



# Internet use and attitudes

2013 Metrics Bulletin

Research Document

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## Section 1

# Introduction

## 1.1 Scope of the report

The purpose of this 2013 internet use and attitudes bulletin is to provide a single home for a number of key internet metrics across a variety of sub-groups within the UK adult population. It is designed to be a reference document for our stakeholders.

It provides the following data:

- Who is online and how this has changed since 2012, the percentage of the UK population who ever use the internet on any device, who has home access, and who accesses the internet from different types of location outside the home.
- The 'breadth' of people's internet use, derived from an aggregation of the number of types of activities carried out by internet users, and focusing on selected types of activity.
- Information on people's attitudes to internet safety, awareness of potential problems relating to protection and privacy, and critical understanding.
- Information about the levels of interest among non-users in different types of internet activity, any proxy use in the past year, and the proportions of non-users without any intention of getting home internet access, who give reasons relating to cost and to interest/ need.

## 1.2 Key findings

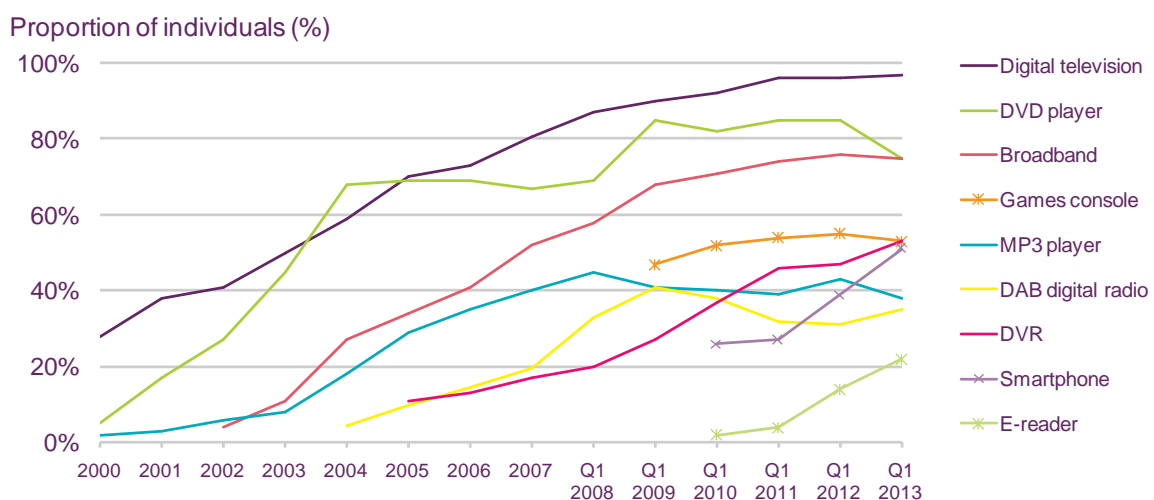
- Three-quarters (75%) of UK adults aged 16+ say they have broadband internet access at home and 82% of UK adults aged 16+ say they use the internet either at home or in other locations. Neither of these measures have changed to any significant extent since 2012. Differences by age group are considerable – 95% of 16-24s say they use the internet, compared to 29% of those aged 75+.
- Forty-nine per cent say they go online via their mobile phone, an increase of ten percentage points on Q1 2012. Seventy-five per cent of 16-24s say they do this compared to 5% of those aged 65+. Fifty-six per cent of those in ABC1 households say they go online via their mobile, compared to 37% of those in DE households.
- Around one in five (22%) of those who use the internet at home or elsewhere are broad users of the internet (carrying out 11-16 of 16 types of activity). Around one quarter (26%) of those in ABC1 households are broad users, compared to 14% of those in DE households.
- Just under half (46%) of those who use the internet at home or elsewhere are narrow users of the internet (carrying out 1-6 of the 16 types of activity). Six in ten (60%) of those aged 55 and over are narrow users, compared to less than four in ten (37%) aged 16-35. Those in C2DE households are more likely than those in ABC1 households to be narrow users (53% vs. 42%).

