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## Evaluation of the Public Internet Access Point Initiative

May 2004

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Version	First Draft
Date	May 2004
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File Location	F:\Projects\758 - PIAP evaluation\Reporting\Final report\final report in progress 3-04.doc

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# 1 Introduction

*The Scottish Executive began implementing its Public Internet Access Initiative in Summer 2002. Since then it has provided approximately 1,600 computers in 725 different venues. The initiative is part of the Executive's wider Digital Inclusion Strategy, which aims to extend access to and use of the internet. This report assesses how well the programme has met its objectives and looks at its overall impact across Scotland.*

## 1.1 Digital inclusion strategy

The Scottish Executive published its Digital Inclusion Strategy called *Digital Inclusion: Connecting Scotland's People* in 2001. It has set several targets in seeking to bridge the digital divide:

- ❑ achieving universal access to the internet by 2005;
- ❑ increasing the number of households in disadvantaged areas with access to the internet;
- ❑ securing the benefits of advanced networked information technologies for education and lifelong learning.

The Executive created a dedicated digital inclusion team to coordinate action across a range of initiatives, which developed and launched the Public Internet Access Point (PIAP) initiative. This is now part of the recently established 21<sup>st</sup> Century Government Team.

## 1.2 Aims & Objectives

The PIAP Initiative is one of the Scottish Executive's key components in its Digital Inclusion Strategy. The Executive's stated aims for the PIAP initiative were:

- ❑ improving public access to the Web in areas of Scotland where access is currently poor;
- ❑ encouraging more people – including those in disadvantaged communities, and disadvantaged individuals such as some older people – to access the web, and;
- ❑ improving the IT literacy rate in the Scottish population.

Under the PIAP initiative, the Executive has invited a wide range of agencies in the public, private and community/voluntary sectors to install PCs with web access and make these available to the public. Each venue receives between one and four PCs, workstations and a Freeserve internet connection.

Broadly the initiative aims to make sure that everyone in Scotland can get access to a publicly available internet connection.

- ❑ In urban Scotland this should be within one mile of every home; and
- ❑ within five miles in rural areas.

The PIAPs were funded to fill identified gaps in existing internet access coverage. Other publicly available access points are available through a range of locations including:

- ❑ libraries;
- ❑ internet cafes; and
- ❑ SIP-funded learning centres.

The aim is to provide Web access in the places people already go, such as shops, pubs, post offices, hairdressers and community centres.

One aspect of the initiative however was to bring computers into places where those not currently using them are likely to be. So some venues are not necessarily open to the public at large, but may deal with specific excluded groups such as lone parents, ethnic minorities or New Deal clients.

## 1.3 Progress

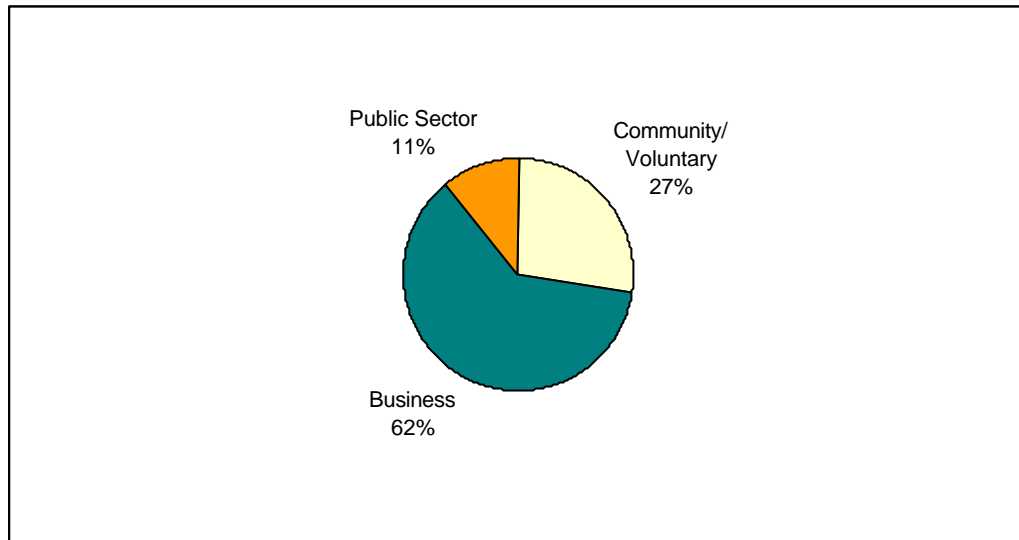
Our research is largely based on the first 600 PIAPs, which had opened by June 2003. We contacted 526 venues through our background survey and follow up calls, representing 89% of those venues offered machines through the Initiative. We understand some 725 PIAPs have now opened.

To help the Executive assess the situations in which PIAPs work best, we have split the PIAPs by sector of the PIAP host. These break down into three categories:

- ❑ **Community sector**, including those based in community centres and managed by community or voluntary organisations;
- ❑ **Public sector**, where the access point is hosted in a building run by the public sector, such as a Council office or library; and
- ❑ **Business sector**, hosted in private sector businesses, including hotels, garages, shops and pubs.

We will use these classifications throughout the report in looking at some of the issues in greater depth. As Figure 1-1 shows, the majority of PIAPs funded are in the business sector (62%) with a further 27% in the community or voluntary sector, with 11% in the public sector.

Figure 1-1 Internet Access Points Funded by sector



Source: Scottish Executive

By summer 2003, the Scottish Executive had provided around 1,300 computers through the PIAP Initiative, with an average of 2.2 machines per host venue. The average number of machines in each venue tended to be higher in the public and community sectors at closer to three machines per venue. In businesses the average number of computers was 1.85, possibly due to greater space constraints.

## 1.4 Evaluation Approach

We have used a number of complementary approaches to gathering information taking account of the lightly regulated context of PIAPs. This report uses information from:

- ❑ A review of literature relating to digital inclusion;
- ❑ 139 'mystery shopper' visits to PIAPs from Caithness to Wigtown, and from Aberdeen to the Western Isles;
- ❑ A background survey of 523 PIAPS covering basic information about their location and user numbers;
- ❑ A phone round of the other 77 PIAPs that were believed to have been open in June 2003;
- ❑ A survey of 389 PIAP hosts covering their experience of operating PIAPs;
- ❑ Area surveys (street and household) within the catchment areas of six PIAPs representing different types of provision, and rurality;
- ❑ A survey of 670 PIAP users from 137 PIAP locations; and
- ❑ A follow-up survey of 210 users three months after the initial one.

## 1.5 Report Structure

We have structured this report to reflect the research objectives. So following this introductory structure the chapters will be:

- ❑ Chapter 2 - How well is the initiative meeting its objectives?
- ❑ Chapter 3 – How are PIAPs being used?
- ❑ Chapter 4 – What are hosts' experiences?
- ❑ Chapter 5 – What is the value of the approach?
- ❑ Chapter 6 – Conclusions and Recommendations

Chapter 4 will also cover issues of how sustainable the PIAP provision is likely to be.

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## 2 Meeting objectives

*The Scottish Executive established the PIAP initiative in order to widen public internet access, target disadvantaged groups and raise ICT literacy. This section looks at how well it has met its objectives, and highlights some issues that the research has identified.*

### 2.1 Have they widened public internet access?

#### 2.1.1 Overall impact

By Spring 2004 the Executive had funded around 725 PIAPs across Scotland. This meant that 95% of the urban population and 93% of the rural population had been covered according to the Executive’s access criteria. This means that the population with access is, in theory, around 4.8 million as outlined in Figure 2-1, representing 94.6% of the overall population.

**Figure 2-1 Population within Public Internet access catchments**

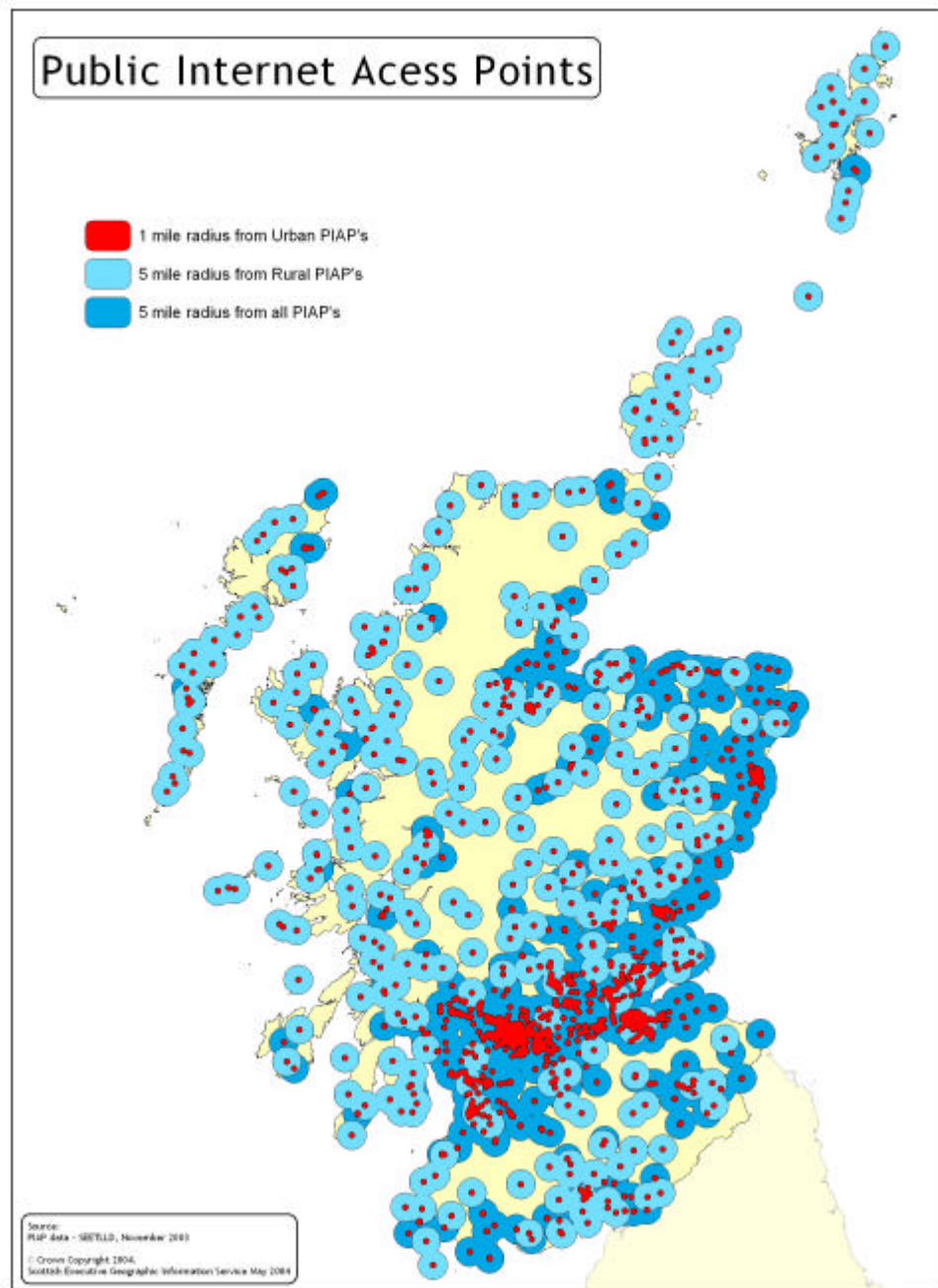
Area	Proportion within Public Internet catchment	Population within catchment
Rural Scotland	93%	878,575
Urban Scotland	95%	3,911,442
Scotland	94.6%	4,790,016

Source: Scottish Executive openscotland and Census 2001 GRO(S)

So the broad access target appears to be almost met. But this means that there are still around 272,000 people without the recommended level of public access, and three quarters of these are in urban Scotland.

Figure 2-2 shows the level of geographical coverage of Public Internet Access Points as at November 2003.

Figure 2-2 PIAP Coverage across Scotland – November 2003



Source: Scottish Executive 2004

### 2.1.2 Effective access

Whilst the PIAP initiative has extended access to most of the population in theory, our research so far has highlighted a number of issues relating to how effective public access is on the ground. So in looking at effective access we need to consider:

- ▣ How many have closed down;

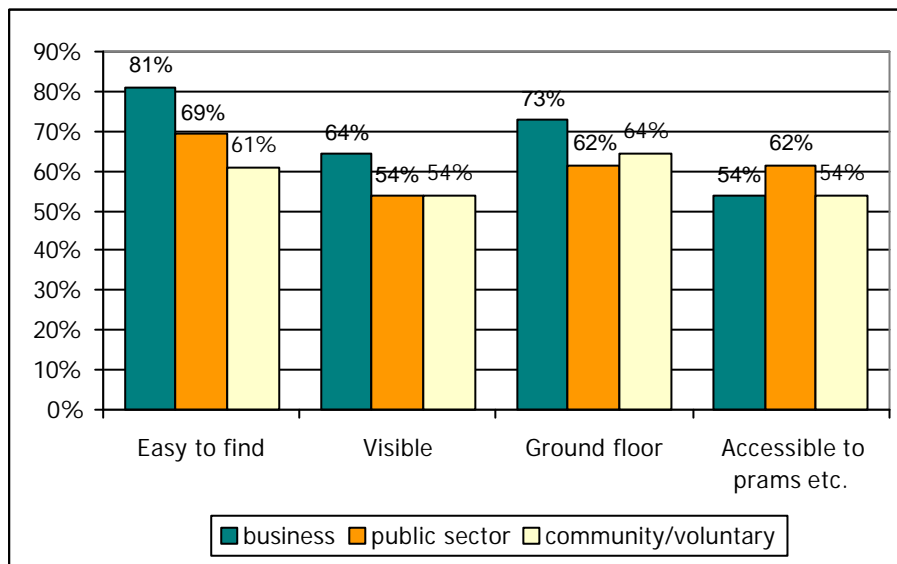
- ❑ How many are genuinely accessible to the public;
- ❑ How many are physically accessible to all people; and
- ❑ How many have problems with hardware or connection.

This will allow us to establish the extent to which the funded PIAPs are providing genuine public access to the Internet.

### 2.1.2.1 Visibility and accessibility

As Figure 2-3 shows, not all PIAP venues were visible and accessible. Our mystery shopper visits found that business venues were most likely to be easily found (81%) and visible from the street (64%). Nearly three quarters of business PIAPs were also on the ground floor (73%); although nearly half were not readily accessible to prams and wheelchairs.

