

**More analysis results of the EURESCOM project P903
"ICT uses in everyday life"**

- **Attitudes and Internet use**
- **Mobile penetration speeds**
- **Different markets in different countries**
- **The P903 Deliverables are to come in July 2001**
- **Please visit our Seminar "ICT users in the new millennium" on 19 June in The Hague**

Just to remind you:

The EURESCOM project "ICT uses in everyday life" explains private use and non-use of the Internet and mobile services. The heart of the project is a cross-national household survey conducted in nine European countries during October to December 2000. The interviewees included non-users, Internet users, mobile telephone users, and users of both Internet and mobile telephones.

Some more interesting results

Attitudes and Internet use

A digital divide?

The diffusion of the Internet within the European countries shows a great gap between the Northern countries in which the Internet is already used by around 60% of the population and the Southern countries with only around 25% users. This gap is growing.

What does this mean?

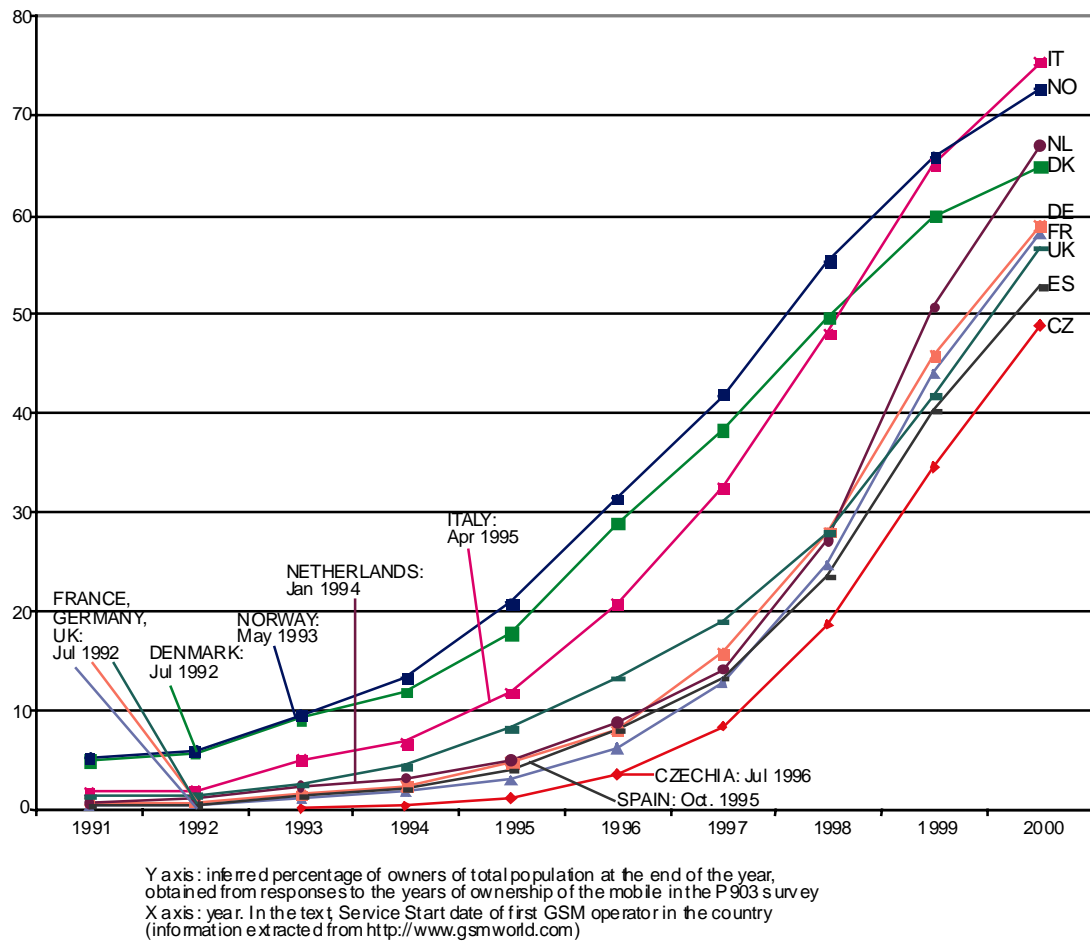
- It means that Internet use is still something for the happy few in many European countries
- It means that broadband services are still not many consumers' cup of tea

Is this gap permanent or can it be overcome?

