

The Future of the Internet Questionnaire Report

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Phil Gyford
phil@gyford.com
www.gyford.com/phil/uhcl/methods1/questionnaire.pdf

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The Sample

Members of four online groups were invited to take part in a questionnaire asking their opinion on the future of the Internet. The groups were:

- UK Net Marketing - A UK-based Internet marketing-oriented email list.
- The Well - San Francisco-based online community. Notices were posted in the Internet, Future and News conferences.
- Online-Europe - "Europe's Internet Business Forum" email list.
- Haddock - UK new media email list.

76 people took part, 39 from the UK and 29 from the USA. Eight people counted other countries as their home and their responses are included in figures referring to the opinion of the entire sample, but they are not analysed separately in the text.

Group	Frequency	%	Distribution within groups by country					
			UK	USA	Belgium	Canada	Italy	France
UKNM	25	32.9%	22	2	0	0	1	0
The Well	24	31.6%	1	22	1	0	0	0
Online-Europe	14	18.4%	3	5	2	2	1	1
Haddock	13	17.1%	13	0	0	0	0	0
Total	76	100.0%	39	29	3	2	2	1

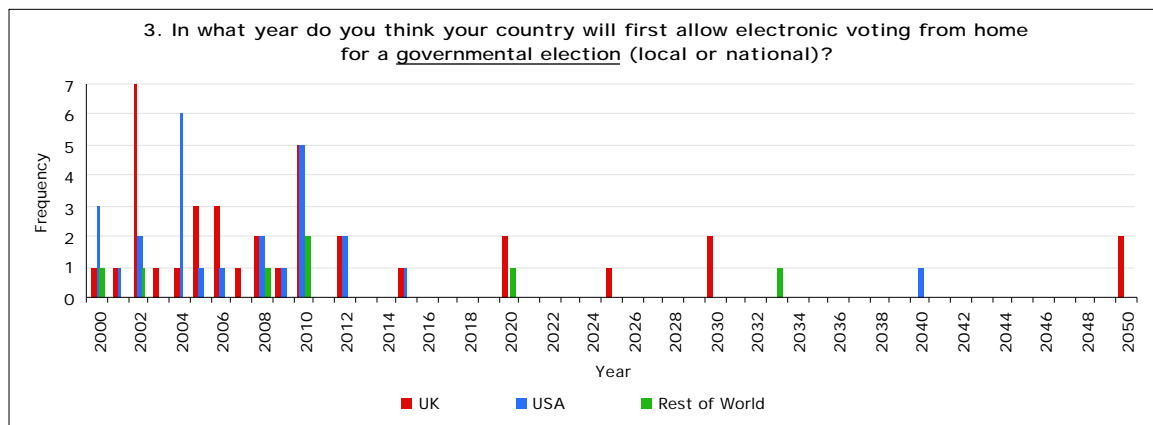
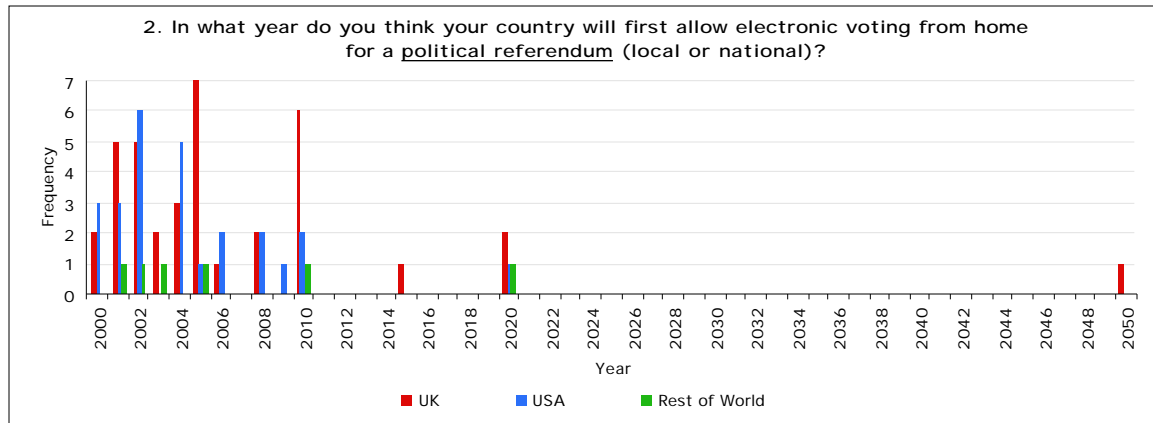
Summary

