Internet use and attitudes

2011 Metrics Bulletin

Research Document

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Contents

Section 1

Introduction

1.1 Scope of the report

This purpose of this 2011 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 2010, the percentage of the UK population who ever use the internet on any device, who has home access, and who accesses it from different types of location outside the home.

- The 'breadth' of people's internet use; derived from an aggregation of the numbers of types of activities carried out by those with access to the internet at home, and by focusing on selected types of activity.

- Information relating to people's attitudes to internet safety and also to their understanding of issues relating to protection and privacy, trust 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 (76%) of UK adults aged 16+ say they have internet access at home, and 74% say they have broadband access at home. Eighty per cent of UK adults aged 16+ say they ever use the internet, an increase of three percentage points on Q1 2010. Differences by age group are considerable – 90% of 16-24s say they ever use the internet, compared to 25% of those aged 75+.

- Thirty-two per cent say they go online via their mobile phone. Fifty-seven per cent of 16-24s say they do this compared to 2% of those aged 65+. One third (33%) of people in urban areas say they go online via their mobile, compared to 23% in rural areas.

- Just over a quarter (27%) of those with home internet access are broad users of the internet (carrying out 11-17 of 17 types of activity. One third (33%) of those in ABC1 households are broad users compared to 13% of those in DE households.

- Seventy-one per cent of those with home internet access say they buy things online, and this does not vary by sub-group. However, other types of activity vary considerably – for example, 48% of those in ABC1 households say they look up information on government or council websites, compared to 19% of those in DE households.

- Nearly two-thirds of internet users (64%) say they are confident installing security features. Men (72%) are more likely to say this than women (56%).

- Over two-thirds (68%) of social networking site users say that only their friends can see their personal information – 73% of women say this compared to 62% of men.

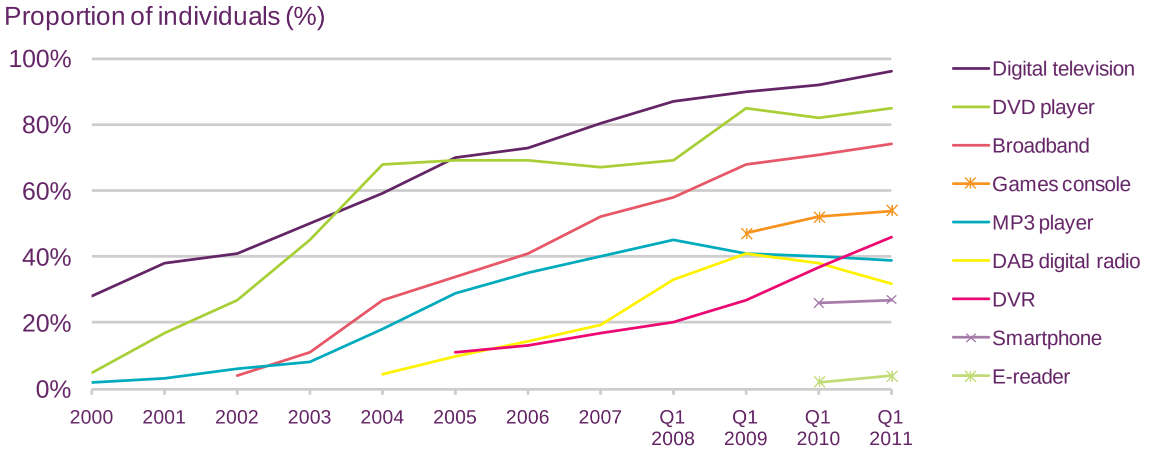
- There are low levels of interest among non-users in various aspects of the internet, such as email (16% interested); and buying things (13% interested).

- Among non-users, 'proxy' use of the internet by someone else on their behalf stands at 21%. Eleven per cent of those not intending to get the internet cite cost as their main reason, and 47% cite a perceived lack of interest – up seven percentage points on 2010.

