



The UK Internet User Monitor

October 2006

Site Report

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TABLE OF CONTENTS

INTRODUCTION	INTRO. 3
METHODOLOGY	INTRO. 4
INFORMATION ABOUT THE SITE REPORT	INTRO. 6
TABLE OF SITE REPORT CHARTS.....	INTRO. 10
SITE REPORT CHARTS	QUESTIONS 1.01 TO 6.11

INTRODUCTION

Overview

The UK Internet User Monitor has three objectives:

1. To profile UK Internet users on a regular and rigorous basis.
2. To allow UK Web sites to compare their users with the UK average.
3. To allow UK Web sites to compare their users with similar sites in their respective industries that took part in the survey.

The UK Internet User Monitor is based on an online survey, conducted over a four-week period on a regular basis. This is weighted according to an offline poll to give figures reliable at a UK level. Forrester Research conducts the survey with the participation of a number of UK Web sites. The 16th such survey was carried out in October 2006 and is described in this document.

- The research ran between October 1st and December 1st, 2006 and 106 Web sites participated.
- The UK Internet User Monitor combines offline mail-out survey research with online polling on a number of UK sites. We carried out 4,010 mail-out surveys (via TNS) and 60,570 online surveys. We then weighted the online results according to the offline responses.
- The number of people in the UK age 16 or above is 46 million. The number of frequent users of the Internet, those that use it several times per week or more often, is 25.2 million (Forrester's Consumer Technographics[®] Q2 2006 European Study). This group of 25.2 million frequent Internet users is the universe for this survey.
- The next wave is planned for May 2007, with results available in June 2007.

Offline research

We commissioned TNS to manage a mail-out survey as part of Forrester's Consumer Technographics product. These interviews were used to determine what proportion of UK adults are Internet users, regular Internet users, and their demographics. This data was then used to weight the online research data.

Online research

Forrester Research carried out an online interview of 60,570 UK users of the Internet. We used this interview to provide a profile of Internet users, their behaviour and their attitudes to their future use of the Internet. The interview was linked to a number of UK Web sites; we randomly selected users of these sites via pop-up technology and invited them to participate.

METHODOLOGY

The Invitation

Internet users visiting participating sites were randomly shown a layer invitation, inviting them to take part in the research. The participating sites needed to put a small piece of JavaScript code into the source code of their Web pages. This code then interacted with the UK Internet User Monitor's servers. We asked sites to run the code over a four-week period from November 1st to December 1st.

Forrester Research determined what fraction of visitors (not visits) should see the pop-up window. This fraction was set according to the traffic levels of the host site and the responsiveness of its users. Cookies were used to prevent one visitor seeing the pop-up invitation twice. Users that did not accept cookies (estimated at around 6% of visitors in the UK) were not invited to participate.

Questionnaire design

Questionnaire design has two objectives: to ask as many questions as possible, while minimizing the time each user spends filling in the questionnaire. The questionnaire comprised around 80 separate questions. These questions were dynamically compiled into a questionnaire, such that most respondents answered around 40 questions. The questionnaire was then delivered via a number of pages, several questions at a time. Users were asked to volunteer an email address for follow-up research.

Questions fell into three categories:

- Questions answered by **all** respondents: for example, demographic details.
- Questions answered by a **subset** (around a quarter) of respondents: for example, media or personal finance behaviour.
- Questions answered only by **qualifying** respondents: for example, the questions about the most recent online purchase were only asked of people who have made an online purchase.

Weighting

The data in this report has been weighted to provide information about frequent UK Internet users. This has been done as follows:

- **Indexed using offline research:** Our offline research provides a statistically robust picture of what fraction of the UK population uses the Internet frequently. It also tells us what this fraction looks like, with demographic information. These figures have been used to balance our Internet-based numbers.

Respondent bases

The UK-level respondent base for each question is shown immediately below the question text on each chart, and the site-level respondent base is shown below that. The total number of respondents to the survey was 60,570. Where the base is less than 60,570, this indicates that either a subset of respondents or only qualifying respondents have answered. The number of respondents who answered on each site is a similar subset or reduced number.

The only exceptions to this are the two questions asked at the beginning of the survey about the country the respondent is in at the time of filling out the survey (Question 1.03) and the residential status of those respondents not in the UK at that time (Question 1.04). The data shown here is from all respondents who answered these questions, and is unweighted. Respondents who answer that they are outside the UK in Question 1.03 are routed through to Question 1.04 and then to the end of the questionnaire, as the UK Internet User Monitor is an analysis of UK-based Internet users.

Rounding of percentages

The underlying data has been calculated to one decimal place. On the charts, these figures are rounded to the nearest percent. As a result, on single-answer charts the percentages may not total 100 because of rounding, and the bars representing the same amounts may not be the same size. On multiple-answer charts, multiple responses were accepted. The percentages, therefore, usually add up to more than 100%.

Social grade

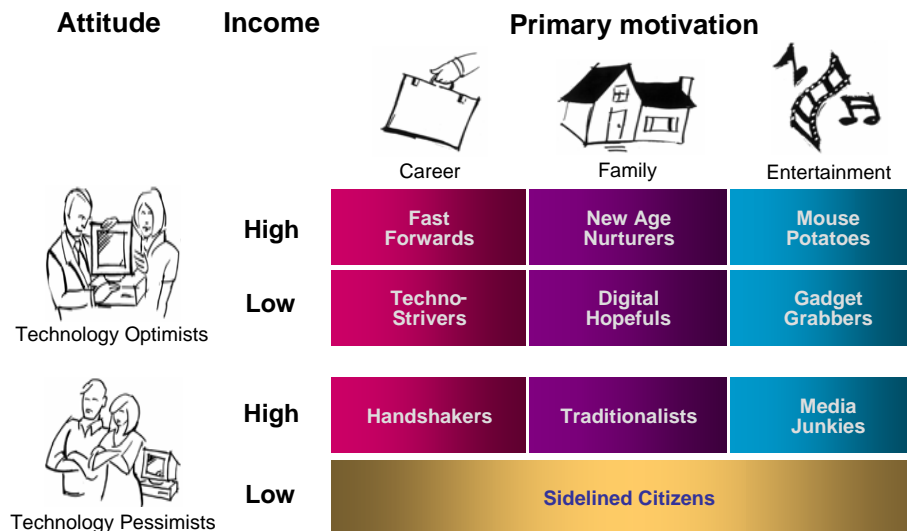
The process by which a respondent's social grade is determined is complex and requires a greater number of questions than are possible within the constraints of the UK Internet User Monitor. The social grade breakdown that appears as Question 1.19 is an estimate and is derived from questions about work status and work type.

Technographics Segmentation

Forrester distinguishes three dimensions in its Technographics segmentation (Questions 1.20 to 1.24) that lead to 10 distinct consumer segments, each showing important differences in the use of certain products (see figure below).

The three segmentation dimensions are:

- **Technology attitude:** This defines the consumer's interest in and aspiration to master new technical products or services (optimist/pessimist).
- **Income:** This determines whether consumers have the means to buy or use new technological products (high income/low income).
- **Primary motivation:** This determines what drives consumers in their daily lives and what makes them use technology products and services in particular (career/family/entertainment).