- 83% of respondents expect to be voting electronically in referendums by 2010, and 35% expect this by 2002. Elections may take a little longer, but 70% still expect electronic voting in them by 2010 and 22% by 2002.
- Most households will be online in ten years time, with 97% of people expecting more than half to have connections. Four fifths of respondents expect the majority of households to have broadband access by then.
- Wireless hand-held devices look set to be ubiquitous ten years from now, with 96% of respondents expecting to use them at least once per week in 2010. PCs won't be disappearing, with 87% expecting to use desktops or laptops regularly.
- The chances of most currently popular sites surviving ten years at the top are slim, with only Amazon.com, AOL.com, Microsoft.com and Yahoo.com given greater than 50% support.

In comparing the views of British and American respondents, I expected to find differences resulting from the varying states of the Internet in each country. The US is often regarded as being up to two years ahead of the UK in its acceptance of the Net and the maturity of the industry. Differences were rare however, suggesting Britain will catch up with America over the next decade.

- Expectations of when electronic voting from home will occur are very similar. The only exception is that a higher percentage of Americans expect political referendums to allow this by 2002 (43% compared to 31% of Britons).
- Although levels of Internet access are far more advanced in America right now, respondents expect levels to equalise over the next ten years with the vast majority of households having access.
- Compared to their British counterparts, few Americans expect to use set-top boxes or games consoles for Net access in 2010, only 31% and 10% for each method (67% and 64% for Britons).
- When asked to pick websites that will make the top twenty over the next ten years, the BBC was a popular choice among the British.
- The Americans were slightly more optimistic about the future for today's websites and traditional non-Net companies.