- Sixty-two per cent of those who use the internet at home or elsewhere say they buy things online. A similar proportion of adults bank online (55%) or use social networking sites (53%), while over one third (36%) watch TV content online. Adults aged 65 and over are less likely to use the internet at home for these activities, and adults in the DE socio-economic group are less likely to bank or watch TV content online.
- Among those accessing the internet at home through a PC / laptop/ netbook or tablet, 66% say they use email filters to block unwanted or spam emails. This is less likely among those aged 55+ (58%) and among DE households (51%). Men are more likely than women to use email filters (69% vs. 63%).
- A majority of internet users (61%) say they make ‘formal’ judgements before entering personal details online, an increase of five percentage points since 2011. Those in ABC1 households are more likely to say they do this compared to those in C2DE households (66% vs. 53%).
- About one in five (18%) of all adult internet users say they read website terms and conditions and privacy statements thoroughly, which is a six percentage point decrease. Adults aged 65+ are more likely to say they read website terms and conditions and privacy statements thoroughly (28%).
- Among non-users, ‘proxy’ use of the internet by someone else on their behalf stands at 18%. Eleven per cent of those not intending to get the internet cite cost as their main reason, while 63% cite a perceived lack of interest, a five percentage point increase.

### 1.3 Overall trends over time

It is useful to provide some initial context of how take-up rates have developed over time, and to compare the internet with other digital media such as digital TV and DAB. Figure 1 sets out how take-up has increased across a range of digital media.

**Figure 1: Take-up of key media since 2000**

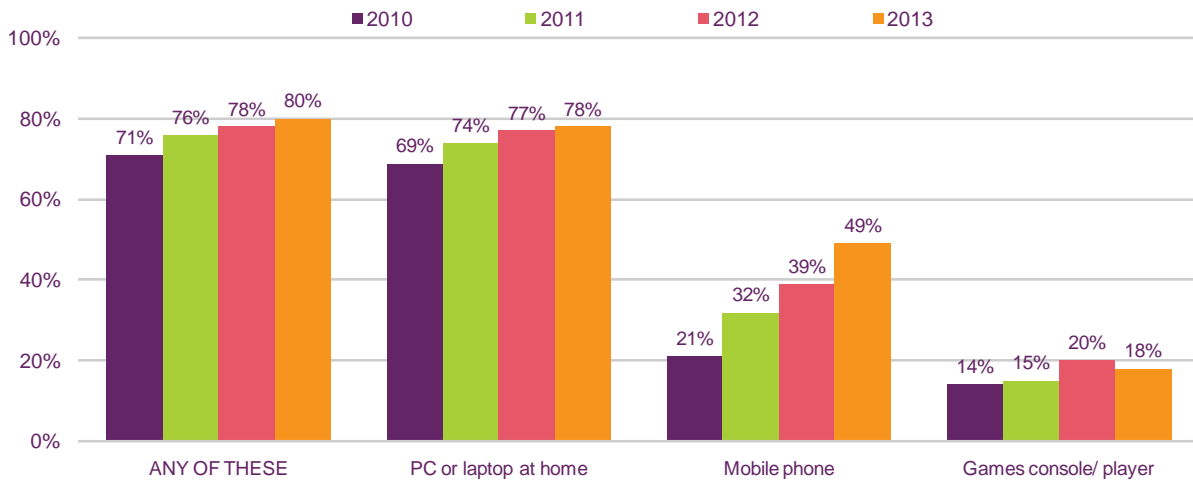


Source: Ofcom research. (Technology Tracker Q1, 2013)

Note: The Question wording for DVD Player and DVR was changed in Q1 2009 so data is not directly comparable with previous years.

Figure 2 shows the extent to which UK adults in 2010, 2011, 2012 and in 2013 use a computer or laptop at home to go online, and also shows those using mobile phones or games consoles/ games players to go online.