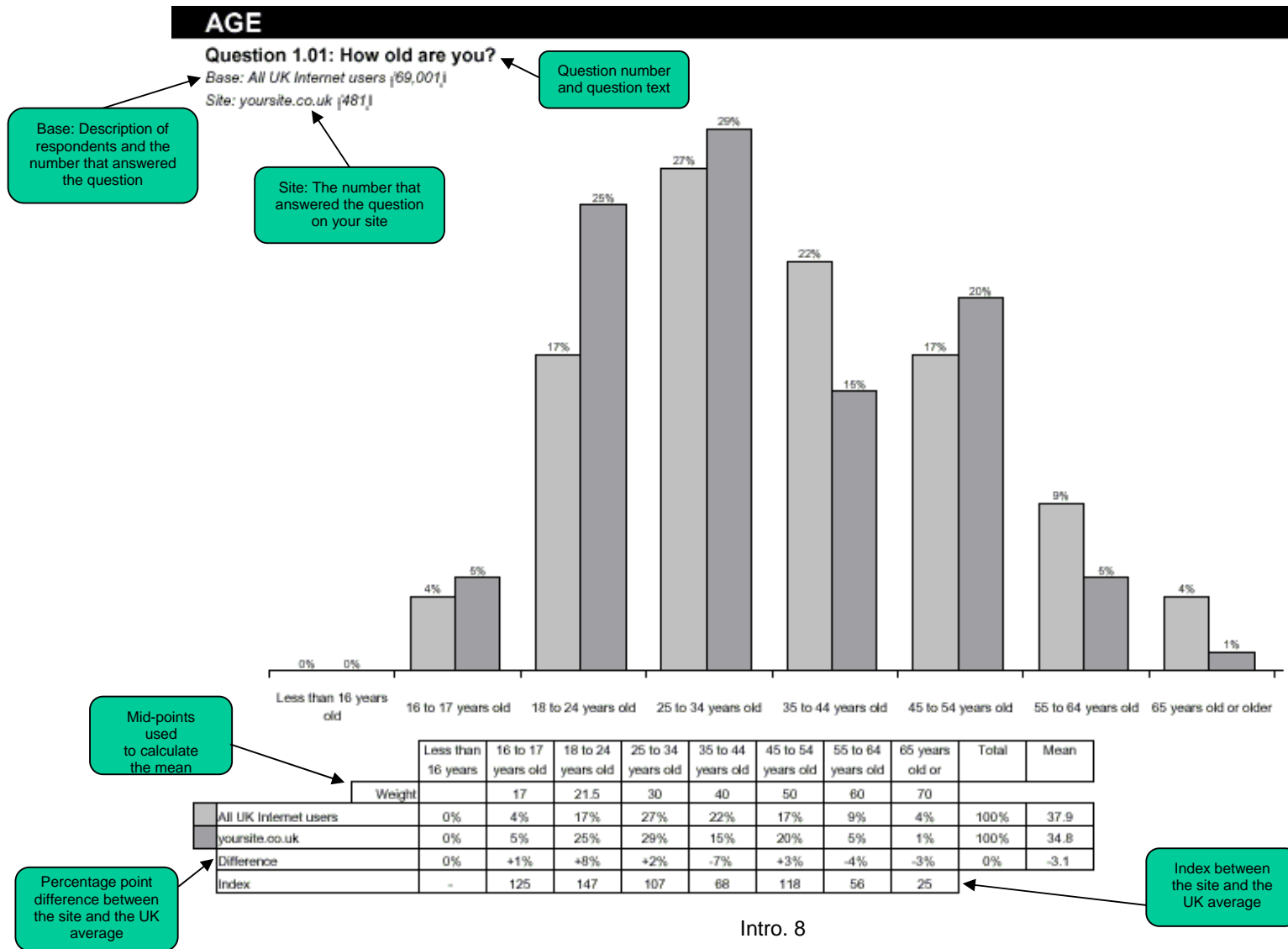


UKIUM Citation Policy

For all public citations of the UK Internet User Monitor, please refer to the "FORRESTER RESEARCH UK INTERNET USER MONITOR CITATION GUIDELINES" document that accompanies this site report.

Site report charts

Each chart in this document conforms to a standard layout. This layout is shown below (this chart is an example and does not represent accurate data):



Participating sites

The sites that contributed respondents are listed below and are grouped by the industry vertical they were placed in:

Auto

Msn.cars
Parkers.co.uk
Theaa.co.uk-roadside
Theaa.co.uk-routeplanner

Finance

Money.guardian.co.uk
Msn-investing
Msn-total money
Theaa.co.uk-lending
Thisismoney
Tiscali.co.uk-money

Health

Goodhealth
Msn-health
Netdoctor.co.uk

Women

Cosmogal.co.uk
Cosmopolitan.co.uk
Emap new woman
Getlippy.com
Handbag.com

Entertainment

Arts.guardian.co.uk
Emap maxemap
Film.guardian.co.uk
Iccheshireonline
Icuddersfield
Icliverpool
Icmidlands
Icnewcastle
Icnorthwales
Icscotland
Icsoutheast
Icteesside
Icwales
Lastminute.com-lifestyle
Msn-computing
Msn-games-hp
Msn-movies
Msn-total entertainment
National-lottery.co.uk
Radiotimes.com
Screenselect.co.uk
Sky.com-news-showbiz
Tescodvdrental.co.uk
Thisislondon
Tiscali.co.uk-entertainment
Topgear.com

Retail

Additions-direct
Diy.com
Ivillage.co.uk
Littlewoods.com
Marshall ward
Sony.co.uk

Sports

Cricinfo.com
Football.guardian.co.uk
Skysports.com

Travel

Baa.com
Lastminute.com-travel
Msn-travel
Thisis network
Travel.guardian.co.uk

Portals

Ask.co.uk
Blueyonder.co.uk
Msn-homepage
Tiscali homepage
Tiscali-broadband

News

Channel4.co.uk
Dailymail
Dailyrecord.co.uk
Environment.guardian.co.uk
Guardian.co.uk
Jobs.guardian.co.uk
Manchesteronline.co.uk
Metro
Mirror.co.uk
Msn-news
Observer.guardian.co.uk
People.co.uk
Politics.guardian.co.uk
Sky.com-news
Society.guardian.co.uk
Sundaymail.co.uk
Sundaymirror.co.uk
Technology.guardian.co.uk
Thesun.co.uk
Timesonline.co.uk

Lifestyle

Msn.lifestyle
Babyexpert
Goodhousekeeping.co.uk
Menshealth.co.uk
Runnersworld.co.uk
Youandyourwedding.co.uk

Music

Capitalfm.com
Choicefm.co.uk
Emap mojo
Emap q
Hit40uk.com
Msn-music
Theonenetwork
Xfm.co.uk

TABLE OF SITE REPORT CHARTS

	QUESTION
1. UK INTERNET CONSUMER PROFILE	
How old are you?.....	Q.1.01
Are you:.....	Q.1.02
Which country/region/territory are you in right now?	Q.1.03
Which of the following best describes your current residential status?	Q.1.04
How many people live in your household, including yourself?	Q.1.05
How many children (aged up to and including 18) are there in your household?	Q.1.06
How old are your children:	Q.1.07
What is the gross (before tax) annual income of your household?	Q.1.08
What would you estimate the value to be of the total combined financial assets of all household members (not including main home)?	Q.1.09
What is your working status?	Q.1.10
Which of the following best describes the type of job that you do?	Q.1.11
What is the highest level of education you have received?.....	Q.1.12
Are you the main income earner in your household?.....	Q.1.13
What is the working status of the main income earner:.....	Q.1.14
What type of work does the main income earner do?	Q.1.15
What is your marital status?	Q.1.16
Which ITV region do you live in?	Q.1.17
Agree with: Technology is important to me	Q.1.18.1
Agree with: I put a lot of time and energy into my career	Q.1.18.2
Agree with: My family is by far the most important thing in my life	Q.1.18.3
Agree with: I am constantly looking for new ways to entertain myself.....	Q.1.18.4
Agree with: I am very competitive when it comes to my career.....	Q.1.18.5
Agree with: I like technology	Q.1.18.6
Agree with: Most of my spare time is devoted to activities with my family.....	Q.1.18.7
Agree with: I spend most of my spare time doing fun stuff with my friends	Q.1.18.8
Estimated social grade	Q.1.19
Technographics: Segments	Q.1.20
Technographics: Technology optimism.....	Q.1.21
Technographics: Income band.....	Q.1.22
Technographics: Income v Optimism.....	Q.1.23
Technographics: Primary motivation.....	Q.1.24