Electronic Voting

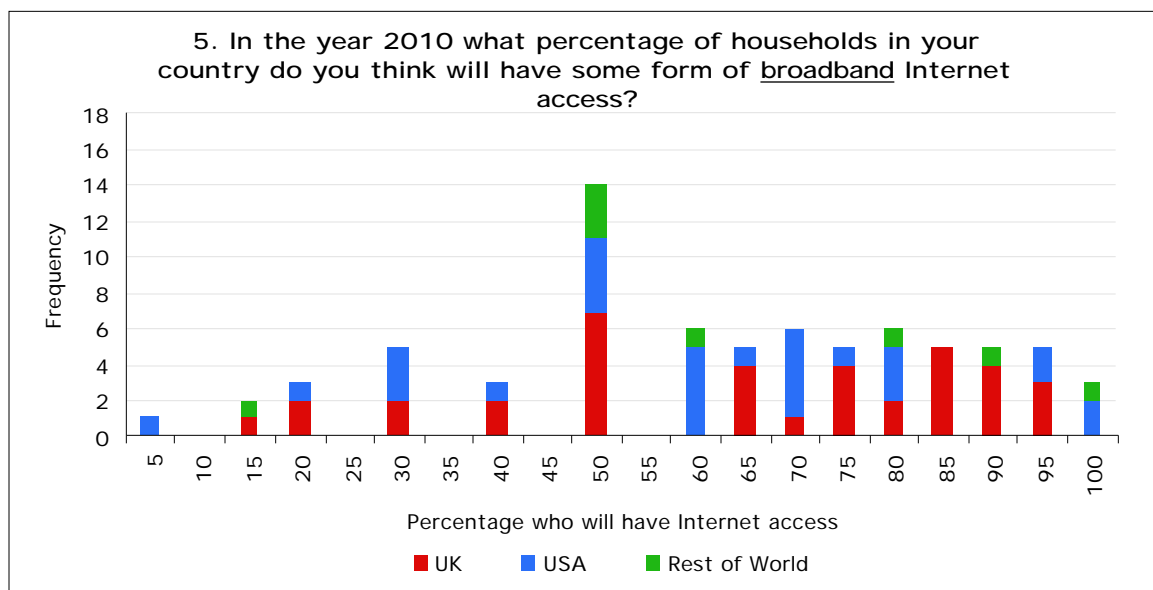
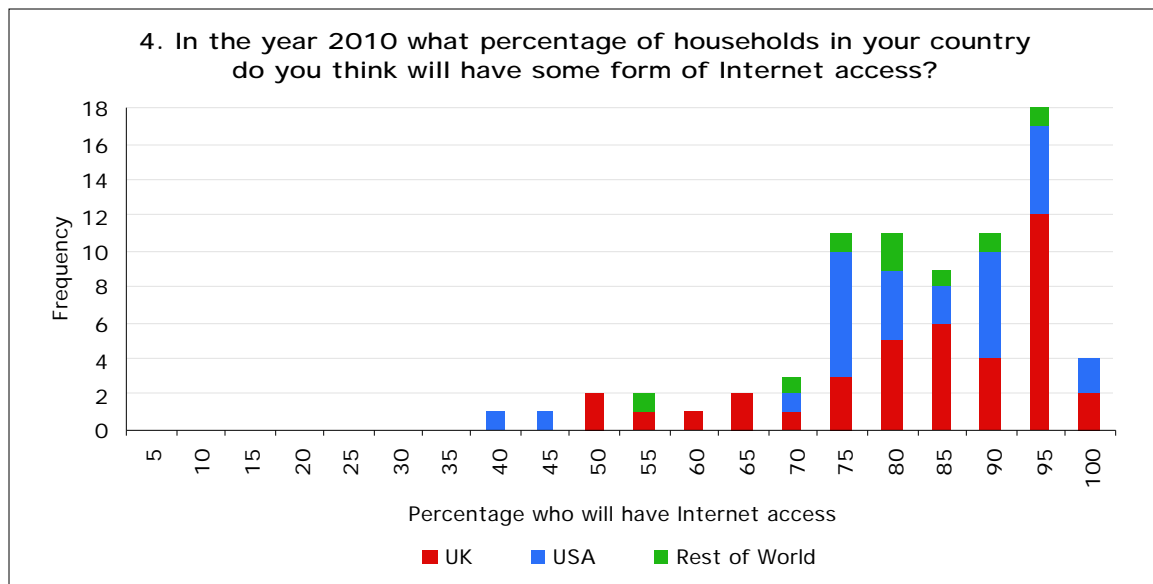


Respondents were asked when their home country would first allow electronic voting from home for both a political referendum and an election. They could select any year up to 2050, “After 2050,” “Never,” or “Already has.” For each of the two questions one person answered “After 2050,” five answered “Never” and one failed to respond; these responses are not counted in the graphs above.

The Americans believe they will see electronic democracy a little sooner than those in the UK. A sizeable proportion believe the first electronic referendums will take place in 2002 or sooner (35% overall, 31% of UK respondents, 43% USA). This seems entirely possible given that trials have already taken place in some US states and 61% expect it to happen by 2005 (62% UK, 64% USA).

Elections are understandably further off, with only one fifth expecting them by 2002. Nearly half expect them by 2006 (44% overall, 44% UK, 50% USA) and 71% by 2010.

