

Suffolk Pathfinder: Attitudes towards New Technology



Suffolk County Council

October 2001

Introduction

Introduction: Research Objectives

- This document presents the findings of a survey conducted by MORI (Market and Opinion Research International) for Suffolk County Council.
- The objective of the research was to understand the attitudes and behaviour of Suffolk residents towards the electronic delivery of council services, with the specific interest of informing the Pathfinder project (i.e. iDTV and kiosks).
- Specific areas covered in the survey included:
 - access to, usage of and confidence in the internet and other new technology;
 - interest in receiving information or making transactions electronically;
 - preferred channels to access council services in the future;
 - activities in this domain likely to be conducted electronically;
 - interest in receiving information about the council or making transactions with the council via new technology; and
 - perceived advantages and disadvantages of using new technology.

Introduction: Methodology

- Interviews conducted by telephone, using CATI (Computer Assisted Telephone Interviewing).
- Using the *Suffolk Speaks!* Panel.
- Quotas were applied to ensure that the sample of residents interviewed reflected the profile of age, gender and work status of Suffolk residents as a whole.
- Results are weighted to reflect the county population profile (by age, work status and district).
- 750 interviews completed, 413 interviews with residents who have internet access at home.
- Fieldwork period: 11th - 24th October 2001.
- Where possible, comparisons are made with KMPG Consulting's e-government survey 2000 and the 2001 e-government survey.

Introduction: Publication of Findings

- As the Council has engaged MORI to provide an objective and representative programme of research, it is important to protect the Council's interests by ensuring that it is accurately reflected in any press release or publication of the findings. As part of our standard terms and conditions, therefore, the publication of the data in this volume is subject to the advance approval of MORI. This would only be refused on the grounds of inaccuracy or misinterpretation of the findings.
- *Colin Wilby & Hannah Gray*

MORI J15350

December 2001

Key Findings

Looking to the Future: Using New Technology

- Internet penetration is higher within Suffolk than recorded nationally.
 - However, take-up of new technology is not uniform across the population.
- The telephone is currently - by some distance - the method of communication people feel most comfortable with. Many people - particularly the more vulnerable and those on the wrong side of the digital divide, prefer to get in touch in person.
- There is some interest in being able to access services electronically, mainly to find out information rather than - at this stage - to make a transaction. For the moment, the internet is not really a top of mind method that people would think of using when getting in touch with the Council.
- A first step would be to put broad ranging information on the web to build people's familiarity in accessing information electronically. Usage of more interactive services will follow later.
- Indeed, the research suggests that people could respond positively to new approaches - indeed, in three or so year's time residents say using the internet at home would be their preferred method of contacting the council - bringing with it benefits to the individual and organisational benefits.
- Concerns over using the internet focus mainly on the confidentiality of information and that it would not lead to problems being dealt with more quickly.

Looking to the Future: Using New Technology

- Enthusiasm surrounding usage of e-services is higher among those who already have internet access.
 - However, those with internet access still tend to be typified as being younger and more middle-class, leaving out the socially excluded - who have the greatest need to access services.
 - Those who are not confident in using the internet highlight access as the key barrier.
 - However, from previous national research, we know that people have been very quick to take on new technology, such as mobile phones and digital TV.
 - What 'encouragement' is needed to get more people using electronic services? Ease of access and cost incentives are key for many people. Assurances on the confidentiality and security of using electronic methods are also a top priority.
 - For the foreseeable future, therefore, it does seem the new ICT-based methods of communication will need to be balanced by the maintenance of more traditional methods of getting in touch with, and accessing, local services. Assuming a business case is proven, there will need to be a carefully thought out multi-channel delivery strategy.
 - A key early step will be building awareness of what is available and what benefits it can bring to residents.

Next Steps: Issues for Discussion

- How will people react when they see what electronic access methods are available in practice?
- It will be important to undertake some diagnostic work where people are shown the new services first hand - to see how they react and to ensure their comments and concerns are reflected in the 'final product'.
- It will also be important to reflect on lessons learned nationally and in other authorities, before moving on to further specific research and/or testing.
- And it will be necessary to ensure that the work is conducted among a cross-section of people, so that the new services are developed sensitively and in a way that reflects the contrasting needs of different groups.

Detailed results

Access to New Technology

Current Access to New Technology

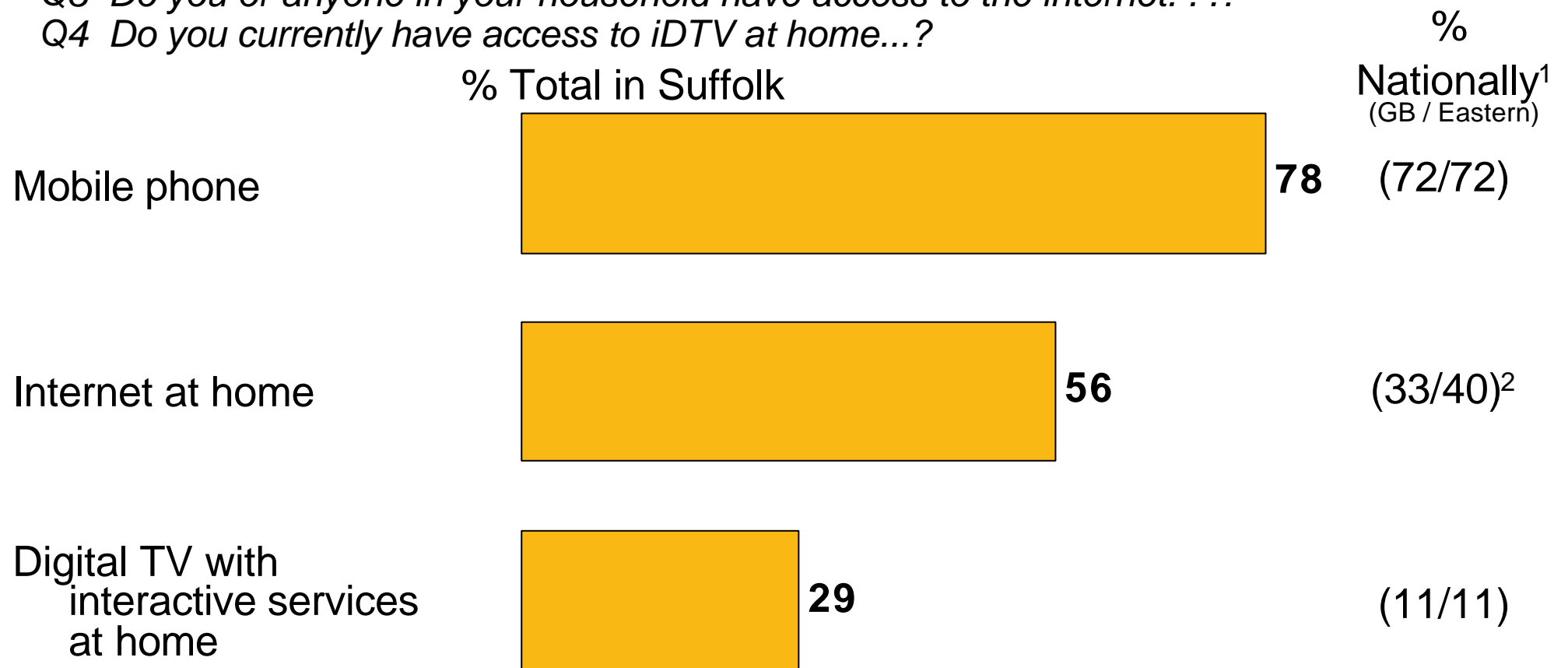
- Seven in ten (70%) of Panel members say they have access to the internet at home or elsewhere e.g. at work or college.
 - 56% have access at home, compared with 49% recorded earlier this year from the Panel (34% of GB public say they have access at home, October 2001 MORI Technology Tracker Survey, face-to-face interviewing)
 - A further 14% have access elsewhere
 - 30% do not have access
- However, significant disparities on access to new technology occur within the population.
 - 67% of the under 55s compared with 36% of the over 55s have internet access at home
 - 63% of ABC1C2s compared with 30% of DEs have internet access at home
 - 88% of the under 55s compared with 60% of the over 55s say they have a mobile phone
- Other *Suffolk Speaks!* Research shows that 14% of those with no internet access say they are planning to have access within the next two years.

Access

Q5 Do you own a mobile phone or a WAP mobile phone?

Q3 Do you or anyone in your household have access to the internet. . .?

Q4 Do you currently have access to iDTV at home...?



Base: Suffolk residents aged 16+ (750)

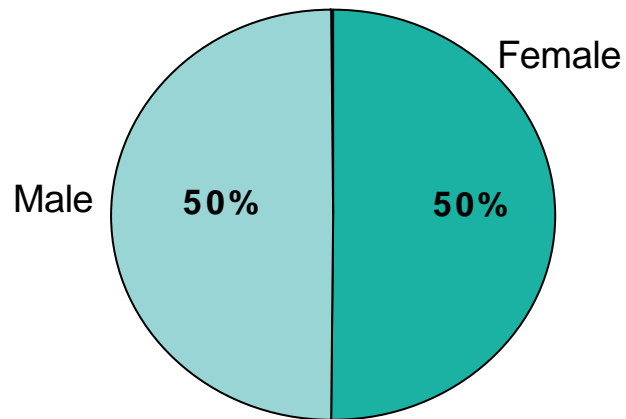
Base¹: MORI Technology Tracker, October 2001 (GB: 4,037, Eastern: 372)

Wording²: Internet usage at home

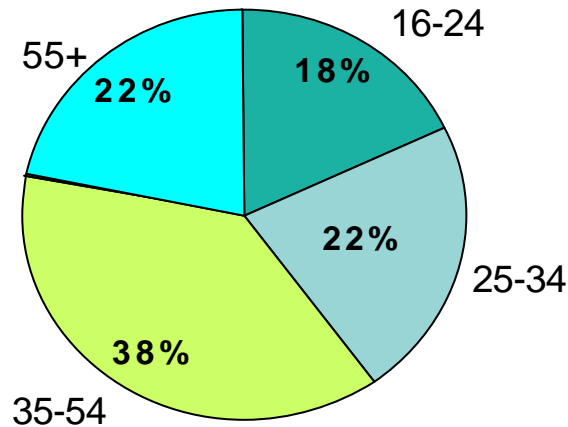
Who has internet access?

Q3 Do you or anyone in your household have access to the internet at home . . . ?

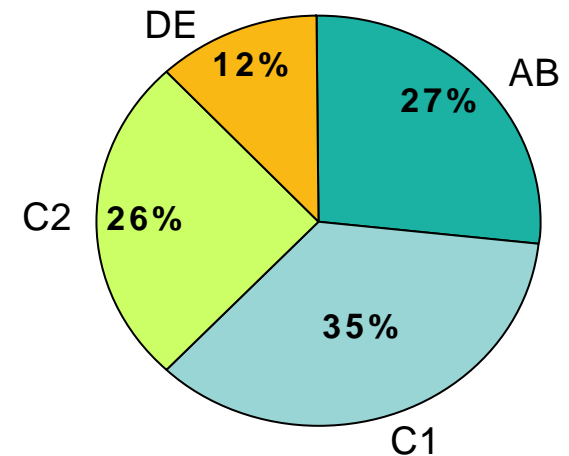
Gender



Age



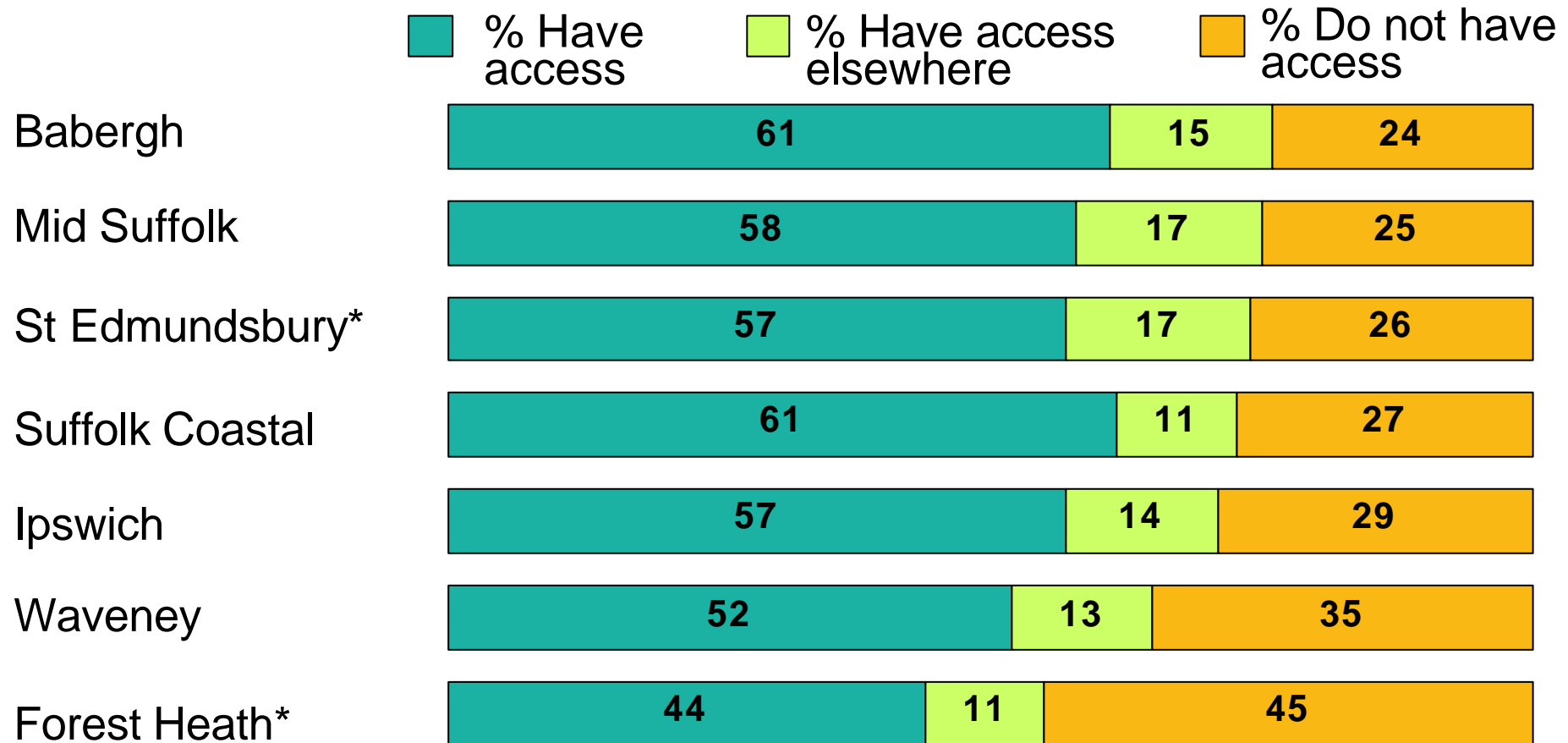
Social Grade



Base: Suffolk residents 16+ with internet access at home (413)