**Figure 2: Devices used to go online: 2010, 2011, 2012 and 2013**



Source: Ofcom research. (Technology Tracker Q1, 2013)

## 1.4 Who is measured

It is important to monitor different sub-groups within the UK, as take-up and use of the internet is skewed, particularly by age and by socio-economic group. For example, while 95% of those aged 16-24 use the internet (anywhere), only 25% of those aged 75 and over do so. And almost twice as many internet users in ABC1 households as in DE households can be categorised as 'broad' internet users.

This *Metrics Bulletin* tracks the following groups wherever possible, given the survey base sizes and sampling:

- Age
- Gender
- Socio-economic group
- Low income / unemployed
- Rural / urban
- Ethnic minority group (EMG)
- Disability
- Devolved nations

The following considerations should be taken into account when looking at these groups:

## **Low income**

Questions about levels of income in surveys tend to attract higher rates of refusal, especially among those on low incomes. This group is included in the report, but as refusal rates vary year on year, there is a degree of uncontrolled variation which means that any trend data should be viewed with caution.

## **Rural/ urban**

The government definitions of rural and urban differ between England and Wales, and Scotland, while the Northern Ireland Assembly allows definitions based on the research need. So in order to achieve consistent analysis by rurality, we have used UK Geographics' Locale Classification. This is a proprietary measure based on the ONS criteria; details can be found at <http://www.ukgeographics.co.uk/images/locale.pdf>. A full description of the seven definitions and how they are classified as rural or urban can be found in Annex 1 of this report.

## **Ethnic minority group (EMG)**

The 'ethnic minority group' comprises all those who answered that they belonged to groups within: Asian and British Asian; Black and Black British; Middle East and Arabic origin; Chinese or other ethnic group; mixed; or other. It should be noted that the group does not include other white ethnic groups such as people from Poland, Australia etc.

Ofcom is aware of the limitations of such a broad categorisation, but to survey all these groups to provide robust individual measures would be prohibitive in terms of cost. As there are no internal controls for sub-category, there is a degree of uncontrolled variation, so we have not reported trend data. We have applied special weighting (derived from ONS data and an examination of Ofcom's previous research) to these data to create an appropriate analysis group. This summary information is provided as an indicative measure, to show differences in take-up and attitudes, which in turn may enable stakeholder understanding and targeting of particular issues.

## **Disability**

The 'disability' group comprises all those who answered that they had any conditions that limited their daily activities or the work they could do. In 2013, 14% of UK adults gave this response. The surveys did not set any quotas or sampling framework for the incidence of disability, and so, like the EMG group, this group should be seen only as an indicative measure of the habits and opinions of disabled people. Likewise, due to the degree of uncontrolled variation, trend data are not reported. We have applied special weighting, derived from examination of Ofcom's previous research, to these data to create an appropriate analysis group.

## **1.5 What is measured**

The first section of this report provides the key data about who is online and how this has changed since 2012. It sets out the percentage of the UK population who ever use the internet on any device, who has broadband access at home, and who accesses the internet from different types of location outside the home.

The second section examines the 'breadth' of people's internet use. It measures this in two ways – by aggregating the numbers of types of activities carried out by those who use the internet at home or elsewhere, and by focusing on selected types of activity.

The next section provides information relating to people’s attitudes towards their internet safety, and also to their understanding of issues relating to protection and privacy and critical understanding.

Finally, we look at non-users of the internet in some detail. We set out their levels of interest in different types of internet activity, and the extent of their agreement that the internet “makes life easier”. The section indicates levels of likely internet take-up, and the proportions of non-users without any intention of getting home internet access, who give reasons relating to cost and to interest/ need. The incidence of any proxy use in the past year is also documented.

## 1.6 Sources used

The metrics set out here come from two main sources - Ofcom’s thrice-yearly survey of take-up and trends (the Technology Tracker)<sup>1</sup>, and Ofcom’s Media Literacy Tracker<sup>2</sup>. Data from the Technology Tracker survey are from January – February 2013, while data from the Media Literacy Tracker are from September – November 2012.

## 1.7 Understanding the results

Measures from Ofcom’s Media Literacy Tracker are reported alongside measures from Q1 2013 from Ofcom’s Technology Tracker. Habits may have shifted in those intervening months, but the relative differences between the sub-groups remain pertinent.