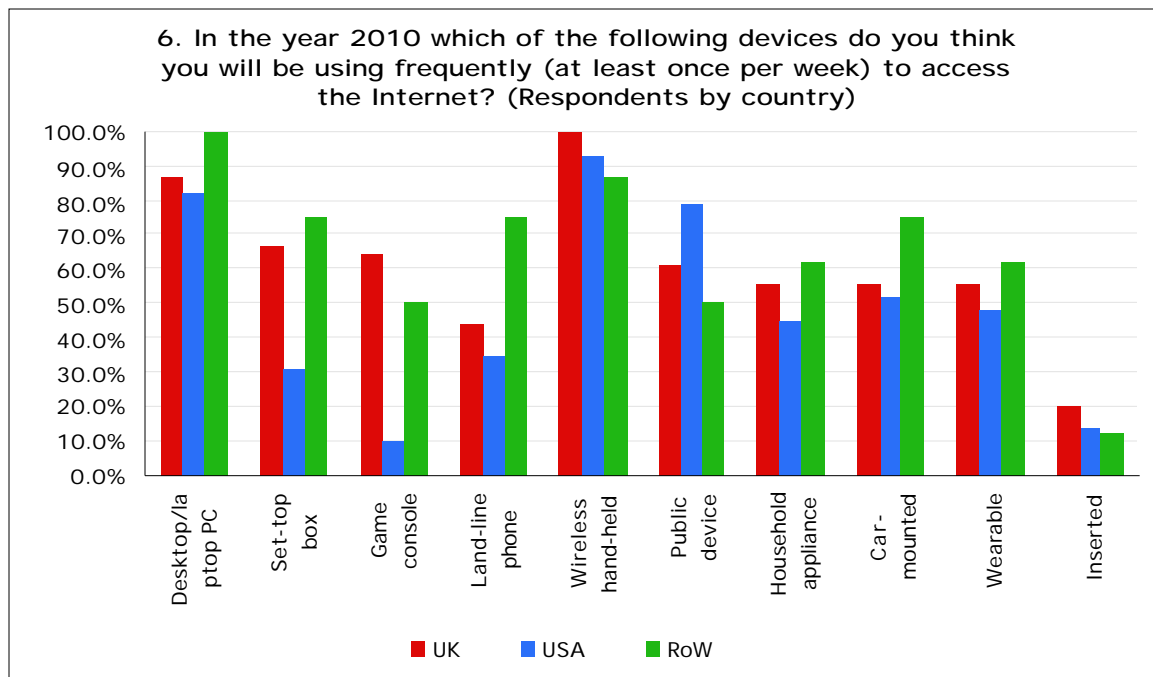
Internet Access



It seems a certainty that more than half our populations will be online in ten years' time, with 97% thinking so (100% UK, 93% USA). The Americans were a little more optimistic that a large proportion of the population will be online, with 93% expecting coverage to reach 7 out of 10 or more households, compared to 85% for Britons.

Broadband access seems a little further off, but respondents were still optimistic with four fifths (81% UK, 79% USA) expecting to see more than half of households online with fast access in 2010. Opinion was more varied on this issue, however, with little difference between the two countries.

Devices Used



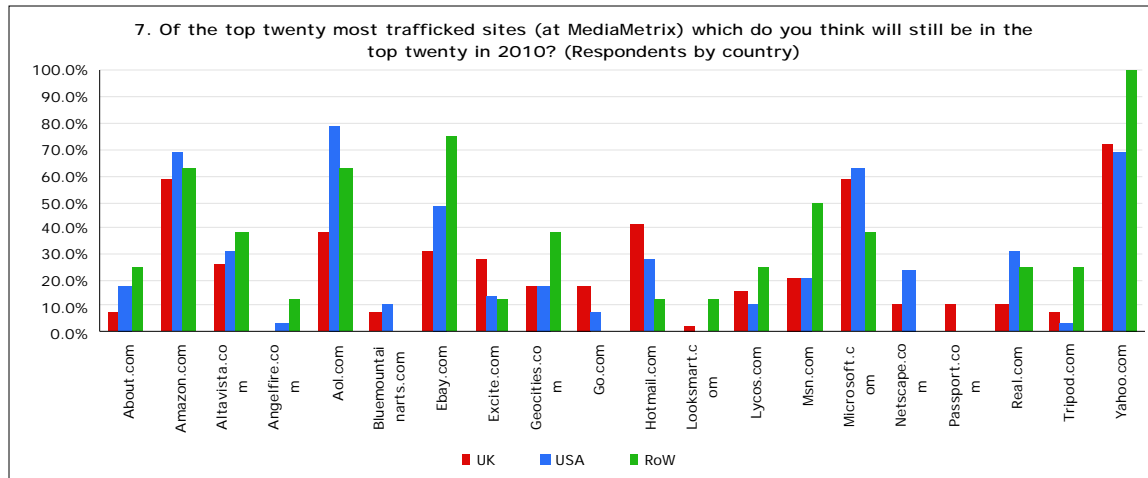
With wireless access the current Next Big Thing, it shouldn't be surprising that 96% (100% UK, 93% USA) expect to be using some form of hand-held device in ten years. Few expect the PC to disappear in the next decade however, with 87% sticking to this model for the foreseeable future (87% UK, 83% USA). We should only expect a few early adopters to be jacking directly into the Net in 2010, with 17% expecting to be using a partially or fully inserted device (21% UK, 14% USA).