2. INTERNET USAGE AND BEHAVIOUR

How often do you access the Internet nowadays?	Q.2.01
When did you first start using the Internet?	Q.2.02
What type of location are you in right now?	Q.2.03
How many computers (PC/Mac/laptop) are there in your household (including any provided by an employer)?.....	Q.2.04
In which rooms do you have or use a game console:	Q.2.05.1
In which rooms do you have or use a PC/Laptop:.....	Q.2.05.2
In which rooms do you have or use a TV set:	Q.2.05.3
In which rooms do you have or use a DVD player:	Q.2.05.4
Do you use the Internet for business/work purposes, personal purposes or both?	Q.2.06
How many hours a week do you spend actively online (from all locations) for personal reasons?	Q.2.07
How did you first hear about the site you're currently on?	Q.2.08
How often do you visit this Web site?	Q.2.09

3. DEVICES AND ACCESS

Which of the following do you have or use:.....	Q.3.01.1
Which of the following do you plan to buy replace in the next 6 months:	Q.3.01.2
Which is your primary mobile network operator?	Q.3.02
What type is your primary Internet connection you have at home?.....	Q.3.03
At home, which is your main Internet service provider (ISP)?	Q.3.04
Satisfaction with you main ISP: Your ISP subscription costs compared with those of other ISPs	Q.3.05.1
Satisfaction with you main ISP: Your ISP set-up costs compared with those of other ISPs	Q.3.05.2
Satisfaction with you main ISP: Your ISP helpline costs compared with those of other ISPs.....	Q.3.05.3
Satisfaction with you main ISP: The quality of the customer services information	Q.3.05.4
Satisfaction with you main ISP: Time it takes to get through to a customer service advisor on the telephone	Q.3.05.5
Satisfaction with you main ISP: Your connection speed	Q.3.05.6
Satisfaction with you main ISP: Online services (e.g., webspace, email virus protection, spam filter etc.).....	Q.3.05.7
Satisfaction with you main ISP: The overall service that your ISP offers	Q.3.05.8
In the next 6 months are you planning to:	Q.3.06
Which of the following have you done in the past 4 weeks while using the Internet/emailing at home?.....	Q.3.07
Do you own a home network or are you planning to install one?	Q.3.08
Frequency of doing on mobile phone: Send SMS text messages.....	Q.3.09.1
Frequency of doing on mobile phone: Send MMS/picture messages	Q.3.09.2
Frequency of doing on mobile phone: Send email	Q.3.09.3
Frequency of doing on mobile phone: Use instant messaging.....	Q.3.09.4
Frequency of doing on mobile phone: Browse the mobile Internet	Q.3.09.5
Frequency of doing on mobile phone: Play games	Q.3.09.6
Which of the following activities do you do via your mobile phone:	Q.3.10
Mobile services paid for ever:	Q.3.11
Agreement with when browsing the mobile Internet: It was easy to find the mobile Web pages (URL) I wanted	Q.3.12.1

Agreement with when browsing the mobile Internet: I would visit these mobile Web sites again	Q.3.12.2
Agreement with when browsing the mobile Internet: The mobile Web sites looked good on my mobile screen	Q.3.12.3
Agreement with when browsing the mobile Internet: The mobile Internet is a valuable addition to my life.....	Q.3.12.4
Agreement with when browsing the mobile Internet: It was easy to navigate to the mobile Web sites.....	Q.3.12.5
Agreement with when browsing the mobile Internet: Most Mobile Web pages loaded quickly	Q.3.12.6
Agreement with: I always shop around for the best mobile subscription (monthly/pay-as-you-go) deal.....	Q.3.13.1
Agreement with: I am willing to try out new mobile services (e.g. mobile internet, making payments)	Q.3.13.2
Agreement with: My mobile phone has replaced nearly all other phone use.....	Q.3.13.3
Agreement with: I find it important to have a fashionable phone	Q.3.13.4
Agreement with: I only use my mobile phone for urgent matters	Q.3.13.5
Agreement with: My mobile phone matches my style	Q.3.13.6
Agreement with: I would never use my mobile for anything other than voice and SMS	Q.3.13.7
Agreement with: I'm willing to pay more for the latest phone	Q.3.13.8
Agreement with: My friends consider me a heavy mobile phone user	Q.3.13.9
Agreement with: My mobile phone subscription is the cheapest one I could find.....	Q.3.13.10

4. ONLINE SHOPPING

Which of the following have you ever done:.....	Q.4.01
Which of the following have you done in the past three months:.....	Q.4.02
Which of the following have you researched online in the past three months:	Q.4.03.1
Which of the following have you bought online in the past three months:	Q.4.03.2
How much in total have you spent online in the past 3 months (including postage and packing)?	Q.4.04
For which of the following services/information have you paid for on the Internet:	Q.4.05
How secure do you think personal financial information (e.g., credit card numbers) is when used to purchase online (over the Internet)?	Q.4.06
Email offers are a great way to find out about new products or promotions	Q.4.07.1
I find email with graphics attractive to read	Q.4.07.2
I prefer promotional emails to online ads	Q.4.07.3
I delete most promotional emails without reading them	Q.4.07.4
I sometimes forward promotional emails to my friends	Q.4.07.5
I want to be able to control the frequency of receiving promotional emails	Q.4.07.6
Business travel	Q.4.08.1
Personal travel.....	Q.4.08.2
Which of the following do you enjoy doing in your spare time:	Q.4.09
Which of the following life events do you expect to happen in the next 12 months:	Q.4.10

5. MEDIA

Which weekday papers do you read at least three times per week:.....	Q.5.01
Which Sunday papers do you read at least three times per month:.....	Q.5.02
How often do you read news online?	Q.5.03
News web sites used in the past 4 weeks:.....	Q.5.04
Top media sources for breaking news:	Q.5.06.1
Top media sources for business news.....	Q.5.06.2
Top media sources for sports news	Q.5.06.3
Top media sources for car ads.....	Q.5.06.4
Top media sources for consumer electronics.....	Q.5.06.5
Top media sources for holiday information	Q.5.06.6
Top media sources for jobs.....	Q.5.06.7
Top media sources for property ads	Q.5.06.8
Top media sources for personal finance	Q.5.06.9
Hours per weeks spend on: Reading paper newspapers.....	Q.5.07.1
Hours per week spend on: Reading paper magazines.....	Q.5.07.2
Hours per week spend on: Watching TV.....	Q.5.07.3
Hours per week spend on: Listening to the radio	Q.5.07.4
Hours per week spend on: Personal Internet use	Q.5.07.5
Hours per week spend on: Work-related Internet use	Q.5.07.6
Hours per week spend on: Playing video games (PC or console).....	Q.5.07.7
Which type of magazine do you like to read:.....	Q.5.08
What is the home page on the PC that you are currently using?	Q.5.09
Please indicate how often you watch Internet (streaming) video?.....	Q.5.10
Frequency of watching over the Internet:	Q.5.11.1 to Q.5.11.10
How often do you: Read product reviews from other customers (e.g. Ciao.co.uk)	Q.5.12.1
How often do you: Write a customer review of a company or product.....	Q.5.12.2
How often do you: Use a price comparison site (e.g. Kelkoo) to compare products.....	Q.5.12.3
How often do you: Read discussion forums or bulletin boards.....	Q.5.12.4
How often do you: Post a comment to a discussion forum or bulletin board	Q.5.12.5
How often do you: Visit social networking sites (e.g. MySpace or Friends Reunited).....	Q.5.12.6
How often do you: Read blog (Web log) contributions from others	Q.5.12.7
How often do you: Post comment to other people's blogs.....	Q.5.12.8
How often do you: Post comments to *your own* blog.....	Q.5.12.9
How often do you: Listen to or watch podcasts.....	Q.5.12.10
How often do you: Read articles delivered by RSS feeds	Q.5.12.11