Within each section, comparisons are made between the sub-group response and the all-UK figure for each of the age, socio-economic/ income and location/ nation groups, and for EMG and disability. Where a response is different to the all-UK figure, the cell has been coloured green (if the sub-group response is higher than the all-UK figure) or red (if it is lower), as shown in the example below. The exceptions are male/ female and urban/ rural, where the comparisons are to each other. Differences are statistically significant at the 95% level.

xx	Signifies higher response
xx	Signifies lower response

Tracking sub-groups over time requires large base sizes in order that percentage changes can be deemed statistically significant. All significant changes since 2012 for measures from the Technology Tracker and since 2011 for measures from the Media Literacy Tracker are indicated within each section in the rows labelled ‘% change’ for the UK overall figure.

The number of interviews conducted with the different sub-groups of UK adults detailed in this report is indicated in the rows labelled ‘base’. Where a sub-group base size is lower than 100 interviews, these responses have been excluded from the analysis and are indicated ‘\*\*\*’ within the grid of measures.

<sup>1</sup><http://stakeholders.ofcom.org.uk/market-data-research/statistics/>

<sup>2</sup><http://stakeholders.ofcom.org.uk/market-data-research/statistics/>



## Section 2

## Internet reach: 2013

This section provides information about who is online and how this has changed since 2012. It sets out the percentage of the UK population who ever use the internet on any device, who has home broadband access, and who goes online from different types of location outside the home. Coloured cells indicate whether the sub-group response is different to the all-UK figure<sup>3</sup>.

	%	Age									Gender		Socio-economic/ income					Location/ nation								
% of all respondents	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
<b>Base</b>	3750	456	620	669	561	589	467	1444	855	388	1792	1958	1867	1881	1108	308	709	189	2713	1037	2250	501	492	507	228	655
<b>Ever use the internet anywhere<sup>4</sup></b>	82	95	95	94	89	81	53	60	42	29	84	81	90	73	69	77	61	88	82	84	83	80	77	78	89	61
% change since 2012	+1																								n/a	n/a
<b>Broadband take up<sup>5</sup></b>	75	80	81	89	85	77	54	58	42	29	77	74	86	63	56	56	47	67	74	82	76	70	66	74	79	55
% change since 2012	-1						-10																		n/a	n/a
<b>Use mobile phone to go online<sup>6</sup></b>	49	75	74	64	46	27	7	15	5	2	50	48	56	40	37	45	30	61	49	48	49	44	47	45	59	23
% change since 2012	+10	+8	+13	+17	+12	+10		+5		+2	+9	+12	+10	+11	+10		+6	+15	+10	+13	+9	+13	+9	+10	n/a	n/a
<b>Use internet at work/ college<sup>7</sup></b>	36	56	49	49	38	23	4	12	2	1	40	33	51	18	13	4	12	16	37	34	37	28	34	32	48	15
% change since 2012	+4		+8	+8							+5	+4		+4	+5				+4		+4				n/a	n/a
<b>Use internet at a library<sup>7</sup></b>	4	9	7	3	4	3	2	2	1	1	4	4	5	3	3	7	5	8	5	1	4	4	5	5	8	5
% change since 2012	-1																						+3		n/a	n/a

<sup>3</sup>Differences are statistically significant at the 95% level. Red cells signify lower and green cells signify higher. For male/ female and rural/ urban, the comparison is to each other

<sup>4</sup> (TT Q1 2013, QE3) Q: Do you/ does anyone in your household have access to the internet at home? / Do you ever access the internet anywhere other than in your home at all?

<sup>5</sup> (TT Q1 2013, QE9) Q: Which of these methods does your household use to connect to the internet at home?

<sup>6</sup> (TT Q1 2013, QD28) Q: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?

<sup>7</sup> (TT Q1 2013, QE3) Q: Do you ever access the internet anywhere other than in your home at all?