This question showed up the largest difference between Britain and America in the entire survey: the amount who expect to be using a set-top box or game console varies greatly. 67% in the UK opt for a set-top box compared to 31% in the USA, and 64% of Britons respondents selected a games console compared to only 10% of Americans. Given the current levels of access via PCs in the USA it could be that Americans see no need for an alternative stationary box, whereas Britons feel the market needs something other than PCs to fill the current gap.

The Americans were more positive about the prospects for devices in public places (79% compared to 62% UK). It could be that there are currently more such devices in the USA so the possibilities are more apparent.

Overall the respondents expect to be using a large variety of access methods on a regular basis. This could indicate either an atypical enthusiasm among the sample or that people won't be tied to one device, willing to swap to the most convenient available means of access in order to connect when and where they want.

Popular Sites

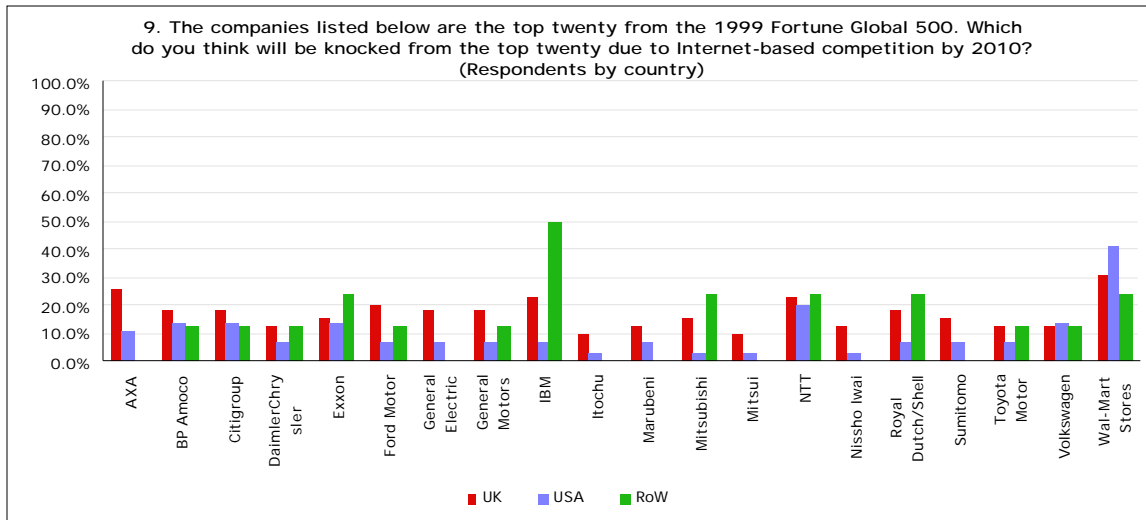


Support for sites varied widely, but only Amazon.com (63%), AOL.com (57%), Microsoft.com (58%) and Yahoo.com (74%) were supported by more than half the respondents. Those with the least chance of surviving were Angelfire.com (3%), Looksmart.com (3%) and Passport.com (5%).

