)

	Home	School/ college	Work	At all
	%	%	%	%
Everyday	12	3	14	24
Most days	7	2	6	12
Three to four times a week	15	2	1	11
Once – twice a week	18	14	2	15
About once a month	4	1	0	4
Less often	8	2	2	6
Never	33	72	72	28
Don't know	2	6	4	0

Percentages do not add exactly to 100% because of rounding of percentages

The right hand column aggregates usage across all possible locations. From this it can be seen that:-

- Almost three-quarters of individuals in the Ennis area use PC's at least occasionally nowadays.
- One in four do so every day of the week
- The broadest base of usage occurs at home. Two-thirds of individuals use PC's in this environment at least occasionally.
- Use in other locations is more confined but tends to be, on average more regular. This is particularly true of work place applications. Although only slightly more than a quarter ever use a computer at work, the bulk of those who do so use the computer on most days of the week.

There are significant variations in the number of usage occasions per week across the sample as a whole:

FREQUENCY OF USE OF PC
(Occasions per week)

		Home	School/ college	Work	At all
All adults		8.6	2.7	5.9	16.9
Gender:	Male	9.9	3.0	7.0	18.6
	Female	7.9	2.5	5.2	15.7
Age:	9-12	12.9	10.4	-	15.3
	13-17	15.1	6.7	-	16.4
	18-54	8.6	1.7	8.8	17.9
	55+	2.3	0.3	1.3	12.0
Educational Status:					
	Studying	13.9	8.8	0.4	16.1
	Completed	7.0	0.6	7.5	17.3

Men are slightly heavier users than women. People who have completed their education are marginally more frequent users than those who are still studying.

In overall terms the frequency of use of a PC increases with age although there is evidence of a sharp fall-off in usage after the age of 55.

School usage of PC's tends to be heavily biased towards pre-teenage groups.

Teens and sub-teens are heavier home users of PCs than are their adult counterparts. Adults make up the difference by their heavier usage of PCs in a work context.

There are other demographic differences evident in the following chart

FREQUENCY OF USE OF PC
(Occasions per week)

		Home	School/ college	Work	At all
Education – Termination					
	Third level	11.2	3.7	12.2	20.6
	Secondary	10.0	2.5	5.4	16.0
	Other	5.2	2.2	1.4	13.2
Social Class	AB	11.3	2.3	12.2	20.9
	C1	10.5	3.4	9.4	18.2
	C2	7.0	2.3	2.8	13.5
	DE	6.2	2.1	1.1	15.7
Home Ownership					
	Owned	9.0	2.9	5.7	16.8
	Rented	6.8	1.6	6.8	17.7

It seems quite clear that age of completion of education and social class are major determinants of frequent PC usage.

2.2 Internet Usage

The pattern of Internet usage is very similar to that examined for PC's in general, but at a lower "gearing" as is evident here

FREQUENCY OF USE OF INTERNET
(Base: All household members using a computer)

	Home	School/ college	Work	At all
	%	%	%	%
Everyday	9	1	7	15
Most days	5	2	3	8
Three to four times a week	13	2	2	12
Once – twice a week	24	12	6	29
About once a month	6	2	1	6
Less often	8	3	2	7
Never	33	66	68	21
Don't know	3	10	10	2

Almost 8 in 10 residents of Ennis use the Internet from some location at least occasionally. About 1 in 4 use the Internet on most days. That Internet usage is broadly evenly divided between home and work applications.

Some of the key demographic differences are evident in the following analysis:

FREQUENCY OF USE OF INTERNET
(Average occasions per week)

		Home	School/ college	Work	At all
All adults		7.3	2.3	4.0	10.1
Gender:	Male	8.5	2.6	5.2	11.8
	Female	6.5	2.1	3.0	9.0
Age:	9-12	3.5	4.5	-	6.0
	13-17	8.9	3.9	-	10.2
	18-54	7.6	1.8	5.6	11.1
	55+	5.4	-	2.2	6.9
Educational Status:					
	Studying	6.8	5.3	0.3	9.6
	Completed	7.5	0.6	5.7	10.4

Internet usage is:-

- More a male than a female phenomenon
- It is heavily focused into the teen and adult phases
- Work usage accounts for a high proportion of adult use of the internet

The following chart completes the demographic analysis

FREQUENCY OF USE OF INTERNET
(Occasions per week)

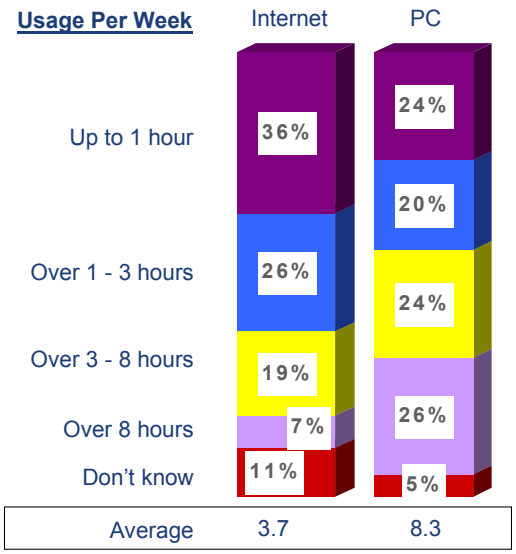
		Home	School/ college	Work	At all
Education – Termination					
	Third level	8.6	3.1	7.9	14.1
	Secondary	7.8	1.8	2.5	9.4
	Other	4.5	2.1	0.8	5.8
Social Class	AB	7.8	1.6	9.3	12.3
	C1	7.5	2.6	5.0	11.0
	C2	6.1	2.1	1.1	7.6
	DE	8.2	2.2	1.9	10.0
Home Ownership					
	Owned	7.5	2.5	3.8	10.4
	Rented	6.1	1.2	4.9	8.6

Internet usage is rather more evenly distributed in social class terms than is the case for other PC applications. It may be that this (the Internet) is the best mechanism for encouraging new technology applications among people from unskilled working class backgrounds.

2.3 Shorter time periods spend on the Internet

Whatever about the differences in terms of number of usage occasions, it seems clear that the average length of time spent by a typical user is significantly lower for the Internet than for other PC applications as is evident here

PC & INTERNET INDIVIDUAL USAGE
(Base: All ever using PC for either purpose)



Demographics

	Internet	Other PC
Gender		
Male	4.0	8.8
Female	3.4	7.9
Age		
9 - 12	2.3	3.9
13 - 17	3.3	4.1
18 - 54	4.2	10.5
55+	2.2	4.6
Education		
Third Level	4.4	12.9
Second Level	3.9	6.6
Other	2.2	4.7

Percentages do not add exactly to 100% because of rounding of percentages

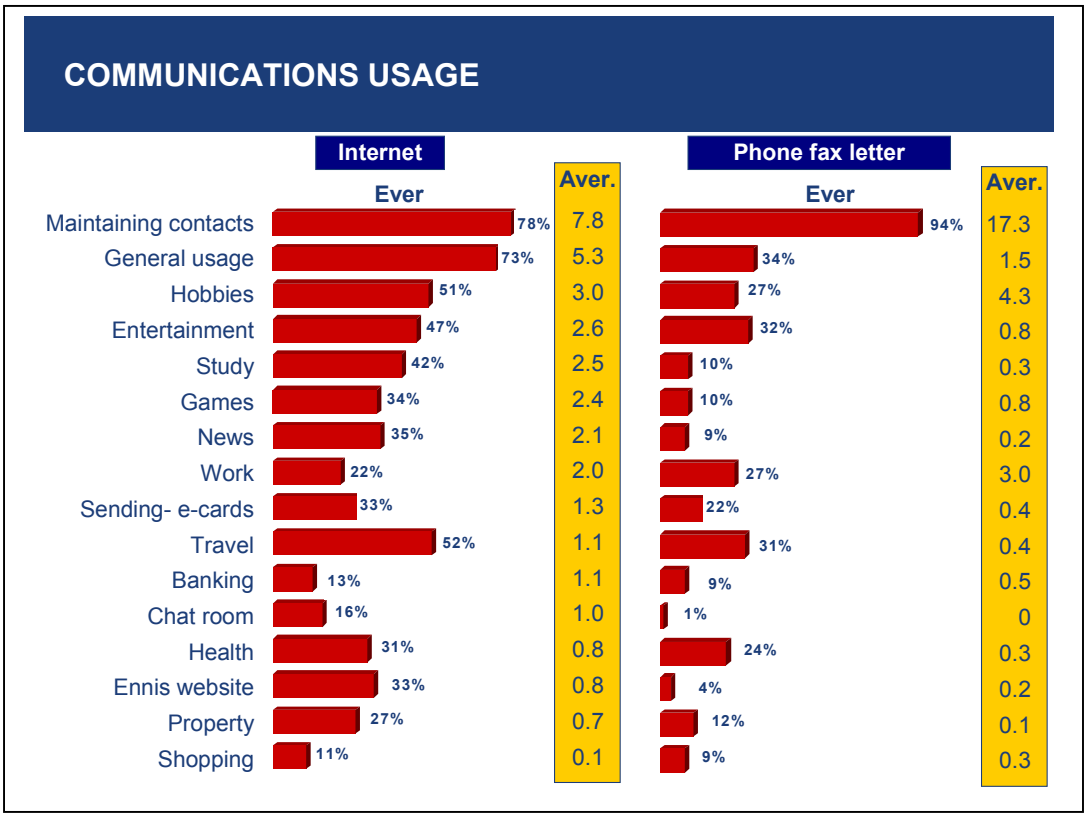
The typical Internet user spends just over three and a half hours per week connected. For other PC applications, the average length of time spent per week is just over eight and a quarter hours.