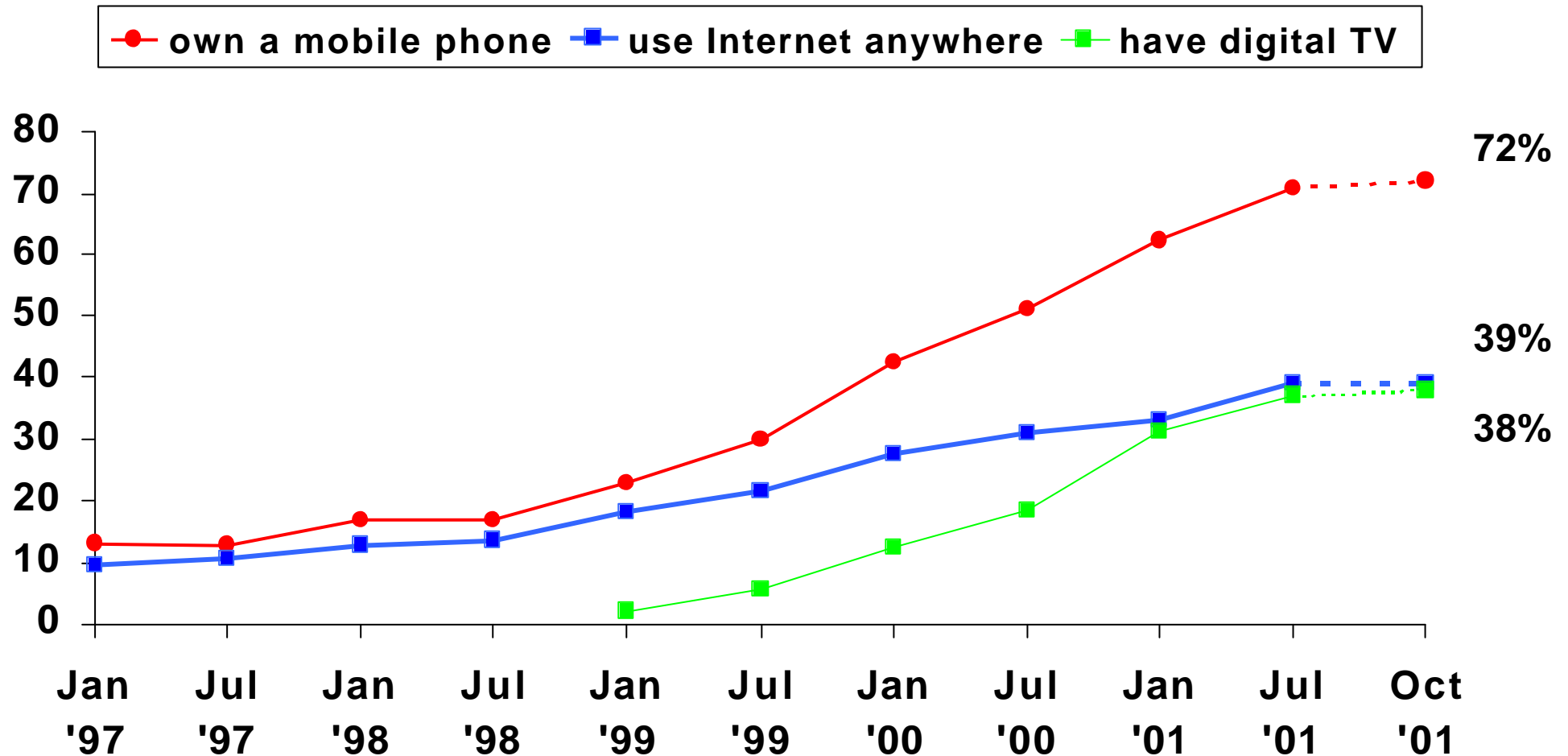
District internet access

Q3 Do you currently have access to the internet at home or elsewhere . . . ?



Base: Suffolk residents aged 16+ (750) * Note: small base size

e-MORI technology national trends



e-MORI Technology Tracker Jan 1997 - October 2001

Base: circa 4,000 interviews per month

* Jan 2001 question wording change

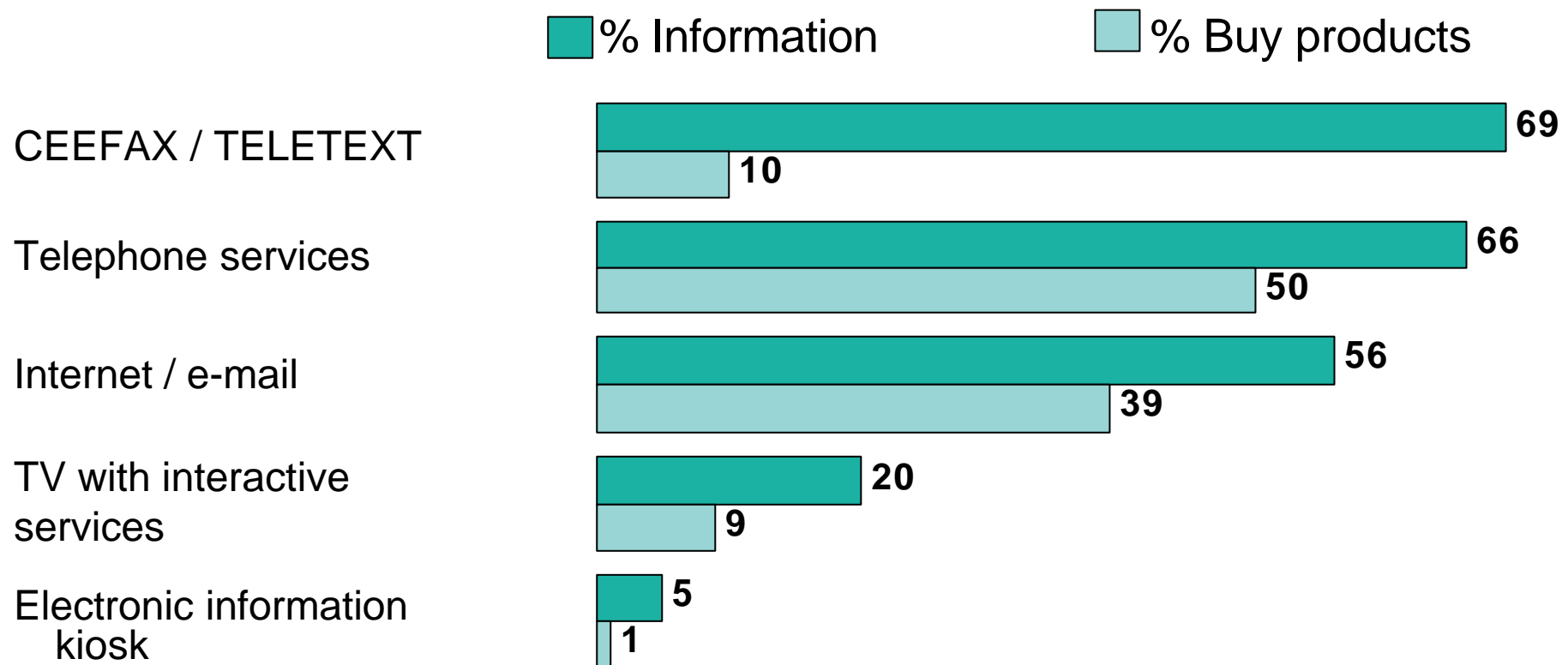
MORI

Channel Usage

- Over half of Panel members have used TELETXT, the phone or the internet to **find out information** (69%, 66% and 56% respectively). One in twelve (8%) say they have never used any of the methods listed to find out information [see next slide].
- 80% of 16-24 year olds have used the internet or e-mail to find out information compared with 32% of the over 55s
- Half (50%) of Panel members have also **bought products** over the phone and two-fifths (39%) have used the internet for this purpose. A third (32%) have never bought products using one of the methods listed [see next slide].
- 48% of respondents have not used one of the electronic methods listed to buy a product, this compares with 27% of 16-24 year olds who say they have not

Channel Usage

Q6/Q7 Which of the following, if any, have you used to find out information or advice....
to buy products?



Base: Suffolk residents aged 16+ (750)

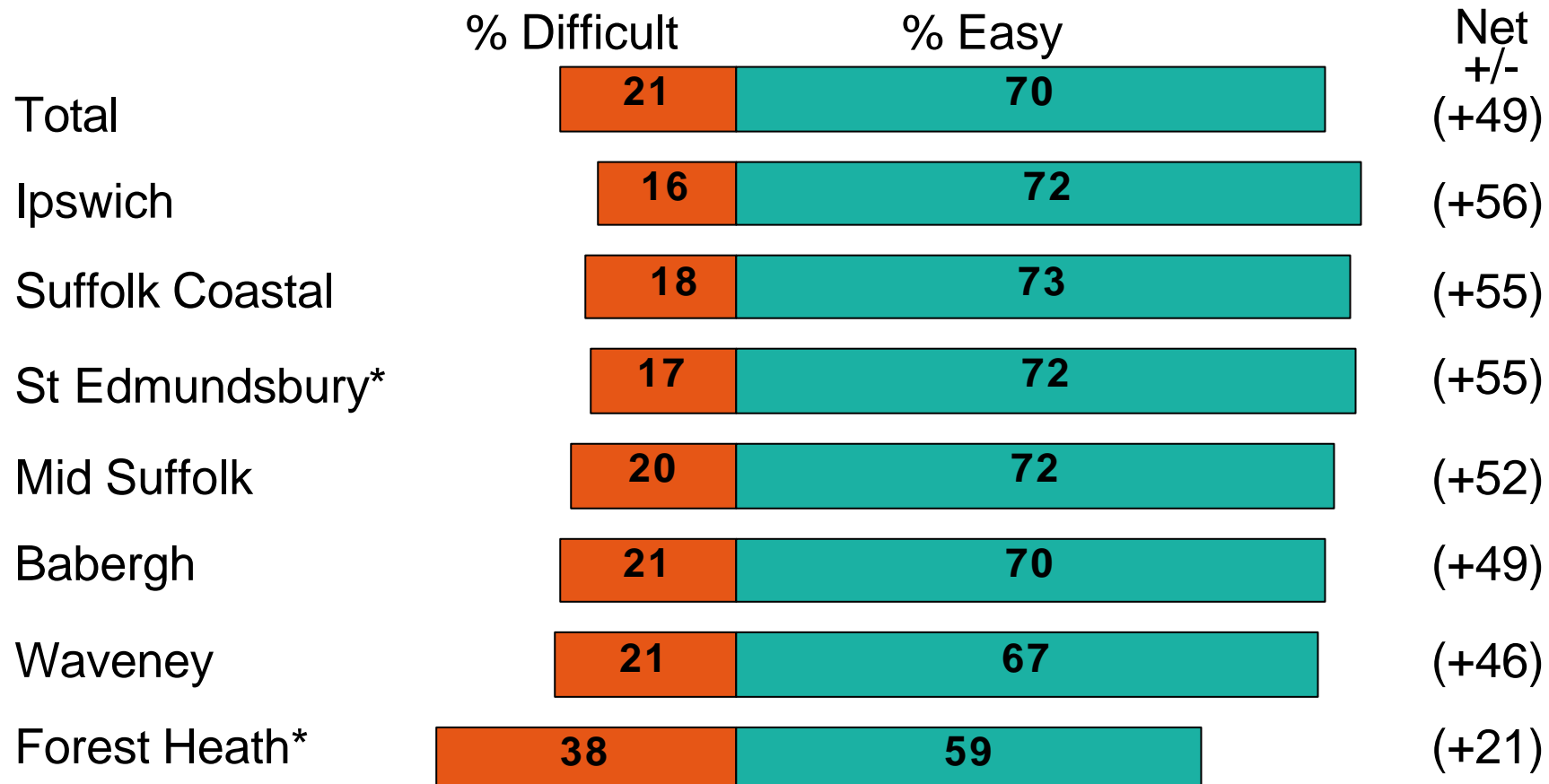
MORI

Current Access to New Technology

- 70% of Panel members say it is easy for them to access new technology (such as the internet or iDTV), 21% say it is difficult to do so.
- Reflecting image patterns, younger people find it easier to access technology than older people (87% of 16-34 year olds versus 48% of over 55s say it is easy)
- Lower socio-economic groups find it more difficult to access technology (76% of ABC1s versus 51% of DEs say it is easy)
- Three-fifths (59%) of Panel members feel confident when using a PC to access the internet. Although a higher proportion of respondents feel confident when using telephone services or TELETEXT (83% and 76% respectively).
- 85% of internet users at home are confident in using the internet
 - 75% of those interested in finding out information about the Council electronically are confident in using the internet, compared with 37% who say they are not interested
 - Younger people are more confident using the internet than older people (79% of 16-34 year olds versus 34% of the over 55s feel confident)
 - Those who are not confident in using the internet say (spontaneously) it is because they don't understand how it works and have not had any experience.

District: Ease of access

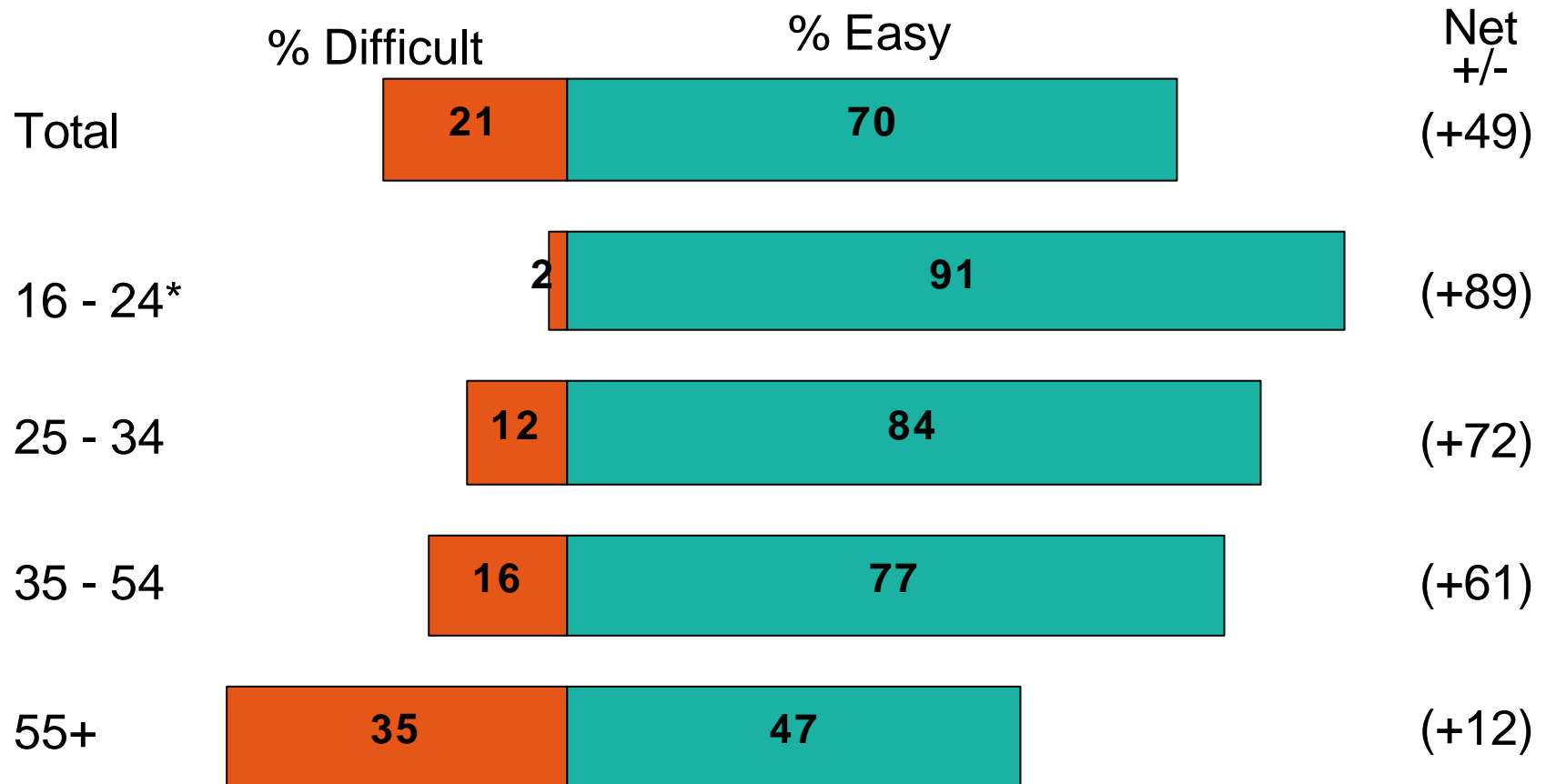
Q2 How easy or difficult is it for you to access new technology?