The largest differences between British and American views were AOL.com (39% UK, 79% USA), which is understandable given the differences between the two ISP markets, and Real.com (10% UK, 31% USA). Americans seemed slightly more optimistic about the chances of sites surviving to 2010's top twenty, giving 5.4 votes out of twenty compared to 4.8 for those in the UK.

Question 8 asked respondents to name up to ten other sites they thought would be in the top twenty in 2010. Many people didn't give any answers for this open-ended question, and there is little to be gleaned from the information (for the full list see the Appendix). However, two sites were mentioned more than twice: the BBC (7 nominations) and Google (4). All but one of the BBC's nominations came from the UK (18% of total UK respondents, or 50% of those who gave answers for this question).

Effect on Existing Companies



This question was criticised by two or three respondents, and I feel little should be read into it. Few could be expected to know enough about all the companies (especially the Japanese conglomerates) to effectively rate their chances of survival, and deciding which might fail due to Internet-based competition, rather than for any other reason, is confusing.

With those reservations however, Wal-Mart is thought to be most likely to drop from the top twenty, with 34% (31% UK, 41% USA) choosing it. Nippon Telegraph and Telephone was second with 22% (23% UK, 21% USA). It should be noted that the high percentage from the rest of the world voting for IBM amounts to only 8 respondents, hence the company's total percentage is somewhat lower (20%). Again, Britons were more pessimistic, giving 3.4 votes out of 20 compared to 2.0 for Americans.

Conclusion

In ten years time the chances are that we'll be voting on important issues using the Internet, and probably in governmental elections. Most people will take advantage of this, with a majority of households having Internet connections, many of which will be high speed. Accessing the Net wherever and whenever one chooses will be commonplace thanks to both the small wireless devices most people carry and the variety of alternate points of access. The landscape of 2010's Internet will be very different to that of today, with few of 1999's top websites making the grade.

In general there were few large differences between British and American respondents. The latter were expecting electronic voting marginally sooner while the British were more optimistic about the numbers of households with Internet access ten years from now (given current levels). The largest difference was that far fewer Americans expect to be using set-top boxes or games consoles to access the Net in 2010. Britons were slightly more pessimistic about the chances of current domains staying popular and traditional companies surviving Internet challenges.

It should be noted there are a number of caveats. The sample comes from four extremely Net-literate groups so the results should not be regarded as an indicator of the opinions of general populations. It is likely, however, that this sample is able to give more educated answers about the effect of the Internet than a more wide-ranging sample might.

However, it is a far from random sample of Internet professionals. Firstly the groups polled are four of which I am a member and felt would give a good balance between British and American respondents. Secondly respondents were simply asked to take part in the questionnaire, rather than being randomly selected. Thirdly there is a fair margin of error given the number of respondents (76 in total), so I have tried not to draw too much from small differences between countries (for this reason no comparison has been made using the eight votes from the rest of the world).

Appendix

1. The next four questions refer to the situation in your home country. What is your home country?

Group	Frequency	%	Distribution within groups by country					
			UK	USA	Belgium	Canada	Italy	France
UKNM	25	32.9%	22	2	0	0	1	0
The Well	24	31.6%	1	22	1	0	0	0
Online-Europe	14	18.4%	3	5	2	2	1	1
Haddock	13	17.1%	13	0	0	0	0	0
Total	76	100.0%	39	29	3	2	2	1

2. In what year do you think your country will first allow electronic voting from home for a political referendum (local or national)?