The demographic differences recorded here reflect the patterns reviewed earlier but they emphasise further the difference between adults and teenagers in the amount of time devoted to PC applications. This no doubt reflects the higher work related usage reported earlier.

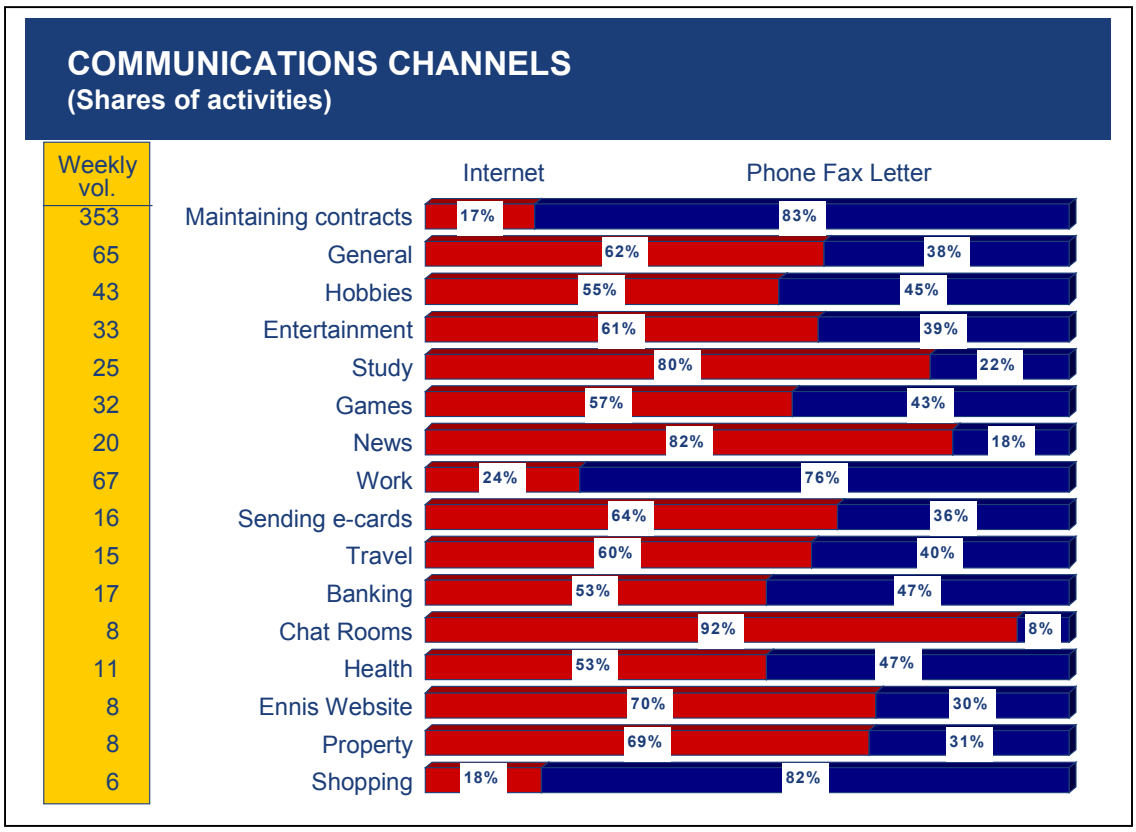
2.4 The Internet in Context

In order to set internet usage in context, respondents were questioned about their frequency of using the Internet nowadays for various applications. They were asked a similar set of questions in relation to using other contact methods in parallel with this: phone, fax and letter.

The following chart summarises the proportions claiming to use any of these communications methods nowadays for any of the stated applications. The chart also shows the average number of occasions per week for each application.



It is possible to gross up from these data to an estimate with a total number of usage occasions per week and to establish a “market share” for Internet vs. other applications. This is done in the following chart



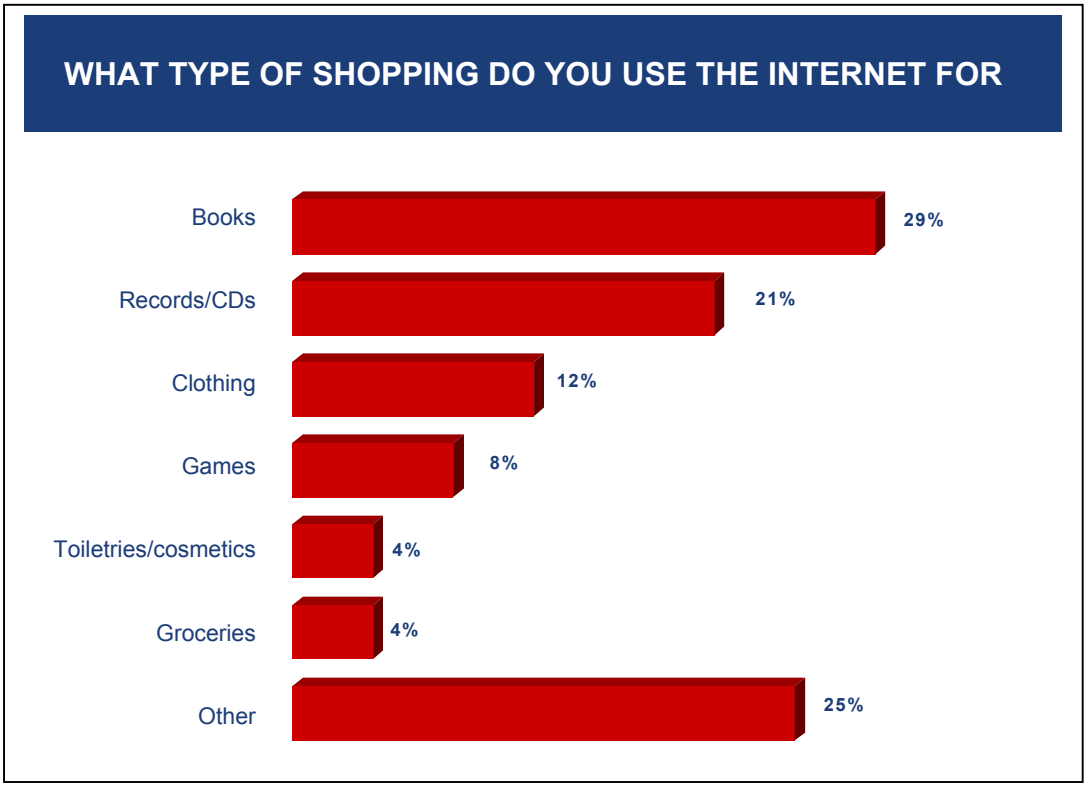
It can be seen that the communications opportunities arising are mainly in the context of:-

- Maintaining contacts with friends
- Work
- General usage applications
- Hobbies
- Entertainment
- Games

The Internet has already got a very high “market share” many of these areas although it is relatively underdeveloped as yet in the two largest opportunity areas: maintaining contact with friends and the work environment.