Base: Suffolk residents aged 16+ (750) * Note: small base size

Age: Ease of access

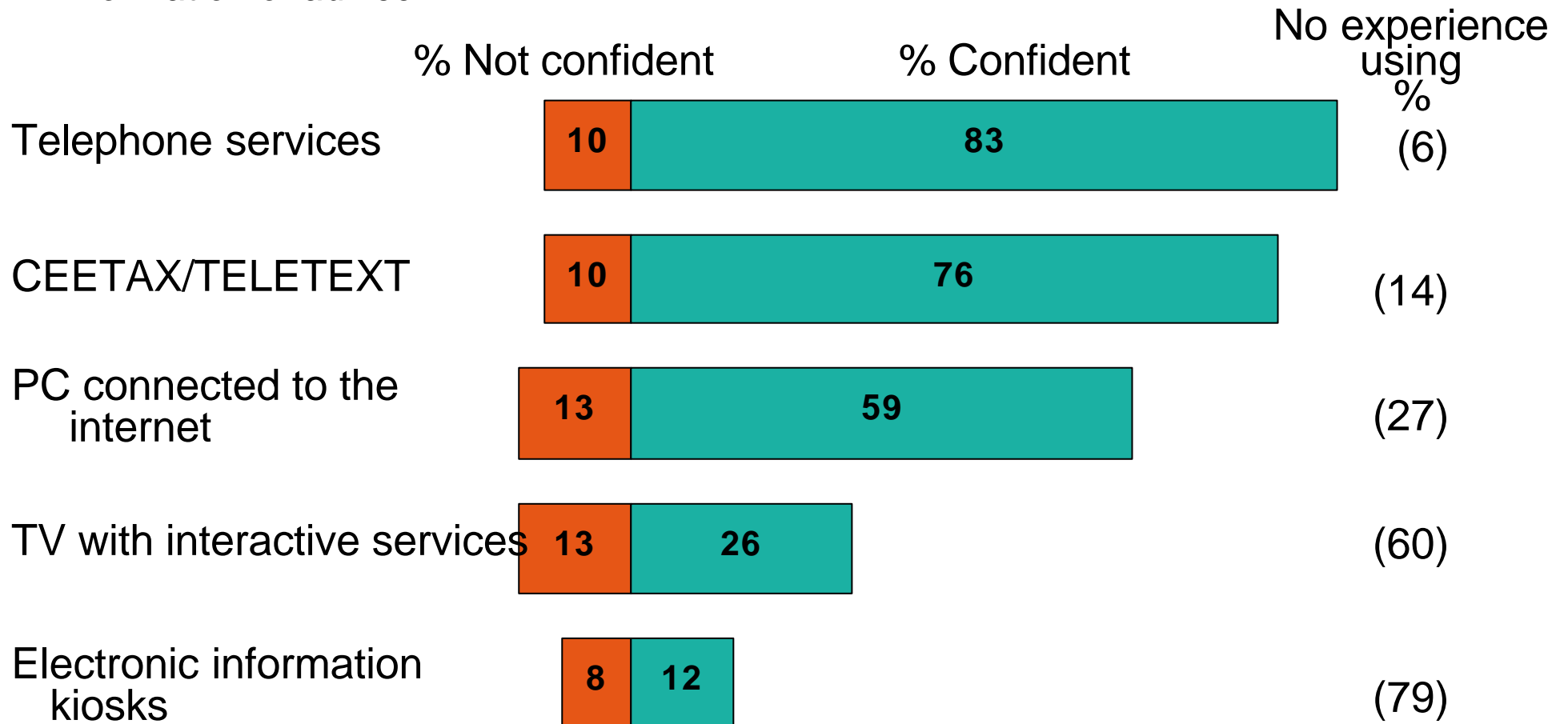
Q2 How easy or difficult is it for you to access new technology?



Base: Suffolk residents aged 16+ (750) * Note: small base size

Confidence when using technology

Q11 How confident or unconfident do you feel about using each of the following to get information or advice?

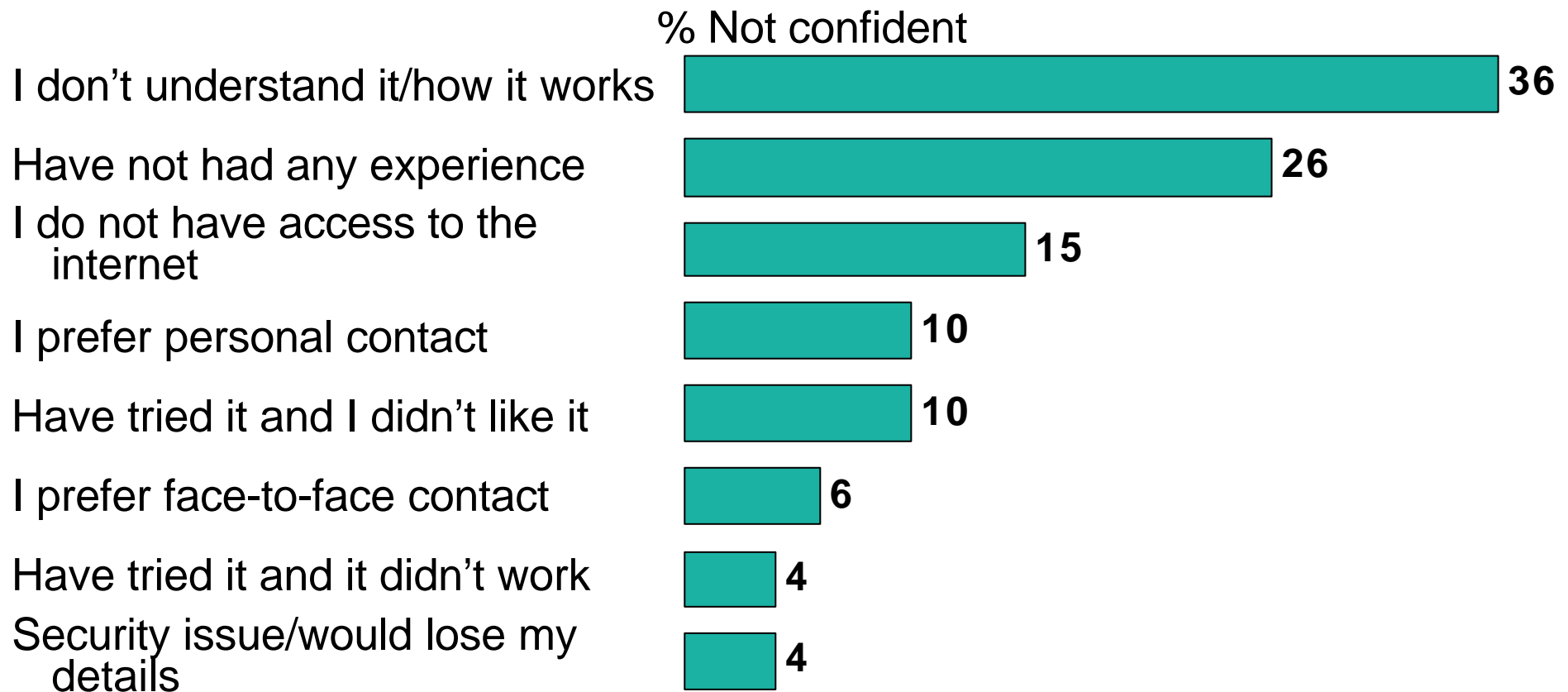


Base: Suffolk residents aged 16+ (750)

MORI

Issues with internet usage

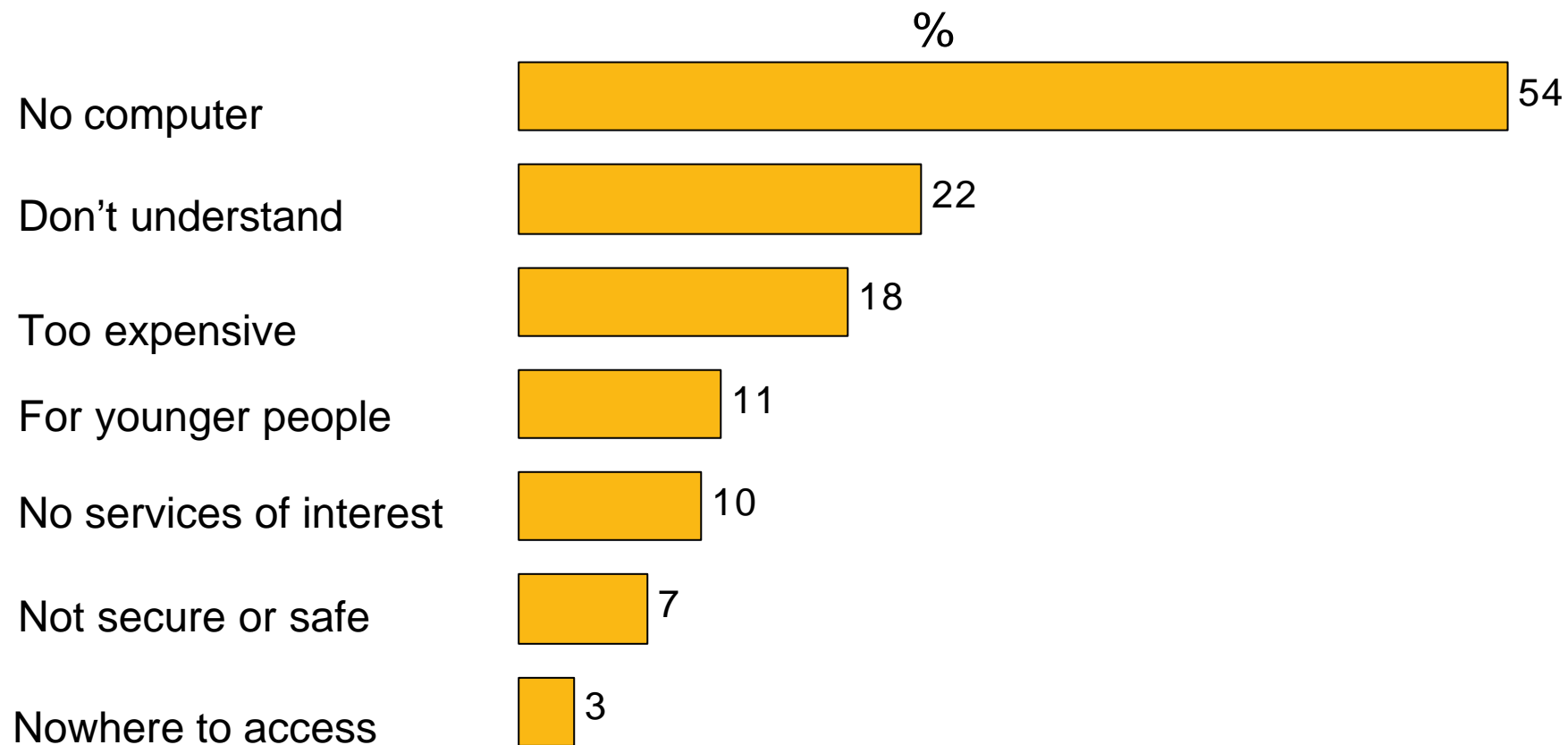
Q12 *And why do you say that you are not confident in using a PC connected to the internet?*



Base: All not confident in using the internet (107)

Reasons for not using the internet (National Data)

Q7 Which, if any, of these are reasons why you do not use the internet?

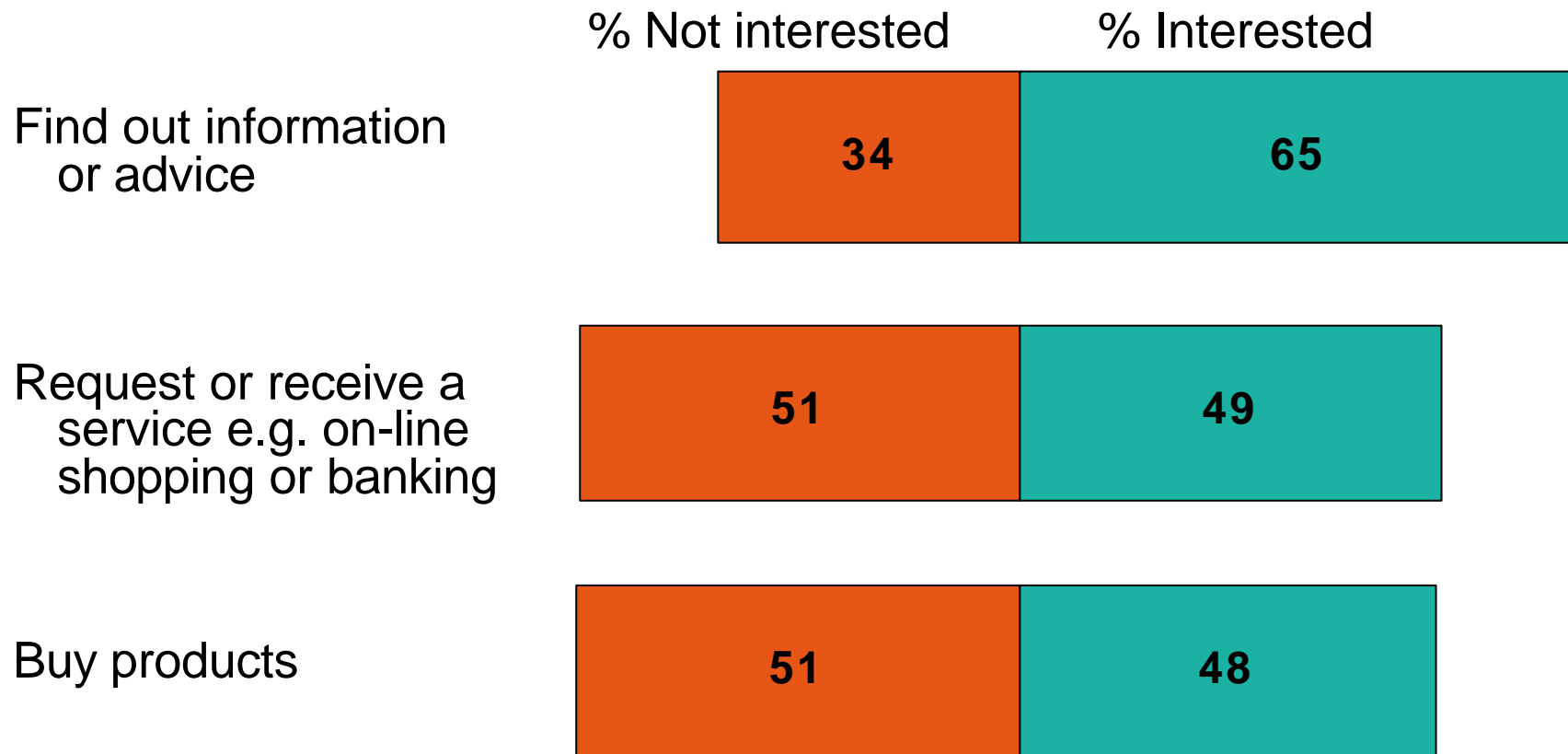


Base: All GB adults aged 16+ who do not use the internet (1,366)

Interest in New Technology

Interest in using technology

Q8-Q10 *How interested, if at all, are you in using new technology (such as the internet or TV with interactive services) to?*