6. PERSONAL FINANCE

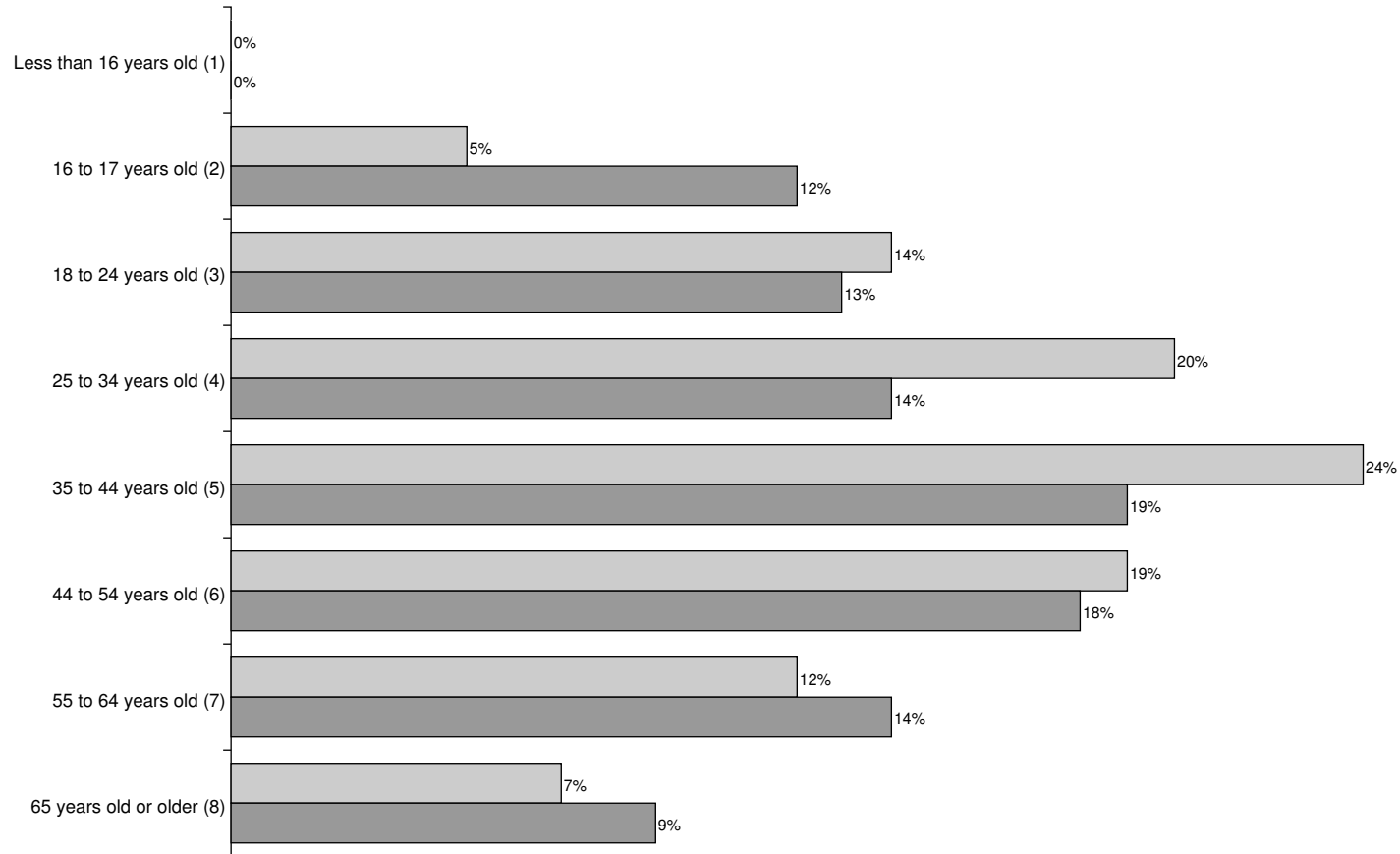
Which of the following is your main bank? Q.6.01
Which financial products do you have:..... Q.6.02
Which financial products have you researched on the past year:..... Q.6.03
Which financial sites have you used to research online: Q.6.04
Which products have you bought or applied for online in the past year: Q.6.05
Websites visited when researching online: Q.6.06
Websites bought insurance from:..... Q.6.07
Why did you decide not to buy insurance:..... Q.6.08
Do you use online/Internet banking on a PC (e.g., to check your account balance, transfer money or pay bills)? Q.6.09
How often have you used online banking recently? Q.6.10
Why do you not bank online (anymore):..... Q.6.11

HOW OLD ARE YOU?

Question 1.01: How old are you?

Base: All UK Internet users (60,570)

Site: Yoursite.com (3,127)



	1	2	3	4	5	6	7	8	Total	Mean
Weight		16.5	21	29.5	39.5	49.5	59.5	70		
All UK Internet users	0%	5%	14%	20%	24%	19%	12%	7%	100%	40.0
Yoursite.com	0%	12%	13%	14%	19%	18%	14%	9%	100%	40.3
Difference	0%	+7%	-1%	-6%	-5%	-1%	+2%	+2%	0%	+0.3
Index	-	240	93	70	79	95	117	129		