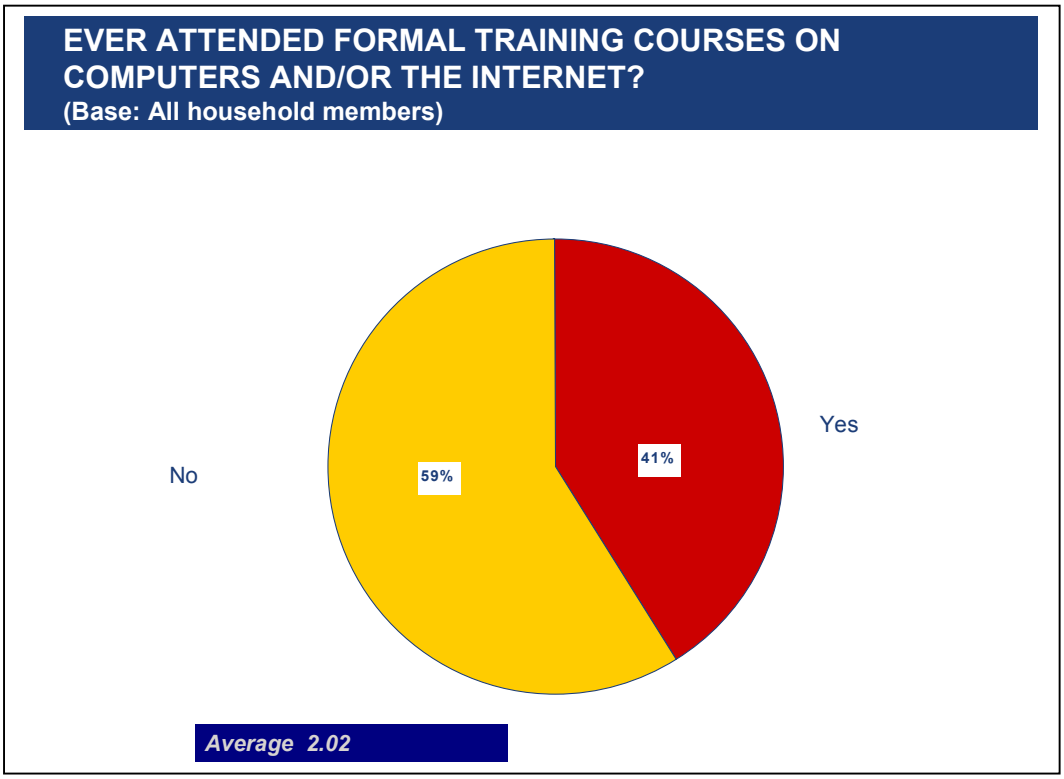
It seems clear also that Internet usage for shopping is relatively infrequent.

When people were questioned about the specific types of shopping they do on the Internet the following pattern emerged.



2.5 Training

4 in 10 household members claim to have had some formal training course on computers and/or the Internet up to now



The average number of courses attended was just over two.

The main types of courses attended are set out below

TYPES OF TRAINING COURSE ATTENDED

	Total
	%
Basic IT/Beginners	70
Internet & e-mail	49
Applications e.g. Word, Excel, PowerPoint	44
ECDL	23
NCVA Certificate	3
Web design	6
Diploma in IT	7
Programming	5
Other	8
Don't know	1

It can be seen that the main focus has been on basic IT for beginners, Internet and e-mail and applications such as Word, Excel and PowerPoint.

There are significant differences evident in the types of training taken by people from different age groups as is evident here:

TYPE OF TRAINING – Part 1

	Total	AGE			
		-12	13 - 17	18 - 54	55 +
	%	%	%	%	%
Basic IT/Beginners	70	94	80	65	82
Internet & E-mail	49	65	45	49	45
Applicationss (e.g. Word, Excel, Powerpoint)	44	29	30	47	39
ECDL	23	-	30	26	
NCVA Certificate	3	-	-	4	-
Web design	6	18	10	6	3
Diploma in IT	7	-	-	9	-
Programming	5	-	10	5	3
Other	8	12	-	9	3

The focus on basics is particularly evident at the younger end of the age spectrum although there is a heavy emphasis on web design in this area also. As one moves into the other age ranges, and particular into the adult years, there is more of an emphasis on applications like Word, Excel etc. and on ECDL.

There are interesting differences evident also depending on whether people have completed their full-time education or not, and at what level they finish their full-time education.

TYPE OF TRAINING – Part 2

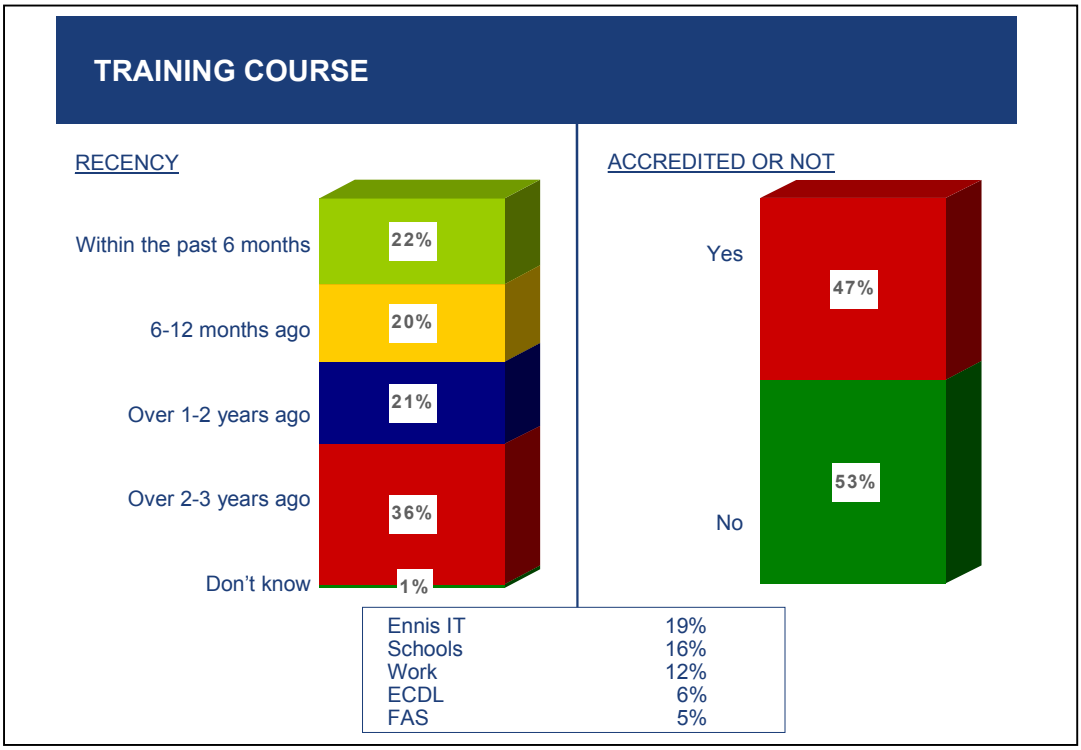
	Total	Education		Finished/studying		
		Study-ing	Finish-ed	Third Level	L. Cert. Sec	Other
	%	%	%	%	%	%
Basic IT/Beginners	70	76	69	63	72	82
Internet & E-mail	49	51	49	52	47	46
Applicationss (e.g. Word, Excel, Powerpoint)	44	35	46	55	34	37
ECDL	23	22	23	24	28	11
NCVA Certificate	3	-	4	4	-	5
Web design	6	12	5	7	6	5
Diploma in IT	7	3	8	11	4	-
Programming	5	6	5	5	4	7
Other	8	8	8	11	3	8

Courses for beginners and for web design have an above average appeal for people who are still studying.

Groups who have completed third level education have a lower level of emphasis on the basics and a higher than average focus on specific applications and on formal qualifications (a diploma in IT, for example).