Year	UK	USA	Rest of World	Total	Year (cont.)	UK	USA	Rest of World	Total
2000	2	3		5	2028				0
2001	5	3	1	9	2029				0
2002	5	6	1	12	2030				0
2003	2		1	3	2031				0
2004	3	5		8	2032				0
2005	7	1	1	9	2033				0
2006	1	2		3	2034				0
2007				0	2035				0
2008	2	2		4	2036				0
2009		1		1	2037				0
2010	6	2	1	9	2038				0
2011				0	2039				0
2012				0	2040				0
2013				0	2041				0
2014				0	2042				0
2015	1			1	2043				0
2016				0	2044				0
2017				0	2045				0
2018				0	2046				0
2019				0	2047				0
2020	2	1	1	4	2048				0
2021				0	2049				0
2022				0	2050		1		1
2023				0	After 2050		1		1
2024				0	Never		1	2	5
2025				0	No response			1	1
2026				0	Total	39	29	8	76
2027				0					

3. In what year do you think your country will first allow electronic voting from home for a governmental election (local or national)?

Year	UK	USA	Rest of World	Total	Year (cont.)	UK	USA	Rest of World	Total
2000	1	3	1	5	2028				0
2001	1	1		2	2029				0
2002	7	2	1	10	2030	2			2
2003	1			1	2031				0
2004	1	6		7	2032				0
2005	3	1		4	2033			1	1
2006	3	1		4	2034				0
2007	1			1	2035				0
2008	2	2	1	5	2036				0
2009	1	1		2	2037				0
2010	5	5	2	12	2038				0
2011				0	2039				0
2012	2	2		4	2040		1		1
2013				0	2041				0
2014				0	2042				0
2015	1	1		2	2043				0
2016				0	2044				0
2017				0	2045				0
2018				0	2046				0
2019				0	2047				0
2020	2		1	3	2048				0
2021				0	2049				0
2022				0	2050	2			2
2023				0	After 2050	1			1
2024				0	Never	2	2	1	5
2025	1			1	No response		1		1
2026				0	Total	39	29	8	76
2027				0					

4. In the year 2010 what percentage of households in your country do you think will have some form of Internet access?

Percentage	UK	USA	Rest of World	Total
5				0
10				0
15				0
20				0
25				0
30				0
35				0
40		1		1
45		1		1
50	2			2
55	1		1	2
60	1			1
65	2			2
70	1	1	1	3
75	3	7	1	11
80	5	4	2	11
85	6	2	1	9
90	4	6	1	11
95	12	5	1	18
100	2	2		4
No response				0
Total	39	29	8	76

5. In the year 2010 what percentage of households in your country do you think will have some form of broadband Internet access?

Percentage	UK	USA	Rest of World	Total
5		1		1
10				0
15	1		1	2
20	2	1		3
25				0
30	2	3		5
35				0
40	2	1		3
45				0
50	7	4	3	14
55				0
60		5	1	6
65	4	1		5
70	1	5		6
75	4	1		5
80	2	3	1	6
85	5			5
90	4		1	5
95	3	2		5
100		2	1	3
No response	2			2
Total	39	29	8	76

6. In the year 2010 which of the following devices do you think you will be using frequently (at least once per week) to access the Internet?

Device	UK	USA	RoW	All
Desktop/laptop PC	87.2%	82.8%	100.0%	86.8%
Set-top box	66.7%	31.0%	75.0%	53.9%
Game console	64.1%	10.3%	50.0%	42.1%
Land-line phone	43.6%	34.5%	75.0%	43.4%
Wireless hand-held	100.0%	93.1%	87.5%	96.1%
Public device	61.5%	79.3%	50.0%	67.1%
Household appliance	56.4%	44.8%	62.5%	52.6%
Car-mounted	56.4%	51.7%	75.0%	56.6%
Wearable	56.4%	48.3%	62.5%	53.9%
Inserted	20.5%	13.8%	12.5%	17.1%
Number of respondents	39	29	8	76

Other:

- GPS integrated system in personal aircraft
- not on the list above. not thought of yet
- Integrated compu-telecom-entertainment devices
- is this a teledildonics question?
- what's a telephone/STB/PC? Products will evolve
- anything electronic i guess
- Cell Phone