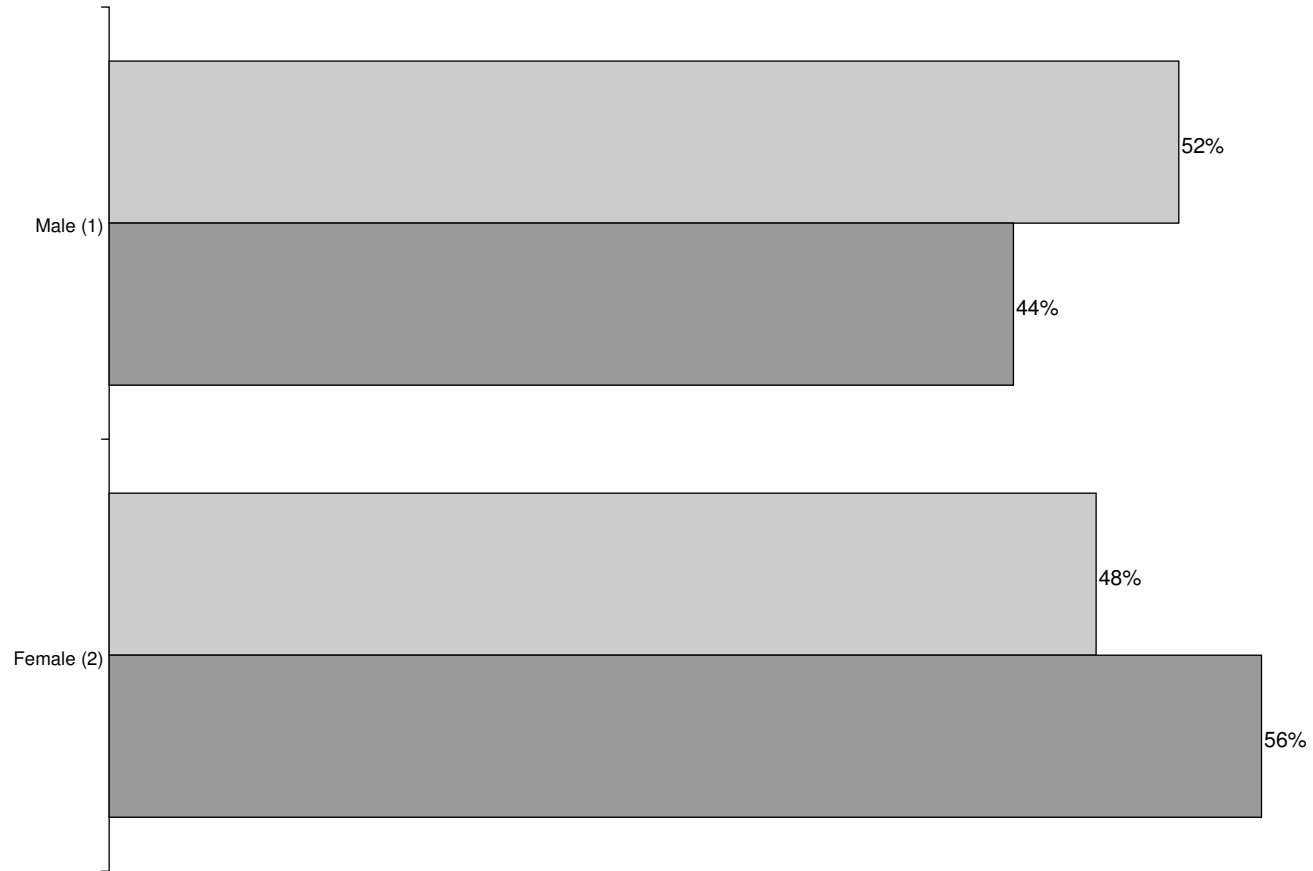
Source: Forrester Research UK Internet User Monitor 2006 Wave 2

ARE YOU:

Question 1.02: Are you:

Base: All UK Internet users (60,570)

Site: Yoursite.com (3,127)



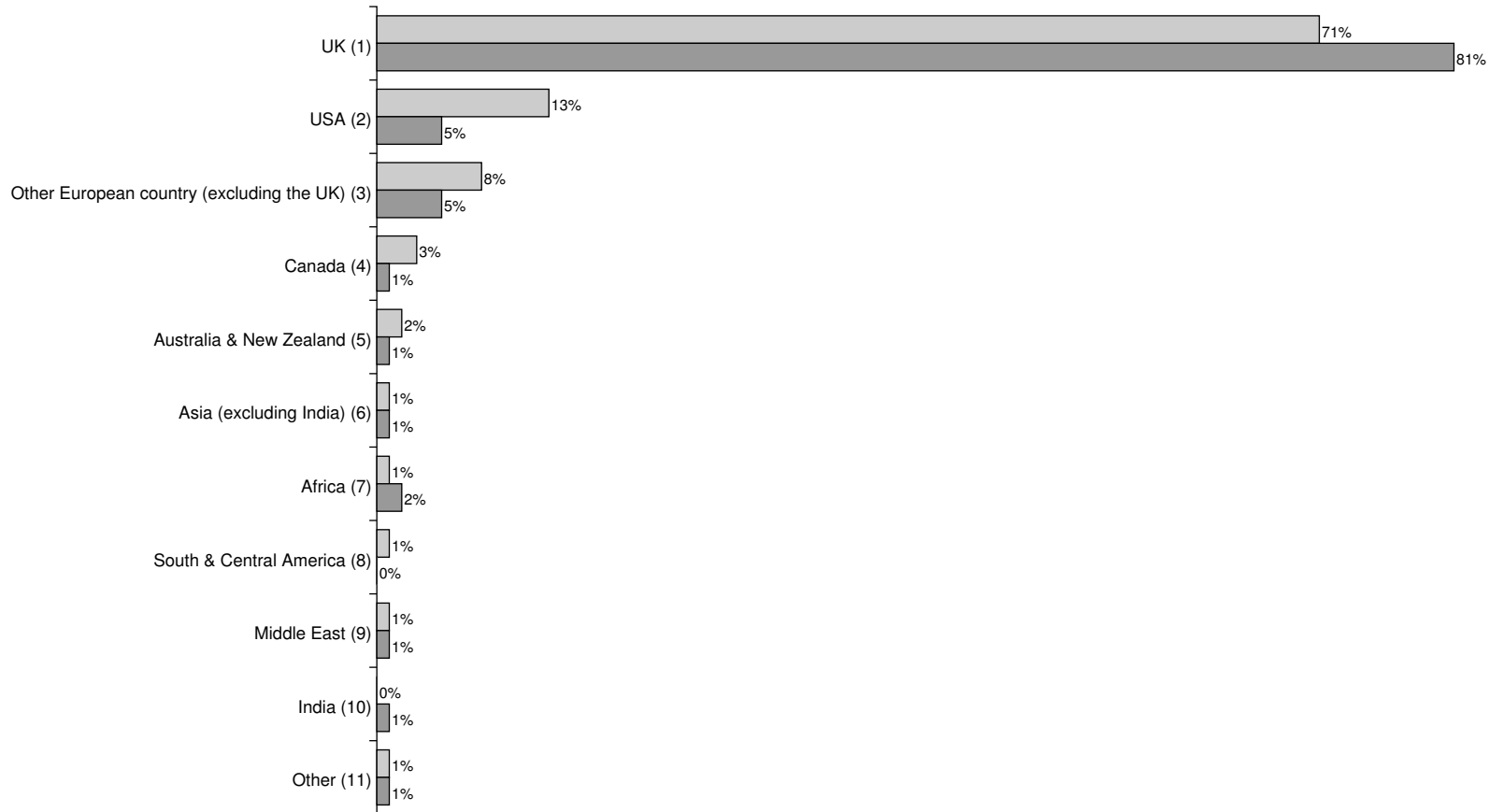
	1	2	Total
All UK Internet users	52%	48%	100%
Yoursite.com	44%	56%	100%
Difference	-8%	+8%	0%
Index	85	117	

WHICH COUNTRY/REGION/TERRITORY ARE YOU IN RIGHT NOW?

Question 1.03: Which country/region/territory are you in right now?