2.6 Continuing Education

The evidence from the survey suggests that a high proportion of the training courses attended have taken place in the relatively recent past as is evident here

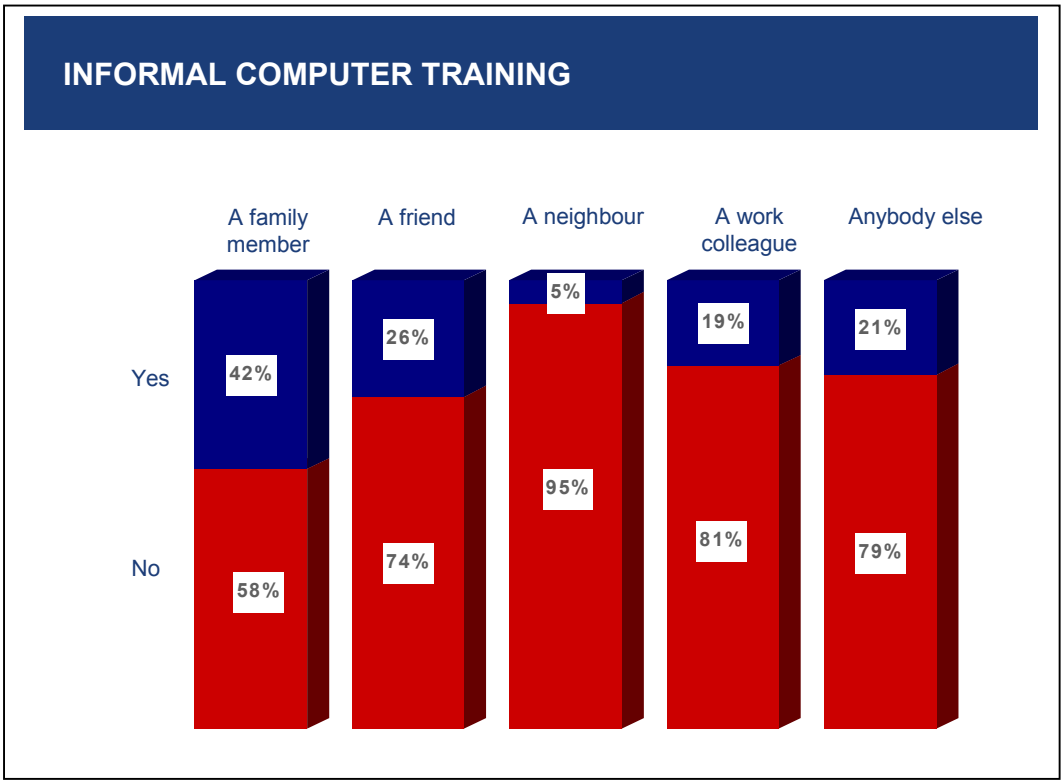


About half of the courses were described as accredited ones. The three most important sources for training courses were:-

- *eircom* Ennis Information Age Town
- Schools
- Work

2.7 A high volume of informal training

Apart from attendance at specific formal training courses, it seems quite clear that there is a reasonably high level of informal computer training which takes place

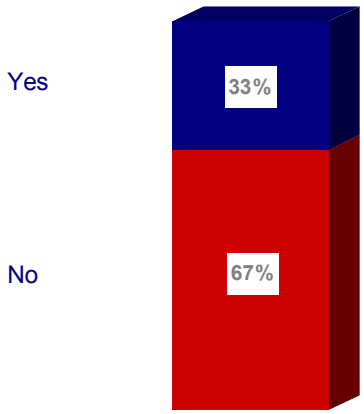


Informal training is particularly commonplace between family members but there is a high level also between friends and work colleagues.

2.8 About a third had some technical problems

About one third of PC users in our sample claim to have experienced some technical problems at some stage with their computer equipment.

TECHNICAL PROBLEMS EXPERIENCED

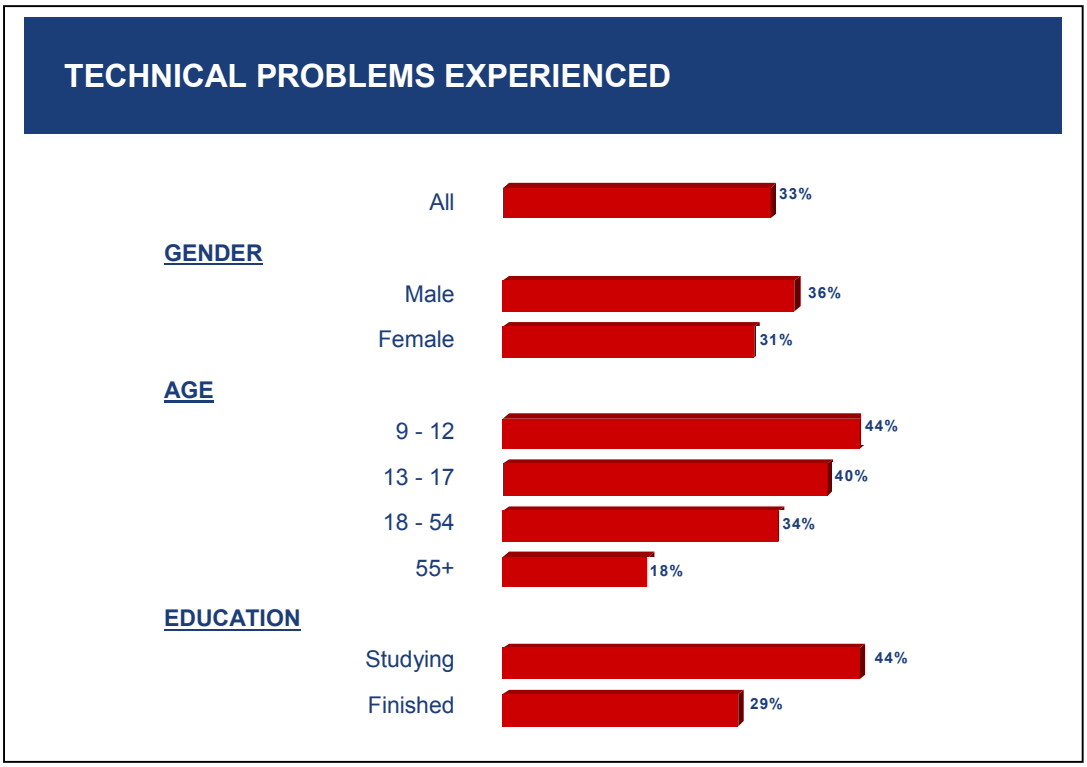


Action *	%
Try to fix it yourself	21
Seek technical support from PC company	40
Contact *eircom* Ennis Information Age Town	44
Take no action	6
Don't know	2

*Answers add to over 100% due to multiple responses.

In these circumstances people are very inclined to contact *eircom* Ennis Information Age Town or to seek technical support from a PC company.

There are significant demographic differences evident also between the groups who claim to have had some technical problems at some stage. This is evident below

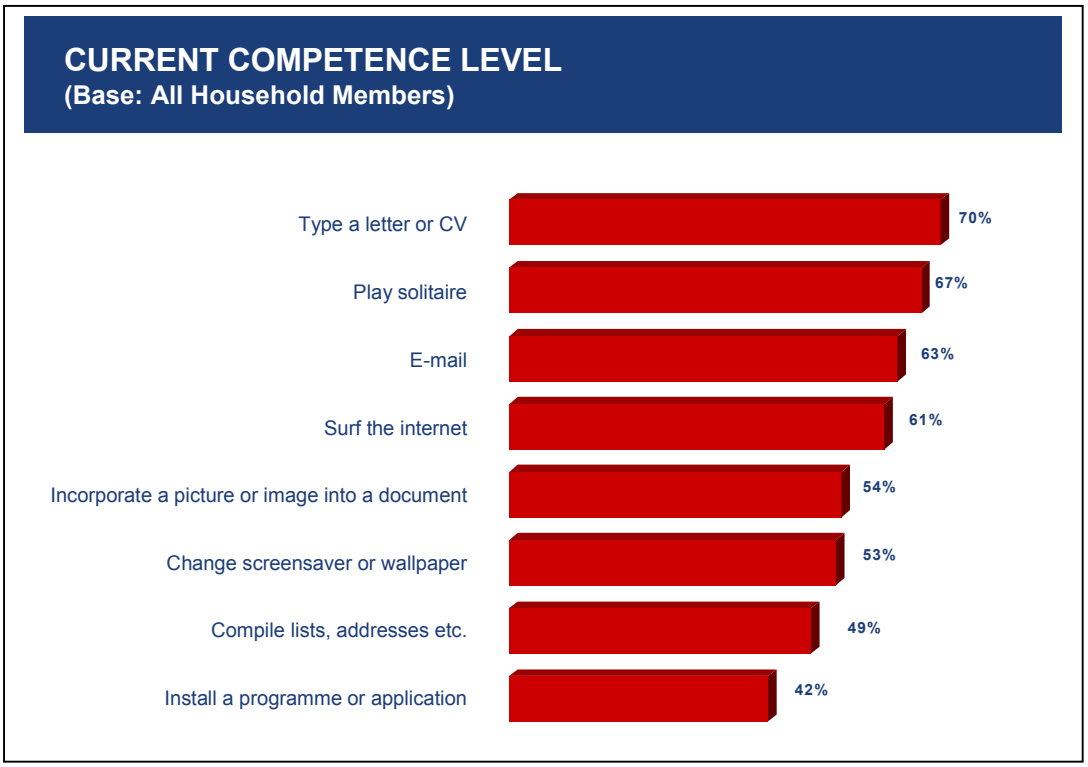


Younger males who are still studying are the people most likely to experience technical problems of this kind.