**Figure 2-3 Visibility and accessibility by sector**



Source: Hall Aitken Mystery Shopper visits n=139

Public sector PIAPs were generally easier to find than community sector ones (69%) and were most likely to be fully accessible to prams and wheelchairs (62%). But they were less likely to be located on the ground floor (62%) and visible from the street (54%) than those in the business sector.

*Had I not known of the PIAP's existence, it is unlikely I would have found it. Window stickers are too small to be seen from any distance, and are pointless unless the PIAP is based in a public building in a pedestrian area.*

Our area survey found that awareness of PIAPs was lowest in the two areas which were within the catchment of Community sector provision, supporting the notion that these venues are not as visible to the general public.

Our visits found that there are also differences in the proportion of venues in the different sectors locating their machines in the main business area of the venue. Only a third of community sector and 38% of public sector venues did so. However, more than half of business venues located their Internet Access Points within the main area of business, perhaps increasing the likelihood of use. This may reflect a greater sensitivity among the business sector for customer needs – particularly those of the general public.

However the location of some of the Internet Access Points within venues limited their use. Some examples of this are:

- ❑ one in a hotel was located in a 'windowless cupboard next to the gents';
- ❑ some within shops are squeezed in between shelves of goods;
- ❑ several in pubs are in a side room that is difficult to find; and
- ❑ one was in an office being used to hold interviews and was therefore not accessible.

### 2.1.2.2 Getting online

Problems with equipment and internet connection were fairly common. In our visits we found that four venues had (some) machines that were not working (3%). We came across seven venues where effectively getting online was not possible because the connection either would not dial up, or was so slow as to be of no use (5%). Our user survey found that one in five users viewed slow connection as a disadvantage of the service.

### 2.1.2.3 Paying and booking

Other potential barriers to using the Internet at PIAPs are the cost and the immediate availability of access. Public sector PIAPs were most likely to charge, with nearly a third having a fee. But none of the public sector PIAPs we visited needed to be booked in advance. The need to book was most likely to be a constraint within the community sector, although this sector was most likely to provide free Internet access.

Other barriers to using the PIAPs involved:

- ❑ having to register and wait;
- ❑ having several forms to fill in;
- ❑ having to be guided through several occupied rooms to find the Internet point; and
- ❑ having to get hold of a key to unlock the room the PC was in.

#### 2.1.2.4 Staff support

While the PIAP Initiative does not have any specific support associated with it, there is still a need for some level of staff assistance for basic use. We encountered problems at four venues due to staffing issues. In three instances there was no one around who could log onto the machine or assist with connection problems. In one, the member of staff was too busy to log onto the machine for someone.

#### 2.1.2.5 Net effective access

Our mystery shopper visits indicated that of the 139 we visited:

- 7% had closed down or had stopped providing internet access;
- a further 2% were not open due to refurbishment;
- 2% were not open at the time of the visit; and
- 2% did not allow access for non-patrons.

If we also include those in which we were unable to get onto the internet, only 81% provided effective public internet access.

#### 2.1.3 Overall user numbers

It is difficult to arrive at definitive figures for the overall number of people who have used PIAPs for several reasons.

- Most venues do not record use levels.
- Those that do may not be staffed to ensure users sign in.
- In rural areas, many are used by tourists.
- It is difficult to gauge the level of repeat use.

Nonetheless it is useful to make an estimate based on the available information we have from:

- Hosts estimates of weekly and monthly use; and
- The six area surveys carried out within the catchment areas of different types of PIAP provision.

With these two sources we can provide a check on the numbers of users claimed by hosts against the number of people who say they have used the PIAP in the areas surveyed. If we apply the overall average usage rates from our research to the wider urban and rural resident population figures, this gives us an estimate of 187,381 as Figure 2-4 shows.

Figure 2-4 Estimated Programme Level User Numbers

	Resident Population	Population with Access	% users	Estimated Users	% Population
Urban/ suburban	4,117,307	3,911,442	3.76%	146,879	3.57%
Rural	944,704	878,575	4.61%	40,502	4.29%
Scotland	5,062,011	4,790,016	3.91%	187,381	3.70%

Using the median usage rates for rural and urban areas provides a very similar estimate (184,500).

These figures tally broadly with data from the host and background surveys; although in many venues in rural areas, tourists boosted user numbers significantly in the summer months. From 280 host venues which provided information, we estimated a monthly user figure of 31,000 for all 725 PIAPs.

From the follow-up survey we can say that repeat use appears fairly high, so we have estimated that each month 20% of users are new, and 80% are return users. Over a period of one year this would mean that approximately 230,500 people use PIAPs. Although this figure is higher than the estimate in Figure 2-4, this figure will include tourists and non-residents using the service, as well as residents living within the local catchment.

Given the difficulties in providing estimates outlined above, it may be reasonable to use a range. So we estimate that between 170,000 and 250,000 people had used the PIAPs between Autumn 2002 and Autumn 2003.

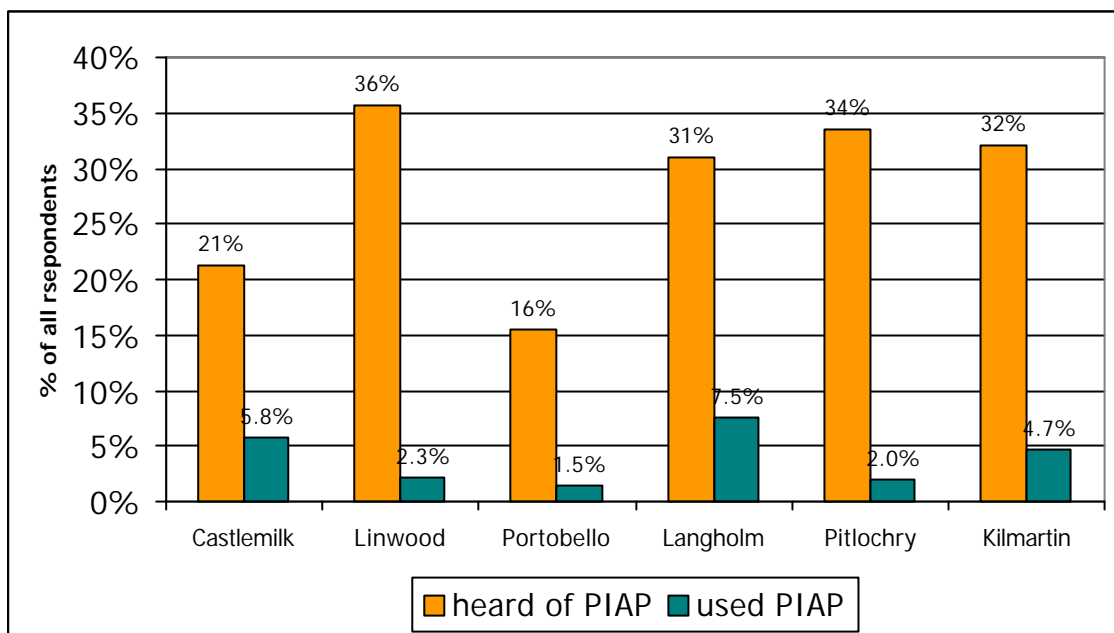
## 2.2 Awareness of Public Internet Access

Across our six area surveys, 27% of respondents were aware of their local PIAP. This figure was highest where the access was located in an existing location that was well used such as a video shop or a local general store (33%). In the two areas where the access point was in a community centre, public awareness was lowest (16% to 21%). This tends to suggest that community facilities are only used by certain sections of the community, and are perhaps not always the most effective way of reaching a wide range of people.

Awareness of the PIAP also tended to be higher in rural areas where people were perhaps more likely to come across the PIAP.

There is evidence from our user and follow-up survey to suggest that using PIAPs is raising general awareness of Internet Access. In the initial survey, 20% of respondents did not know of anywhere else apart from their home or the PIAP to get access to the Internet. When the same group were surveyed three months later, the proportion not aware of alternative access had dropped to less than 1%.

Figure 2-5 Awareness of Public Internet Access Points within six catchment areas



Source: HA Area Surveys n=1978

## 2.3 Other Internet access

### 2.3.1 Home internet access

Overall 47.6% of the PIAP users surveyed had home internet access; although only 40.6% had access for the whole household. This means that more than half of the users do not have home access (52.7%). But this varies with the economic situation of individuals; and 82% of unemployed users surveyed had no home access.

According to the ONS, 41% of households had home internet access in Scotland in summer 2003, so it would appear that PIAPs are attracting slightly more people with home access than in the population as a whole. But the programme is clearly attracting significant numbers of users without home access.

Some 60% of users of PIAPs in towns and urban areas do not have home access, while a slight majority of users in rural and remote rural areas do have home access. There is little difference by PIAP sector in the proportion of users who do not have home access.

A higher proportion of PIAP users in socially excluded areas do not have home access (59%). This suggests some success in targeting disadvantaged groups in these areas.

Of those who responded to the follow up survey 45% still do not have internet access at home and 7% have got internet access at home since coming to the

PIAP. Of those who do not have internet access at home around a half are considering getting access.

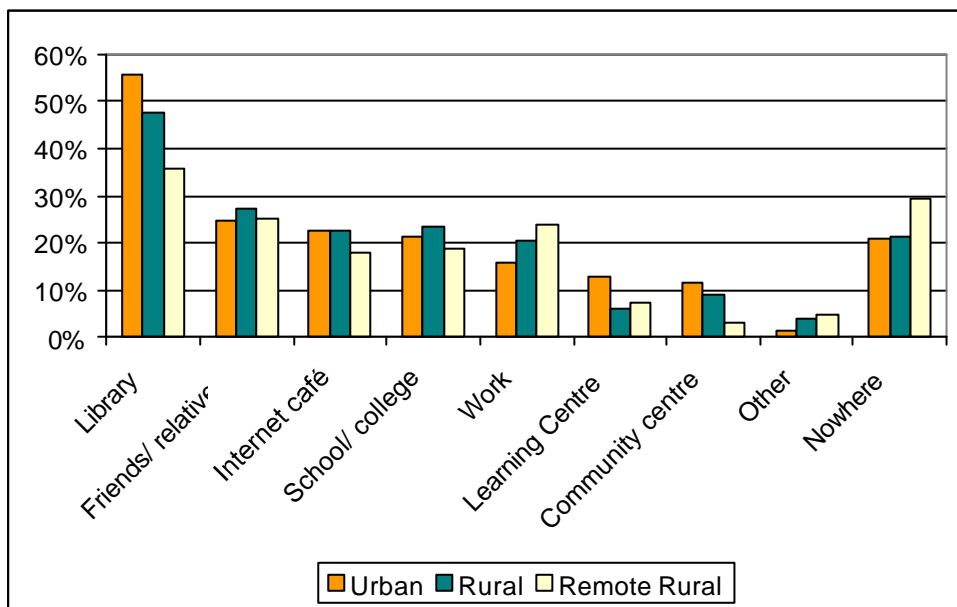
### 2.3.2 Access elsewhere

Nearly a quarter of PIAP users have no other public access, or at least know of none (24%). This figure is even higher in remote rural areas, where 30% have no other access apart from those who have access at home.

Libraries are the most widely cited other source of internet access, and this is particularly so in urban areas, where more than half the PIAP users knew they could get internet access (56%).

Over a quarter of PIAP users could access the Internet at a friend or relative's house (26%), and one in five could do so at a school or college (22%). But those using PIAPs in remote rural areas were less likely to identify alternative access points, apart from their place of work.

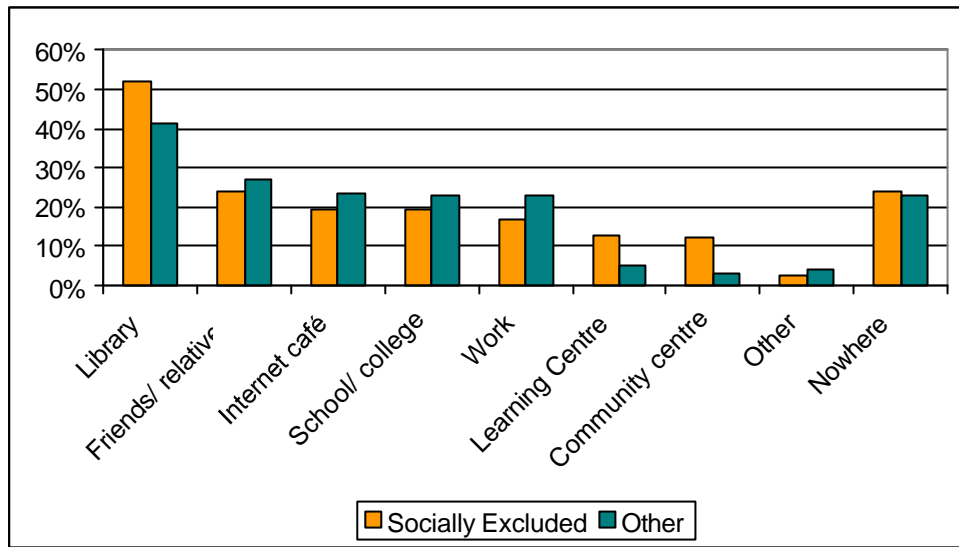
Figure 2-6 Awareness of other Internet access by rurality



Internet cafes appear best known to younger age groups aged under 25 with a quarter of users in these age groups mentioning them.

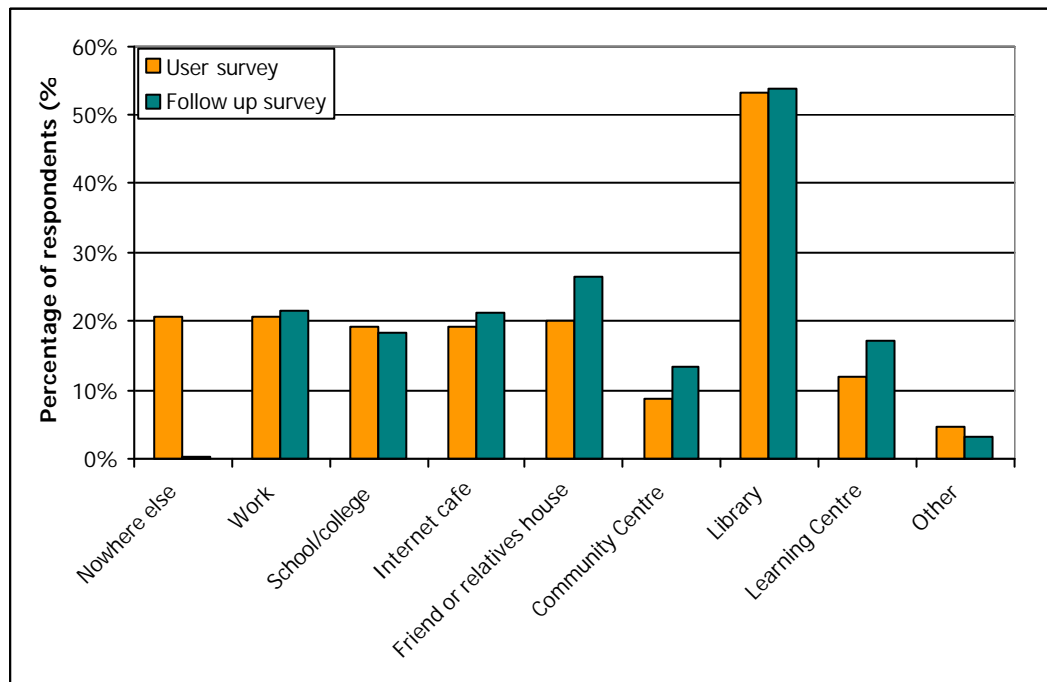
As Figure 2-7 shows, PIAP users in socially excluded areas appear equally likely to know about alternative access points, although the sources of access tend to differ from those in other less disadvantaged areas. Users in disadvantaged communities are much more likely to cite libraries, community centres and learning centres and less likely to identify school, work, internet cafes or friends and relatives houses as providing internet access. This perhaps reflects investment in community learning and ICT through SIPs and initiatives such as Digital Champions.