## Section 3

## Internet breadth of use

The 'breadth' of people's internet use is indicated in this section in two ways – by an aggregation of the numbers of types of activities carried out by those who use the internet at home or elsewhere, and by focusing on selected types of activity. Coloured cells indicate whether the sub-group response is different to the all-UK figure<sup>8</sup>. The types of activity are ranked by the percentage of those saying that they ever do such things. Changes made to this question in 2013 mean that it is not possible to make comparisons with 2012.

	%	Age									Gender		Socio-economic/ income						Location/ nation								
	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability	
% of all who use the internet at home or elsewhere																											
<b>Base</b>	2918	430	582	616	482	452	245	808	356	111	1425	1493	1635	1281	708	226	387	157	2099	819	1787	394	361	376	198	353	
<b>Carrying out 1-6 of the 16 types of internet activity<sup>9</sup></b>	46	37	37	45	49	56	67	60	67	67	45	48	42	53	54	47	56	51	46	45	46	49	48	46	40	50	
% change (UK) since 2012	n/a																										
<b>Carrying out 7-10 of the 16 types of activity<sup>9</sup></b>	27	29	27	29	29	26	17	21	15	10	27	27	29	23	21	22	20	24	27	27	26	35	29	24	24	21	
% change (UK) since 2012	n/a																										
<b>Carrying out 11-16 of the 16 types of activity<sup>9</sup></b>	22	31	32	24	16	11	6	9	4	1	23	21	26	15	14	20	17	18	22	22	23	13	17	18	29	18	
% change (UK) since 2012	n/a																										

<sup>8</sup>Differences are statistically significant at the 95% level. Red cells signify lower and green cells signify higher. For male/ female and rural/ urban, the comparison is to each other

<sup>9</sup>(TT Q1 2013, QE5A) Q: Which, if any, of these do you use the internet for? (NB Changes were made to this question in 2013 which mean that it is not possible to make comparisons with the 2012 findings. In 2012 the question asked those with access to the internet at home to state which activities were undertaken at home by anyone in the household. In 2013 the question asked those who use the internet at home or elsewhere to state which activities they personally undertake.)

The 16 types of internet activity are: social networking sites, Twitter, emails, communications, purchasing, banking, radio/ audio services, games, health, government sites, information (work/ school/ college), watching TV content, watching video clips/ webcasts, downloading entertainment content, uploading/ adding content to the internet, real-time gambling/ trading/ auctions.

	%	Age									Gender		Socio-economic/ income						Location/ nation								
% of all who use the internet at home or elsewhere	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability	
<b>Base</b>	2918	430	582	616	482	452	245	808	356	111	1425	1493	1635	1281	708	226	387	157	2099	819	1787	394	361	376	198	353	
<b>Purchase goods/ services/ tickets online<sup>10</sup></b>	62	60	66	68	64	62	48	54	44	36	62	63	69	52	48	48	51	45	61	70	62	65	62	60	59	51	
% change (UK) since 2012	n/a																										
<b>Bank online<sup>10</sup></b>	55	48	61	65	57	50	36	43	33	25	57	53	64	41	37	37	36	42	54	61	55	57	52	51	57	45	
% change (UK) since 2012	n/a																										
<b>Use social networking sites<sup>10</sup></b>	53	78	71	57	43	28	20	23	16	8	48	58	54	51	52	62	53	69	53	51	52	56	61	53	52	40	
% change (UK) since 2012	n/a																										
<b>Watching TV content online<sup>10</sup></b>	36	44	44	38	29	27	23	25	21	16	39	32	40	28	27	28	26	25	35	37	35	35	36	39	36	30	
% change (UK) since 2012	n/a																										
<b>Look up information/ services on government or council websites<sup>10</sup></b>	35	21	35	42	39	41	31	36	29	23	36	35	42	26	25	32	21	22	35	35	37	31	31	22	36	30	
% change (UK) since 2012	n/a																										
<b>Information on health-related issues<sup>10</sup></b>	34	25	38	40	33	33	29	30	26	22	30	37	39	26	26	26	22	24	34	34	35	25	28	26	42	34	
% change (UK) since 2012	n/a																										
<b>Use Twitter<sup>10</sup></b>	18	35	26	16	13	6	6	5	4	0	19	17	22	13	12	19	16	19	18	17	18	14	19	18	24	13	
% change (UK) since 2012	n/a																										

<sup>10</sup>(TT Q1 2012, QE5A) Q: Which, if any, of these do you use the internet for?