2.9 Current levels of competence in context

One of the objectives of the research project was to establish current levels of competence in computer technology. It would have been possible to ask people to assess themselves in this regard but the results would have been rather difficult to interpret. Different individuals might use different criteria and benchmarks. On this basis it was thought better to compile a list of tasks and to ask respondents which, if any of these, they could currently cope with.

The top 8 competencies are set out below



Not surprisingly, there are significant differences evident between different demographic groups in the skills they have acquired

CURRENT COMPETENCE X DEMOGRAPHICS – Part 1

	Total	AGE				Education	
		-12	13 - 17	18 - 54	55 +	Study-ing	Finish-ed
	%	%	%	%	%	%	%
Type a letter or CV	70	85	91	75	30	90	63
Play solitaire	67	95	91	72	25	87	61
E-mail	63	69	86	69	25	81	57
Surf the net	61	71	86	66	21	82	54
Incorporate a picture or image into a document	54	71	90	58	10	81	45
Change screensaver or wallpaper	53	73	84	57	10	75	46
Compile lists, addresses etc.	49	27	65	57	17	58	46
Use spreadsheets like Excel or similar	42	15	53	52	11	49	40
Install a programme or application	42	47	60	47	10	57	37

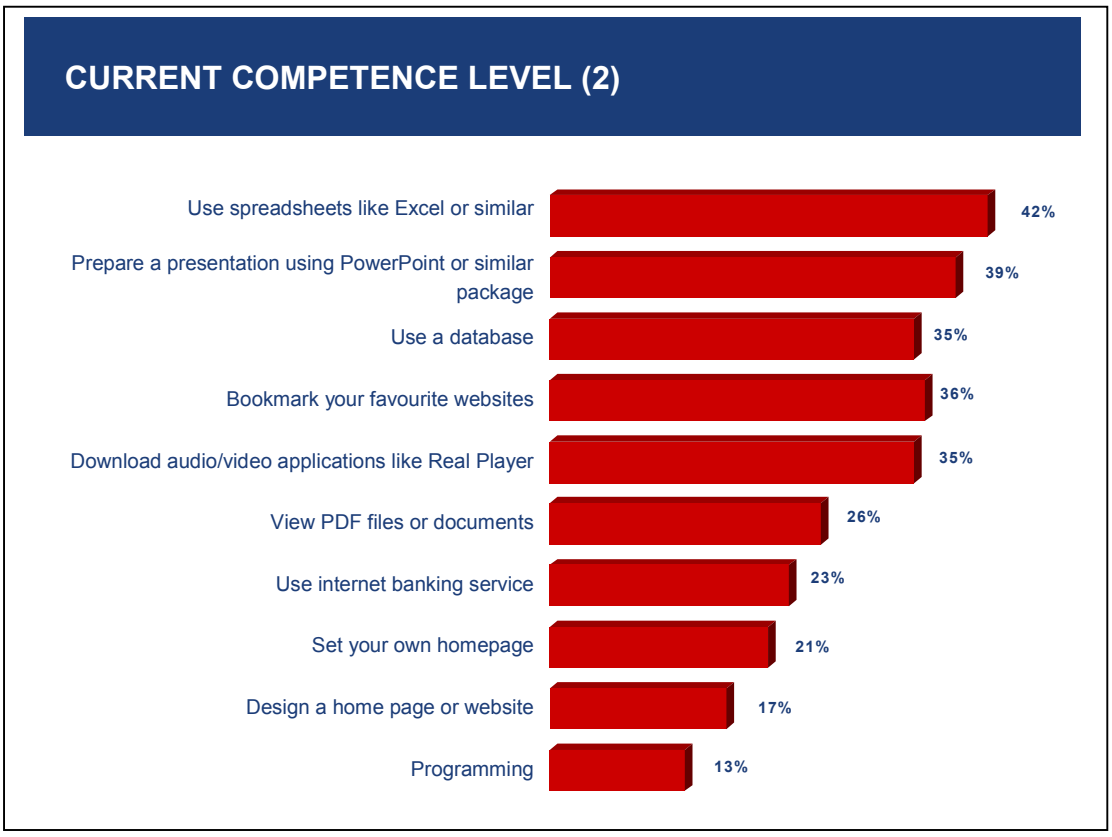
= high = low

It is immediately evident that there are very significant differences between people who are studying and those who have finished their education in the types of tasks they are confident about taking on.

Many of the tasks seem to be acquired at a very young age. Of the top 8, only compiling lists and addresses and using spreadsheets like Excel fall outside the competence of the youngest age cohort (9-12 year olds).

13-17 year olds are the group with the broadest range of capability while the adult age group (18-54) is a bit more constrained in its degree of competence. Nevertheless, the majority of adults can cope with the top 7 items listed.

Competence levels in the remaining 10 areas are set out below.



Here again there are very marked demographic differences evident as is clear below:

CURRENT COMPETENCE X DEMOGRAPHICS – Part 2

	Total	AGE				Education	
		-12	13 - 17	18 - 54	55 +	Study-ing	Finish-ed
	%	%	%	%	%	%	%
Prepare a presentation using PowerPoint or similar package	39	31	65	45	6	56	34
Bookmark your favourite websites	36	33	58	40	9	49	32
Download audio/video applications like Real Player	35	33	60	39	9	48	32
Use a database	35	13	35	45	10	37	35
View PDF files or documents	26	16	29	32	8	25	27
Use internet banking service	23	2	17	32	6	22	24
Set your own homepage	21	11	36	24	5	28	19
Design a home page or website	17	15	29	19	4	23	15
Computer programming	13	11	16	16	3	15	13

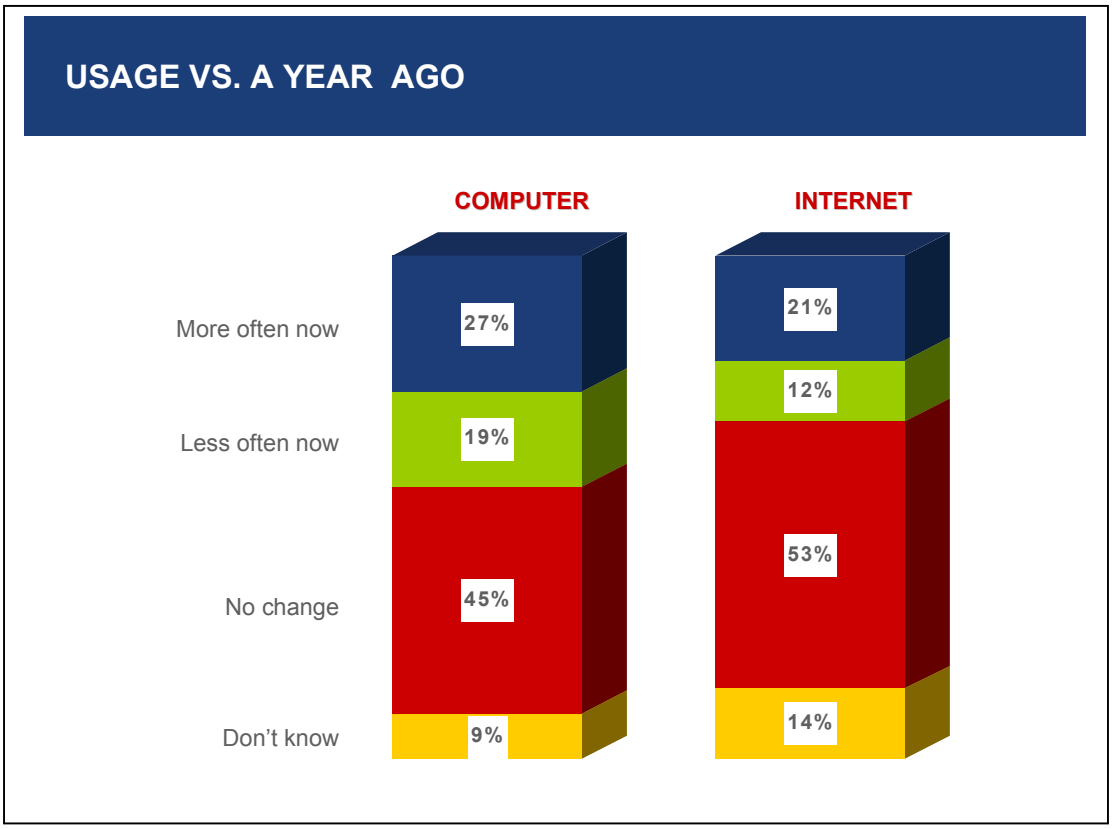
= high = low

People aged over 55 really have quite low levels of competence and certain specific applications have a very clear adult bias: using data bases, viewing PDF files or using internet banking services.