Figure 2-7 Awareness of other Internet access by social disadvantage



Our area surveys found that libraries were the best-known source of public Internet access (14%) aside from PIAPs. And more than a fifth of the 45-54 year old age group were aware of internet access at libraries suggesting that age may be a factor in awareness of different sources (22%).

Figure 2-8 Changes in awareness of other internet access sources among PIAP users



Source: HA Follow up survey, n=208

Our follow-up survey has found that users three months on have found other places to get access to the internet as shown in Figure 2-8. In the initial survey a fifth of respondents knew of no other access source, whereas three months on every respondent apart from one knew of places to access the internet apart

from the PIAP and their own home. This suggests that using the PIAP raises general awareness of the Internet.

### 2.3.3 Encouraging more home access

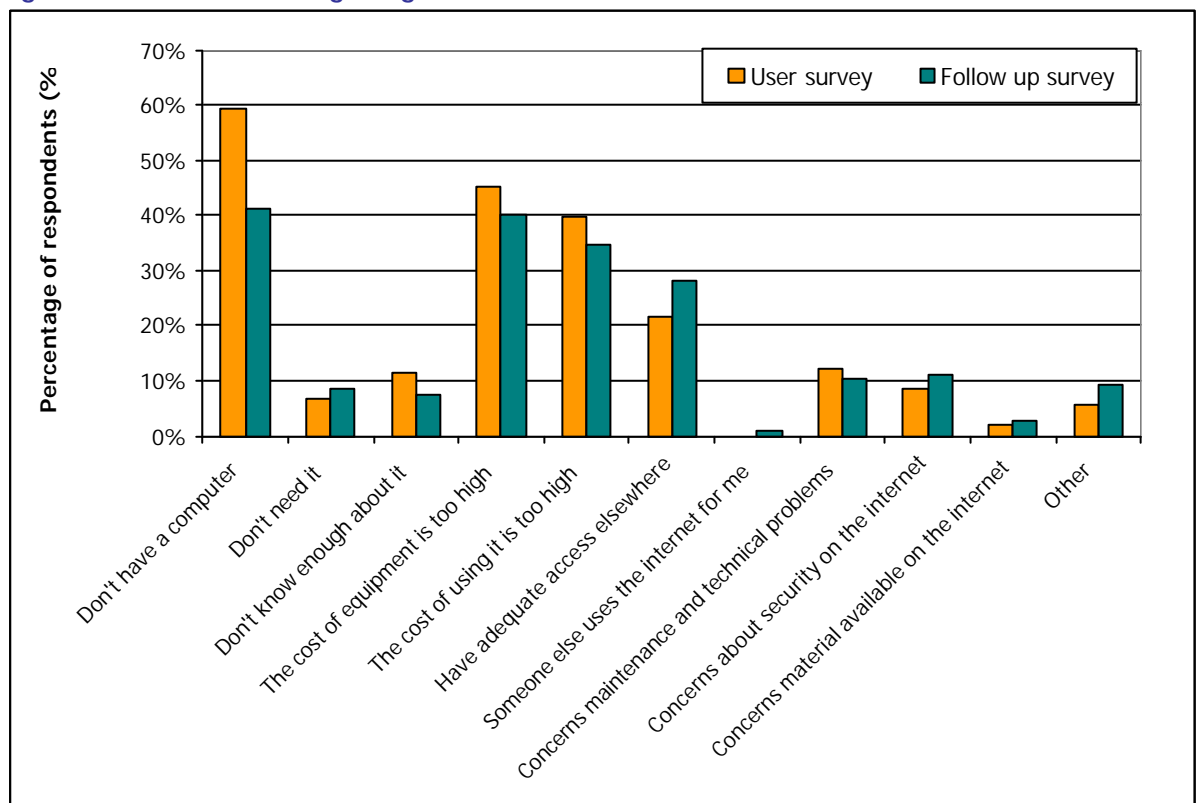
Although not a stated aim of the initiative, the Executive also hoped that by trying the internet and extending their experience of it at a PIAP, many of the users who didn't have home internet access would feel motivated to get it.

- Of the respondents to the follow up user survey, 7% of those who had not had home internet access in the first survey did by the follow up survey; and
- Of those who had not yet got home access, around half (49%) were considering it.

Although only a small sample, this suggests that home internet access is likely to increase more quickly among PIAP users. However for some having adequate Internet access at the PIAP will mean they do not need to get home access.

The main barriers to getting internet access at home have changed from the initial user survey. More people now state that they have adequate access elsewhere but less because they do not have a computer or because of the cost of equipment or maintenance.

Figure 2-9 Reasons for not getting home internet access



Source: HA Follow up survey, n=208

## 2.4 Have PIAPs reached disadvantaged groups?

The main criteria for funding a PIAP was increasing the population within the catchment area of public internet access. But in addition the Executive funded PIAPs that would serve socially disadvantaged groups who may not use other local public internet access. This would include:

- ❑ people who are personally disadvantaged, such as lone parents or those from black and minority ethnic groups; and
- ❑ people living in disadvantaged areas.

So, in Glasgow there are three PIAPs within a mile of each other targeting different groups. These serve lone parents, ethnic minorities and unemployed people in off-street locations that specialise in offering each group a wider range of services including Internet access.

Most PIAPs targeting particular disadvantaged groups appear to be within the community or voluntary sector. A third of PIAPs are in areas categorised by the Executive as “socially disadvantaged” (33%). As Figure 2-10 shows, these are particularly concentrated in urban areas, where two thirds of the PIAPs are within socially excluded postcodes.

**Figure 2-10 Targeting Socially Excluded Areas (SEAs)**

	% PIAPs in SEAs	% Postcodes in SEAs
Urban	67%	57%
Accessible rural	21%	32%
Remote rural	23%	26%

Source: Hall Aitken analysis using rural/urban classifications by Databuild and socially excluded classifications from Scottish Executive

Economic status is another factor of disadvantage and our user survey found that 14% of PIAP users responding were unemployed. This is more than three times the overall unemployment rate across Scotland. Figure 2-11 shows that Community/Voluntary sector PIAPs attracted a higher proportion of unemployed users (15%). This is perhaps because this sector is more likely to target disadvantaged groups. However business sector PIAPs also attracted a high proportion of unemployed users, and public sector PIAPs were not far behind.

**Figure 2-11 Centres attracting disadvantaged groups**

Sector	Percentage of users unemployed
Community/Voluntary	15%
Business	14%
Public Sector	11%

Source: HA User Survey, n=670

Our user survey has identified a number of areas where PIAPs appear to be successfully targeting more disadvantaged people:

- ❑ Users within socially excluded areas were more likely to be nervous or wary about using the Internet, and were more likely to need help;
- ❑ A higher proportion of users in socially excluded areas did not have home internet access (59%);
- ❑ PIAP users in disadvantaged areas were more than twice as likely as users elsewhere to be using the Internet to look for jobs (36% compared to 16%); and
- ❑ A higher proportion of users in disadvantaged areas stated that their ICT skills had improved since using the PIAP (85%).

## 2.5 Are the PIAPs raising ICT literacy?

Given the issues around support raised by the mystery shopping visits and the likelihood of attracting people who already used the internet, could the PIAPs succeed at raising ICT literacy?

We asked users if their internet skills had improved since they have been using the PIAP.

- ❑ 78% said their internet skills had improved since they'd been using the PIAP;
- ❑ 45% said they were using the internet for things they wouldn't or couldn't before – for research, e-commerce, job search or e-mail;
- ❑ 64% also said they use the internet for longer at the PIAP because it is cheap or free.

### 2.5.1 Using the Internet for new things

We asked PIAP users whether they were now using the internet for things they couldn't or wouldn't before. Overall 45% of users said that they were, and this was again linked to age. Figure 2-12 shows that PIAPs are having a greater impact on expanding the internet skills of older age groups. More than half of the 55 and over age groups were doing new things using the Internet (54%), compared to only a third of the under 16 age group (32%).

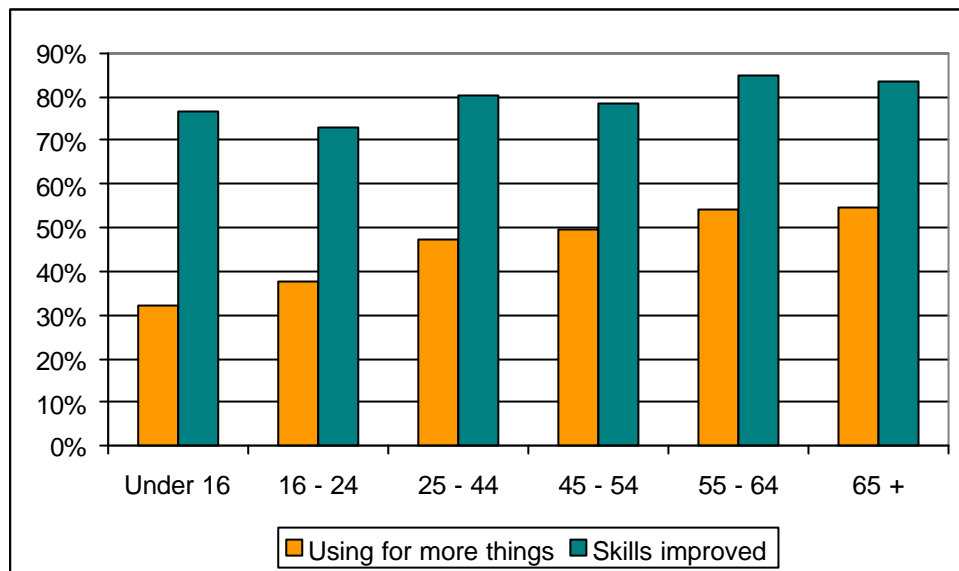
The most common new things were:

- ❑ E-mail (15%);
- ❑ Looking for Job vacancies (13%);
- ❑ Booking travel tickets (13%); and
- ❑ Shopping (13%).

Users in urban areas appear to be more likely to be using the internet for new things (48%) compared to users in remote rural communities (41%). And users

in socially disadvantaged communities are also more likely to have expanded their internet use (48% compared to 40%).

**Figure 2-12 Increased use or skills by age group**



Source: User Survey n=670

Using the PIAPs has also led to improved internet skills for the vast majority of people (79%). And 40% had said their skills had improved a lot. There was less of a variation by age in terms of improving skills, although a slightly higher proportion of users aged 55 and over said their skills had improved. More than half of unemployed users said that their internet skills had improved a lot (57%), with 85% identifying some level of improvement.

Users in public sector (88%) and Community sector (82%) PIAPs were more likely to identify improved internet skills than users in the Business sector (70%). And 85% of users in socially excluded areas identified improved skills; 49% saying that their skills had improved a lot.

3

### 3 How are they being used?

*This section looks at how PIAPs are working on the ground. It examines the types of users, how they use the internet at PIAPs compared to elsewhere, the kind of support that users need and their general levels of satisfaction with the PIAP.*

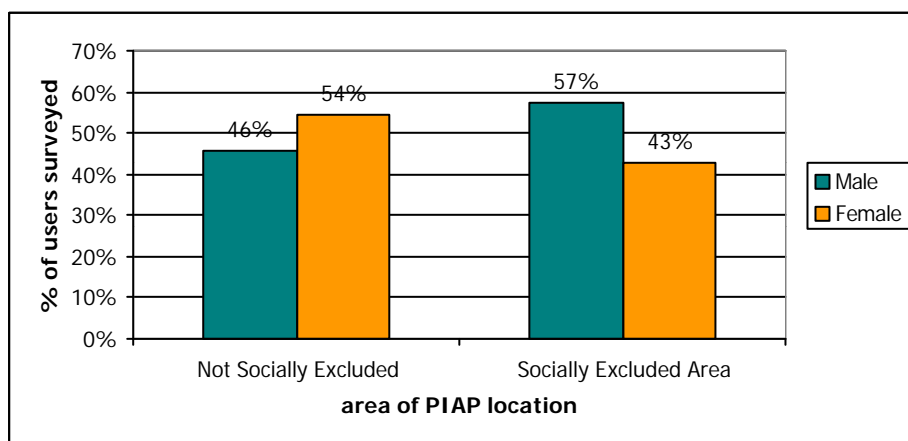
#### 3.1 User profile

##### 3.1.1 Types of people using the PIAPs

As discussed in Chapter 2, the PIAP initiative was intended to extend public internet access to anyone who needed it, although it was hoped to be particularly useful to disadvantaged groups.

Overall there were more male users than female users, which mirrors the wider situation with Internet access, 52% of the users were males. But in remote rural areas the situation was reversed and 53.2% of users were women. Males outnumber female users across the different host sectors, but most markedly in the public sector PIAPs (55.8%). There is also a high proportion of male users within socially excluded areas (57.4%) which may be due to PIAPs targeting unemployed people in these areas who are more likely to be men.