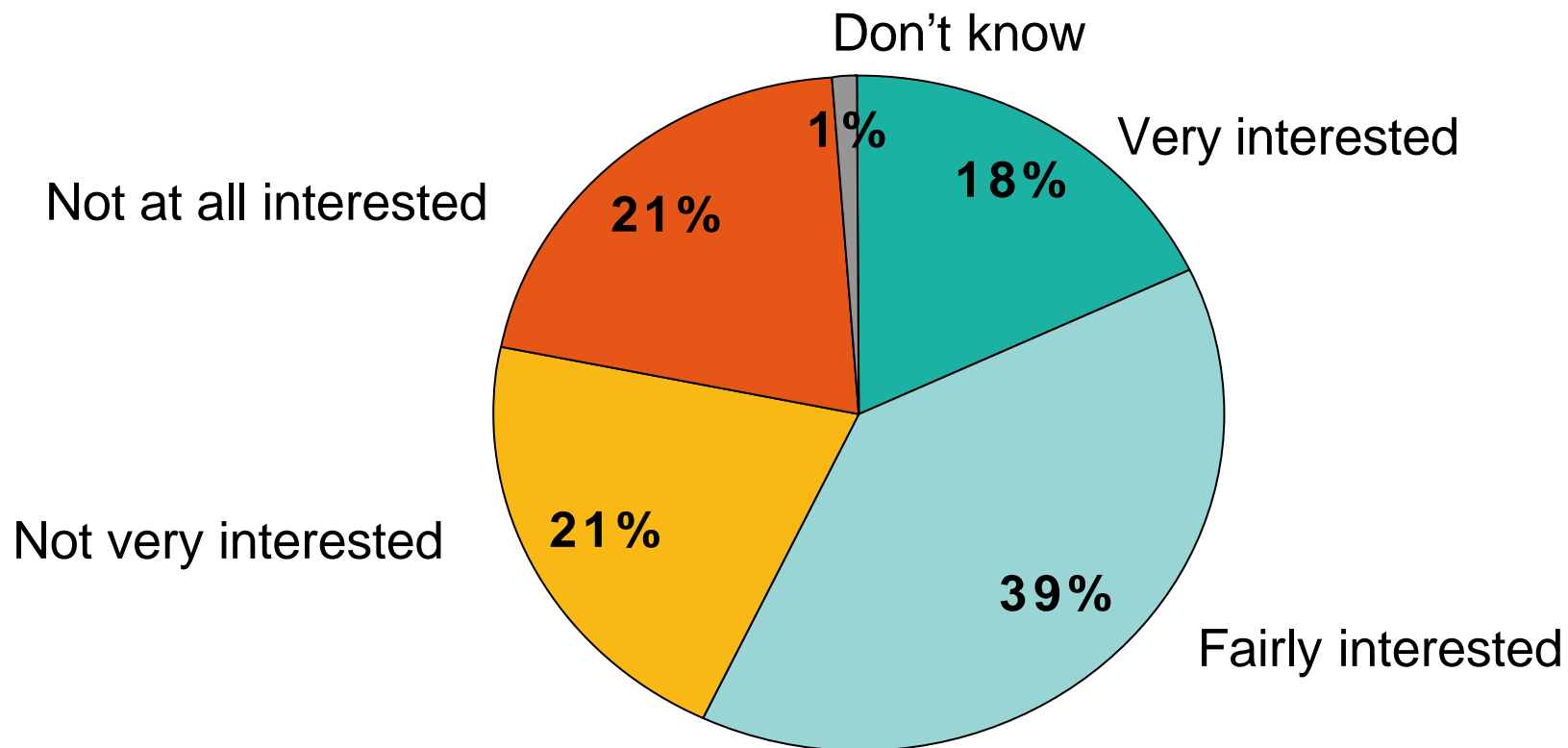
Base: Suffolk residents aged 16+ (750)

Overall Interest in e-Services

- 57% of Panel members say they are interested in **obtaining information about local council services** via the internet or other electronic means.
 - This includes 18% who say they would be *very* interested.
- 29% of the GB public say they would be at least fairly interested in receiving government information electronically (e-Government survey 2001).
- Those with internet access are over twice as likely as those without to be interested in the idea of receiving this type of information electronically (69% versus 30%).
- Interest increases among younger respondents, as it does among higher social grades.
 - 72% of those aged 16-34 are interested compared to 41% among those aged over 55
 - 59% of ABs say they are interested, while 49% of DEs cite this as being the case

Overall Interest

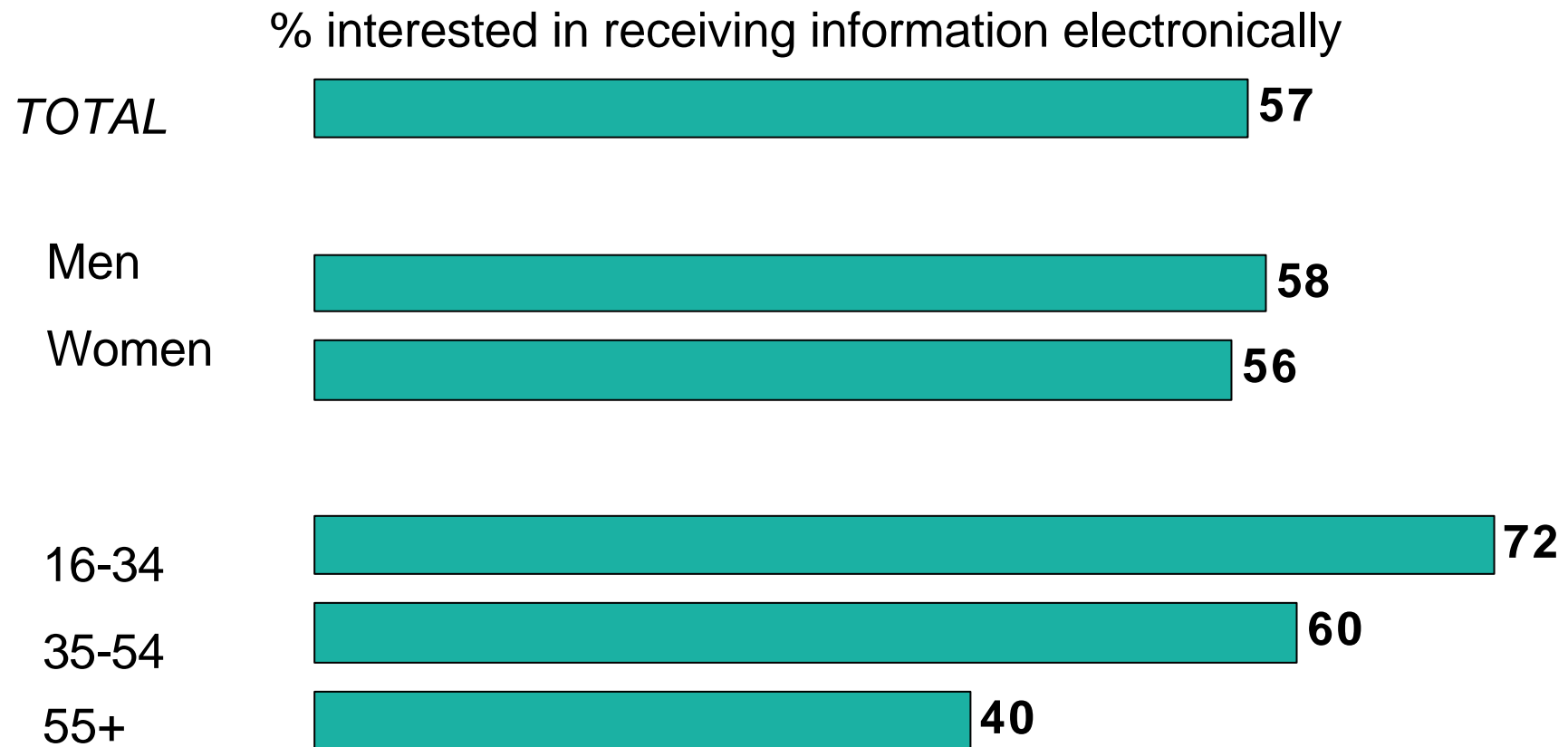
Q3 *How interested or not, would you be in obtaining information about local council services via the internet or any other electronic means?*



Base: Suffolk residents aged 16+ (750)

Overall Interest: sub-group differences

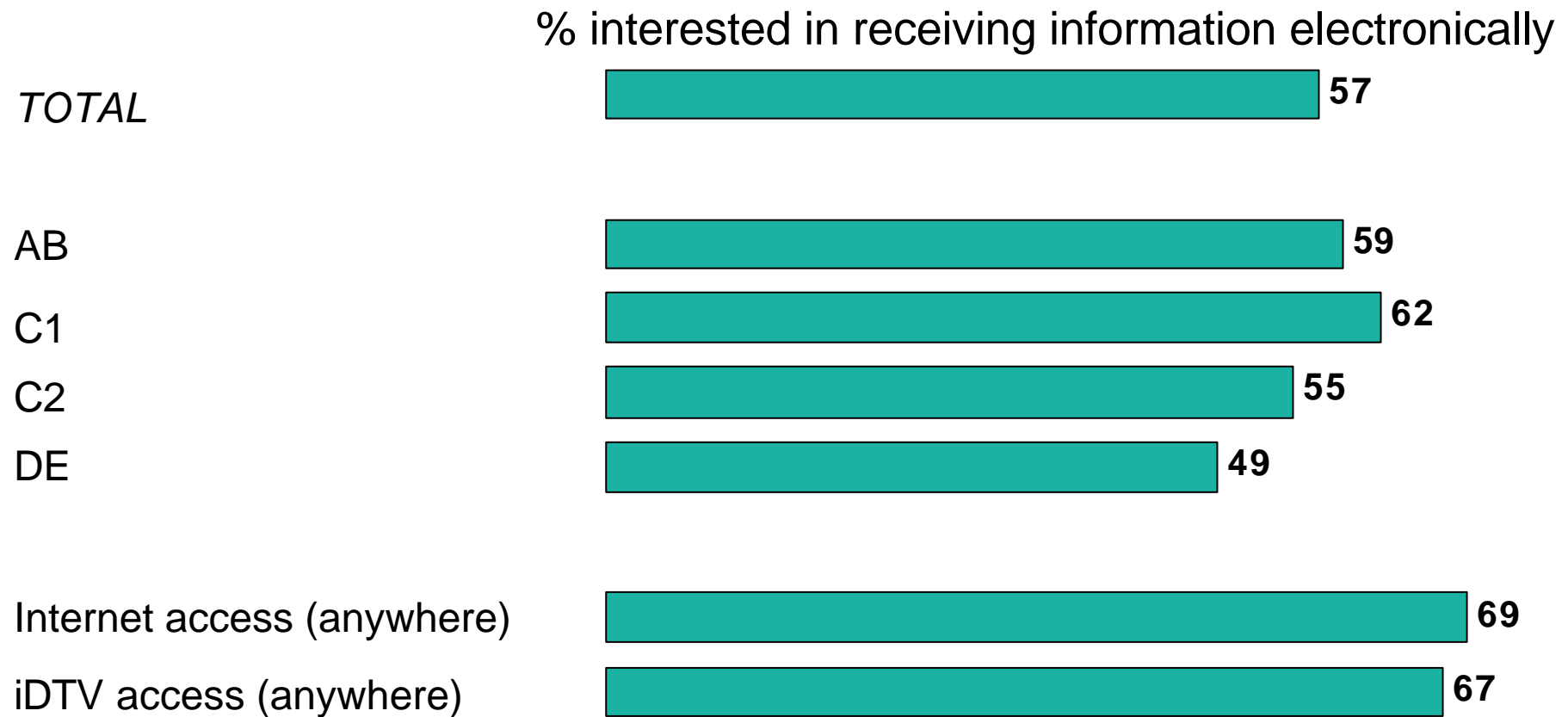
Q3 *How interested or not, would you be in obtaining information about local council services via the internet or any other electronic means?*



Base: Suffolk residents aged 16+ (750)

Overall Interest: sub-group differences

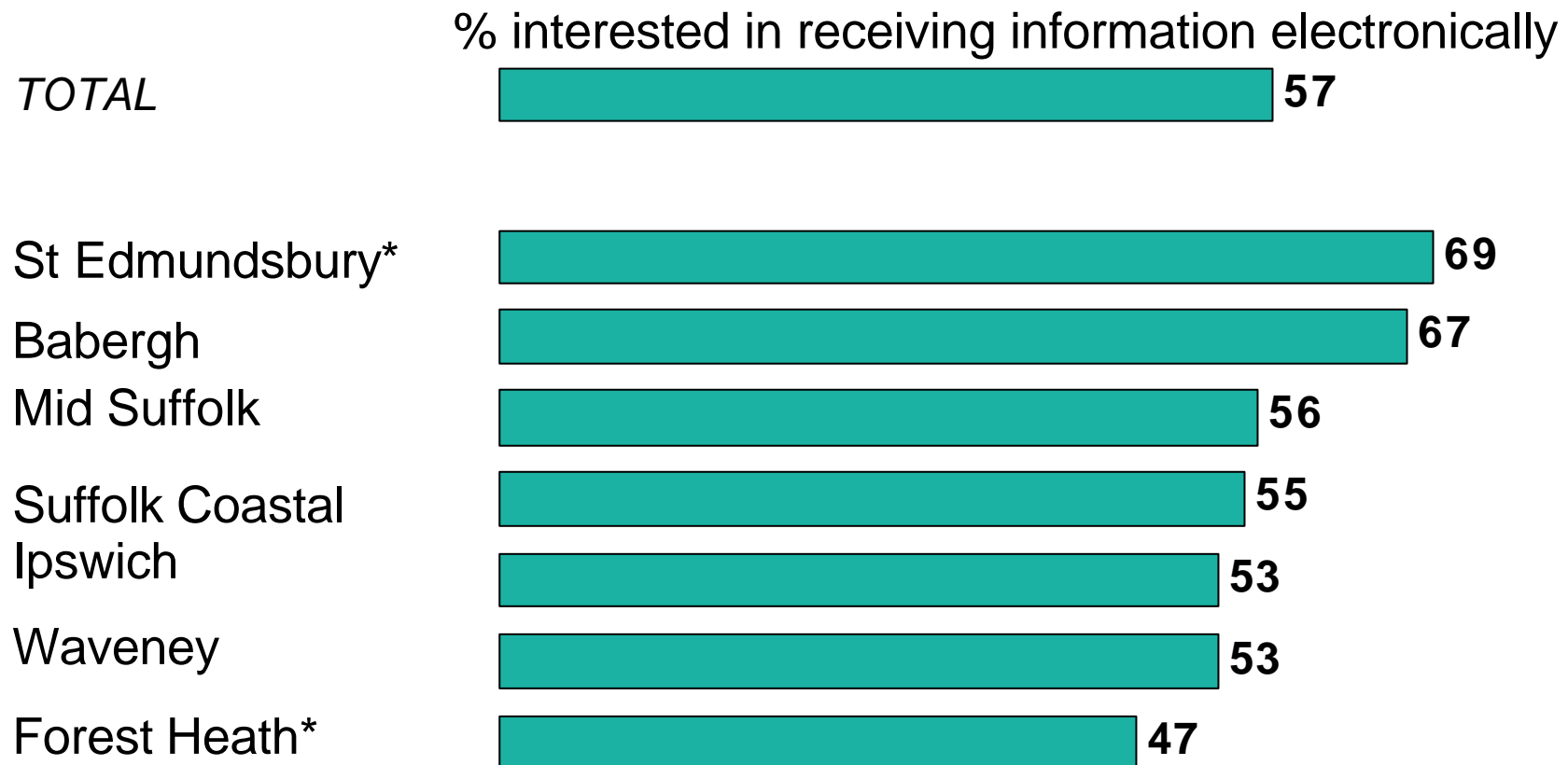
Q3 *How interested, or not, would you be in receiving information about local council services, via the internet or any other electronic means?*