Base: All Internet users (142,022)

Site: Yoursite.com (7,151)



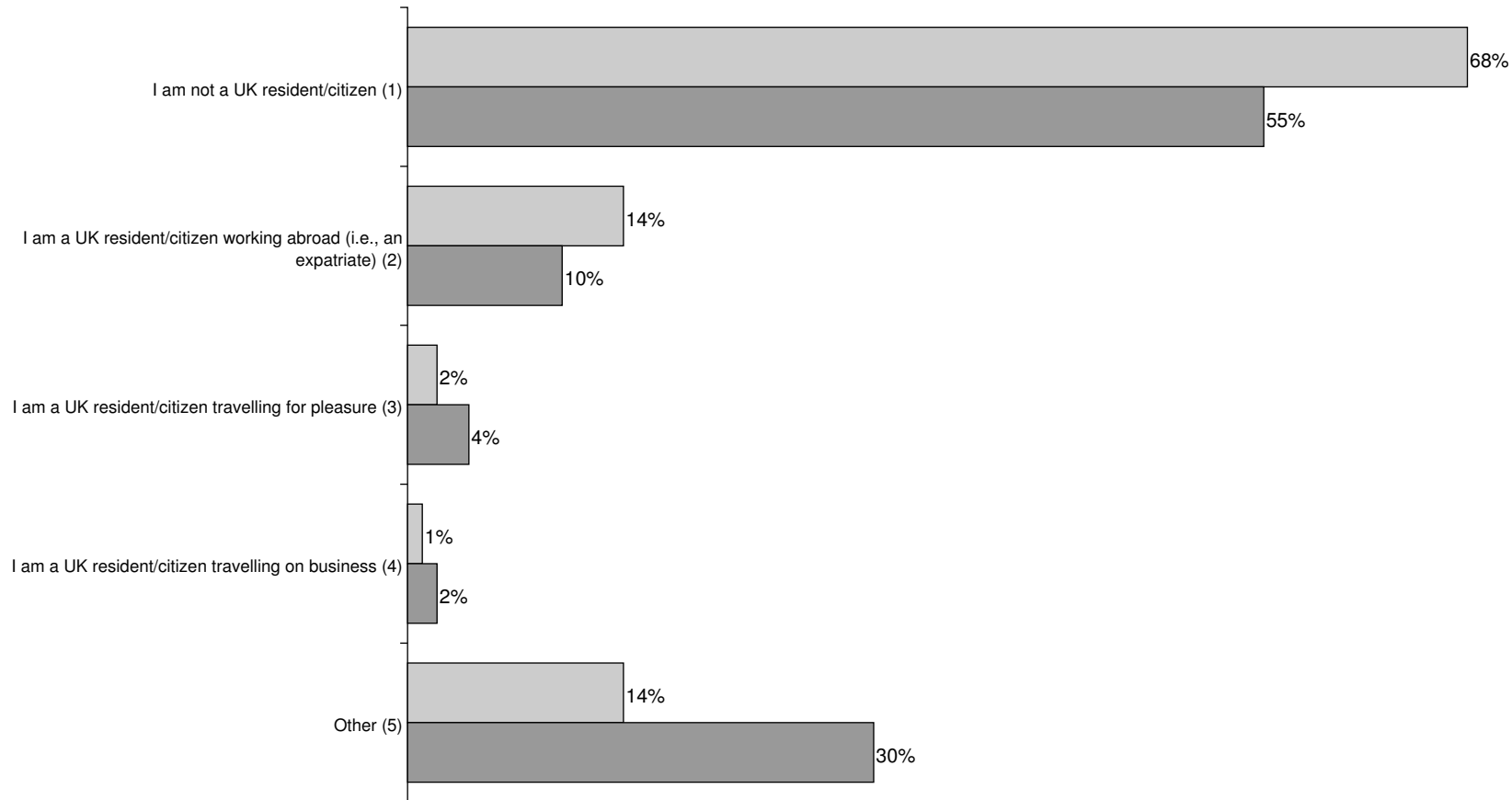
	1	2	3	4	5	6	7	8	9	10	11	Total
All Internet users	71%	13%	8%	3%	2%	1%	1%	1%	1%	0%	1%	100%
Yoursite.com	81%	5%	5%	1%	1%	1%	2%	0%	1%	1%	1%	100%
Difference	+10%	-8%	-3%	-2%	-1%	0%	+1%	-1%	0%	+1%	0%	0%
Index	114	38	63	33	50	100	200	0	100	-	100	

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CURRENT RESIDENTIAL STATUS?

Question 1.04: Which of the following best describes your current residential status?

Base: All non-UK Internet users (41,467)

Site: Yoursite.com (1,335)



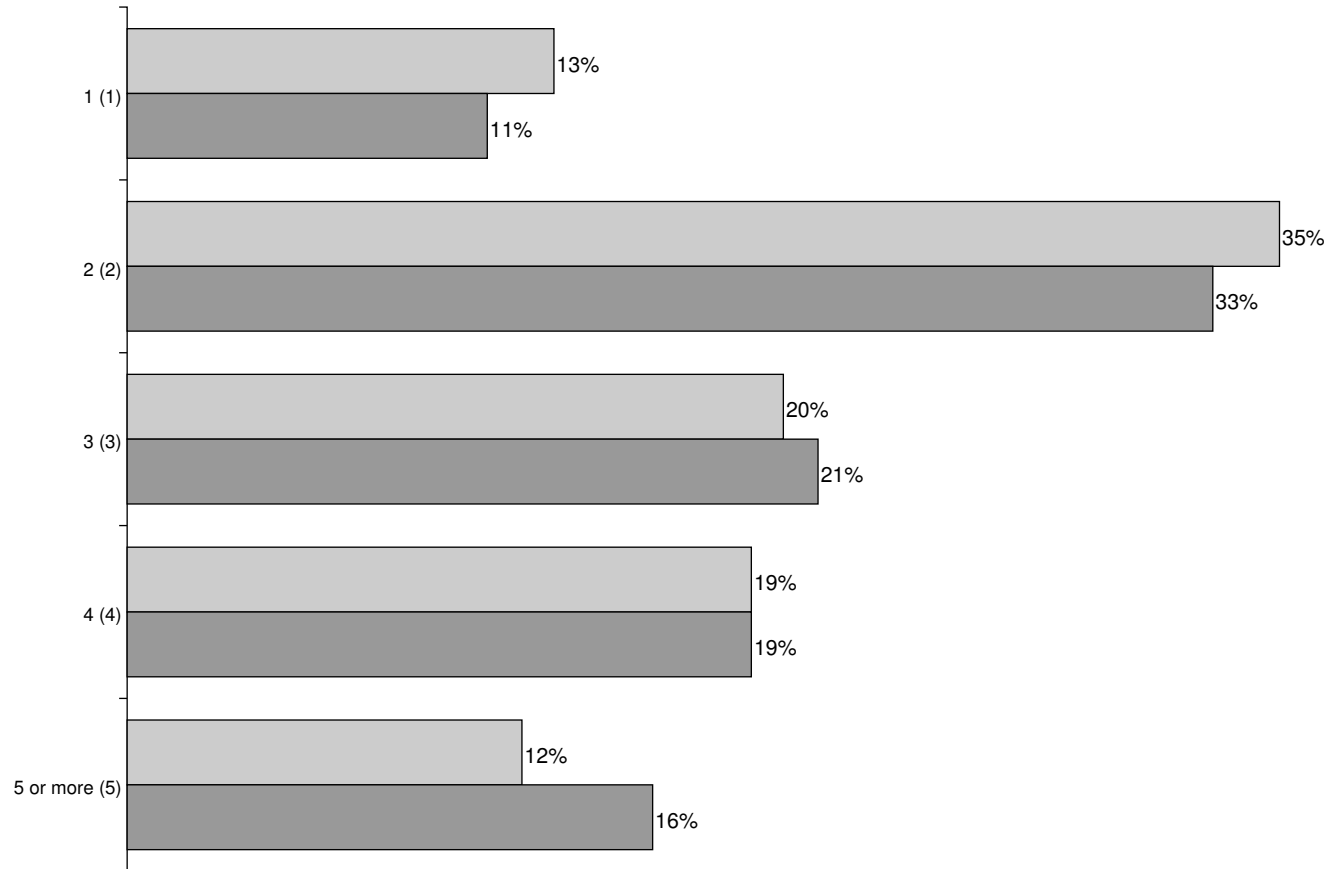
	1	2	3	4	5	Total
All non-UK Internet users	68%	14%	2%	1%	14%	100%
Yoursite.com	55%	10%	4%	2%	30%	100%
Difference	-13%	-4%	+2%	+1%	+16%	0%
Index	81	71	200	200	214	

HOW MANY PEOPLE LIVE IN YOUR HOUSEHOLD, INCLUDING YOURSELF?