**Figure 3-1 Gender balance by social disadvantage of area**



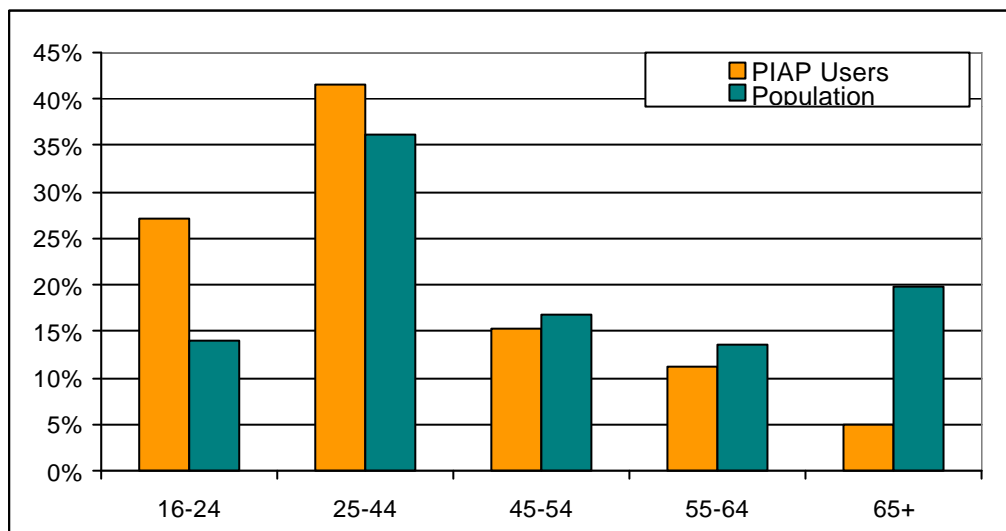
Source: Hall Aitken, User Survey and PIAP users in Area Survey, winter 2003-4. n=665

Although the PIAPs are attracting a broad spread of ages, they appear to be more effective at targeting younger people. A third of the users surveyed were aged under 25 and around one in ten were aged under 16.

However it is difficult to compare the proportion of under 16 users with the wider population, because the youngest age groups will not be using the Internet. So Figure 3-2 compares the user profile against the proportion of the 16 plus population as a whole. It shows that PIAPs appear to be more successful at attracting younger age groups, with twice the proportion of 16 to 24 year olds using PIAPs compared to the population as a whole. There is also a higher proportion of 25 to 44 year old users.

However, the proportion of users aged 65 and over is much lower than in the wider population as a whole, representing only 5% of 16+ users. This suggests that PIAPs are not an effective way of targeting older users. This is perhaps not surprising, given that there is only limited support available, and that older age groups are far less likely to be confident about using the Internet.

Figure 3-2 Age of PIAP users surveyed



Source: Hall Aitken User Survey, 2003-2004. n=670, Census 2001, GRO(S)

There were some variations in the profile across different types of venue:

- ❑ 16-24's are better represented at public sector venues (33% of users) than community sector PIAPs (20% of users).
- ❑ Over 55's make up a lower share of users in socially excluded areas than elsewhere (11% against 19%).
- ❑ A higher proportion of over 55s use PIAPs in the community/voluntary sector venues (20% against 10% in the other sectors).
- ❑ There is very little variation by age between urban and rural PIAPs.

Our user survey found that PIAP users are most likely to be regular internet users. The vast majority use the internet at least once a week (83%). And only 4% were using it for the first time. This may explain why the age profile of users is skewed towards younger age groups.

### 3.1.2 Types of users targeted

From the hosts' perspective, there are broadly three types of target user:

- ❑ *Client groups*: a particular group of people who regularly use the venue, or are likely to be there because they belong to a specific group;
- ❑ *The wider public*: a genuine drop-in service for the public at large, where any use of the services is incidental to using the Internet; and
- ❑ *Staff*: people working in the venue who have no other internet access.

We asked hosts which groups that they specifically targeted and which groups mostly used the service. Nearly half of all venues were targeting the general public, but only one in ten stated that this was the main group using the service.

Our surveys found that the vast majority of PIAP venues attract users from the general public to some extent (86%). However this also means that there are about one in seven venues that do not have users from the wider public but concentrate on their own client group.

And more than a quarter identified their own client group as their main source of users. This tends to suggest an element of success in bringing computers to where people are.

Some 59% of PIAP users responding to the survey were either customers, regular visitors or were on the premises anyway. The vast majority of users had used the PIAP venue before the internet access was there (81%). A fifth of users surveyed had heard through word of mouth (19%). But only 7% of users said they had used the access after seeing stickers in the window.

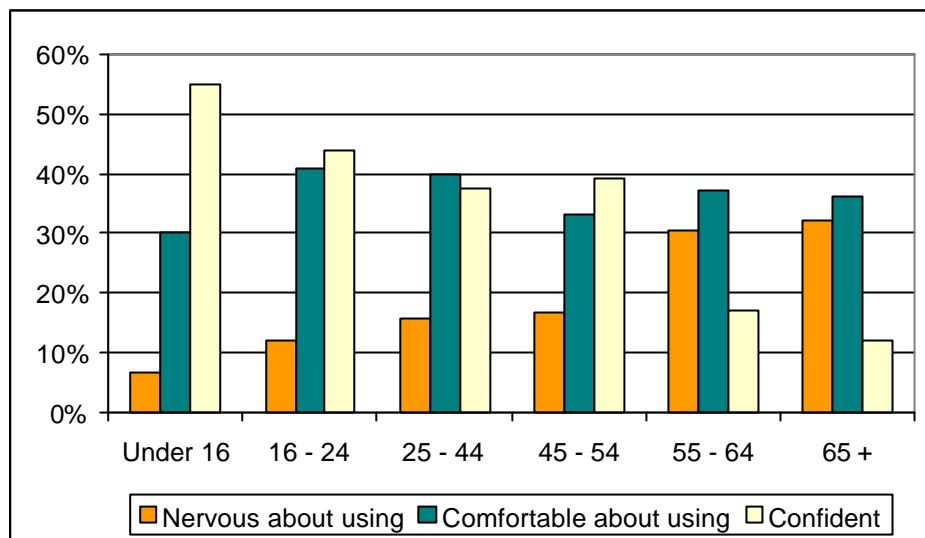
Staff were more likely to use the computers in the PIAPs based in businesses and community venues, though there was very little variation between urban and rural PIAPs. Staff in PIAPs outside socially excluded areas were slightly more likely to be using the computers.

## 3.2 Support Needs

### 3.2.1 Confidence

Three quarters of users were either comfortable or confident using the PIAP (75%). But 14% were wary about using it at first, and 8% needed some support or persuasion. As Figure 3-3 shows, confidence in first using the PIAP varied strongly with age. Very few under 16s felt nervous about using the PIAP whilst a third of those aged 65 and over said they were nervous or found it daunting. However there was very little difference in terms of gender.

Figure 3-3 Feelings about first using the PIAP by age group



Source: User survey n=670

Around a quarter of users in public sector PIAPs found it daunting or were wary about using the internet access (24%), compared to only 12% in business sector PIAPs. This may be because public sector access points were often targeting more disadvantaged groups. Around one in five users in socially excluded areas (19%) were wary about using the service at first, compared to 13% in other areas.

Almost half of those who were confident had a computer at home compared to only a fifth of those who were not confident. Confidence when first coming to the access point may relate then to the fact that they own a computer at home and are familiar with it.

Our follow-up survey found that a higher proportion of those who were not confident initially were using the internet for things they wouldn't or couldn't before (49% compared to 40%). And higher proportion of those who were not confident when starting to use the PIAP were using the internet at the PIAP at least once a week at the time of the follow-up survey.

### 3.2.2 Support needs

Some 37% of users needed some level of help and users in disadvantaged areas were more likely to need help (46%). The biggest need for help was in logging onto the internet (17%) and finding what they were looking for on the internet (15%).

The need for support also had a strong correlation with age. Over half of the 55 to 64 age group needed some level of help (53%) and three quarters of those aged 65 and over needed support (76%). But only around a quarter of users aged under 25 needed support.

Users in remote rural areas were less likely to need support with more than three quarters stating that they did not need any help (77%). But in urban areas, half of the PIAP users needed some level of help (50.5%) with 14.5% needing a lot of help.

Overall, 89% of those who needed assistance got it from host venue staff. This was highest in the public sector, where 96% got help from venue staff. Some 16% of users needing help got assistance from other users, and this was particularly evident among users aged 45 and over and users in the community and voluntary sector. One in five users in socially excluded areas who needed help got it from other users (20%).

We came across peer support, where users help each other out, in a number of our visits to PIAPs. From the host survey it appears that this is quite a common phenomenon, with around one in five hosts reporting this happens a lot, and more than half reporting it occasionally.

Only 2% of users needing help said that they did not get help.

## 3.3 PIAP use

### 3.3.1 Reasons for using the PIAP

Nearly half of the users chose to use the public access because they have no access at home (47%) and 11% did so because they have no other public access. Non-working users were more likely to cite lack of home access as a reason for using the PIAP; 70% of unemployed users and 55% of the long term sick were using PIAPs for this reason. And this was more likely to be a reason for users in urban areas (52%) and socially disadvantaged areas (51%) where there tend to be lower rates of home access.

Users in remote rural areas were most likely to be using the PIAP because there was no other public access (17%). This suggests that the Scottish Executive strategy of providing coverage in areas with no existing access is succeeding in widening access in these areas. Users in PIAPs within businesses are also more likely than those in other sectors to cite lack of alternative public access (13%).

Half used it because it was cheap or free (49%), and a similar proportion because it was convenient (48%). Men were slightly more likely to cite the low cost as a reason for using the PIAP (51%). Some 70% of long term sick or disabled users said they used it because it was convenient or nearby. A higher proportion of people in remote rural areas also cited the convenient location as a reason for using it (53%).

Business sector locations were more likely to be viewed as convenient by users. Over half of the users in business sector PIAPs cited convenience as a reason for using them, which backs up the findings from the mystery shopper visits.

Women were more likely to state that they were using the PIAP because they were there anyway (30% against 26%). This suggests that putting PIAPs in

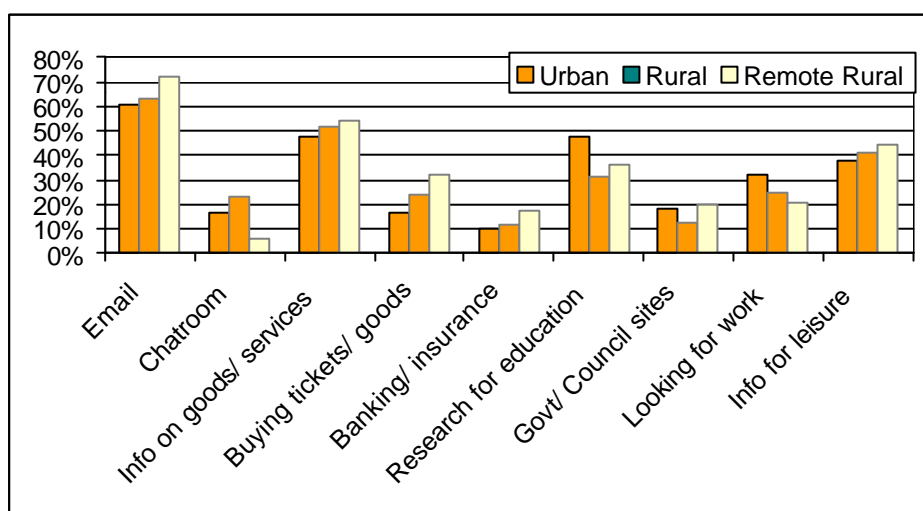
places where people go regularly (such as hairdressers) may be helping to target women. More than a third of users in the business sector indicated that they were using it because they 'were here anyway'.

### 3.3.2 What Internet is used for

Around two thirds had used PIAPs for email, which was the biggest use (65%). Older age groups made more use of email, with 73% of the 45 to 54 year old age group using it. And as Figure 3-4 shows, people in PIAPs in remote rural areas were also more likely to be using email, with 72% doing so, compared to only 61% in urban areas.

Half of the users surveyed had used the internet for finding info on goods/ services (51%). This was higher among employed users (58%) and lower among the unemployed (44%) and students (32%). As Figure 3-4 shows, people in more rural areas are also more likely to use the internet access for this purpose, and 54% in remote rural areas did so compared to 48% in urban areas and towns. This perhaps suggests PIAPs provide a way of accessing a greater range of goods and services for rural users. But people in socially disadvantaged areas are less likely to be using the PIAPs to find out about goods and services (47% against 56%).

Figure 3-4 Type of Internet use by rurality

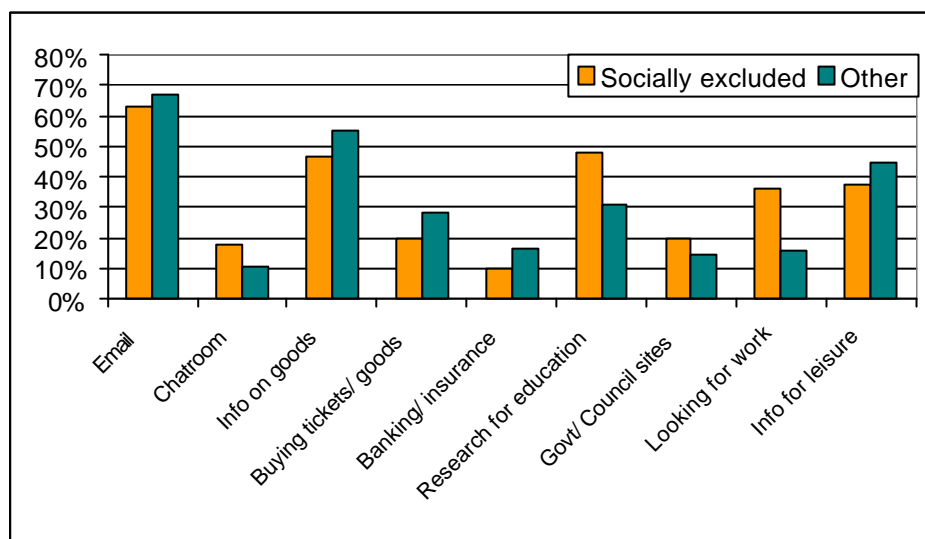


Some 23.5% of users overall had used the internet to buy goods or services and this seems linked strongly to age. The most likely age group to be using the PIAP for this purpose was 55 to 64 year olds, where 39% had done so. This compares to 20% of 16 to 24 year olds and just 12% of the 65 plus age group. Perhaps surprisingly, women were more likely than men to buy online (26% compared to 21%). Economically active groups were also more likely to buy online, with almost a third of full time employed users doing so (32%), compared to just 16% of unemployed users. People using PIAPs within businesses were also more likely to buy goods or services online (28%) than those in the public or community sectors.