Base: Suffolk residents aged 16+ (750)

Overall Interest: sub-group differences

Q3 *How interested, or not, would you be in receiving information about local council services, via the internet or any other electronic means?*



Base: Suffolk residents aged 16+ (750) * Note: small base size

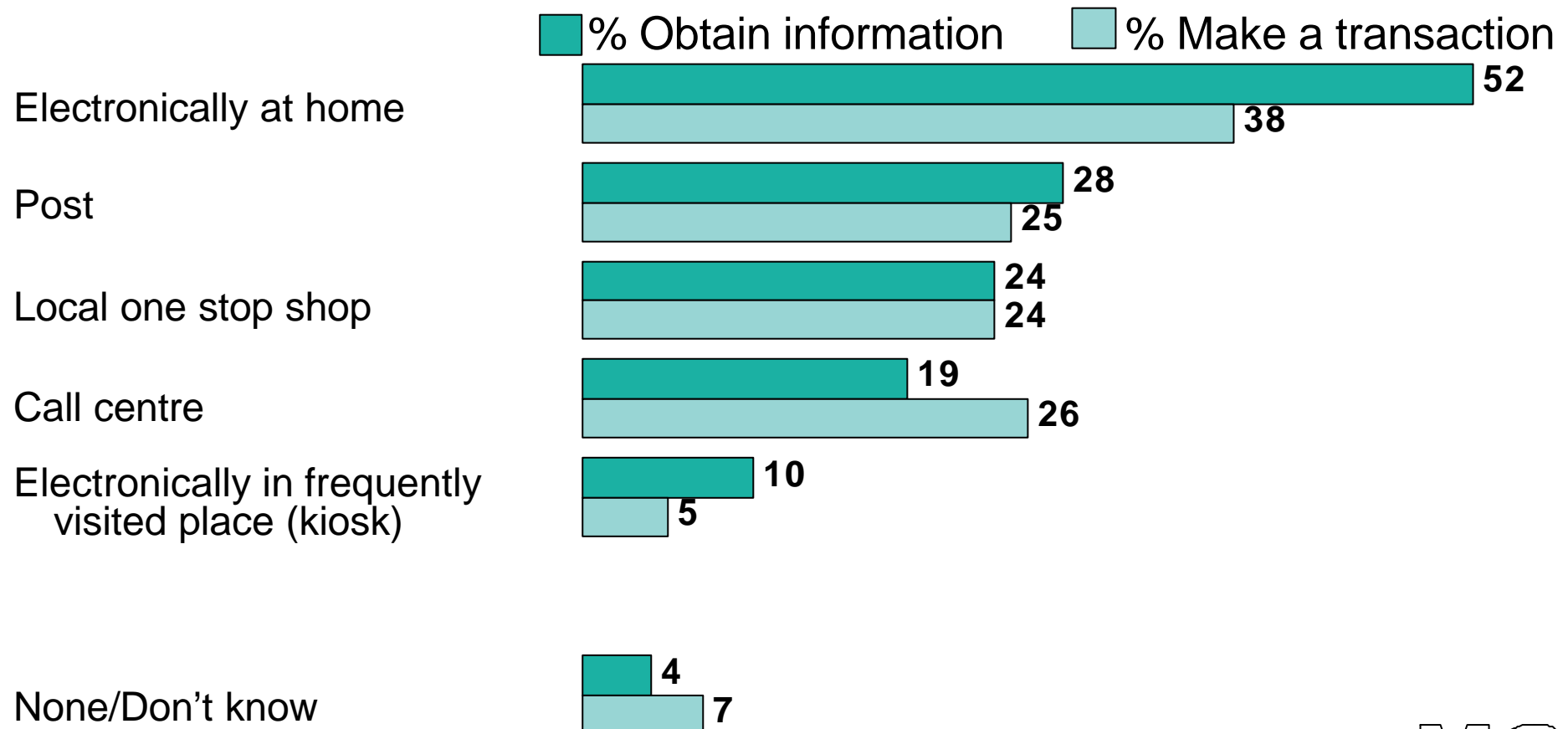
Channel Preferences

Channel Preferences

- Over half (52%) of the Panel members would prefer to **obtain information** electronically about local council services in 3 or 4 year's time. Fewer, 38%, would prefer this method when **making a transaction** for a local council service.
- Emphasising that the e-agenda is not only about moving public services online, preferences are also strong for contacting the council by post and through a call centre or one-stop-shop. Few state kiosks as their preferred choice, perhaps due to a lack of awareness and availability of this method.
- Channel preferences vary considerably according to social class and age group.
 - 63% of ABs preferred method of accessing information in 3 years time is the internet compared with 33% DEs
 - 22% of ABs choose the post, while 34% of DEs do so

Future Channel Preferences

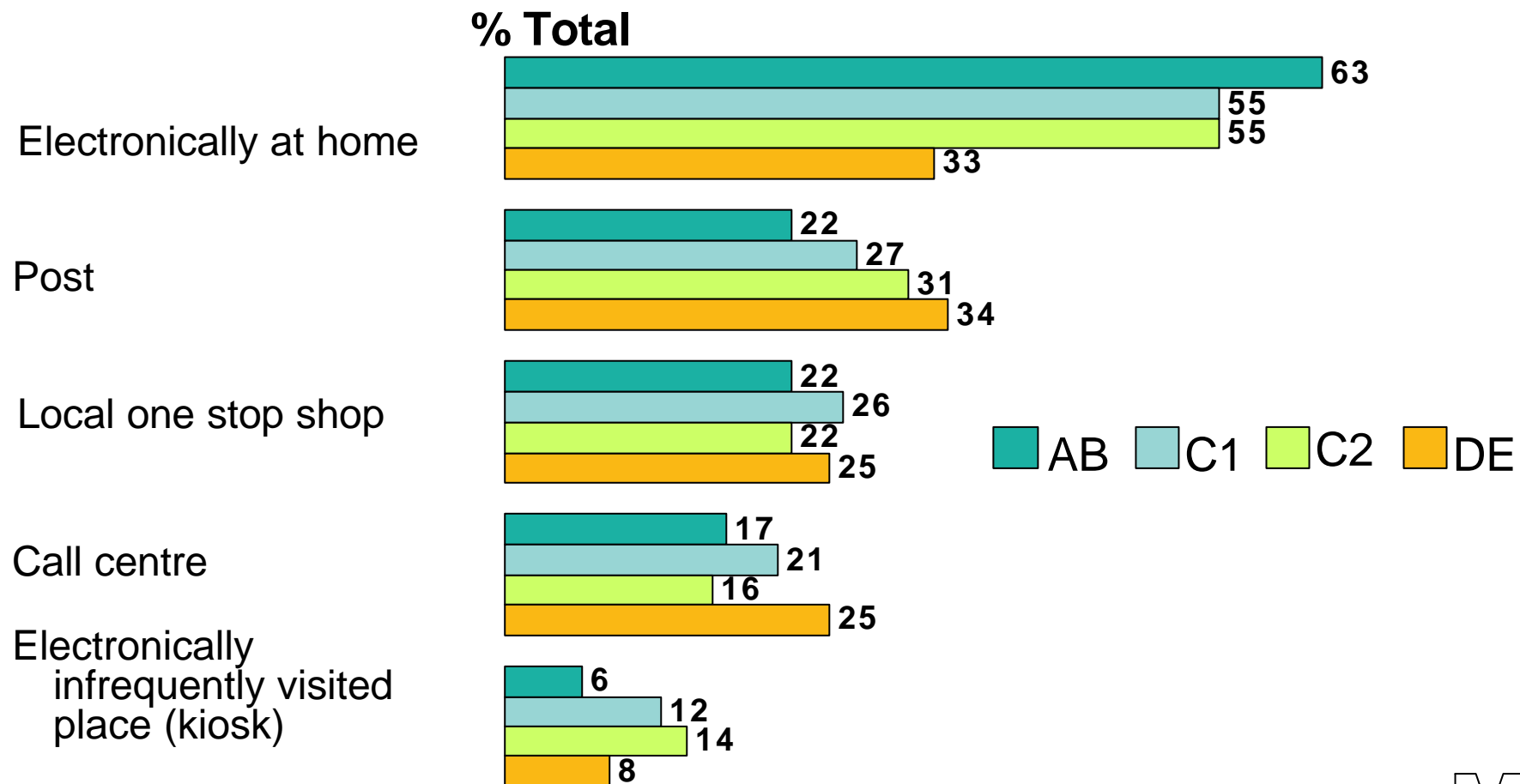
Q4/Q5 *In three years time, which one or two, if any, of these would you prefer to use when obtaining information about council services . . . or make a transaction for a local council service?*



Base: Suffolk residents aged 16+ (750)

Future Channel Preferences: Social Class Profile

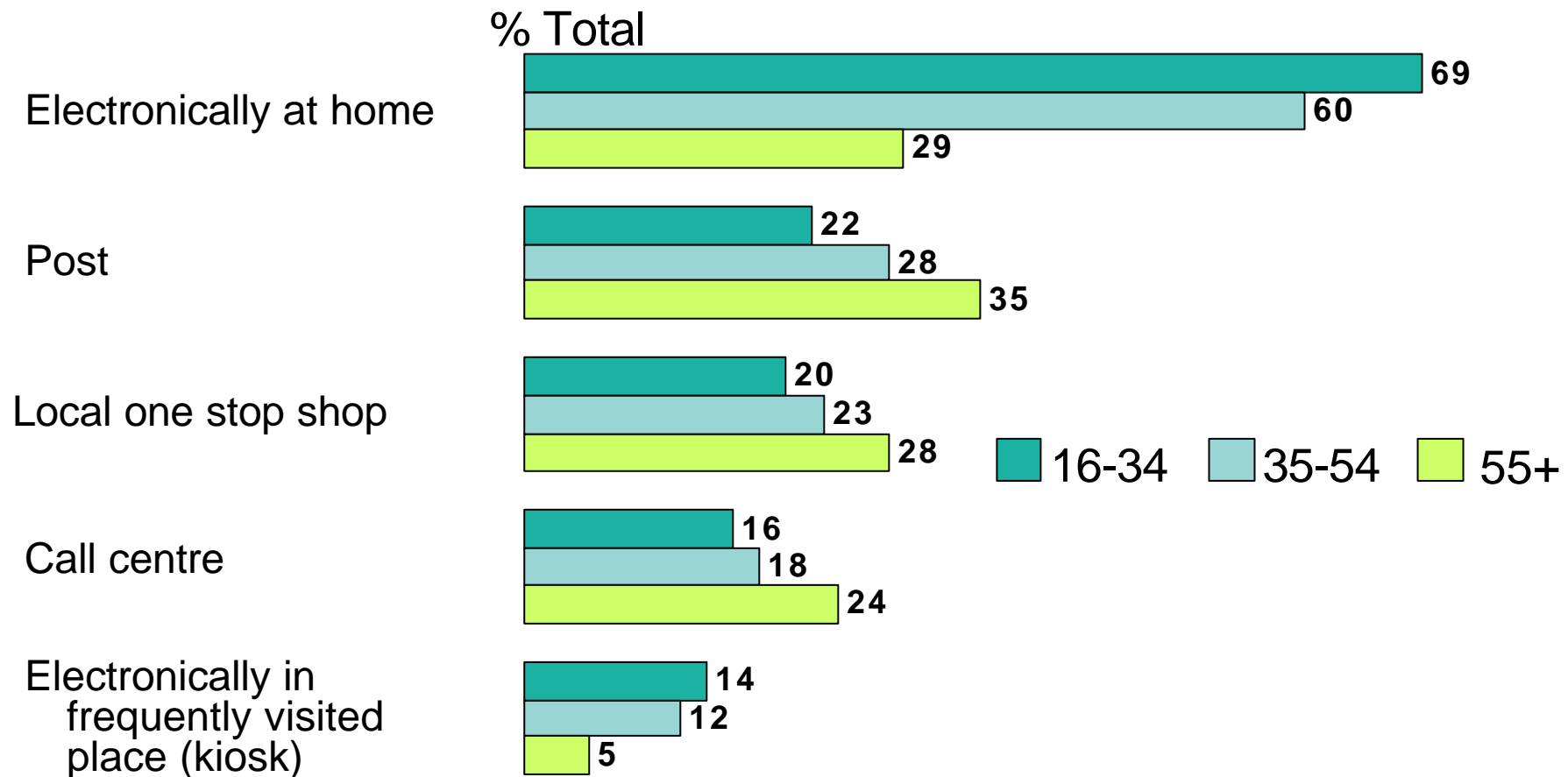
Q4 *In three years time, which one or two of these would you prefer to use for obtaining information about local council services?*



Base: Suffolk residents aged 16+ (750)

Future Channel Preferences: Age Profile

Q4 *In three years time, which one of these would you prefer to use when obtaining information about local council services?*



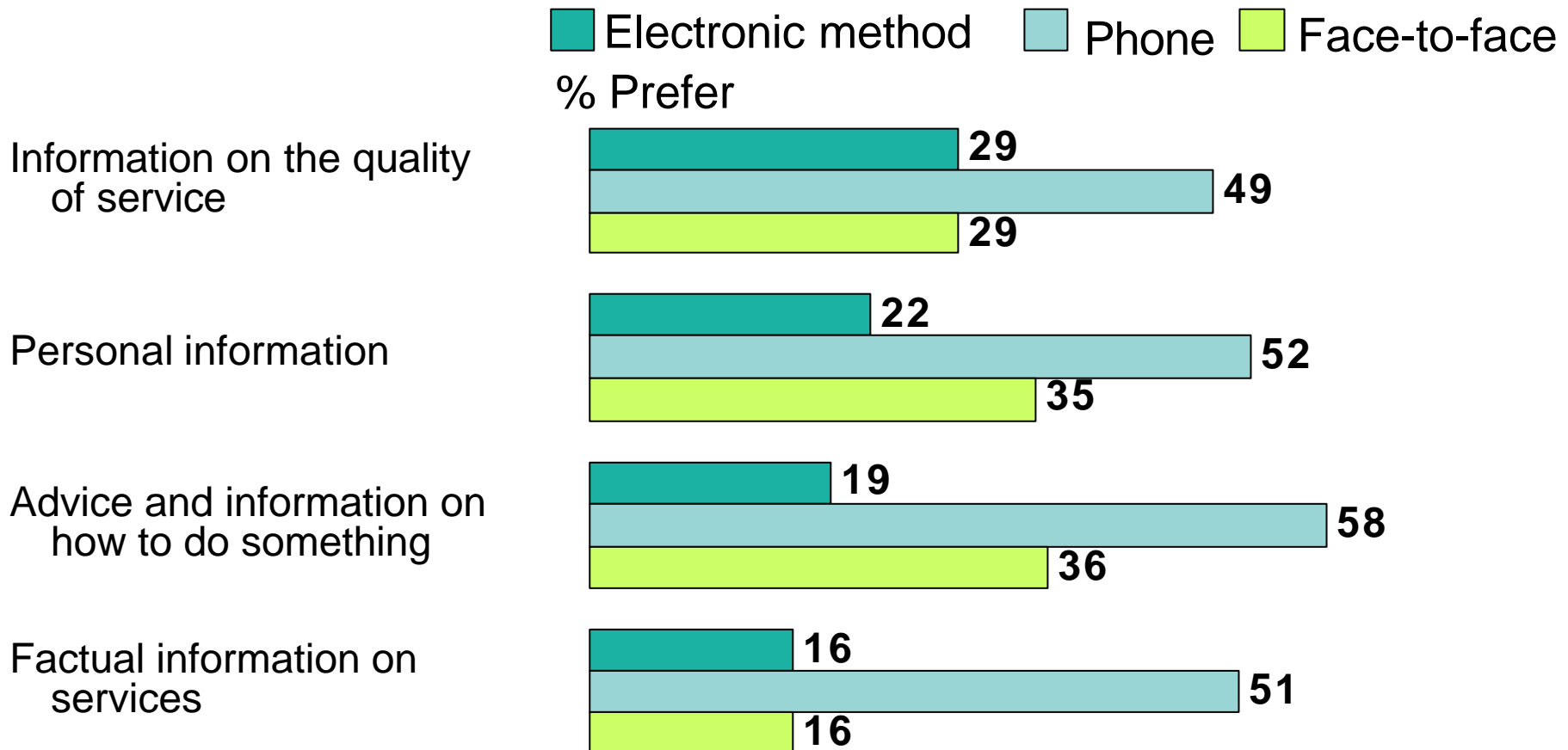
Base: Suffolk residents aged 16+ (750)