Some of the other applications such as preparing a presentation, book marking favourite websites or downloading audio, video applications are much more the preserve of teenagers.

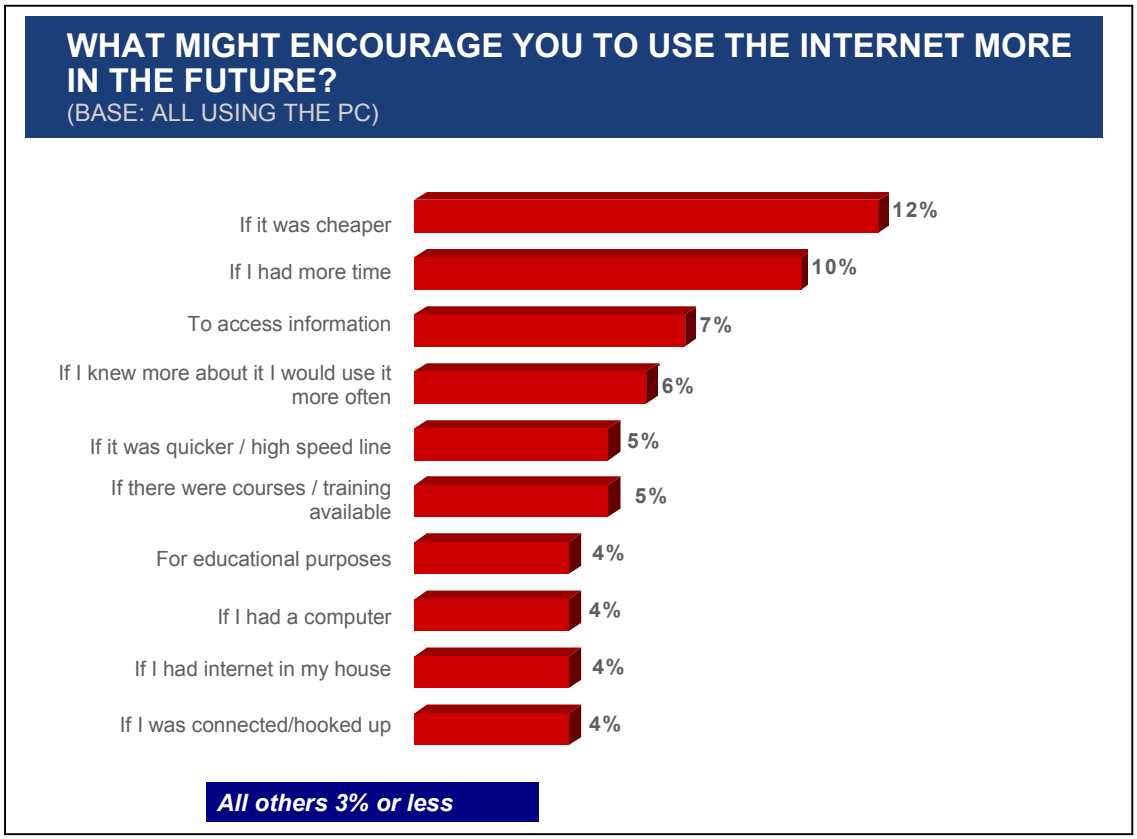
2.10 Usage continuing to grow

Judging by people's reported changes in usage over the past 12 months, it seems clear that people's usage of PC's and the Internet are continuing to grow as is evident here:



The largest single group has remained unchanged during the period in question. However there are significantly more people who say they are using either the computer or Internet services *more* often rather than less often nowadays.

The main stimulants to likely increased usage of the Internet are summarised below



The main extra stimulus is likely to come from:-

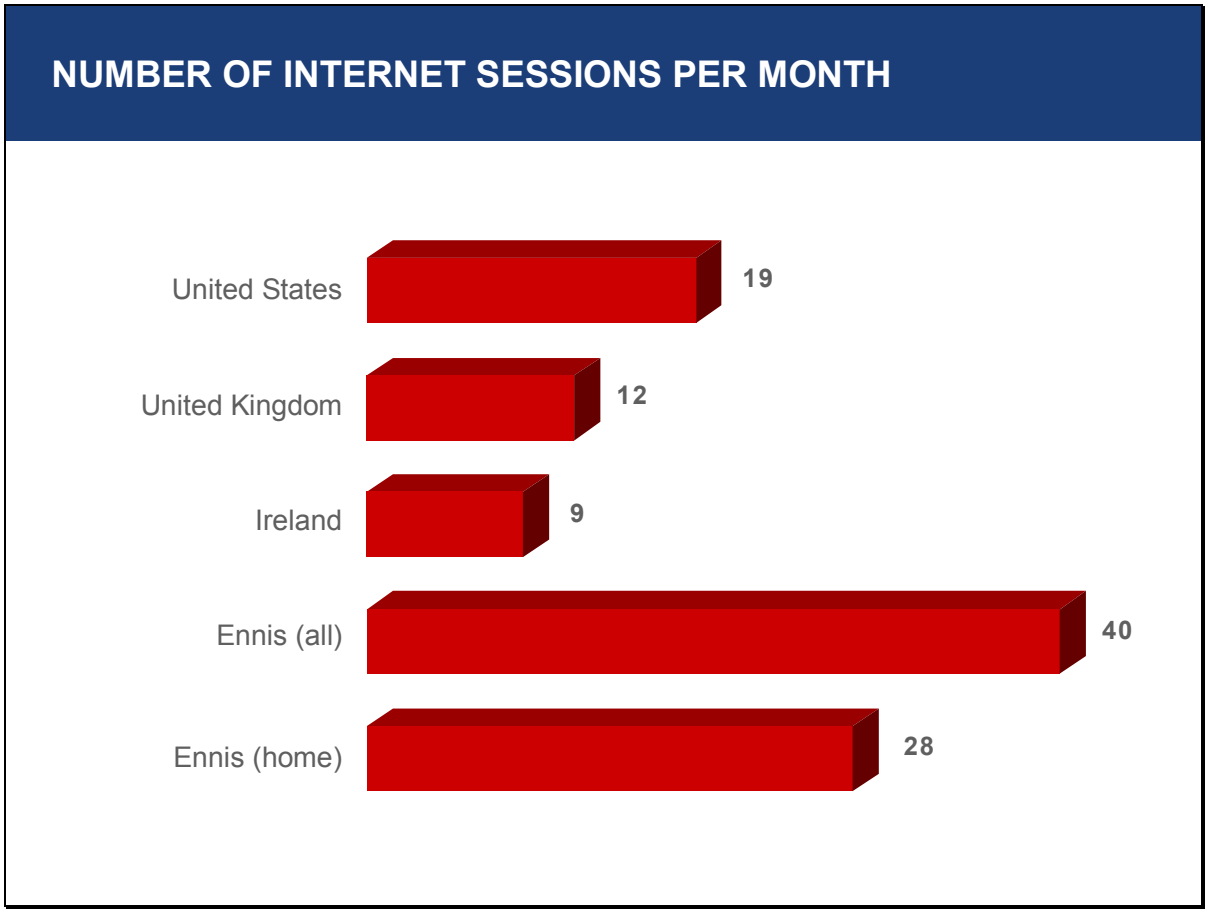
- If costs of on-going usage are reduced somewhat
- And people having extra time available
- And learning more applications

SECTION THREE
INTERNET USAGE PATTERN – SOME COMPARISONS

In this section of the report we draw some comparisons between international benchmarks and the Internet usage patterns reported in Ennis.