Some 13% of users had used the PIAP for banking or insurance, and again this was highest among 55 to 64 year olds (21%). Women were more likely to use the access point for this purpose than men (15% compared to 11%). As with buying online, employed people and those living in rural areas were more likely to bank online. PIAP users in businesses were also more likely to use the service for banking (17%).

Overall 40% used PIAPs for research associated with study or education. But more than half of unemployed (53%) and long-term sick (55%) users had used the PIAP for study. This may be due to programmed use within PIAPs which specifically target disadvantaged groups. This may be backed up by the high proportion of users in public sector PIAPs using the internet for study (59%) and the higher proportion using PIAPs in socially excluded areas for learning (48.2%).

Figure 3-5 Type of Internet use by level of social disadvantage



Some 17% of users surveyed had accessed Government or local authority websites. Older age groups (25+) were much more likely to use the PIAPs for these services.

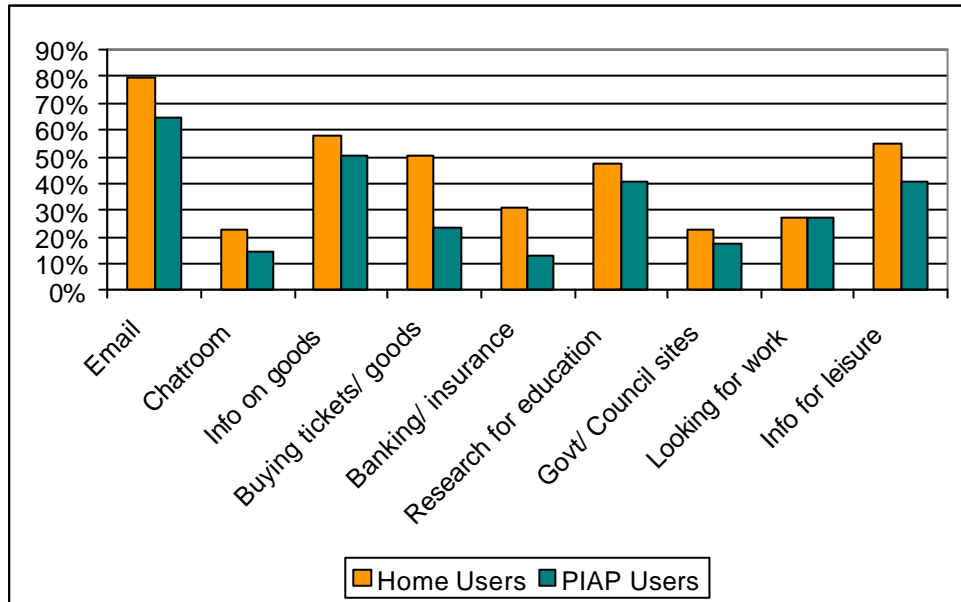
More than a quarter of users (26.9%) had used the internet to look for jobs, with men more likely to do so than women (31% against 23%). Perhaps not surprisingly, unemployed users were most likely to look for jobs online, with 70% doing so at the PIAPs. People in towns (32%) and in public sector managed PIAPs (42%) were also more likely to be using the internet for job search. And people using PIAPs in socially disadvantaged areas are more than twice as likely to be using the internet to look for work (36% compared to 16%). Again this may be linked to PIAPs targeting certain groups such as unemployed people.

Overall 41% of users used the PIAPs for getting information for leisure or interests, and men were more likely to use the internet access for this purpose (44% against 37%).

Use of chatrooms was strongly linked to age, with 43% of under 16s using the PIAPs for this purpose. This compares to only 9% of the 25 to 44 age groups.

If we compare what people in PIAPs use the internet for with what people with home access use it for, we can see there are some interesting differences. Home users generally use the Internet for a greater range of things, reflecting greater levels of use in every category other than job search. But home users are far more likely to engage in e-commerce (50% against 24%) and e-banking (31% against 13%) than users in PIAPs. This clearly relates to the greater privacy and security associated with home access. The areas where PIAP usage most closely mirrors home usage are in job search, accessing government and council websites and finding information about goods and services.

Figure 3-6 Internet use at home and at PIAP



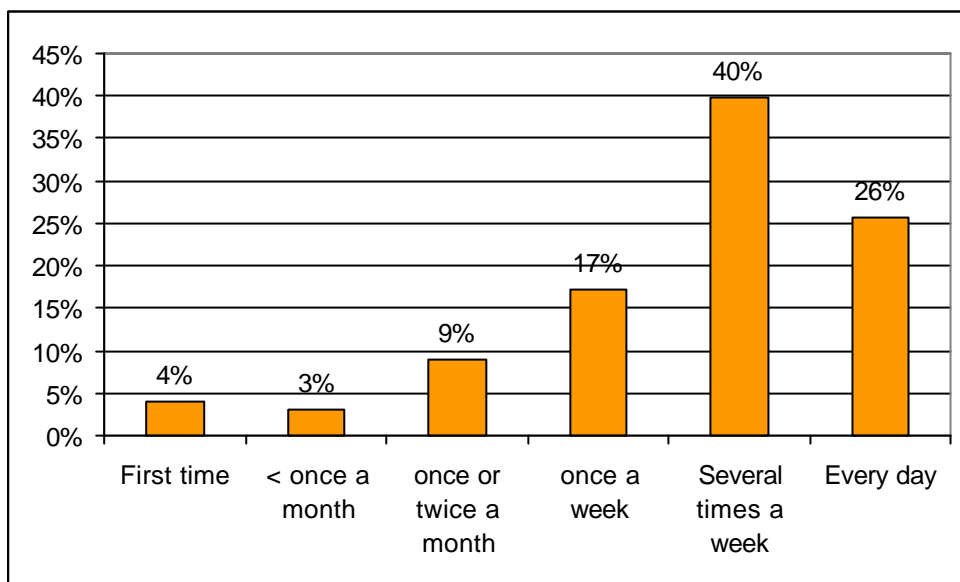
Results from our follow up survey show that more people are now using the internet access at the PIAP for the following activities compared to the initial survey:

- ❑ Finding information for leisure/interest (59% compared to 44%);
- ❑ Research for studies/education (47% compared to 43%); and
- ❑ Buying or ordering tickets, goods or services (30% compared to 26%).

### 3.3.3 Frequency of use

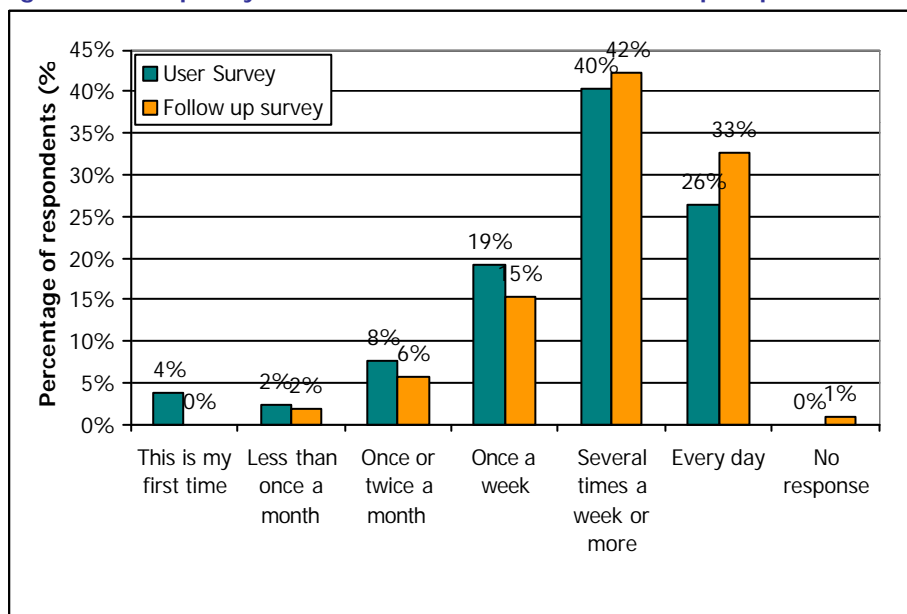
Figure 3-7 shows that most PIAP users are regular Internet users. Two thirds use the Internet several times a week or more and only 7% use the Internet less than once a month.

Figure 3-7 Frequency of Internet Use



If we look at the internet use of those who responded to both the initial and follow-up user surveys, Figure 3-8 shows a general increase in the proportion of users accessing the internet several times a week or more (from 66% to 75%).

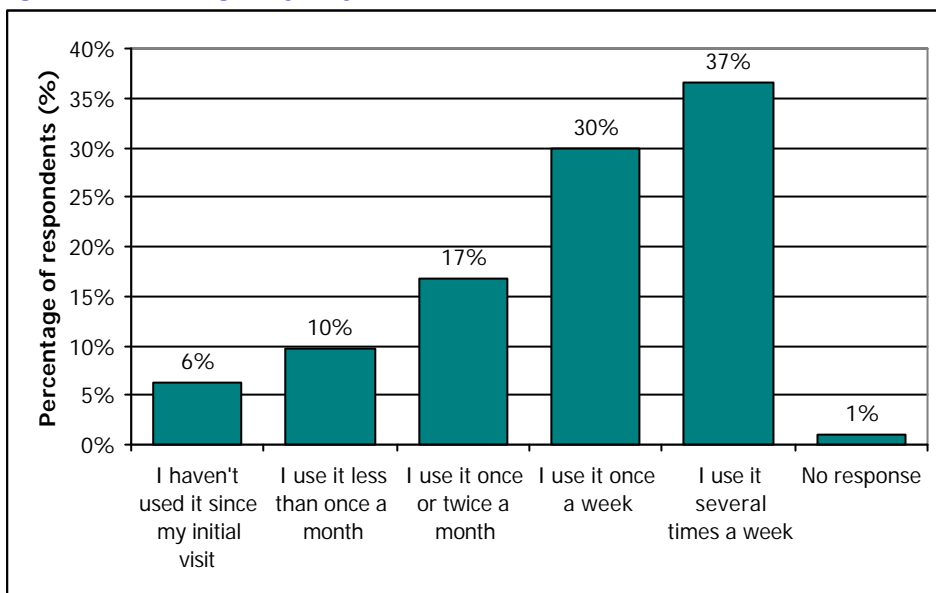
Figure 3-8 Frequency of internet use for matched follow up respondents



Source: HA Follow up survey, n=208

Our follow up survey of users also indicates that more than two-thirds (67%) of respondents to the follow up survey are accessing the internet at the PIAP at least once a week, as Figure 3-9 shows. Only a small proportion (6%) have not returned to the PIAP since their initial visit and this closely corresponds to the proportion who gained home access since first visiting the PIAP. However there is likely to be some under-reporting from those using the PIAP casually.

**Figure 3-9 How regularly do you access the internet from the PIAP?**



Source: HA Follow up survey, n=208

### 3.4 Users Views on the service

In general the feedback from users has been positive with 97% agreeing that internet access at PIAPs encouraged people to use the internet and 86% agreeing that the PIAP benefits the local community.

Most users in the follow-up survey thought the quality of the service was either better or unchanged since they started using the internet at the PIAP. In terms of suggestions as to how the PIAP access can be improved, the main ones were:

- ❑ Install broadband (15% of those responding);
- ❑ Advertising leaflets (14%); and
- ❑ None/nothing (10%).

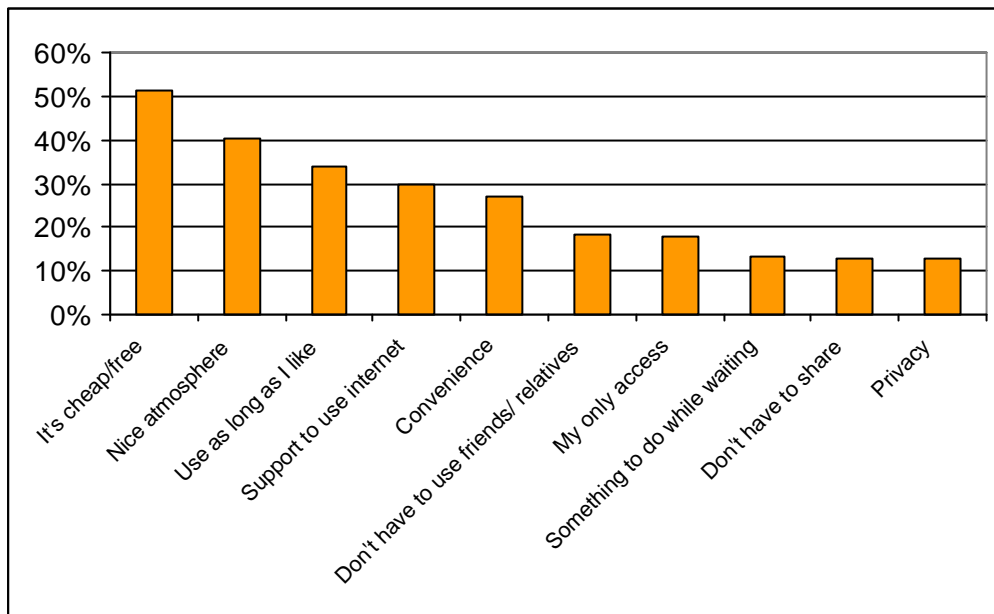
#### 3.4.1 Advantages

Figure 3-10 shows the main advantages identified by users of using the Public Internet Access Point. The most frequently identified advantage was the fact

that it was cheap or free, which more than half of the users mentioned. And 40% thought that the nice atmosphere was an advantage. Being able to use the internet for as long as they liked was mentioned by a third of users as an advantage (34%).

And 30% said the fact that they got support to use the internet was an advantage over other provision. For 18% the PIAP was the only place they can get internet access.

Figure 3-10 Advantages of using the PIAP



Source: user survey n=670

Figure 3-11 shows that more respondents in the follow-up survey cited the fact that the service is free or cheap as an advantage (78% compared to 57%). This suggests that the low cost is a factor in continuing or repeated use.