Current Channel Preferences

- Currently, the phone is the preferred method of communication when requesting **information**. Speaking to someone face-to-face is also a popular choice when discussing personal information or asking how to do something. Overall half (49%) of the Panel members say they would use an electronic method for at least one of the methods listed [see next slide].
- 57% of ABs say they would request factual information electronically compared with 23% of DEs
 - 30% of 16-34 year olds would request personal information electronically compared with 8% of those aged over 55
- Again, many would prefer using the phone to make a **transaction** [see Q23]. Second preference is equally divided between an electronic method and face-to-face.
 - 28% of home owners would pay for items electronically compared with 12% of council tenants
 - 40% of 25-34 year olds would prefer to vote/ be consulted electronically compared with 16% of the over 55s

e-Information Requests

Q20 *Would you prefer to use to use the phone using a single contact number, visit a local office in person or use an electronic method...? [up to 2 choices]*

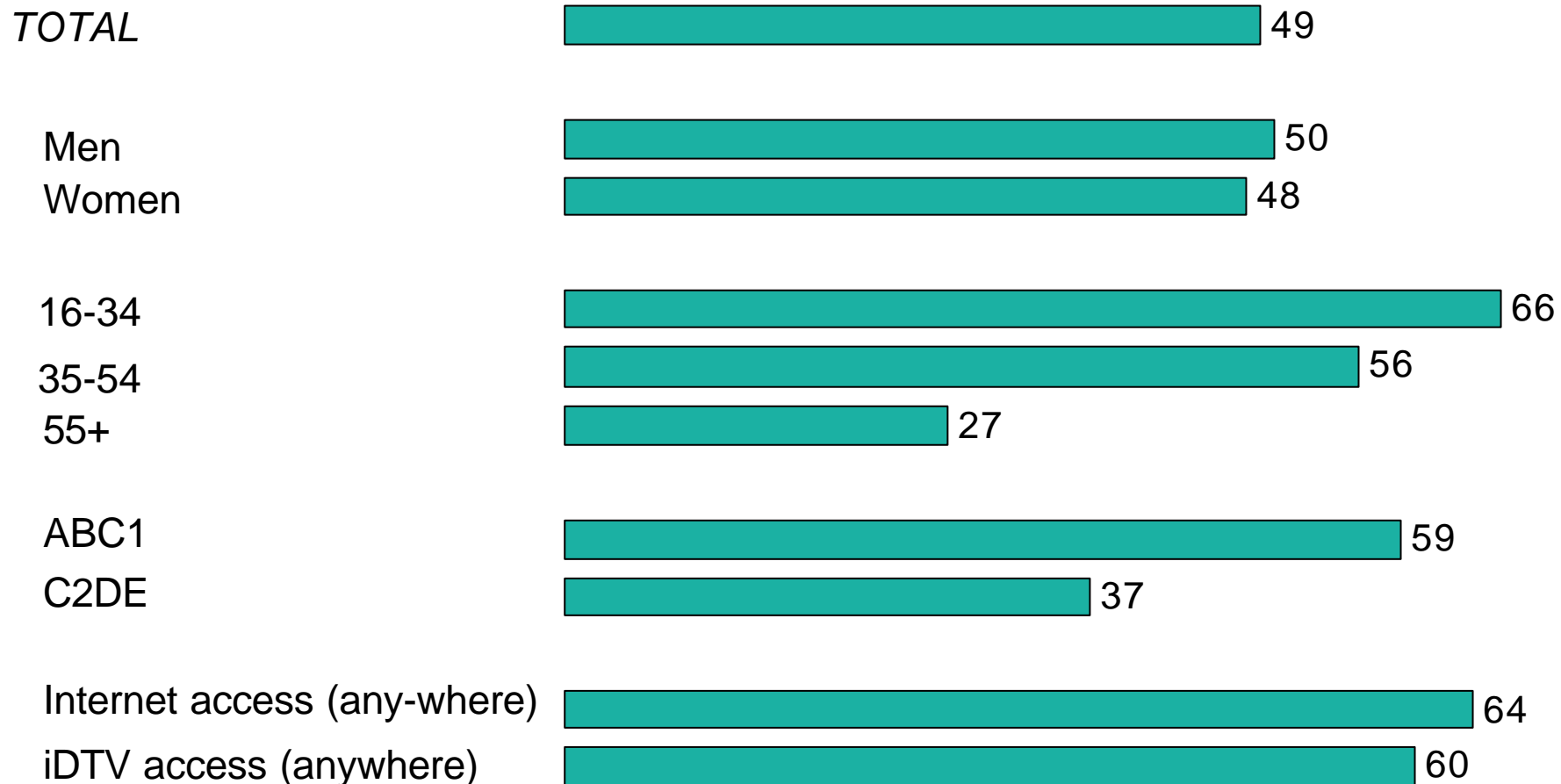


Base: Suffolk residents aged 16+ (750)

e-Information Requests: Differences

Q20 For the following requests for **information** . . . ?

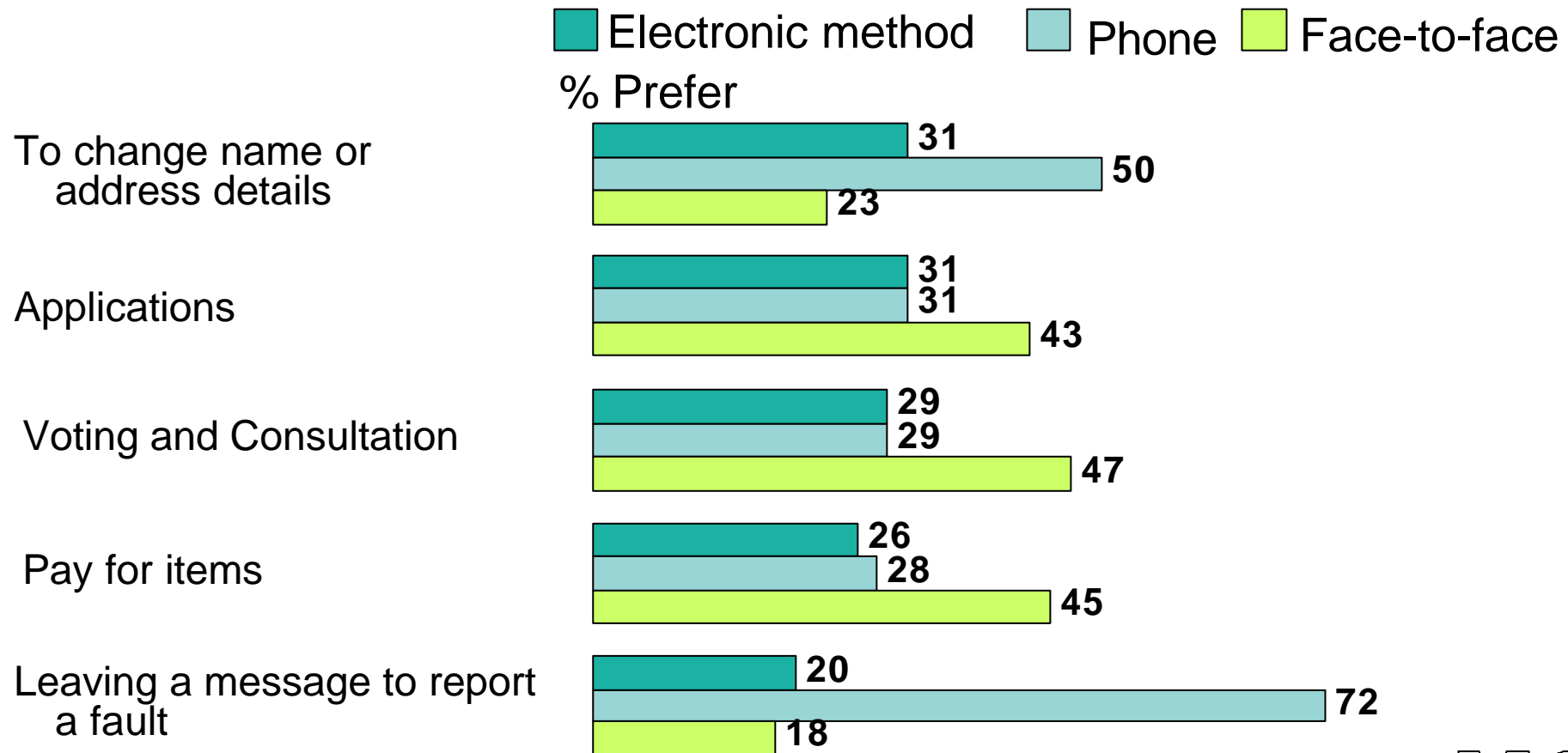
% would request information electronically



Base: Suffolk residents aged 16+ (750)

e-Transactions

Q23 *Would you prefer to use to use the phone using a single contact number, visit a local office in person or use an electronic method...? [up to 2 choices]*



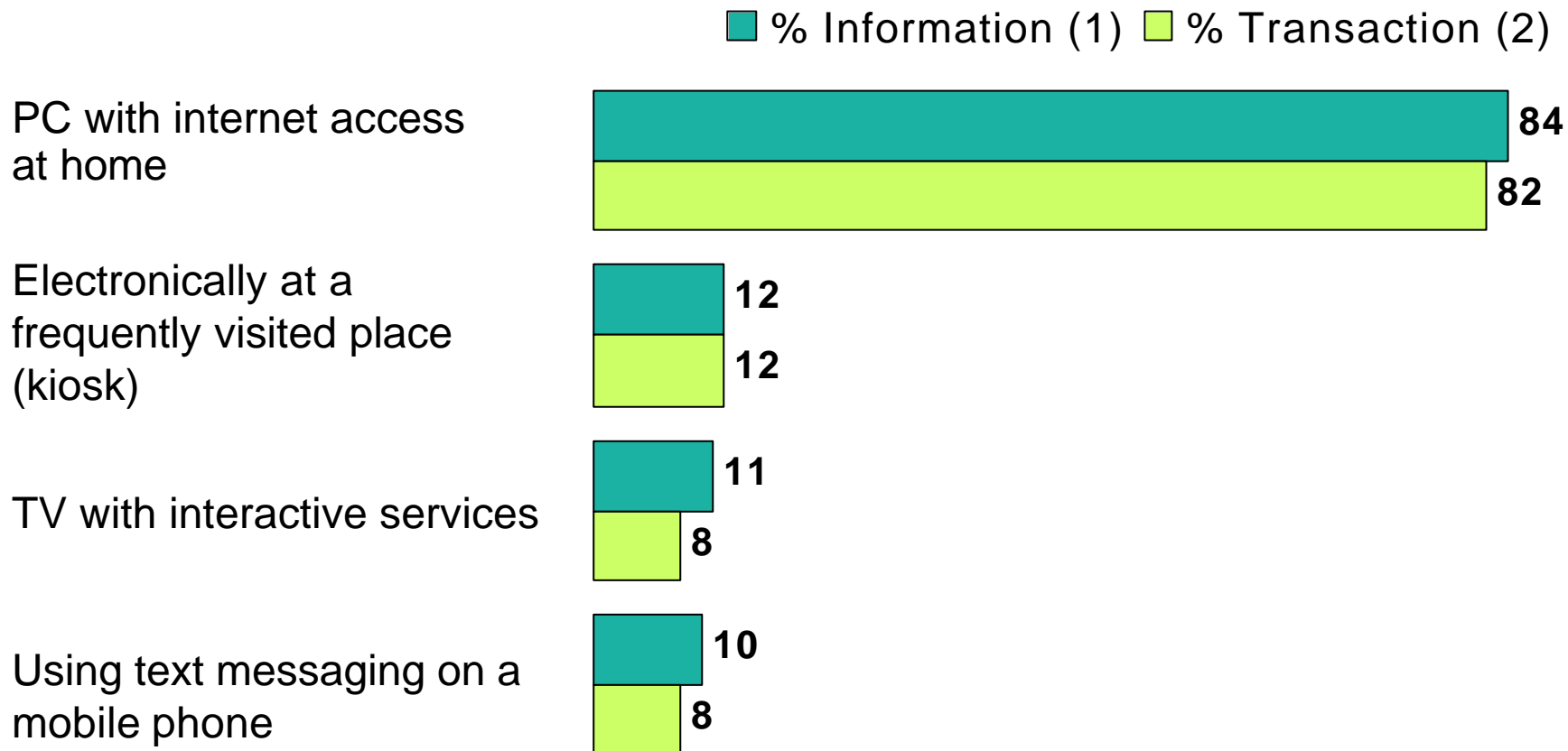
Base: Suffolk residents aged 16+ (750)

e-Channel Preferences

- Among those who would prefer to receive information or make transactions electronically, over eight in ten (84%) would prefer to use a PC with internet access at home.
- 91% of ABs would prefer to find out information via a PC at home compared with 71% of DEs who say this
- iDTV
 - One-fifth (18%) of those with iDTV say this would be their preferred electronic method of communication for information
 - 18% of C2DEs would prefer to use iDTV for information compared with 8% of ABs
- Text messaging
 - 15% of C2DEs would prefer to use text messaging for information compared with 7% of ABs
 - 26% of 16-24 year olds would prefer to use text messaging for information compared with 4% of the over 55s (note: small base size)

Preferred Technology Sources

Q21/4 And which one or two of the following four electronic methods would prefer to when finding out **information** about a service . . . use making a **transaction** concerning a service?