Question 1.05: How many people live in your household, including yourself?

Base: All UK Internet users (60,566)

Site: Yoursite.com (3,127)



	1	2	3	4	5	Total	Mean
Weight	1	2	3	4	6		
All UK Internet users	13%	35%	20%	19%	12%	100%	2.9
Yoursite.com	11%	33%	21%	19%	16%	100%	3.1
Difference	-2%	-2%	+1%	0%	+4%	0%	+0.2
Index	85	94	105	100	133		

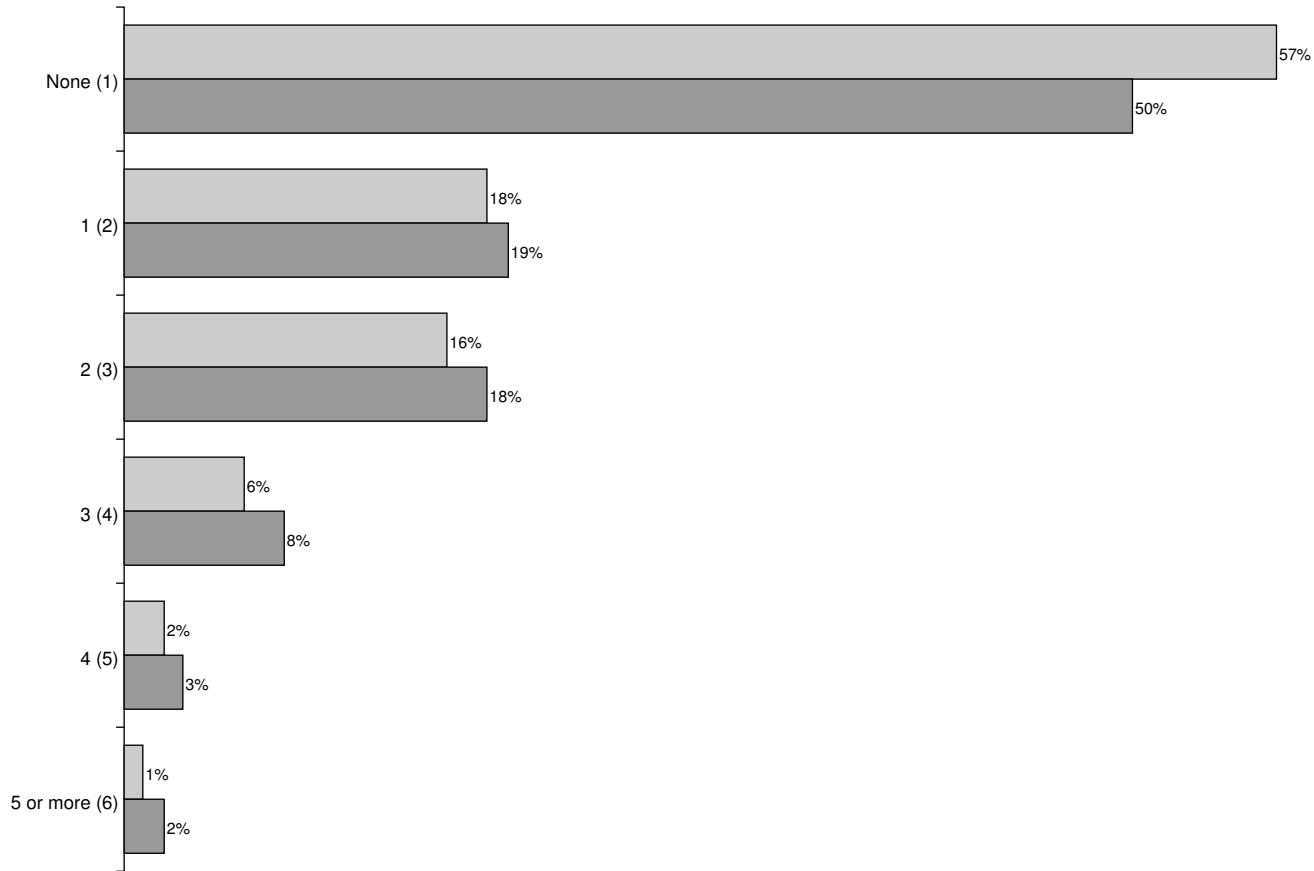
Source: Forrester Research UK Internet User Monitor 2006 Wave 2

HOW MANY CHILDREN (AGED UP TO AND INCLUDING 18) ARE THERE IN YOUR HOUSEHOLD?

Question 1.06: How many children (aged up to and including 18) are there in your household?

Base: All UK Internet users living in a household bigger than one (52,512)

Site: Yoursite.com (2,776)



	1	2	3	4	5	6	Total	Mean
Weight		1	2	3	4	6		
All UK Internet users	57%	18%	16%	6%	2%	1%	100%	1.9
Yoursite.com	50%	19%	18%	8%	3%	2%	100%	2.0
Difference	-7%	+1%	+2%	+2%	+1%	+1%	0%	+0.1
Index	88	106	113	133	150	200		