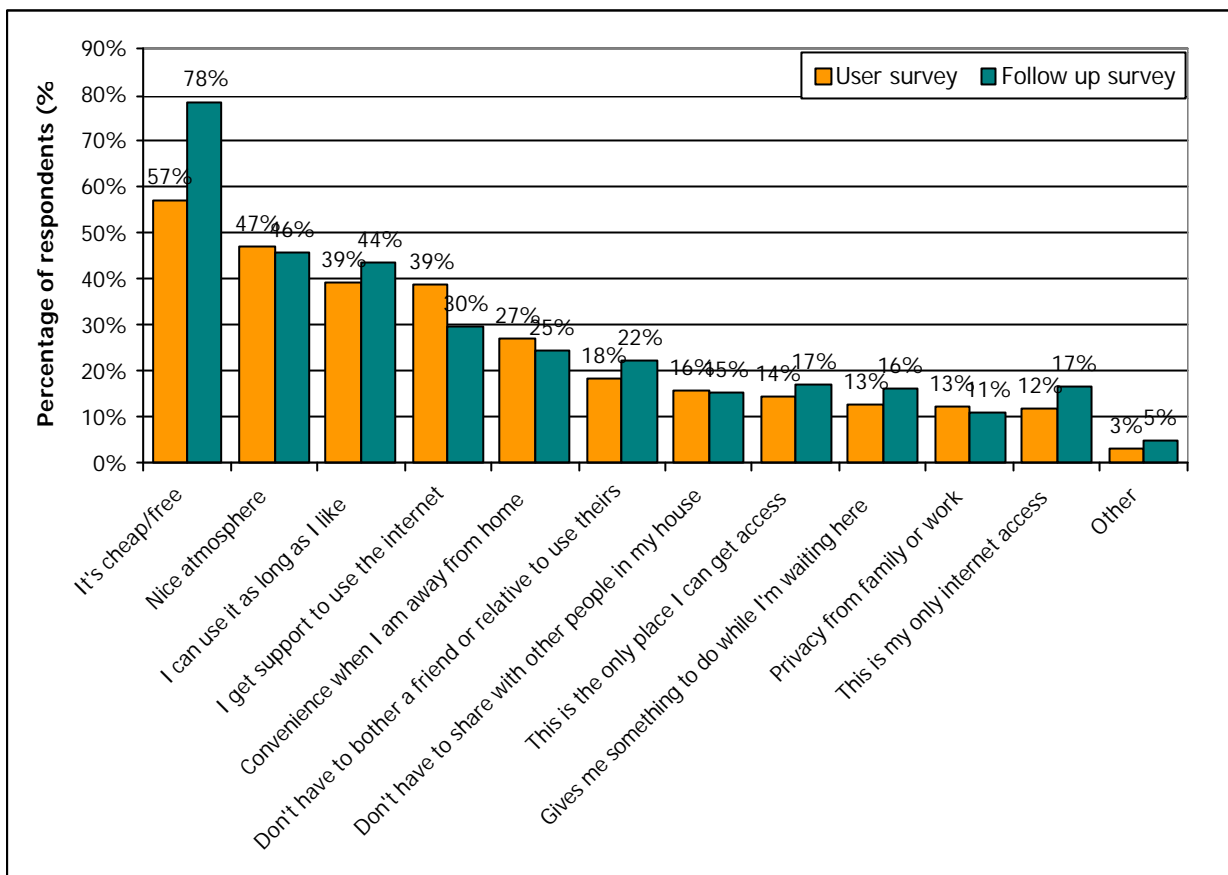
### 3.4.2 Disadvantages

Most (61%) said there were no specific disadvantages of using the PIAP. But 21% said the slow connection speed was a disadvantage and under 16s (28%) and men (24%) were more likely to highlight this. Slow connection was also more likely to be highlighted by users in rural (23%) and remote rural (28%) PIAPs.

Lack of privacy (7%) and time limits (6%) were the other most significant disadvantages. And one in ten under 16s highlighted lack of privacy and time limits as disadvantages.

The main disadvantage among the follow-up survey respondents was still the slow connection speed stated by 22% of respondents, followed by time limits (11%). Although overall 57% stated there were no specific disadvantages.

**Figure 3-11 What advantages have you found from accessing the internet here rather than somewhere else?**



Source: HA Follow up survey, n=208

4

## 4 Hosts' experiences

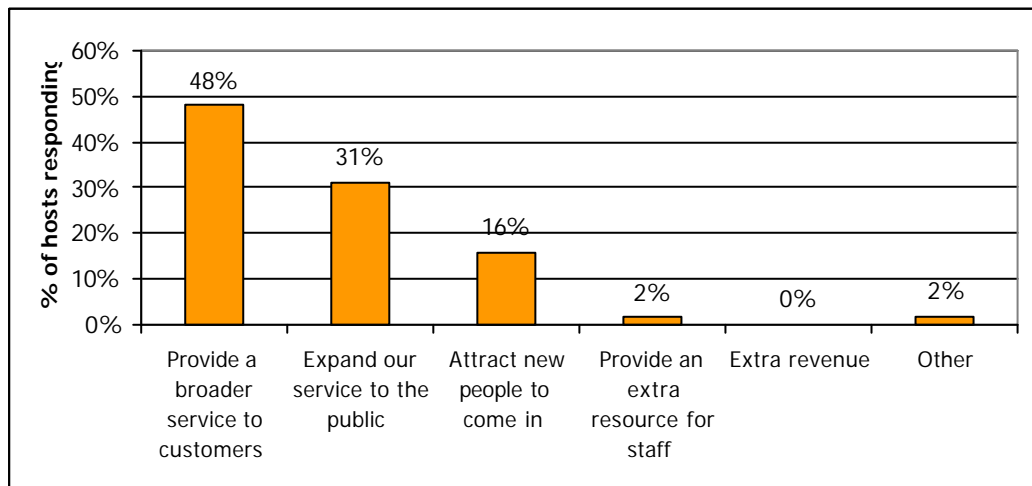
*This chapter looks at the initiative from the hosts' perspective. It looks at their motivation, their marketing and publicity activities and what training and support needs they identify. It also looks at the overall sustainability of the access points.*

### 4.1 Views on running an access point

#### 4.1.1 Motivations

We asked hosts why they had decided to take part in the PIAP initiative. Nearly half said that serving their customers better was the main motivation for getting the PIAP. Nearly a third were primarily motivated by expanding their service to the public, and a further 16% wanted to attract new people into the venue. Notably, the potential revenue a PIAP could offer was not a primary motivator for any of the hosts.

**Figure 4-1 Main motivation to host a PIAP**



Source: Host survey

#### 4.1.2 Benefits

The benefits hosts perceive most relate closely to two biggest the reasons they chose for hosting a PIAP: providing a broader service to customers and proving a service to the community. Two-thirds of hosts (66%) found organisational benefits with new people coming in and/or an extra resource for staff. Notably,

only 6% saw any added income as a benefit. The key benefits we quantified are shown below.

**Figure 4-2 Benefits hosts perceive from having a PIAP**

Benefits identified by hosts	% of hosts finding benefit
Provides a broader service to customers	81%
Provides a service to the community	79%
Attracts new people into the venue	49%
Provides an extra resource for staff	47%
Makes people more comfortable while they wait	13%
Provides extra income	6%

Source: Host Survey, Base = 373

Several learning centres said that having the PIAP allowed learners to access the internet outside their training sessions, thus broadening their service. A further benefit for 85% of hosts is the availability of the PIAPs for staff use.

### 4.1.3 Challenges

Given that the basis of the PIAP initiative is to place internet access points in organisations where prospective users already go for other reasons, it is perhaps not surprising that the key challenges hosts report relate to distractions from getting on with their every day work. As Figure 4-3 shows more than four out of ten hosts have staff time taken up with technical problems or in helping users.

**Figure 4-3 Challenges for hosts**

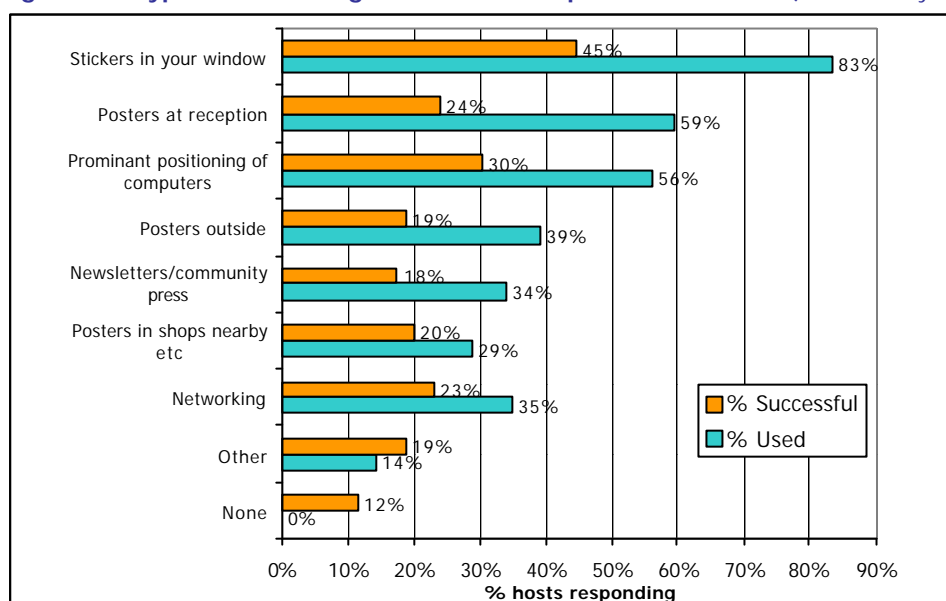
Challenge	% of hosts experiencing
Technical problems are taxing on staff time	43%
Supporting internet access point users diverts staff from core duties	42%
Space constraints	28%
Security issues for our clients	19%
Broken equipment looks bad	15%
Staff using internet for leisure purposes	15%
Public users change the comfortable atmosphere for regular clients	8%
Other	8%

Source: Host survey

## 4.2 Marketing & Publicity

One of the challenges for the initiative identified in the mystery shopping visits is the variability of marketing materials to let potential users know the service is there, especially as nearly half of the PIAPs we visited were not in the main business area. The hosts surveyed felt that the picture was more hopeful. Only 6% said they had not found any type of marketing successful. Over half of hosts seem to find that their marketing is not working as well as they had expected either, as Figure 4-4 below shows.

**Figure 4-4 Types of marketing used and host s' perceived success (not mutually exclusive)**



Source: Host survey, Base = 284

The most popular type of marketing uses the window stickers provided by the Scottish Executive. The posters supplied by the Executive are also well used, particularly by those using the window stickers. Nearly half managed to position the computers in a prominent place to attract attention to them. Many also used their own initiative to spread the word through networking, newsletters and posters in other shops nearby. Some hotels also said they highlight the PIAP service in their brochures, menus or tent signs in the rooms.

We asked the hosts if they would like additional signage from the Scottish Executive and 39% said they would. On the basis of our mystery shopping experience, we suggested two types of signs. Of the hosts who were interested in additional signage,

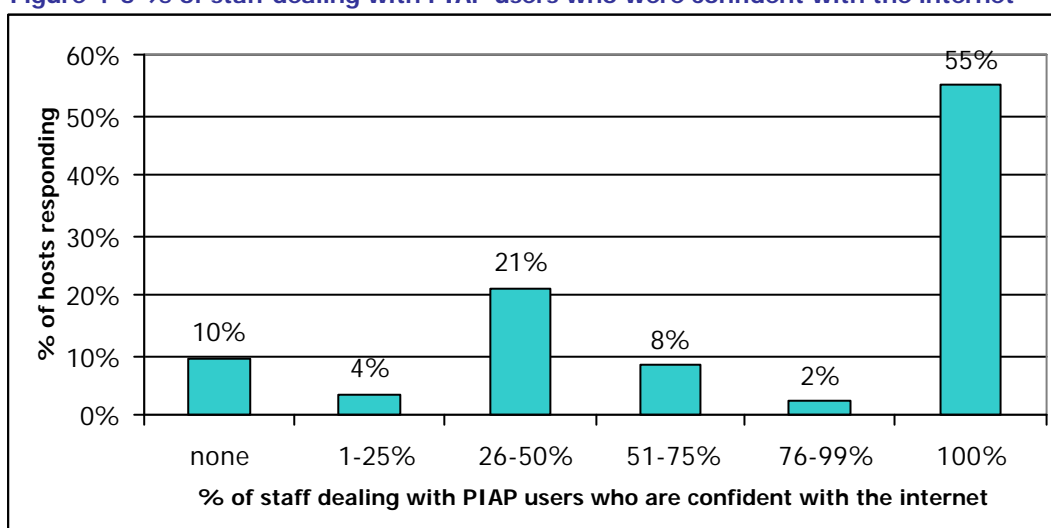
- ❑ half said they would like sandwich board signs for the street outside (52%); and
- ❑ 39% said they would like "Lotto" style signs that stick out from the building.

### 4.3 Staff confidence with ICT and training needs

The factor that most markedly determined the success of the PIAPs, and whether or not they were still operating, was the host's experience of ICT. If they were confident with ICT, they were more able to share it with their community or customers. If they were new to it and they had a problem with the ICT they had little or no technical support and were at a loss. Some hosts said that their users changed the password settings on the computers without realising this would mean that neither the host nor any other users could get in.

We asked hosts about their staff's experience of ICT before the PIAP. Just over half said all the staff that deal with PIAP users were confident using the internet before the PIAP opened. A third of PIAPs (35%) said that half or less of these staff were confident with the internet. Ten percent even said *none* of the staff who deal with PIAP customers are confident using the internet. This will clearly limit their ability to support users, encourage them to try the internet and simply manage the PIAP themselves. In one pub we visited, the owners could use the computers but the employee who worked during the day could not so customers were discouraged from using the internet during the day.

**Figure 4-5 % of staff dealing with PIAP users who were confident with the internet**

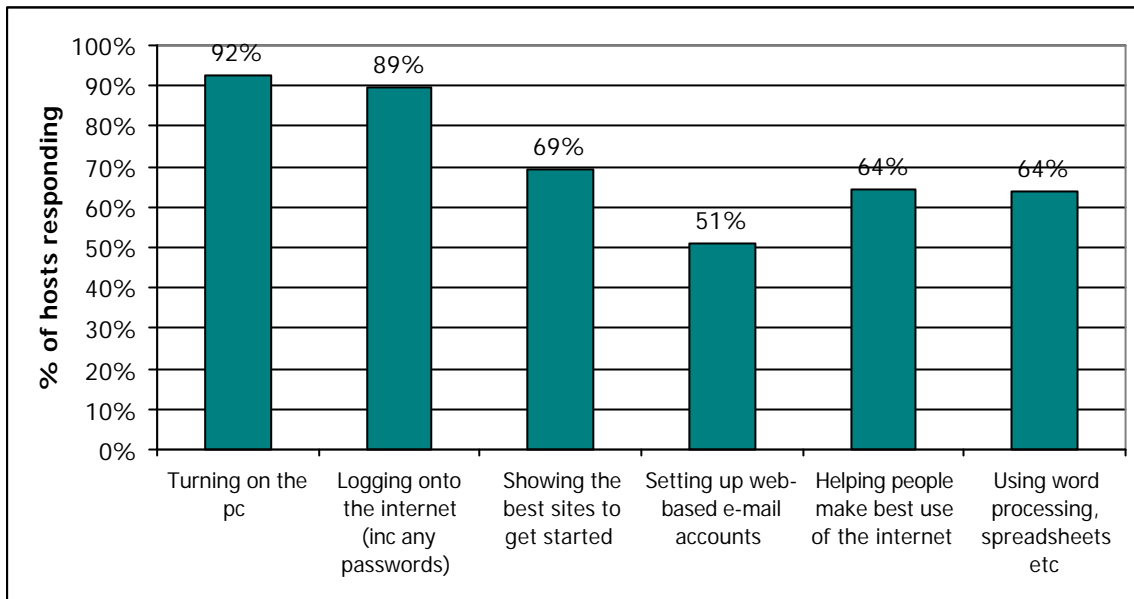


Source: Host Survey, Base = 353

Staff who were not already confident with the internet were unlikely to have been given any training. Two thirds of hosts said their non-confident staff had had no training. On average, only 23% of staff not confident with the internet were given training on using the internet and only 21% were given training in supporting PIAP customers. Only 7% of hosts said that everyone who needed training got it.