## Section 4

# Internet attitudes and understanding

This section provides information relating to people's attitudes towards their internet safety, their understanding of issues relating to protection and privacy, and their critical understanding. Coloured cells indicate whether the sub-group response is different to the all-UK figure<sup>11</sup>.

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all using the internet at home through a PC/ laptop/ netbook/ tablet	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemplo yed	Low income	income/ children	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
<b>Base</b>	1293	209	193	256	182	186	142	453	267	125	650	643	779	514	270	46	150	49	1104	189	807	164	168	154	75	152
<b>Home internet users who have/ use email filters on their home PC/laptop<sup>12</sup></b>	66	63	70	69	70	63	49	58	47	43	69	63	72	56	51	**	56	**	65	69	65	78	64	58	**	61
% change (UK) since 2011	+3																									

<sup>11</sup>Differences are statistically significant at the 95% level. Red cells signify lower and green cells signify higher. For male/ female and rural/ urban, the comparison is to each other

<sup>12</sup>(MLT 2012, IN8D) Q: For each of those measures or features that you had heard of, could you please choose one option from the card to say whether or not you have or use this on the computer you use at home? : Email filters that can block unwanted or spam emails

	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
% of all internet users <sup>13</sup>																										
<b>Base</b>	1381	229	219	273	194	190	147	466	276	129	691	690	812	569	309	50	179	61	1180	201	857	183	177	164	82	161
<b>Internet users who say they make 'formal' judgements before entering details<sup>14</sup></b>	61	61	63	63	64	56	51	54	47	35	61	61	66	53	54	**	58	**	62	54	60	71	54	43	**	47
% change (UK) since 2011	+5																									
<b>Internet users who say they read thoroughly website terms and conditions or privacy statements<sup>15</sup></b>	18	13	16	18	20	16	28	21	28	31	15	19	18	16	16	**	21	**	18	16	17	12	33	14	**	18
% change (UK) since 2011	-6																									

<sup>13</sup>These measures are shown on a separate page as the base is all internet users whereas the base on the previous page was all those who use the internet at home through a PC/ laptop/ netbook or tablet

<sup>14</sup>(MLT 2012, IN32) Q: Could you tell me whether you would make a judgement about a website before entering these types of details? (Home address or phone number, credit or debit card details and so on). How would you judge whether a website is secure? (In this context, formal judgements relate to looking for a padlock symbol on the website or other system/ software messages)

<sup>15</sup>(MLT 2012, IN38) Q: Which of the following statements best describes what you do about website terms and conditions or privacy statements?

\*\* = Sub-group base size lower than 100 and therefore excluded from the analysis

	%	Age									Gender		Socio-economic/ income					Location/ nation								
	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
% of all social networking site users	784	208	182	183	90	70	35	121	51	16	363	421	451	333	189	39	125	54	679	105	475	118	104	87	51	64
<b>Base</b>	784	208	182	183	90	70	35	121	51	16	363	421	451	333	189	39	125	54	679	105	475	118	104	87	51	64
<b>Social networking site users who say only their friends can see their personal information<sup>16</sup></b>	72	72	75	72	**	**	**	76	**	**	67	76	74	69	68	**	81	**	71	**	73	62	80	**	**	**
% change (UK) since 2011	+5																									

	%	Age									Gender		Socio-economic/ income					Location/ nation								
	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
% of all search engine site users	1305	222	215	262	184	180	135	422	242	107	651	654	781	524	286	50	164	55	1116	189	816	175	163	151	78	149
<b>Base</b>	1305	222	215	262	184	180	135	422	242	107	651	654	781	524	286	50	164	55	1116	189	816	175	163	151	78	149
<b>Search engine users who understand that the accuracy of the information in the websites shown in results is variable<sup>17</sup></b>	60	57	60	66	62	55	55	56	54	50	62	58	63	55	55	**	57	**	61	54	61	56	47	57	**	56
% change (UK) since 2011	+3																									

<sup>16</sup>(MLT 2012, IN22A) Q: Which of these options apply in terms of who can see... Your personal information – such as your relationship status, date of birth, home town, and so on?