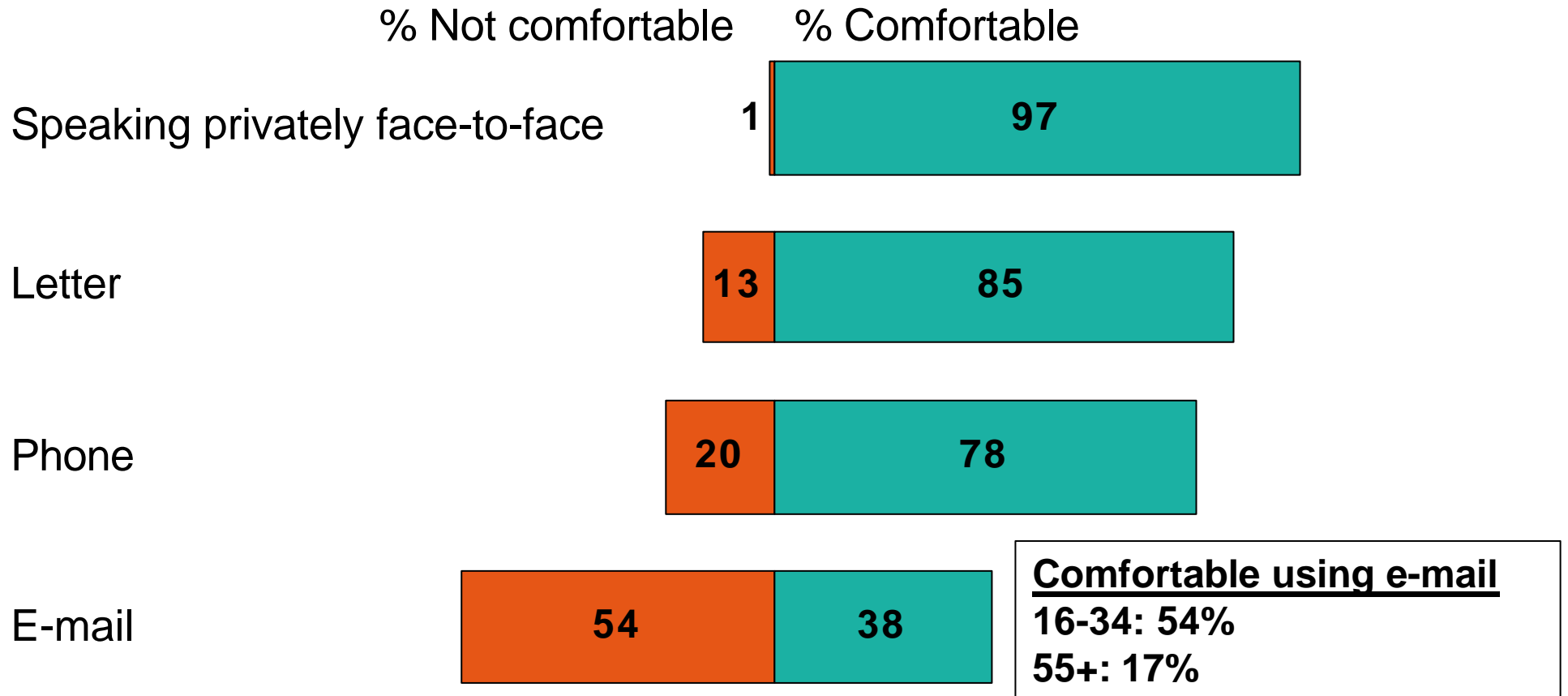


(1) Base: All who would prefer to receive **information** electronically (352)

(2) Base: All who would prefer to use an electronic method for any **transactions** with the Council (359)

Information on Personal Matters

Q26 How comfortable, if at all, would you feel when leaving information about personal matters using the following methods?



Base: Suffolk residents aged 16+ (750)

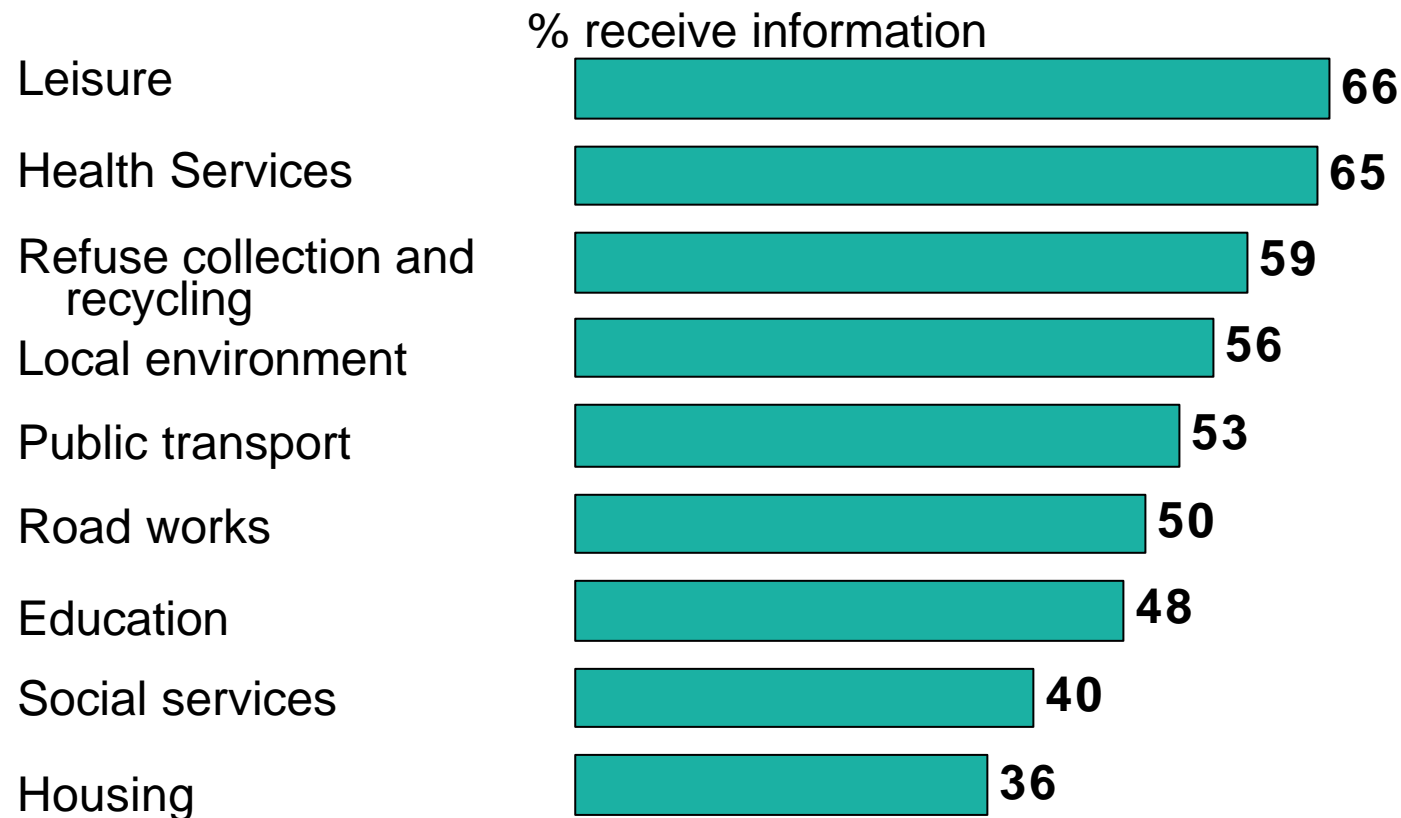
e-Services

e-Services

- Over eight in ten Panel members (84%) are interested in finding out about one of the services listed electronically [see next slide].
- 94% of the under 55s are interested 'electronically' in at least one of the services compared with 68% of the over 55s
- If the council is interested in identifying quick 'public' wins, asked which service they would be most likely to access electronically, it is information on leisure and health services which emerges as the most popular choices.
- This is the case among both those with internet access, and the wider public (selected by 77% and 66% respectively for leisure, and 72% and 65% for health services)
- Fewer respondents are interested in finding information about social services, local environment and housing via electronic methods (4%, 3% and 2% respectively rate these as 'most useful').
- An analysis of the data by sub-groups reveals significant differences.
 - 57% of council tenants are interested in receiving information about housing electronically

e-Services

Q18 *In say 3 or 4 years' time, which of the following services, if any, would you be willing to receive **information** about electronically (e.g. through the internet or TV with interactive services)?*



Base: Suffolk residents aged 16+ (750)

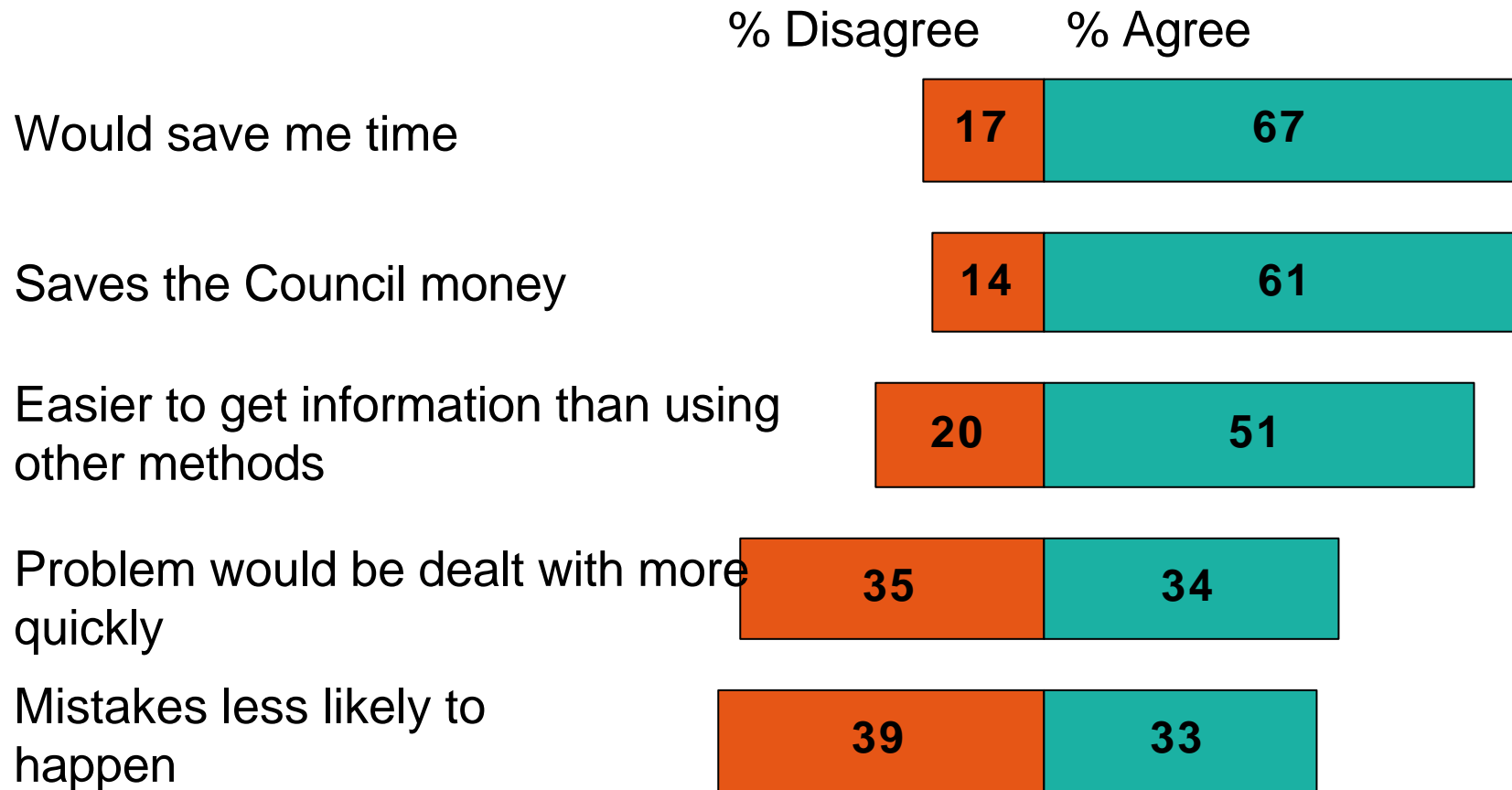
Perceptions of Electronic Communication

Perceived Barriers

- The benefits of electronic communication are seen to be the time and money savings (67% and 61% respectively agree). Over half (51%) agree it is easier to get information this way.
- As many agree as disagree that problems would be dealt with more quickly and that mistakes would be less likely to happen.
- Disadvantages of using electronic communications are seen to be problems with the reliability of equipment and that people prefer to deal directly with staff (71% and 67% respectively agree).

Benefits of dealing electronically

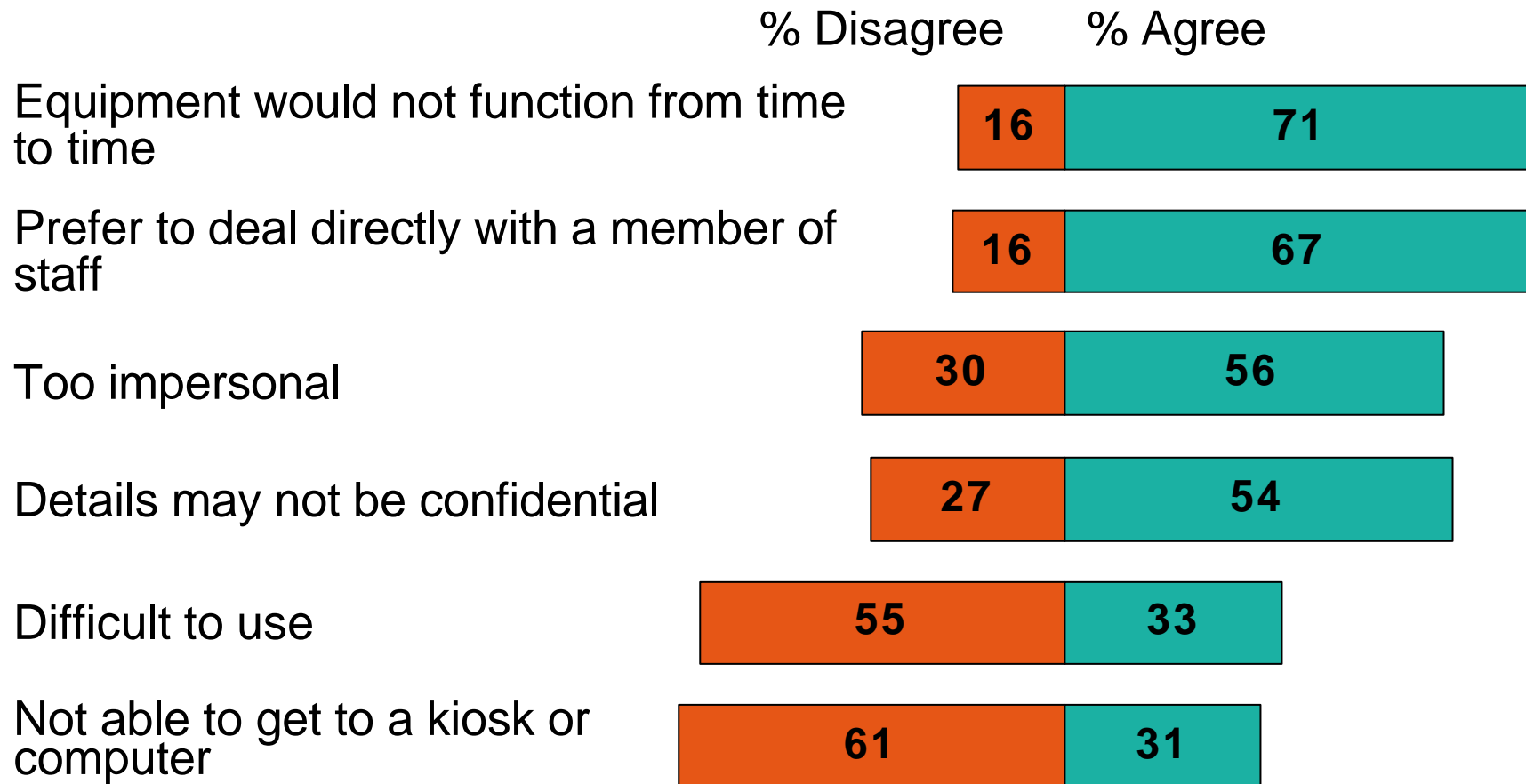
Q27 To what extent do you agree or disagree with the following suggested **benefits** of dealing with the Council electronically?



Base: Suffolk residents aged 16+ (750)

Drawbacks of dealing electronically

Q28 To what extent do you agree or disagree with the following suggested **drawbacks** of dealing with the Council electronically?