3.1 Internet Usage

Some relevant comparisons can be made with results reported in the Irish Communications Market Quarterly Review.

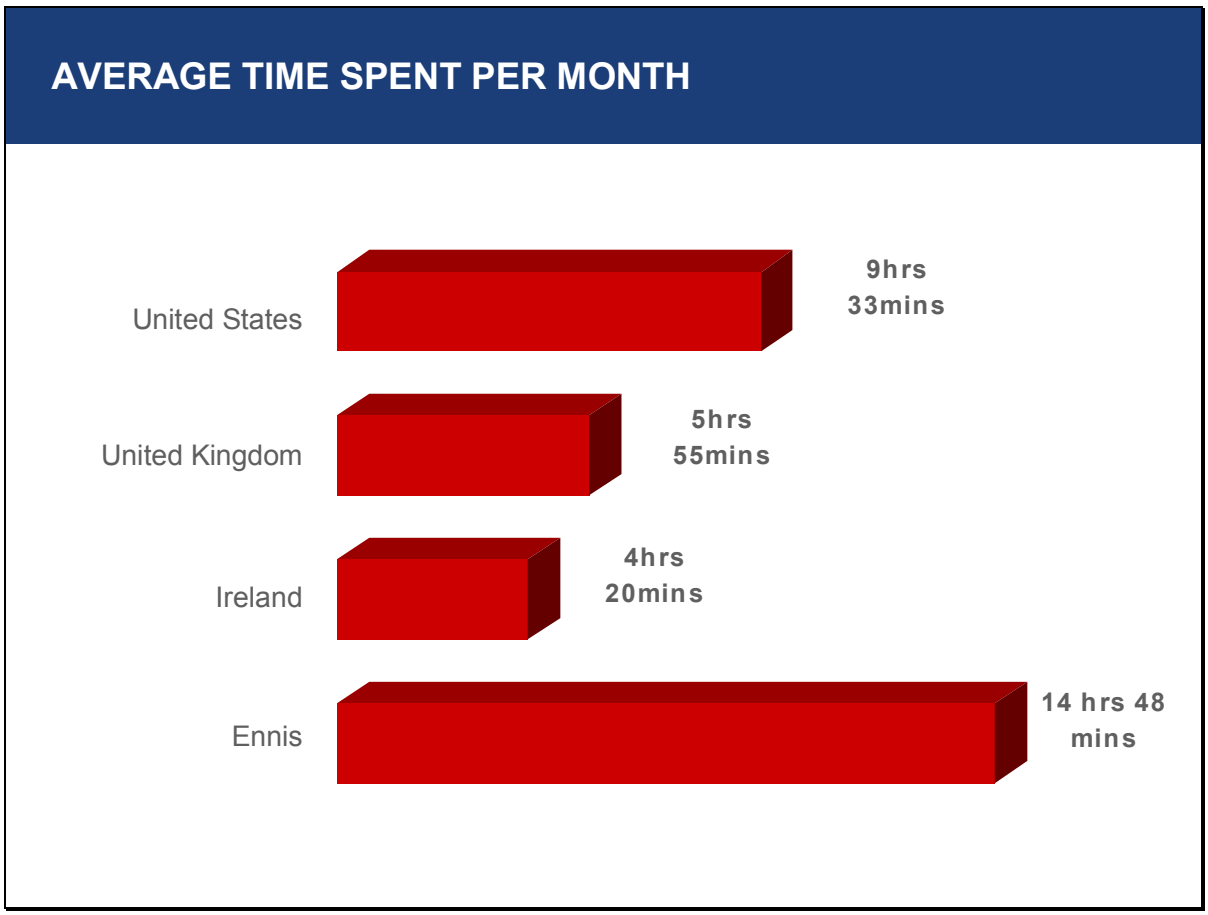


It is not quite clear from the reports whether the International comparisons relate to the Home only or to total Internet usage.

Whichever way we look at it, the typical Internet user (home and work) in Ennis, accesses the Internet with a frequency that is significantly above average.

3.2 Surfing Time

The indications are that Ennis surfers also spend longer periods of time surfing.



3.3 Usage Patterns

Amárach Consulting produce regular Reports or Internet Purchasing Patterns. Their most recent report suggests a rank order for purchasing different items, without giving precise figures. The rank order coincides with the general indicators from Ennis.

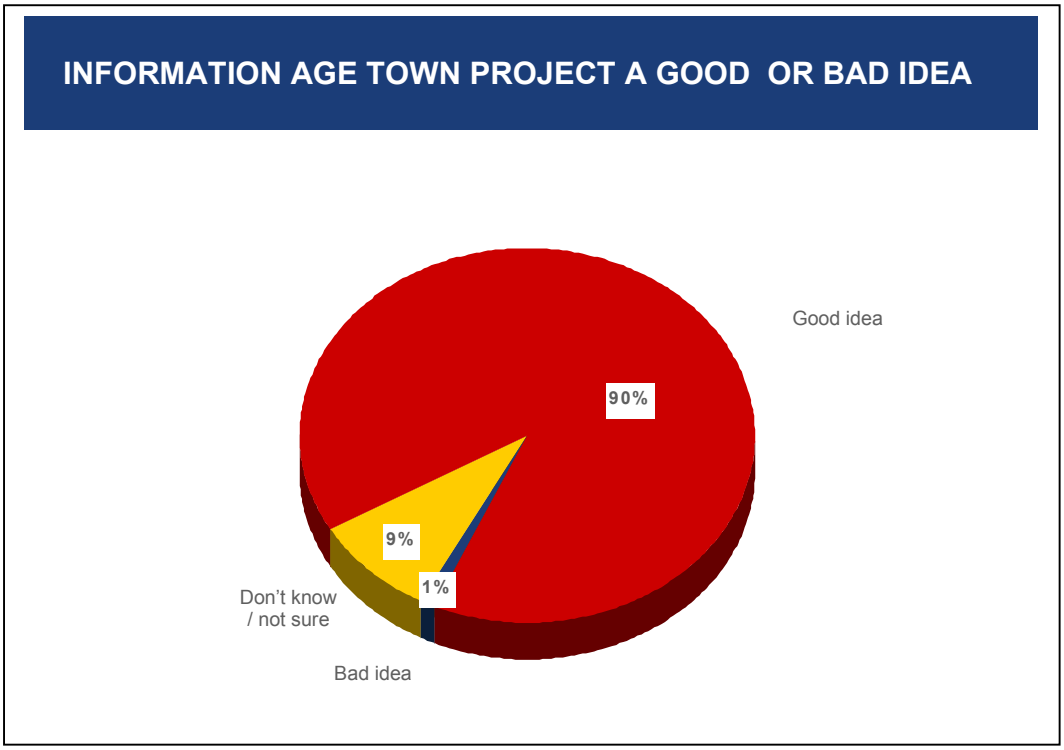
Amárach (rank)	Subject	Ennis Survey Equivalent
1.	Travel	52% of Internet users in Ennis have used the internet to check travel arrangements
2.	Books	3% in Ennis have bought via Internet
3.	Records / CD's	2% in Ennis have bought via the Internet

SECTON FOUR
INFORMATION AGE TOWN PROJECT
– AN APPRAISAL -

In this final section of the report we summarise people's views on the Information Age Town Project itself.

4.1 Overwhelmingly a good idea

Greater than 90% of people in Ennis consider the Information Age Town to have been a good idea.