The shortcomings in staff confidence and training to overcome this are important in terms of the experience of the users. If the staff available cannot help them, they will not be able to make the best use of the service, or in some cases use it at all.

**Figure 4-6 Average % of PIAP staff who can help users with each activity**

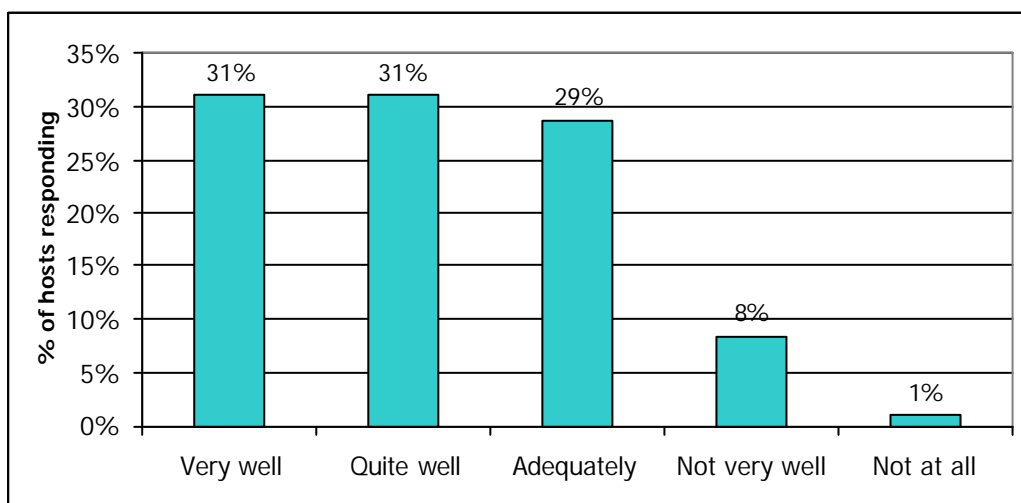


Source: Host Survey

Although at most PIAPs all the relevant staff can help users turn on the PC and log into the internet, support to actually use the internet is considerably less. In fact, in half of the PIAPs surveyed no staff know how to set up a web-based e-mail account. Given the PIAP advertising that uses e-mail as a key hook, this is a major limitation.

We asked hosts how well they thought their staff are able to support PIAP users. As Figure 4-7 below, shows, almost two thirds were very positive, with 31% saying users were supported “very well”. However 29% felt that their ability to support users was only adequate and 9% said they were “not very well” able to help (8%) or indeed not at all (1%). These people need more support.

Figure 4-7 Hosts' perception of their staff's overall ability to support PIAP users

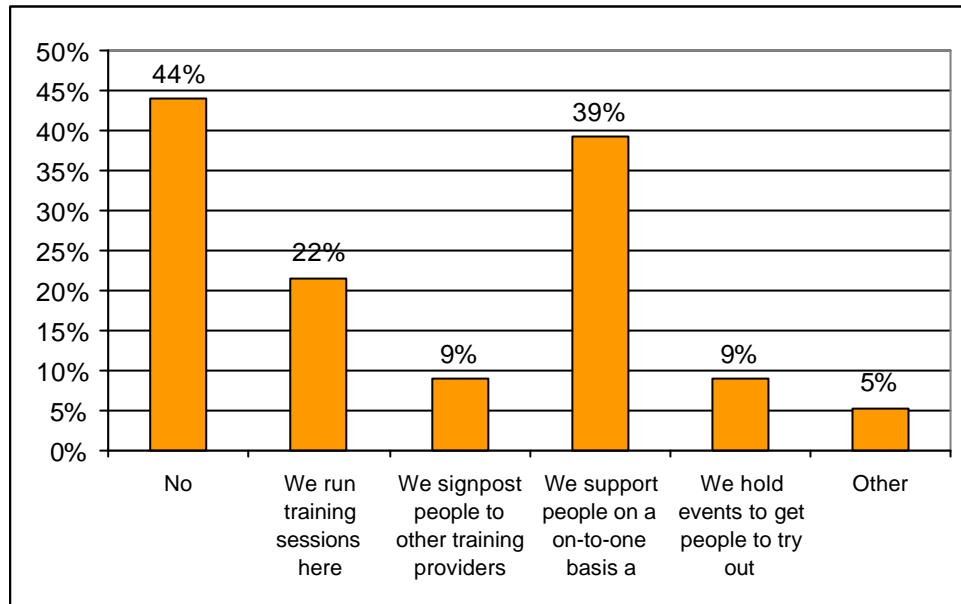


Source: Host Survey, Base = 371

### 4.3.1 Training

While 44% of hosts surveyed do not provide any training for their users, more than one in five provide training sessions (22%). A significant proportion say that they provide one-to-one support to users (39%). Roughly one in ten hosts signpost users to other training providers (9%).

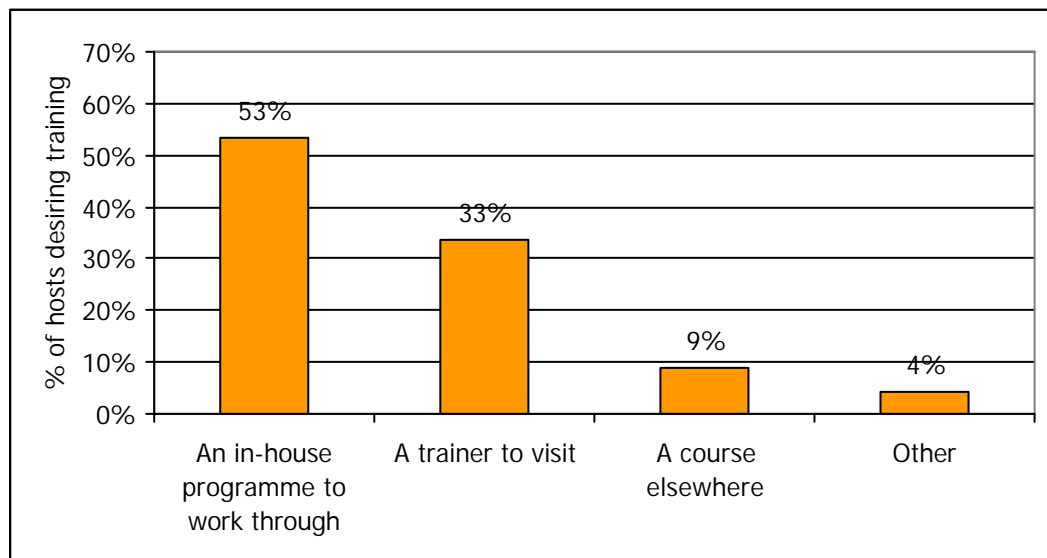
Figure 4-8 Do you provide training for users?



Source: Hall Aitken Host Survey n=310

We asked hosts if they would be interested in additional staff training and 57% said yes. Those who wanted training were most interested in training that staff could work through in-house (53%) or a trainer visiting (33%). The key factor here was minimising staff down-time and travel costs.

Figure 4-9 Types of training hosts would like provided through the Scottish Executive



Source: Host Survey, Base = 328

### 4.3.2 Technical support

As Figure 4-10 shows, hosts experience a range of technical problems including: lack of technical knowledge, unhelpful configuration of computers and inadequate internet connectivity.

**Figure 4-10 Technical problems experienced**

Technical problem	% of hosts surveyed
Problems with the computers (inc viruses)	41%
Internet connection installation	26%
Phone line breakdown	24%
Phone line installation	23%
Problems with the workstation	23%
Internet connection speed/loss	19%
Workstation and/or computer delivery	16%
Internet connection loss	13%
Internet connection speed	9%

Source: Host Survey, Base = 387

Hosts also complained of broken printers, users changing the log-in settings on the computers and making them inaccessible to staff and other users alike.

Our host survey found that hosts rely on a range of help with technical support. Those who have access to IT support within their organisation rely most heavily on this for all but telephone line related problems.

Just over two-thirds of hosts said they have access to internal ICT support – 37% on the premises and 34% somewhere else. But that leaves nearly a third with no access to IT support except telephone help-lines and some had problems knowing who to call.

## 4.4 Sustainability

### 4.4.1 Costs and income

The cost implications for PIAP hosts are set out in Figure 4-11 below. Hosts most commonly identify electricity and staff time costs as most significant.

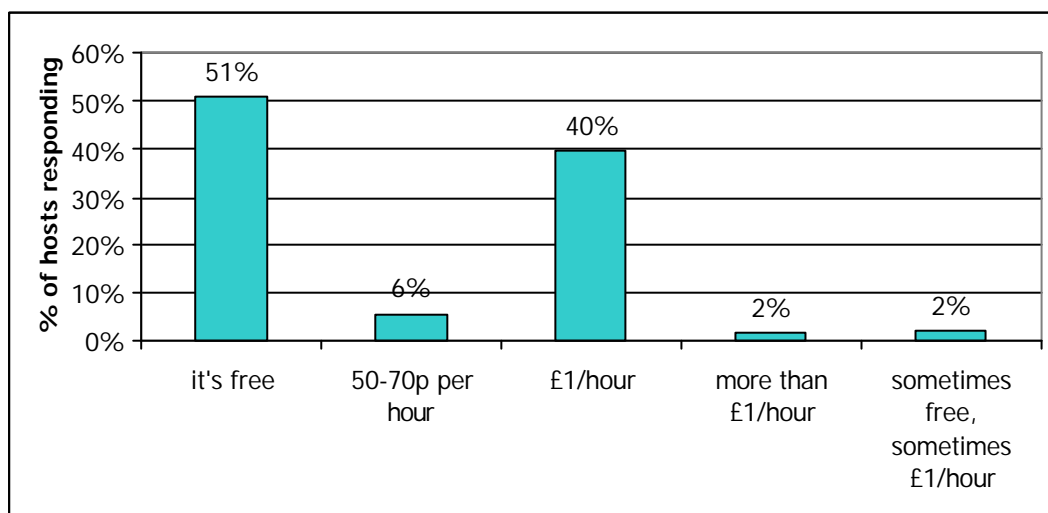
**Figure 4-11 Significant costs for hosts**

Significant cost	% of hosts surveyed
Electricity	40%
Staff time	30%
Ink, paper and other consumables	12%
Marketing	9%
Loss of revenue generating space	4%

Source: Host Survey, Base = 387

The Scottish Executive had hoped that the computers would be able to pay their way, but as Figure 4-12 shows half of the hosts don't charge for the Internet access. This is an important factor in the usage of the service, and is the biggest advantage given by users. A further 40% charge the suggested £1 per hour.

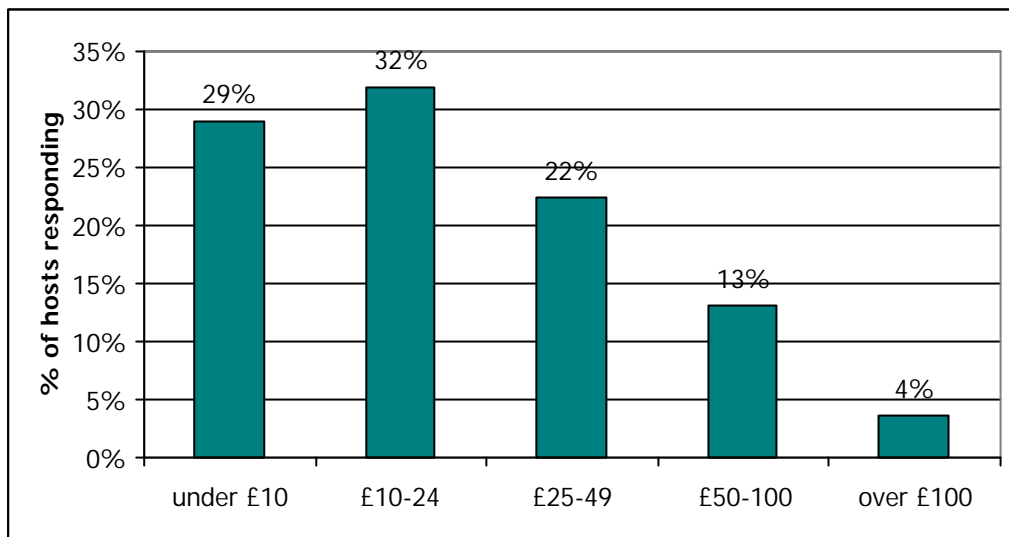
Figure 4-12 Prices charged for internet access



Source: Host Survey, Base = 381

The majority of PIAPs do not generate a great deal of income for their hosts. Indeed, for those who told us how much they earn, 29% would not even cover the monthly costs for the Freeserve account. Some hosts not included in the chart below said they rarely have any users, so their income will be close to none. However about one in six hosts who charge earn £50 or more a month providing a useful source of supplementary income.