<sup>17</sup>(MLT 2012, IN40) Q: Which of one of these is closest to your opinion... – I think that some of the websites will be accurate or unbiased and some won't be

\*\* = Sub-group base size lower than 100 and therefore excluded from the analysis

**Section 5**

# Interest in the internet among non-users

This section provides information about the levels of interest among non-users for different types of internet activity, any proxy use in the past year, and the extent of users' agreement that the internet "makes life easier". It indicates levels of likely internet take-up, and the proportions of non-users without any intention of getting home internet access, who give reasons relating to cost and to interest/ need. Coloured cells indicate whether the sub-group response is different to the all-UK figure<sup>18</sup>.

	%	Age									Gender		Socio-economic/ income						Location/ nation								
	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability	
% of all non-internet users																											
<b>Base</b>	424	5	17	27	40	72	112	335	263	151	202	222	133	291	195	8	147	8	359	65	268	53	54	49	21	142	
<b>Interest in using email to contact friends and relatives<sup>19</sup></b>	18	**	**	**	**	**	11	15	13	14	21	16	20	17	18	**	19	**	19	**	19	**	**	**	**	**	14
% change (UK) since 2011	+4																										
<b>Interest in buying things over the internet<sup>19</sup></b>	12	**	**	**	**	**	8	12	10	11	15	10	10	14	16	**	12	**	12	**	13	**	**	**	**	9	
% change (UK) since 2011	-1																										
<b>Interest in looking at information on hobbies or interests<sup>19</sup></b>	15	**	**	**	**	**	10	13	11	12	14	15	14	15	16	**	15	**	14	**	15	**	**	**	**	11	
% change (UK) since 2011	+1																										

<sup>18</sup>Differences are statistically significant at the 95% level. Red cells signify lower and green cells signify higher. For male/ female and rural/ urban, the comparison is to each other

<sup>19</sup>(MLT 2012, IN10 Q: I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I'd like you to say which of the options on the card applies to you [I'm interested in this])

\*\* = Sub-group base size lower than 100 and therefore excluded from the analysis

	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
% of all non-internet users																										
<b>Base</b>	424	5	17	27	40	72	112	335	263	151	202	222	133	291	195	8	147	8	359	65	268	53	54	49	21	142
<b>Proxy use of the internet in the past year<sup>20</sup></b>	18	**	**	**	**	**	18	19	19	18	19	18	25	15	15	**	14	**	19	**	19	**	**	**	**	22
% change (UK) since 2011	-5																									
<b>Agreement that “the internet makes life easier”<sup>21</sup></b>	33	**	**	**	**	**	39	32	31	25	31	36	39	31	29	**	32	**	33	**	32	**	**	**	**	36
% change (UK) since 2011	-5																									

	%	Age							Gender		Socio-economic/ income					Location/ nation										
	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
% of all those without internet at home																										
<b>Base</b>	874	46	68	72	81	135	207	607	472	265	396	478	241	633	440	102	350	37	667	207	502	121	130	121	39	300
<b>Likelihood of getting internet access at home in the next 12 months<sup>22</sup></b>	15	**	**	**	**	11	6	5	4	3	15	16	16	15	17	30	15	**	16	8	16	12	17	14	**	8
% change since 2012	-2																									

<sup>20</sup>(MLT 2012, IN11) Q: In the past year, have you asked someone else to send an email for you, get information from the internet for you, or make a purchase from the internet on your behalf?

<sup>21</sup>(MLT 2012, IN35A) Q: Here are some things people sometimes say about using the internet. Whether you use the internet or not can you please tell me to what extent you agree or disagree with each statement using the scale on this card?