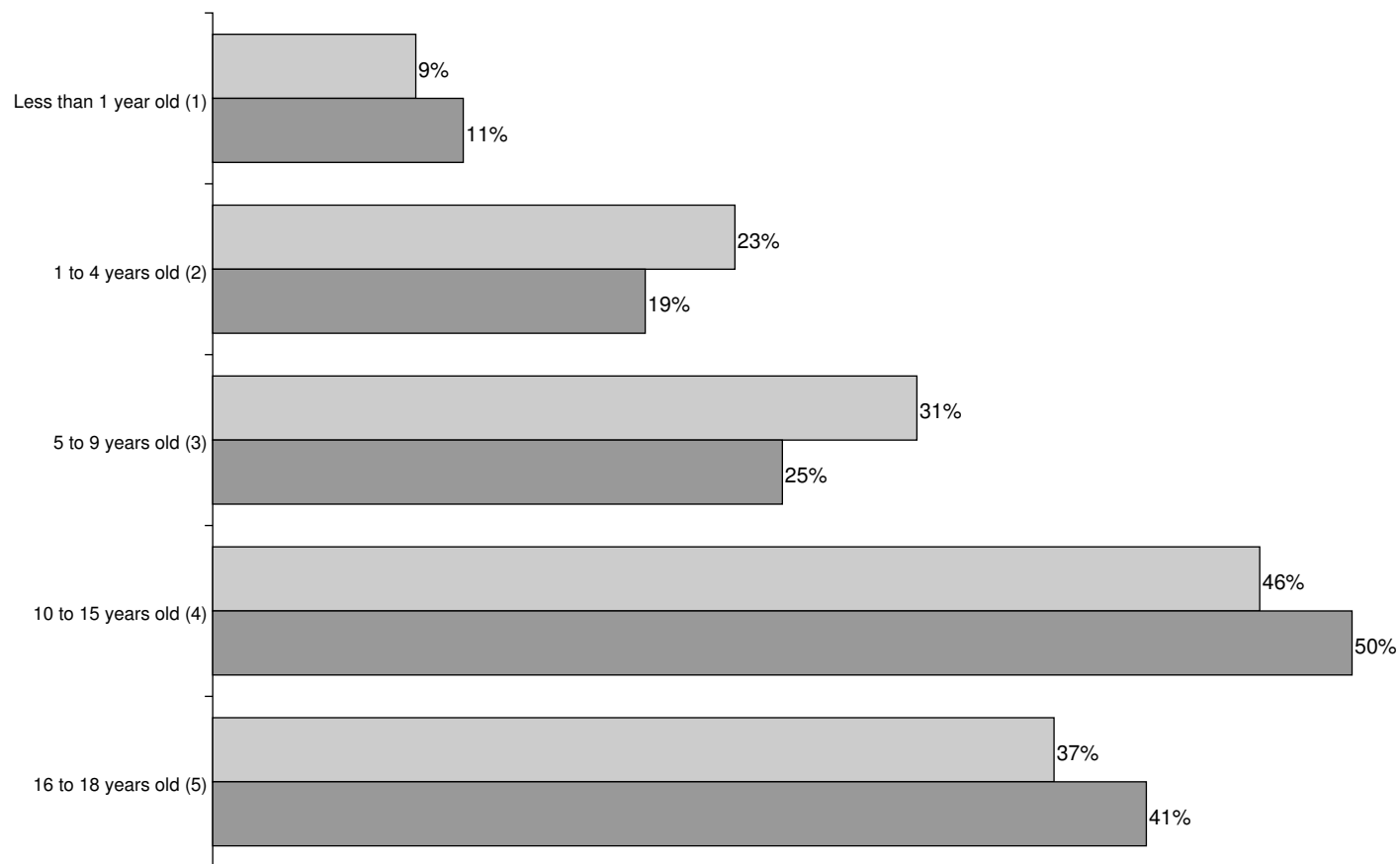
Source: Forrester Research UK Internet User Monitor 2006 Wave 2

HOW OLD ARE YOUR CHILDREN?

Question 1.07: How old are your children:

Base: All UK Internet users with children (22,701)

Site: Yoursite.com (1,379)



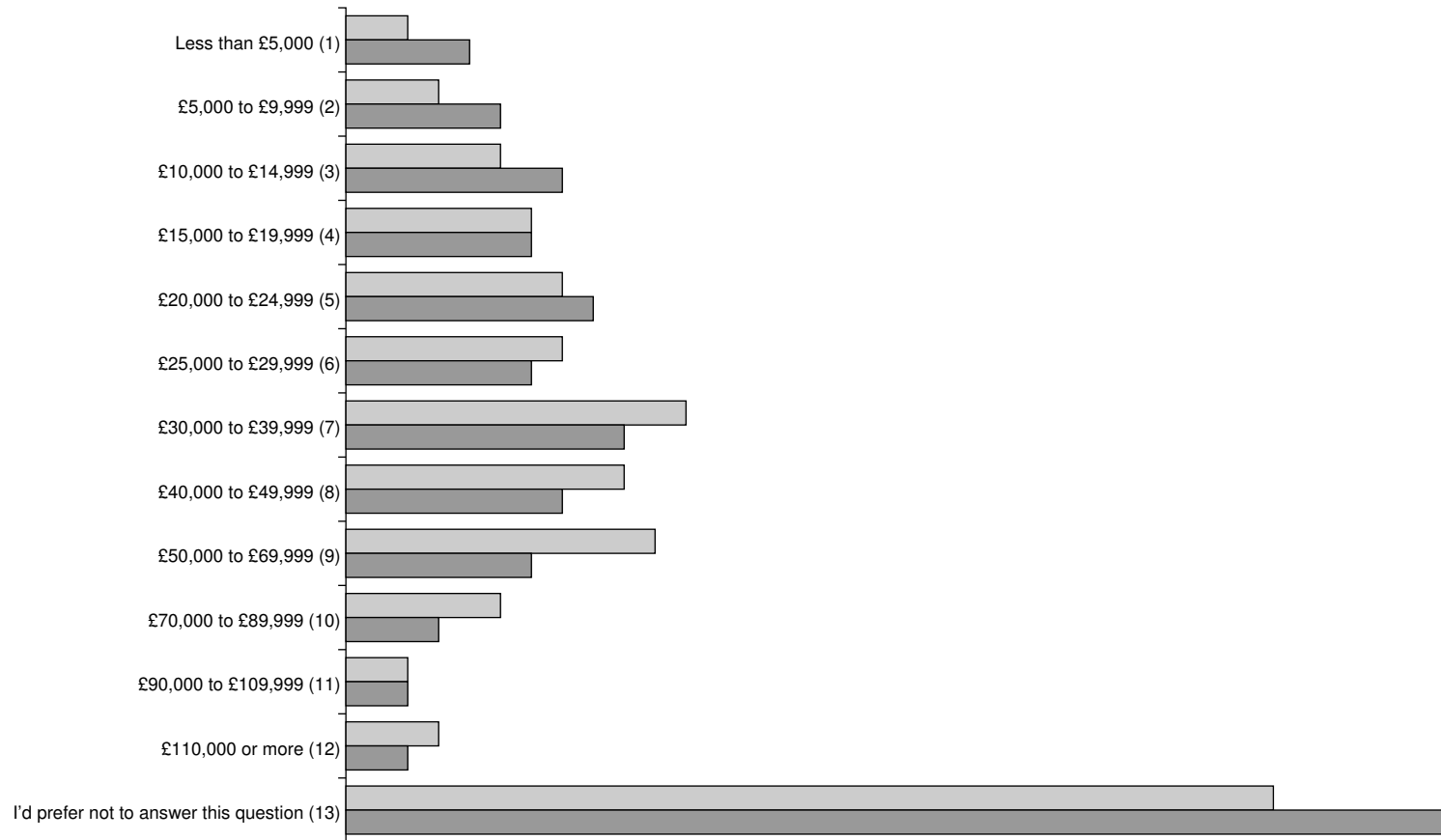
	1	2	3	4	5	Total
All UK Internet users	9%	23%	31%	46%	37%	145%
Yoursite.com	11%	19%	25%	50%	41%	147%
Difference	+2%	-4%	-6%	+4%	+4%	+2%
Index	122	83	81	109	111	

WHAT IS THE GROSS (BEFORE TAX) ANNUAL INCOME OF YOUR HOUSEHOLD?

Question 1.08: What is the gross (before tax) annual income of your household?

Base: All UK Internet users (60,567)

Site: Yoursite.com (3,127)



	1	2	3	4	5	6	7	8	9	10	11	12	13	Total	Mean
Weight	2500	7500	12500	17500	22500	27500	35000	45000	60000	80000	100000	120000			
All UK Internet users	2%	3%	5%	6%	7%	7%	11%	9%	10%	5%	2%	3%	30%	100%	41533
Yoursite.com	4%	5%	7%	6%	8%	6%	9%	7%	6%	3%	2%	2%	36%	100%	35343
Difference	+2%	+2%	+2%	0%	+1%	-1%	-2%	-2%	-4%	-2%	0%	-1%	+6%	0%	-6190
Index	200	167	140	100	114	86	82	78	60	60	100	67	120		

Source: Forrester Research UK Internet User Monitor 2006 Wave 2