1.3 Overall trends over time

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

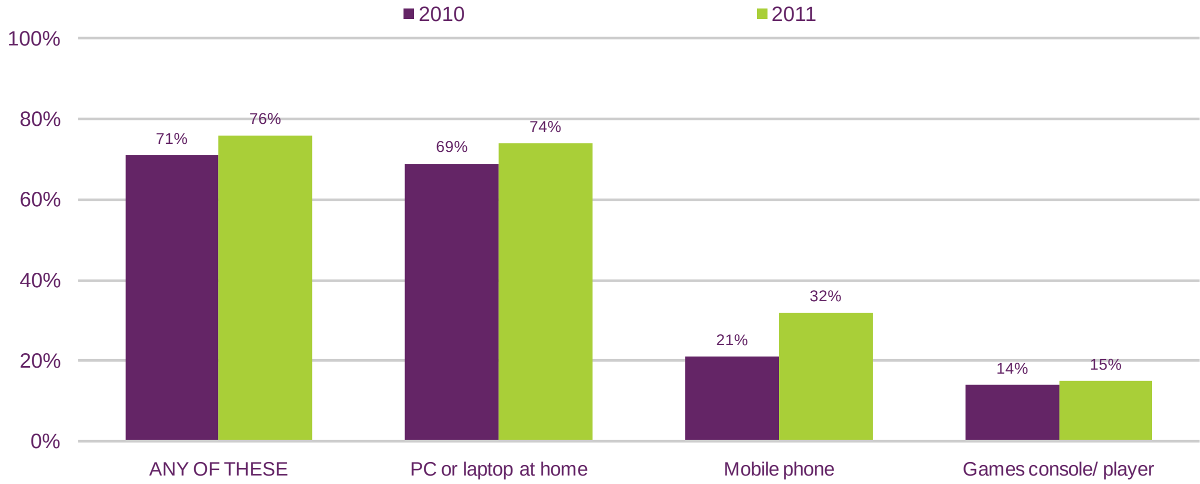
Figure 1: Take-up of key media since 2000



Source: Ofcom research.
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 and in 2011 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 and 2011



Source: Ofcom research.

1.4 Who is measured

It is important to monitor different sub-groups within society, as take-up and use of the internet is skewed particularly by age and by socio-economic group. For example, while 90% of those aged 16-24 use the internet (anywhere), only 25% of those aged 75 and over do so. And more than twice as many internet users in ABC1 households than 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. Therefore, to enable consistent analysis by rurality, UK Geographics' Locale

Classification is used instead. This is a proprietary measure based on the ONS criteria and 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 well aware of the limitations of such a broad categorisation, but surveying all these groups to provide robust individual measures would be prohibitive in terms of cost. There are no internal controls for subcategory, so there is a resultant degree of uncontrolled variation which means that trend data is not reported. Special weighting, derived from ONS data and an examination of Ofcom's previous research, has been applied to these data to create an appropriate analysis group. This summary information is provided as an indicative measure, to show differences in take-up or 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 2011, 15% 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 is not reported. Special weighting, derived from examination of Ofcom's previous research, has been applied 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 2010. It sets out the percentage of the UK population who ever use the internet on any device, who has home access, and who accesses it 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 an aggregation of the numbers of types of activities carried out by those with access to the internet at home, 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, trust and critical understanding.

Finally, non-users of the internet are looked at in some detail. Their levels of interest in different types of internet activity are set out, 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')[1], and from Ofcom's Media Literacy survey[2]. Data from the Technology Tracker survey is from January – February 2011, while data from the Media Literacy survey is from two waves conducted in the spring and autumn of 2010.

1.7 Understanding the results

Measures from spring and autumn 2010 from Ofcom's Media Literacy Tracker are reported alongside measures from Q1 2011 from Ofcom's Technology Tracker. Habits may have shifted in those intervening months, but 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 either 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 comparison is 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 change can be deemed statistically significant. All significant changes since 2010 for measures from the Technology Tracker and since 2009 for measures from the Media Literacy survey 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.

[1] http://stakeholders.ofcom.org.uk/market-data-research/statistics/
[2] http://stakeholders.ofcom.org.uk/market-data-research/statistics/

Section 2

Internet reach 2011

This section provides the key data about who is online and how this has changed since 2010. It sets out the percentage of the UK population who ever use the internet on any device, who has home access, and who accesses it from different types of location outside the home. Coloured cells indicate whether the sub-group response is different to the all-UK figure[3].