The main reasons why they feel that the project was a good idea are set out below

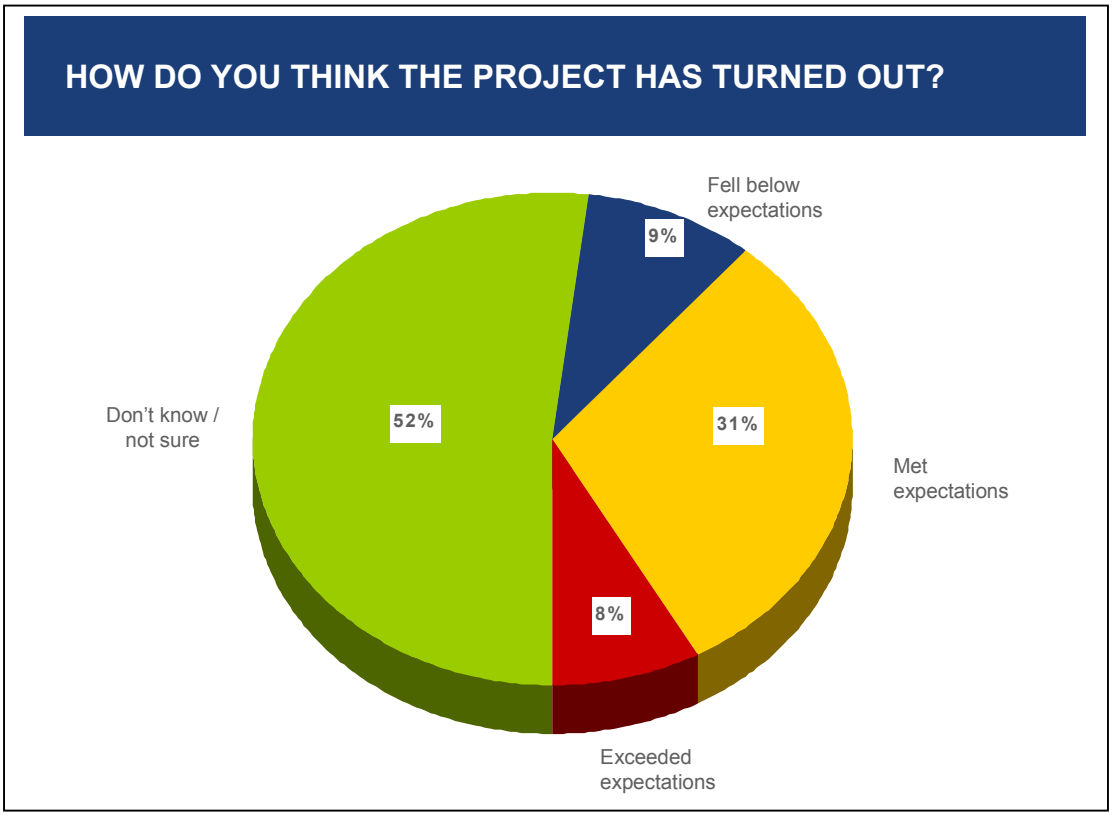
REASONS FOR OPINION OF 'ENNIS INFORMATION TOWN' IDEA

Base: All seeing as a good idea	Good idea
	%
People have become computer literate / have learned computer skills	21
Good for younger generation	20
People own their own computers	18
Boost for town itself / oppertunities for the town / puts town on the map / town is progressive	17
Gave people subsidised computers	9

Other answers all 5% or less

It can be seen that there are a variety of reasons put forward for this view. However the main positives relate to the benefits derived by individual residents and particularly by younger people. There is however also some considerable sense that the town as a whole has benefited from the venture.

As is evident from the following chart, many people have difficulty in assessing how the project turned out against their expectations, primarily because they did not know what to expect.



Among those who do have a view however by far the largest group feel that the project met expectations.

The pattern of reasons for having a positive view in this regard reflect what we saw earlier in regard to the assessment of the project overall.

REASONS FOR PROJECT RATING
(Base: Exceeded/Fell below)

Exceeded		Fell below	
	%		%
People are skilled/computer literate	20	Got computer and heard no more about it/no follow up	11
Every household got a computer	15	No great boom in business/expected more industry to the town	10
It is great for the town itself/puts the town on the map/prosperity for the town	14	Disappointing nothing special	9
Happy with scheme	8	Expected more courses/not enough training	9
Good for schools	7	No IT jobs created	9
Everything can be done on computer	7	It has fizzled out a bit	8
Educational	7	Need more backup	8
Great to keep accounts	7		
People did courses	6		

Among the minority who feel that the project has fallen below their expectations the main specific criticisms were:-

- That they got a computer and heard no more about it after that
- Some were disappointed that the financial benefit to the town were not even more marked.

People have a very clear understanding of what they see as being the most beneficial thing about the project overall

MOST BENEFICIAL THING ABOUT THE PROJECT OVERALL?
(Base: All household members)

	Total
	%
Every household has a computer	25
Gave people the opportunity to become computer literate – skilled in computers	17
Great for young people	16
People get subsidised computers	13
Good for schools to have computers	6
The internet – helped me to surf the internet	5

All others 5% or less

In simple terms the availability of computers and the opportunity provided for people to become computer literate are the main benefits that arise.

People have difficulty in nominating anything that might have been handled any better in the management of the project.

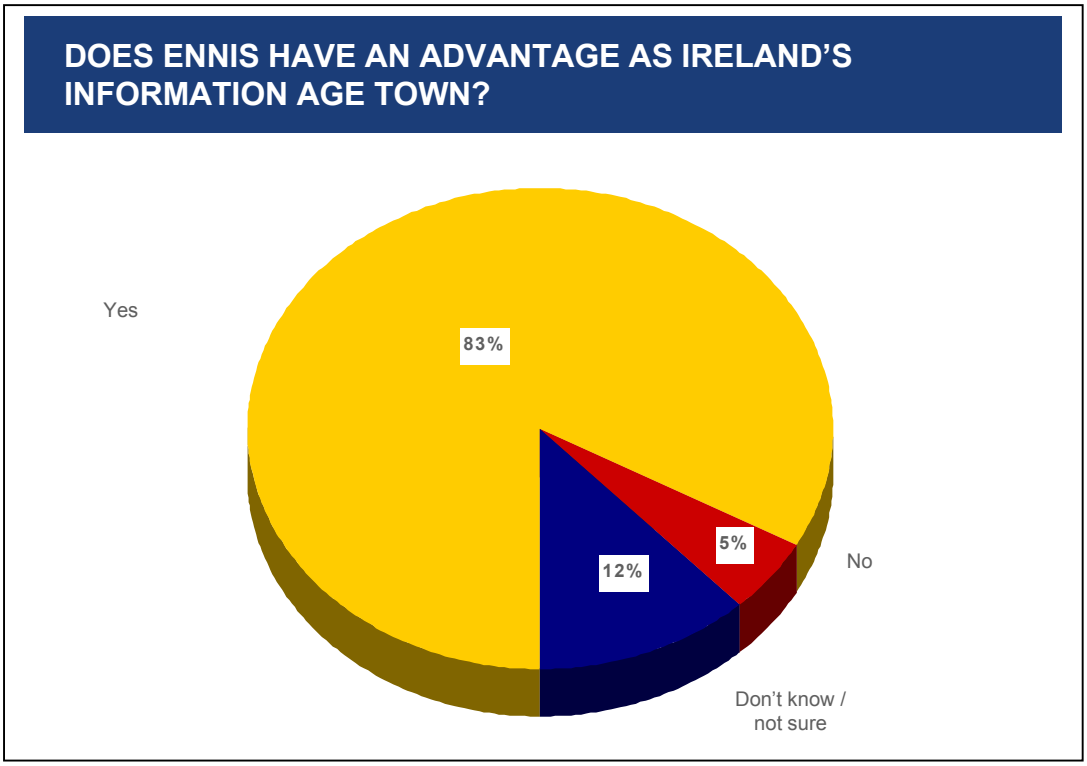
ASPECT OF THE PROJECT THAT COULD HAVE BEEN MANAGED BETTER?

	Total
	%
Nothing/DK	74
More courses/market courses/more training	8
Widen the perimeter of the offer/extend project/equality in distribution/give 2nd chance	3
There was no follow up after initial period	3
More information is necessary	2

All others 1% or less

It can be seen that three-quarters of Ennis residents can think of nothing that could have been handled better in the project. The main specific suggestion was that there could have been more courses and more training for people.

One very important consideration is that the vast majority of people in Ennis now believe that the town has an advantage as Ireland's Information Age Town



As with many of the other assessments, the reason for this positive disposition is a combination of feeling that the town has benefited on the one hand and individuals have been helped to improve their skills on the other.

MAIN ADVANTAGES

	%
More jobs available	12
People are computer literate/skilled in the use of computer	19
Every household has their own computer	14
Hs brought business/industry to town	17
Great for the town/put us on the map/town is progressing	24
Great for young people	13

All others 5% or less