Figure 4-13 Monthly earnings for those who charge

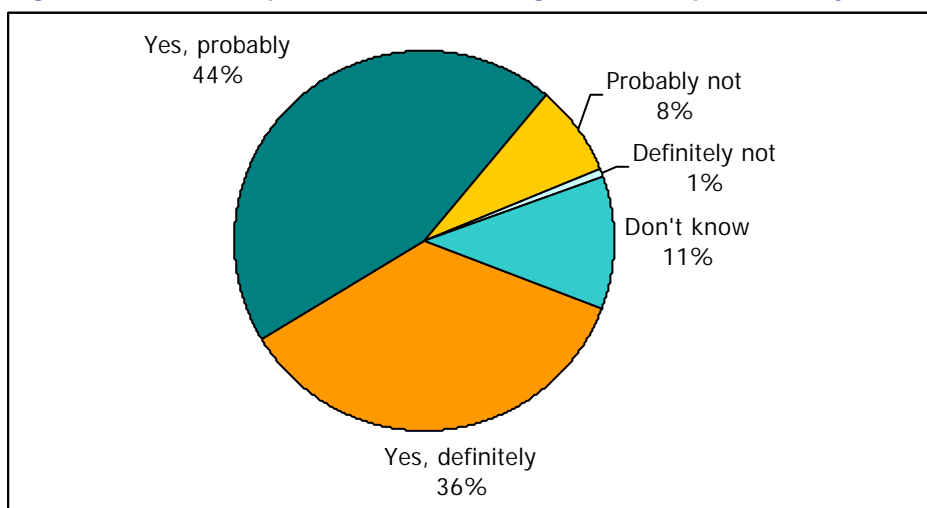


Source: Host Survey, Base = 138

#### 4.4.2 Future commitment to providing service

Four-fifths of hosts are positive about the future of their PIAP service, though only a 36% say they will definitely continue to host the service when their free internet access contract runs out.

Figure 4-14 Hosts' expectation of continuing the service post-subsidy



Source: Host Survey, Base = 379

### 4.4.3 PIAPs are worthwhile

Although hosts often experience challenges in providing the PIAP service themselves, they overwhelmingly agreed that “putting public internet access points into my type of organisation is worthwhile” – 93% agreed, 6% were unsure. Only 2% disagreed that they were worthwhile.

### 4.4.4 Further support needed

In addition to the support requested with signage and training, 28% of the hosts identified further support needs.

**Figure 4-15 Further types of support identified by hosts**

Type of support	hosts identifying need
Improved technical support	37%
Financial support	26%
Training support	17%
Broadband	12%
More press advertising	10%
Better advertising	6%

Source: Host Survey

The recommendations for improved technical support included:

- advice or software for filtering obscene websites,
- localised support or regular visits to tidy up software systems, and
- helpline numbers for technical support.

The main areas where revenue support was sought were to provide:

- more staff for proper user support and
- two years more internet access.

Particularly proactive hosts said they would like to be able to provide business service support for small businesses using the computers for graphics, more computers, more learning materials, and outreach work to attract more users.

## 5 Value of the approach

*This chapter summarises how well the programme has met its objective, identifies some of the key issues which have emerged and looks at the overall value for money of the programme.*

### 5.1 Meeting Objectives

The initiative has helped to widen public access to the internet in areas with little or no previous facilities. But the range of barriers to effective access meant that we were only able to effectively gain internet access in 81% of the PIAPs we visited.

The Initiative seems to be better at targeting existing clients within the host venues than bringing in the wider public. This is a positive feature of the Initiative and one of its stated objectives. It is also an approach which is widely advocated in the digital inclusion sphere. Eight out of ten users had visited the venue before the PIAP was opened.

Business sector venues appear to be best able to attract users and raise awareness of the service. Business sector PIAPs tend to be more visible and are more likely to be located in places where people will use them. Business sector hosts are also perhaps better at marketing and publicising services.

In addition, more than two thirds of venues reported that their staff were making use of the PCs to access the Internet. Since computer use in certain SME sectors is low, this may be an unintended benefit of the Initiative.

The programme has succeeded in extending the available access of the Internet. And this has been particularly effective in remote rural areas and in disadvantaged areas largely in urban Scotland. One in six users in remote rural areas had no other access outside the home.

PIAPs have successfully targeted users in more disadvantaged urban areas, where a high proportion of users have no Internet access at home, and are not confident in using the Internet.

More than half of PIAP users have no home access; and it appears that this programme has been relatively successful in attracting users without home access.

But most users are not new to the Internet, and it appears that most users are not getting their first taste of the Internet through this programme. Whilst most users are getting the support they need, it is likely that many potential users

would not feel confident enough to use the Internet at PIAPs without specific support and encouragement.

The programme has been very successful at targeting unemployed users, and in giving people the opportunity to look for jobs online. This is likely to be due to specific targeting of some PIAPs with New Deal clients, job clubs etc.

The programme has not succeeded in targeting older people. This may be because a higher proportion of older people are unaware of the benefits of the Internet and need a high level of support and encouragement to use it. The majority of PIAP users tend to be people who have some knowledge of, or interest in using the Internet. But PIAPs have had a positive impact on the small number of elderly people who have used them.

PIAP users have increased their level of use and tend to use the internet for a wider range of things than before. Using the Public Internet access points also appears to raise awareness of internet access more generally, with users more likely to find alternative places to access the Internet after using the PIAP. There is also some evidence that the rate of home internet access is increasing more quickly among PIAP users.

The majority of users report that their internet skills have improved since using the PIAP. People who were not confident at first and those using the service in disadvantaged areas were more likely to report improved levels of skills.

## 5.2 Value for Money

The costs of implementing the Public Internet Access Point programme has been a relatively modest £4.1 Million. By providing computers and access in existing locations, it has been able to lever in staffing and running costs, for a relatively modest capital outlay. Overall the unit cost of establishing each PIAP has been around £5,655. However this unit cost increases to £6,895 if we only consider the access points which are operating effectively.

One of the key advantages of this approach has been the flexibility that it allows in delivering services. The non-prescriptive approach has enabled people in remote rural areas to engage in e-commerce, whilst at the same time allowing unemployed people in deprived areas to look for jobs online

Figure 5-1 summarises the overall impacts of the programme and also shows what each £1,000 of public funding has achieved. It is clear that the investment has led to a wide range of impacts, providing Internet Access to nearly 100,000 people who have no home access. That is equivalent to giving 24 people access for each £1,000 of public money.

Figure 5-1 Impacts of the PIAP Programme

Impacts	Total	Per £1,000
Users in socially excluded areas	100,062	24
Unemployed Users	25,859	6
Users using Internet to look for work	44,409	11
Users long-term sick/ disabled	5,621	1
Users with caring commitments	5,621	1
Users 65+	8,245	2
Users without home access	98,750	24
Users with no other public access	39,163	10
Users buying online	44,035	11
Users needing support	69,893	17
Users not confident	46,283	11
Users Improving Internet Skills	147,469	36
Users using the internet for new things	84,134	21
Total Users	187,381	46

Each £1,000 of Scottish Executive investment has also resulted in:

- ❑ 24 people getting internet access in socially disadvantaged areas;
- ❑ ten people with no other Internet access getting online;
- ❑ 11 people using the Internet to look for jobs, and six unemployed people accessing the Internet;
- ❑ 36 people improving their Internet skills and 21 using the internet for things they could not before.

### 5.3 Deadweight, displacement and leakage

In evaluating the impact of public expenditure it is useful to look at:

- ❑ **Deadweight**; to what extent would the outcomes and impacts have occurred without the funding;
- ❑ **Displacement**; the extent to which the impacts have been additional rather than having been displaced from other projects or interventions; and
- ❑ **Leakage**; the extent to which the funding has resulted in impacts to groups and individuals who were not being targeted.

The level of deadweight is likely to be very limited, given that one of the key requirements in funding the access points was to fill gaps in existing provision; either in terms of geography or user groups.

Although some additional machines were provided within libraries which would already have free internet access through the 'Peoples Network' initiative; this was only where the applicant could demonstrate that demand out-stripped the existing capacity.

It is possible that some private sector hosts may have provided internet access for their customers without the Scottish Executive funding, but this access would not be available to the wider public. And as very few businesses are making money from providing internet access at low or no cost; most businesses who would provide the service would be likely to do so at a much higher cost.

So in terms of providing low cost access to the public, we would suggest that there is very little deadweight in the programme.

In terms of displacement, there may again be some overlap between the provision through the People's Network and access points funded in the PIAP programme. But the number of areas where the catchments overlap is limited to a few urban areas. And where these overlaps occur, the PIAPs being funded are generally aimed at specific target groups who may be less likely to use the service in libraries.

The level of displacement from existing paying services may be more significant, but only around a fifth of users were aware of Internet cafes where they could get access, and these are likely to be in urban and more affluent areas. So the policy of targeting PIAPs towards areas with no public access, and socially disadvantaged areas would mean that displacement from existing paying services is probably minimal. People will tend to use the service that is most convenient to them, and where this is a private paying service, people who could afford to would be likely to continue to use it.

Leakage describes impacts which fall outwith groups being targeted. And given the very broad objectives of extending public internet access, this is unlikely to be a factor in this programme. Although nearly half of the users have home internet access, the aim of the programme was to extend public Internet access by funding access in places where people go. People use the PIAPs because they are convenient and cheap; and therefore all users are likely to be benefiting from improved choice in internet access.

## 6

## 6 Conclusions & Recommendations

*This chapter summarises some of the key findings from the evaluation and sets out how the Executive might best target future resources for a similar type of Public Internet Access service.*

### 6.1 Conclusions

#### 6.1.1 Overall impact

The initiative's policy of putting cheap or free access in places where people already go is working. Users choose to use the PIAPs because they are convenient, cheap or free and often provide a comfortable environment.

They have provided access to around 100,000 users who lack home access, and around 40,000 users who have no other public access.

They have been particularly effective in attracting unemployed users and have had a greater impact on disadvantaged areas.

However they have not succeeded in attracting older people to any great extent, and are not a particularly effective way of getting new people to use the internet.

#### 6.1.2 Targeting

It appears that two types of targeting have been successful to some extent in the PIAP programme, and it would make sense to focus on these areas of strength in the future:

- Addressing current gaps in public access, especially in more remote rural areas; and
- Targeting disadvantaged users in areas with low rates of home internet access.

#### 6.1.3 General environment

The environment within which PIAPs are established is critical to their success. Those in the business sector were more likely to site them within the main business area and attract existing customers to use them. But many venues had

crammed the PCs into small corners or back-rooms making the atmosphere off-putting.

The majority of machines we came across were either switched off or powered down. Many users had problems logging on and getting started. This is likely to be off-putting to anyone wanting to get quick access to the internet.

Those PIAPs which had the best physical environment tended to be in venues which had sufficient space to devote a specific area to the service.

#### 6.1.4 Support

The other element which contributes to the environment is the level of staff support. In the majority of cases staff were friendly and helpful. But in a significant number of PIAP venues we came across staff who were unable to provide effective assistance.

Lack of supervision is often a problem with PIAPs and hosts commonly report users accessing inappropriate material. Only a quarter of venues visited were supervised.

Guidance was only available in a minority of venues, and staff were available to help in less than half of all venues. The situation was better in the public sector where a third provided guidance and more than half had staff available to help. However 98% of those users who needed support had received it.

Although most hosts feel they can support users needs at least adequately, one in ten admit that they cannot support user needs very well, or at all. More than half of all hosts would like staff training and most would want it delivered flexibly in-house.

#### 6.1.5 Technical problems and slow connection

Aside from opening hours, visibility and physical access there are a number of practical barriers. In particular, lack of staff available to help with log-in, broken machines and slow connection which have all limited effective access in our own experience. These issues are likely to be even more daunting to somebody wanting to try the Internet for the first time.

Technical problems also take up valuable staff time, and are likely to put hosts off continuing to provide the service. A third of hosts identify a need for improved technical support.

Connection Speed was a common problem and often prevents effective access. More than one fifth of users and a similar proportion of hosts highlight this as a problem, and it appears worse in remote rural areas.

### 6.1.6 Hosts Experiences

The vast majority of hosts thought that the Initiative was a good thing in their organisation. Most were motivated by providing wider services to their clients or to the public. Very few were motivated by increased trade or income.

However half of the hosts surveyed reported more people coming in as a result (49%). And almost as many considered it was an additional resource for staff (47%). Only 6% reported increased income as a benefit.

The main negative issues relate to the impact that running the PIAP has on staff time. This relates to both technical problems and supporting users. Often staff are not trained to adequately support user needs, and half of the staff dealing with users are unable to help them set up an email account.

### 6.1.7 Sustainability

Whilst the vast majority of hosts thought that putting in a public internet access point in their organisation was worthwhile (93%), most do not earn any income from providing the service. However very few are motivated by earning additional income so they may be prepared to bear the costs.

More than a third of hosts say they will continue the service after the Scottish Executive support runs out (36%) and a further 44% say that they probably will. Only about one in ten of the hosts say they are unlikely to continue the service.

## 6.2 Recommendations

### 6.2.1 Overall programme

In general terms the programme has been a cost-effective way of extending internet access, and it would make sense to continue to support services that are now up and running.

If the Executive wanted to focus on the key strengths of the programme it should focus on:

- ❑ Remote rural provision where there is no other existing public access; and
- ❑ Disadvantaged areas where home internet access rates are low.

Putting computers in existing businesses appears to be most effective in promoting internet awareness and use.

The most effective way of targeting disadvantaged groups is through agencies/projects which currently work with them. This approach is effective in leveraging in the necessary support for these target groups.

### 6.2.2 Connection Speed

We would suggest that any future programme addresses the problem of connection speed which causes significant problems in many access points. With improving technology and the increasing availability of broadband, peoples' expectations will continue to rise.

The Executive may want to focus on providing fewer machines but with a better level of specification. The Executive should consider taking advantage of new technologies such as wireless networks to provide an improved level of service in areas where connection is currently poor and where household access to broadband is limited.

### 6.2.3 Environment

Any future programme should set out minimum requirements for the location and general environment of the access point including issues of space, visibility and accessibility.

The Executive should develop a good practice guide to provide hosts with advice on where to locate their access points and how best to set it up.

### 6.2.4 Support

The Executive should consider having a minimum requirement for some basic support for users. This may involve the host agreeing to have someone receive basic training in using the Internet. Around half of users needed some form of support in using the internet at PIAPs and often staff are not available or able to help.

### 6.2.5 Getting started

The Executive should consider using software which provides a quicker and more straightforward start-up process. Many users and hosts experience problems in trying to log onto the service.

### 6.2.6 Training

A high proportion of staff in host venues are unable to provide even basic support to users. The Executive should consider developing self-administered training materials for host staff, or providing training sessions for staff.

### 6.2.7 Technical support

Any future programme should consider using a higher proportion of the budget towards providing technical support. This may involve a help-line, or more regular maintenance and trouble-shooting visits from technical staff.

### 6.2.8 Costs

The low cost of the internet access is one of the strengths of this programme. It will be important that the service continues to be available at a low cost, even if the level of service improves.

### 6.2.9 Marketing & publicity

If the service is to be sustained, the Executive should continue to carry out national advertising and promotional campaigns.

The Executive should consider developing more effective signage for the Internet Access Points, such as 'lotto' style signs.