The P903 data show that:

- it is possible to close the gap, by accelerating the adoption. This is shown by Germany and to a certain amount also by the Netherlands, which within a few years rose from having a rather mediocre Internet adoption rate to now being at the top of the adoption scale,
- groups not having a 'natural affinity' for the Internet, like women, become the majority of new users in later diffusion waves,
- a lot of effort should be given to facilitating the use of the Internet by providing help, easy access and simple devices.

Mobile penetration speeds



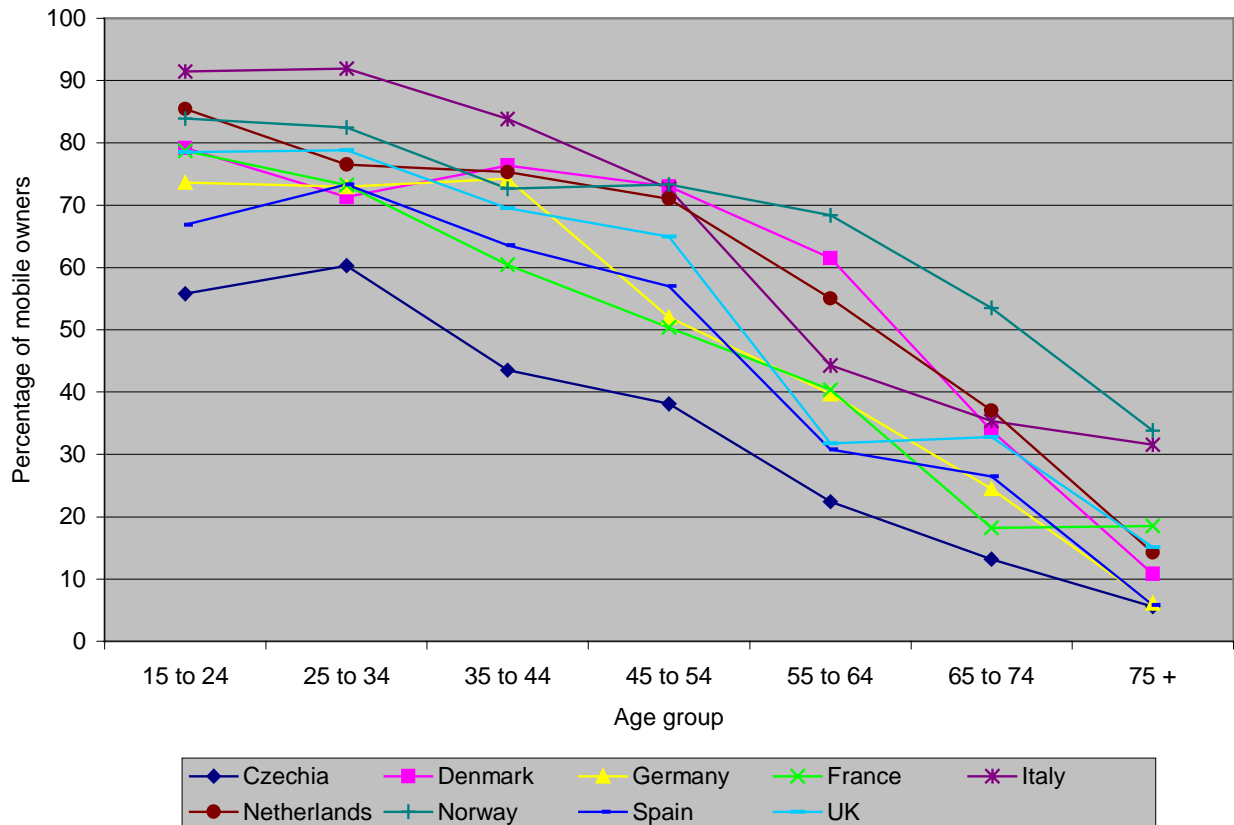
The figure above shows the accumulated number of P903 interviewees who now (Nov. 2000) own a mobile telephone, as a function of the year of adoption. This graph also shows the speed of adoption of the mobile phone in each country, thus revealing very interesting differences across Europe:

- Apart from the well-known difference between the Nordic countries (Norway, and slightly below Denmark), which first introduced analogue mobile telephony (NMT), it is very surprising just how quickly Italy has climbed to the first position in mobile telephony adoption in Europe. However, we note from the results that this is caused by the rapid adoption by the youngest people, the ownership rate decreasing equally rapidly as age increases, especially for women.
- Being the first countries to launch GSM networks did not lead to the higher ownership rates, as is clear in the case of France, Germany and the UK, the three of them being quite close in the above figure. The Netherlands, however, in spite of launching GSM slightly afterwards, has adopted more quickly than its neighbour countries. Spain has also quickly reached ownership rates similar to those in France and Germany.
- Czechia, the only East European country in the survey, has been the last in deploying GSM networks, and thus has a slightly lower level of adoption in comparison with the other countries, but again shows the same trends and speed of adoption.

What are the reasons for these differences? What socio-demographic, mobility, time use and social network variables can explain (or show any relationship with) these differences?

Different markets in different countries

Age, as is well known, is still the most important factor for predicting the adoption of the mobile telephone, and this is the case in all countries. However, in spite of some common trends, certain differences remain between and within countries as regards adopters. A basic comparison of age groups (see the figure below) shows that mobile telephony adopters in Norway are relatively more homogeneous across age groups than in the other countries. However, in Italy almost every young person owns a mobile telephone, while the rate drops to 30% for people older than 55 (see figure below).



Through analysis of the P903 survey, these and other patterns will be related to factors such as the adoption, length and intensity of use and the diversity of use of this technology. Also included in the survey are questions about future mobile services that will provide essential insights into the future of these markets in the different countries.

The P903 Deliverables are to come in July 2001

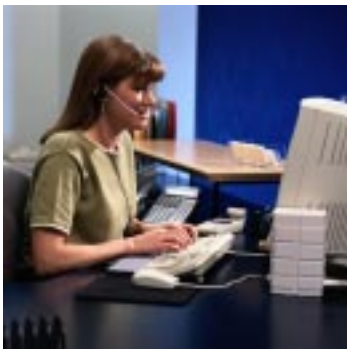
P903 will provide three interesting deliverables to the EURESCOM shareholders and members

- A high level EURESCOM Project Report ***“Checking it out with the people – ICT markets and users in Europe”*** which summarises the main findings of the qualitative and quantitative survey (EDIN 0161-0903). This document is tailored to high level decision makers and to people who want to get a quick overview of some of the most interesting P903 results.

- A Technical Information paper "***Checking it out with the people – ICT markets and users in Europe (detailed documents)***" containing detailed information and results of the project (EDIN 0162-0903). This deliverable is suitable for experts who want to dig deeply into the methodology and results of the project. It contains a number of annexes with the theoretical framework, the qualitative analysis, the construction of the questionnaire, including the P903 questionnaire itself, and detailed results of the statistical analysis of the P903 database.
- A ***database package*** containing a short manual on how to use the database, the basic SPSS database, the HTML Codebook and the Questionnaire package with the questionnaire in all the languages used in the survey. This database package is relevant for analysts who want to do their own analysis, going beyond the more general analysis conducted within the P903 project. Conducting one's own analysis could in particular be interesting for analysing country specific issues.

The documents and the database package will be available in July to our shareholders and members on the EURESCOM Web server (<http://www.EURESCOM.de/public/projects/P900-series/P903/P903.htm>)

Please visit our Seminar "*ICT users in the new millennium*" on 19 June in The Hague



EURESCOM is kindly inviting you to attend the EURESCOM Seminar "ICT users in the new millennium" on Tuesday, 19 June 2001, in The Hague. The Seminar is disseminating results of our three EURESCOM ICT user focused projects P902, P903 and P904.

Please do not miss this opportunity to:

- hear about the future of community learning services
- look at the demonstrations of a Web-based community learning demonstrator
- hear how telework influences quality of life
- get ideas for products, marketing and implementation of telework
- hear about our ICT survey where more than 9000 users and non-users in 9 European countries were interviewed
- find out why some people are using ICT and some are not
- hear about trends in ICT services.

More information about this seminar

http://www.eurescom.de/public/events/ICT2001_Hague/Workshop_flyer.asp

Deadline for registration: 4 June 2001

http://www.eurescom.de/public/events/ICT2001_Hague/registrationthehague.asp

The Seminar is free of charge and limited to EURESCOM shareholders and members.