<sup>22</sup>(TT Q1 2013, QE24) Q: How likely are you to get the internet at home in the next 12 months?

\*\* = Sub-group base size lower than 100 and therefore excluded from the analysis



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	%	Age										Gender		Socio-economic/ income						Location/ nation						
% of those not intending to get the internet at home in the next 12 months	All UK 16+	16-24	25-34	35-44	45-54	55-64	65-74	55+	65+	75+	Male	Female	ABC1	C2DE	DE	Unemployed	Low income	Low income/ children in home	Urban	Rural	England	Scotland	Wales	N Ireland	EMG	Disability
<b>Base</b>	660	12	18	33	55	108	186	542	434	248	297	363	185	475	325	52	265	11	487	173	369	96	99	96	22	265
<b>Cost as main reason for not having the internet at home†<sup>23</sup></b>	11	**	**	**	**	13	3	5	3	3	14	9	5	14	17	**	17	**	11	14	10	**	**	**	**	12
% change since 2012	± 0																									
<b>Perceived lack of interest as the main reason for not having the internet at home†<sup>23</sup></b>	63	**	**	**	**	71	73	67	66	61	62	63	69	60	56	**	58	**	62	65	67	**	**	**	**	52
% change since 2012	+11																									

<sup>23</sup>(TT Q1 2013, QE25B) Q: Why are you unlikely to get internet access at home in the next 12 months?

† = It should be noted that these results could be an outcome of reluctance among some groups to 'admit' to cost barriers, or to other sorts of issues around non-take-up of the internet such as fear or lack of confidence

\*\* = Sub-group base size lower than 100 and therefore excluded from the analysis

## Annex 1

# Technical note

### 1.1 Background

The metrics set out in this report come from two main sources - Ofcom's thrice-yearly survey of take-up and trends (the Technology Tracker), and Ofcom's Media Literacy Tracker.

Ofcom commissioned Saville Rossiter-Base to carry out both of these surveys. Interviewing for both surveys was conducted by Fieldworks, a specialist fieldwork agency, face-to-face, in the home, using pen and paper. Findings from the Technology Tracker are reported in Ofcom's *Communications Market Report* and *Consumer Experience Report*. Findings from the Media Literacy Tracker are reported in Ofcom's *UK Adults' Media Literacy Report*.

### 1.2 Sampling

Interviewers are provided with specific addresses, with quotas of interviews to be achieved for each sampling point issued for the survey. The data are then weighted to the national UK profile for age, gender, socio-economic group and region. Matrix weighting has been used to achieve consistent profiles across the surveys. Special weights have been applied to respondents in each of the 65+, EMG and disability categories.

A total of 3,750 adults aged 16+ were interviewed for the Technology Tracker at 315 different sampling points in the UK. All interviews were conducted between 4 January and 28 February 2013.

For the Media Literacy Tracker, a total of 1,805 adults aged 16+ were interviewed at 200 different sampling points in the UK. All interviews were conducted between 24 September and 2 November 2012.

The grids within each section of this report indicate the number of interviews conducted with the different sub-groups of UK adults detailed in this report.

## Local classification – urban-rural classification

As there is no 'official' rural-urban classification that is consistent across the UK, this research makes use of the classification developed by UK Geographics. This assigns to output areas and postcodes a rural-urban classification based on the nature of the settlement in which it resides. For Locale groups A-D, each city or town lying inside a larger conurbation is treated separately.

Category	Description	%age of UK population	Population Threshold
A	Large city	14.8%	500k to 1m
B	Smaller city or large town	19.8%	100k to 499k
C	Medium town	32.3%	15k to 99k
D	Small town within 10 miles of larger settlement (A,B,C)	17.3%	2k to 14.9k
E	Small town more than 10 miles from larger settlement (A,B,C)	1.8%	2k to 14.9k
F	Rural area within 10 miles of larger settlement (A,B,C)	11.6%	Less than 2k
G	Rural area more than 10 miles from larger settlement (A,B,C)	2.4%	Less than 2k

When creating rural-urban splits, Ofcom considers codes A-E to be urban and F-G to be rural.