Base: Suffolk residents aged 16+ (750)

The Future

Potential in the Future

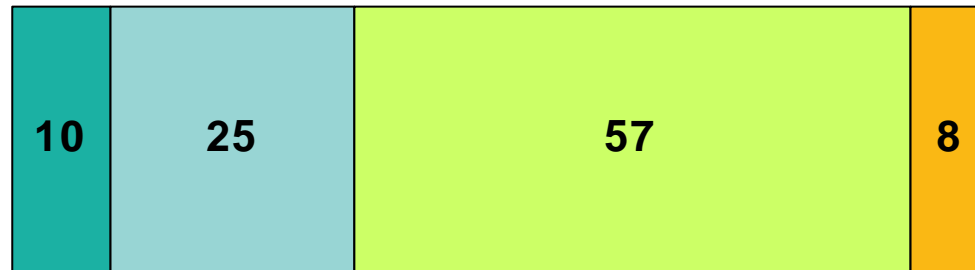
- The majority of Panel members (65%) say they are likely to use new technology to find out information about a Council service. However, fewer (50%) say they are likely to use this method to carry out a transaction.
- 77% of those with access to the internet agree that dealing with the Council electronically would save them time, 45% of those without internet access agree with this statement
- Ease of access, discounts on the costs of some services and assurances on the confidentiality are highlighted by respondents as the key ways of encouraging them to use new technology to make transactions with the Council.
- One in seven (14%) Panel members, spontaneously, mentioned that they would prefer to contact the council electronically rather than use a traditional method of communication when finding out general information.

Likelihood of Usage

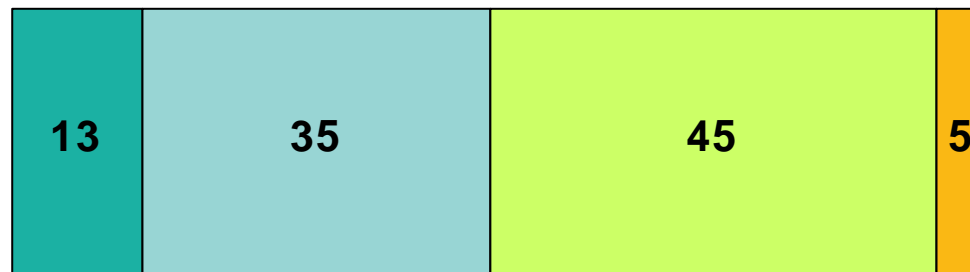
Q22/5 How likely or unlikely would you be to use new technology (such as the internet or TV interactive services) to find out **information** about a service?...to make **transaction** concerning a service?

■ % Certain not to ■ % Unlikely ■ % Likely ■ % Certain to

...for information



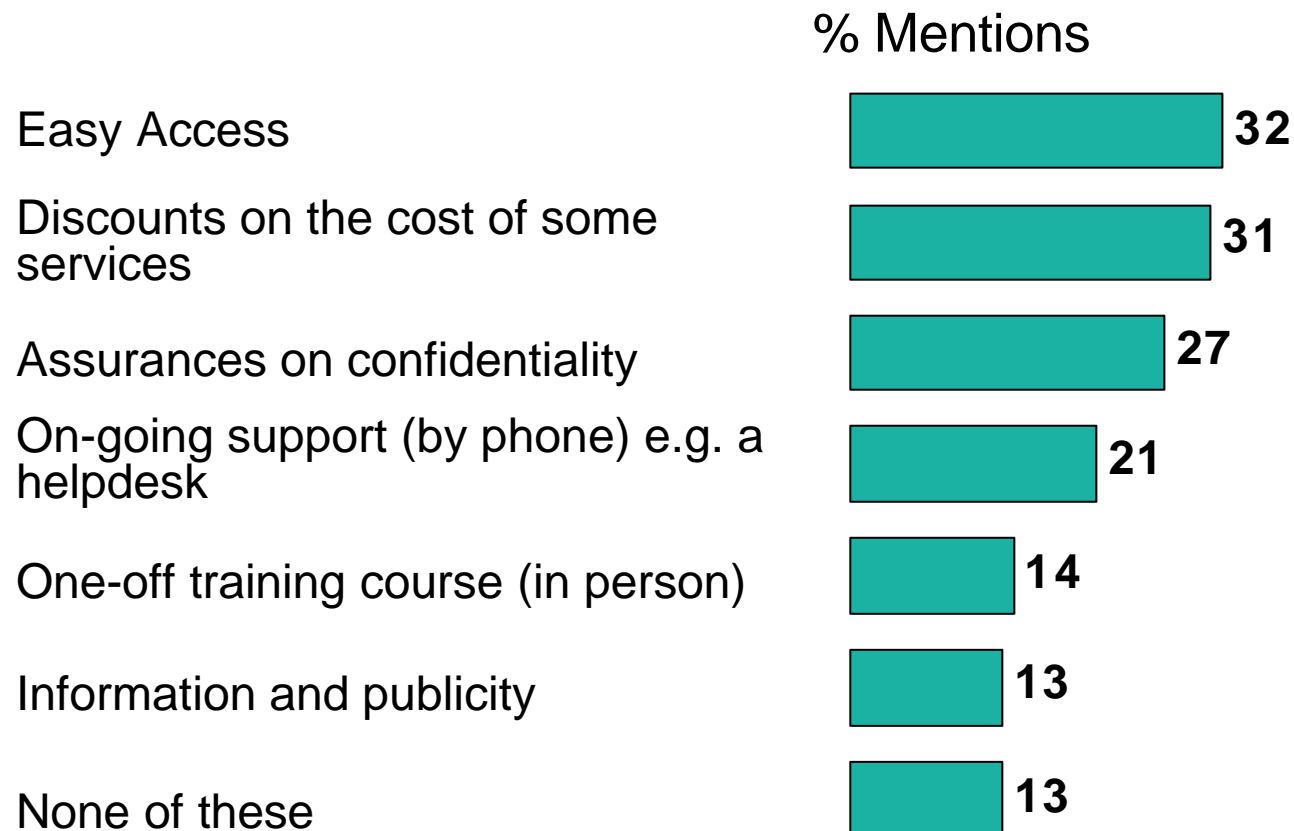
...making transactions



Base: Suffolk residents aged 16+ (750)

Encouragement Needed

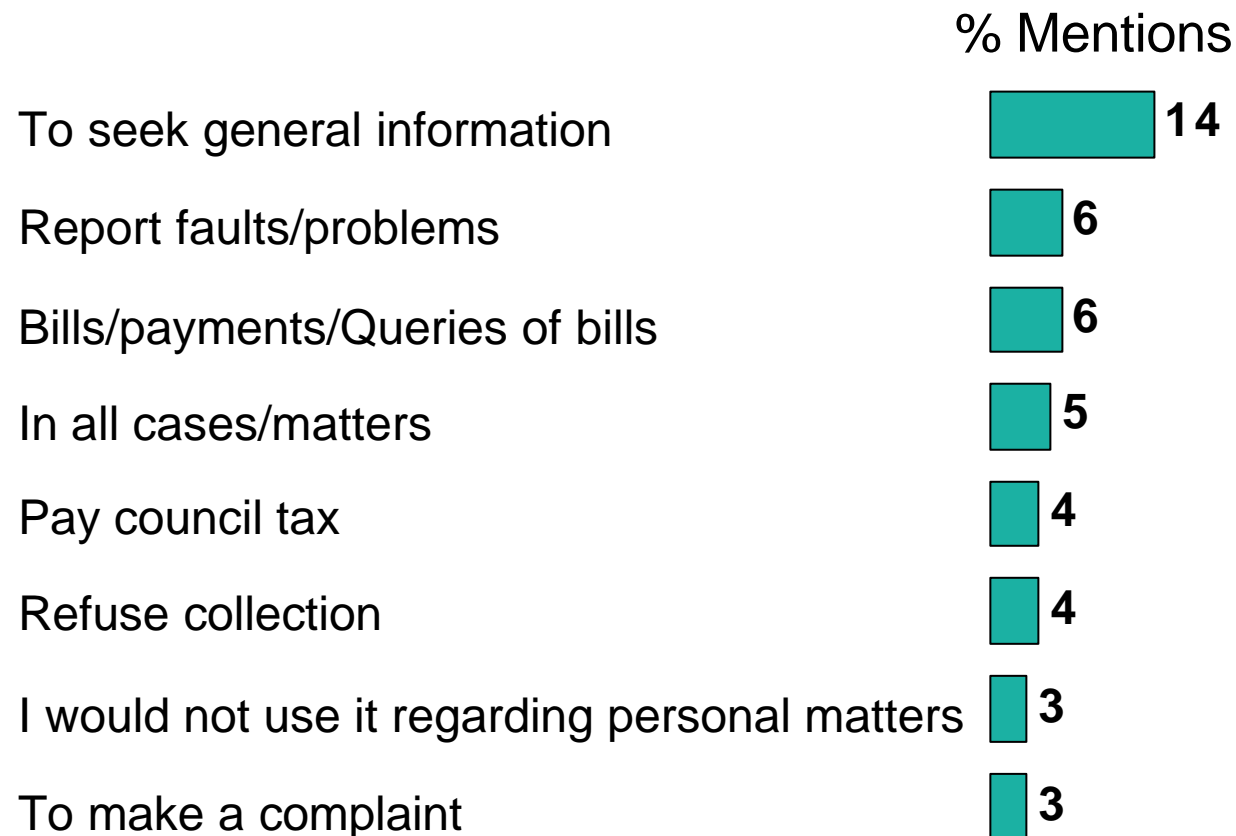
Q29 Which one or two, if any, of the following would encourage you to use electronic methods to contact, find out information or make transactions with the Council?



Base: Suffolk residents aged 16+ (750)

E-Service Preferences

Q30 *In what cases would you prefer to contact the Council electronically rather than visiting an office or speaking to them on the telephone? UNPROMPTED*



Base: Suffolk residents aged 16+ (750)

E-Service Preferences: Comments

Q30 *In what cases would you prefer to contact the Council electronically rather than visiting an office or speaking to them on the telephone? UNPROMPTED*

- **Information and simple requests**
- *Just to find out information on services, that's all*
- *Simple information like bank-holiday refuse collection timetables*
- *Routine matters i.e. reporting a faulty street light*
- *Factual information, it cuts down on paper*
- *Firstly paying things like council tax and secondly getting information on local issues*
- *For mundane things, like paying fines, council tax etc.*
- *For general enquiries that don't need an immediate response, like recycling information*

E-Service Preferences: Comments

- **Convenience and speed**
- *To object to planning initiatives, rather than fiddling about with forms*
- *In most cases, because it is usually open only when I'm at work*
- *In most cases I prefer electronic contact, the offices are quite far away and you can never get through on the phone*
- *I live in a village so it would be more convenient to try and contact the council electronically*
- *A quick way of telling them to repair or sort things out*
- *Where 24hr service is given it gives you more flexibility, you can do it in your own time*
- *For a general range of issues, as on the phone you don't always get through e.g. rubbish enquiries*
- *I would prefer to deal with the council electronically in all cases*

E-Service Preferences: Comments

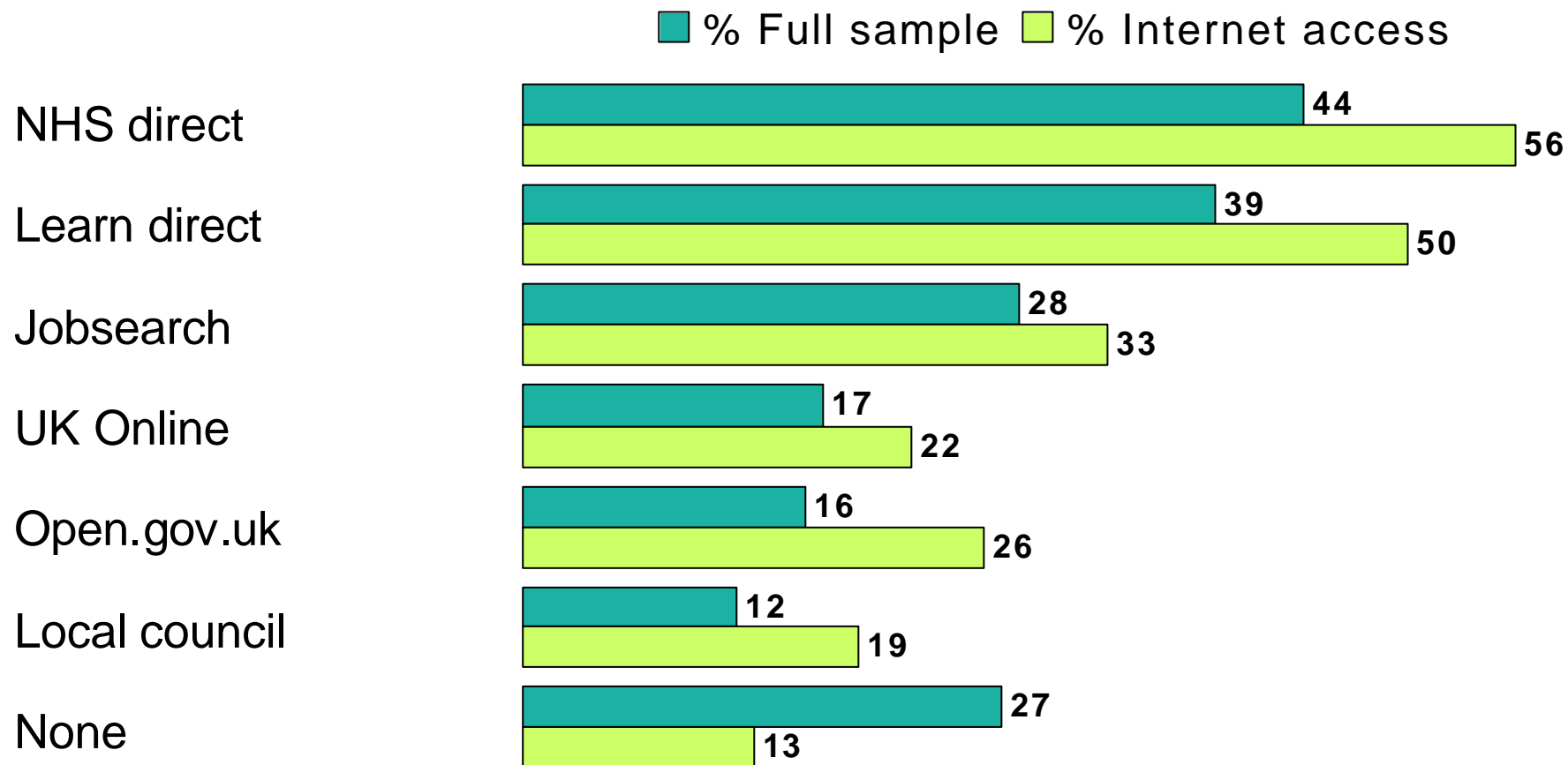
- **Issues about confidentiality**
- *For mundane day-to-day transactions which would not involve confidentiality, such as paying council tax, reporting problems and so on*
- *Only impersonal matters, such as a question regarding rubbish. I would not consider using it regarding personal matters*
- *I'm not wholly convinced it is secure*
- *I think making complaints would be easier and slightly more anonymous*

E-Service Preferences: Comments

- **Many still prefer traditional methods of contact**
- *To pick up information, but otherwise I prefer personal contact*
- *I would still feel most confident in dealing with them in person, even for information. The phone is very easy and cheap to use, and they usually pick up*
- *Just routine stuff, if you had a major problem I think it's best to talk to someone*
- *If a bill had gone wrong, but overall I would prefer to get a direct answer from a person*
- *Council tax etc, but anything personal I'd want someone to talk to*
- *I would contact the council to look up factual information, but I would prefer to phone if I needed advice or to discuss something*

Awareness of e-Government Services (National Data)

Q7 Which, if any, of these internet public services have you heard of?



Base: All GB adults aged 16+ (1,964)