7. Of the top twenty most trafficked sites (at MediaMetrix) which do you think will still be in the top twenty in 2010?

Site	UK	USA	RoW	All
About.com	7.7%	17.2%	25.0%	13.2%
Amazon.com	59.0%	69.0%	62.5%	63.2%
Altavista.com	25.6%	31.0%	37.5%	28.9%
Angelfire.com	0.0%	3.4%	12.5%	2.6%
Aol.com	38.5%	79.3%	62.5%	56.6%
Bluemountainarts.com	7.7%	10.3%	0.0%	7.9%
Ebay.com	30.8%	48.3%	75.0%	42.1%
Excite.com	28.2%	13.8%	12.5%	21.1%
Geocities.com	17.9%	17.2%	37.5%	19.7%
Go.com	17.9%	6.9%	0.0%	11.8%
Hotmail.com	41.0%	27.6%	12.5%	32.9%
Looksmart.com	2.6%	0.0%	12.5%	2.6%
Lycos.com	15.4%	10.3%	25.0%	14.5%
Msn.com	20.5%	20.7%	50.0%	23.7%
Microsoft.com	59.0%	62.1%	37.5%	57.9%
Netscape.com	10.3%	24.1%	0.0%	14.5%
Passport.com	10.3%	0.0%	0.0%	5.3%
Real.com	10.3%	31.0%	25.0%	19.7%
Tripod.com	7.7%	3.4%	25.0%	7.9%
Yahoo.com	71.8%	69.0%	100.0%	73.7%
Number of respondents	39	29	8	76

8. Are there any sites which you think will be in the top twenty most trafficked in 2010 which are not at the moment? Enter up to ten addresses or site names in the spaces below.

Address	Times mentioned
2010.com	1
alltheweb.com	1
ask.com	1
bbc.co.uk or bbc.com	7
boo.com	1
britannica.com	1
broadcast.com	1
bt.com	1
buymygroceries.com	1
cnn.com	2
expedia.com	1
eyeconomy.com	1
go-neutral.com	1
google.com	4
haddock.org	2
irs.ustreas.gov	1
leisureplanet.com	1
marxists.org/archive/marx	1
mp3.com	1
news.yahoo.com	1
nytimes.com	1
palm.net (or clones of...)	1
peopledaily.com.cn	1
peapod.com	1
planetrx.com	1
shirky.com	1
sjmercury.com	1
travelocity.com	1
wal-mart.com	1
weboffice.com (or similar)	1
webvan.com	1
Sites which don't exist yet	3
.gov and privatised public service sites	1
More government sites	1
mine ;-)	1

9. The companies listed below are the top twenty from the 1999 Fortune Global 500. Which do you think will be knocked from the top twenty due to Internet-based competition by 2010?

Company	UK	USA	RoW	All
AXA	25.6%	10.3%	0.0%	17.1%
BP Amoco	17.9%	13.8%	12.5%	15.8%
Citigroup	17.9%	13.8%	12.5%	15.8%
DaimlerChrysler	12.8%	6.9%	12.5%	10.5%
Exxon	15.4%	13.8%	25.0%	15.8%
Ford Motor	20.5%	6.9%	12.5%	14.5%
General Electric	17.9%	6.9%	0.0%	11.8%
General Motors	17.9%	6.9%	12.5%	13.2%
IBM	23.1%	6.9%	50.0%	19.7%
Itochu	10.3%	3.4%	0.0%	6.6%
Marubeni	12.8%	6.9%	0.0%	9.2%
Mitsubishi	15.4%	3.4%	25.0%	11.8%
Mitsui	10.3%	3.4%	0.0%	6.6%
NTT	23.1%	20.7%	25.0%	22.4%
Nissho Iwai	12.8%	3.4%	0.0%	7.9%
Royal Dutch/Shell	17.9%	6.9%	25.0%	14.5%
Sumitomo	15.4%	6.9%	0.0%	10.5%
Toyota Motor	12.8%	6.9%	12.5%	10.5%
Volkswagen	12.8%	13.8%	12.5%	13.2%
Wal-Mart Stores	30.8%	41.4%	25.0%	34.2%
Number of respondents	39	29	8	76