	%	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
Base	*3474*	*460*	*540*	*676*	*528*	*535*	*407*	*1270*	*735*	*328*	*1679*	*1795*	*1798*	*1676*	*975*	*259*	*697*	*178*	*2458*	*1016*	*1983*	*487*	*493*	*511*	*241*	*602*
Ever use the internet anywhere[4]	80	90	95	93	86	72	53	55	40	25	80	79	89	68	60	70	55	85	79	83	81	70	72	78	87	58
% change since 2010	+3		+5					+4				+4							+3		+4				n/a	n/a
Home internet access[5]	76	81	88	90	82	73	55	56	41	26	77	76	86	64	56	60	49	81	75	82	78	64	72	76	78	56
% change since 2010	+3		+6					+5				+5	+3	+4					+3	+5	+5			+5	n/a	n/a
Broadband take-up[6]	74	78	85	89	82	72	53	55	40	25	75	74	84	63	55	59	47	77	74	80	76	61	71	75	77	54
% change since 2010	+3			+4		+6		+7	+6			+6	+3	+5					+4	+5	+4		+6	+7	n/a	n/a
Use mobile phone to go online[7]	32	57	53	39	29	13	4	7	2	0	34	30	38	24	20	27	19	34	33	23	34	22	25	29	42	17
% change since 2010	+11	+16	+19	+14	+14	+6		+4			+11	+11	+13	+7	+5	+8	+4	+11	+11	+5	+11	+6		+10	n/a	n/a
Use internet at work/ college[8]	29	47	37	40	36	16	2	8	1	0	31	28	44	12	7	3	11	13	31	19	31	19	27	24	41	9
% change since 2010	-1																			-8		-8			n/a	n/a
Use internet at a library[8]	4	11	6	2	3	3	2	2	2	2	4	4	5	3	3	8	7	4	4	3	4	2	3	5	11	3
% change since 2010	-1														-3									-3	n/a	n/a

[3] 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
[4] (TT Q1 2011, 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?
[5] (TT Q1 2011, QE2) Q: Do you or does anyone in your household have access to the internet/ world wide web at home (via any device, e.g. PC, mobile phone etc.)?
[6] (TT Q1 2011, QE9) Q: Which of these methods does your household use to connect to the internet at home?
[7] (TT Q1 2011, QD28) Q: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?
[8] (TT Q1 2011, 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 with access to the internet at home, and by focusing on selected types of activity. Coloured cells indicate whether the sub-group response is different to the all-UK figure[9]. The types of activity are ranked by the percentage of those saying that they ever do such things, with the exception of two measures which come from our Media Literacy Tracker rather than our Technology Tracker, and therefore are shown on a separate page in order to signal differences in base size.

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all with access to the internet at home	**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
Base	*2534*	*376*	*462*	*602*	*437*	*368*	*215*	*657*	*289*	*74*	*1234*	*1300*	*1529*	*1005*	*504*	*146*	*315*	*141*	*1787*	*747*	*1493*	*329*	*334*	*378*	*183*	*304*
Carrying out 0-5 of the 17 types of internet activity[10]	35	26	28	26	35	45	60	53	67	**	34	35	27	46	54	43	44	49	34	40	34	34	38	40	33	40
% change (UK) since 2010	-2																									
Carrying out 6-10 of the 17 types of activity[10]	39	38	43	40	38	37	31	33	27	**	38	39	40	36	33	42	38	34	39	37	38	42	40	40	37	43
% change (UK) since 2010	+1																									
Carrying out 11-17 of the 17 types of activity[10]	27	36	28	33	27	18	9	14	7	**	28	26	33	18	13	15	17	17	28	23	28	24	22	20	30	16
% change (UK) since 2010	+2																									

[9] 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

[10] (TT Q1 2011, QE5A) Q: Which, if any, of these do you or members of your household use the internet for whilst at home?

The 17 types of internet activity are: Social networking sites, Twitter, Emails, Communications, Purchasing, Banking, Radio/ audio services, Games, Health, Government sites, Information (work/ school/ college), Information (personal), Watching TV content, Watching video clips/ webcasts, Downloading entertainment content, Uploading/ adding content to the internet, Real time gambling/ trading/ auctions.

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

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all with access to the internet at home	**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
Base	*2534*	*376*	*462*	*602*	*437*	*368*	*215*	*657*	*289*	*74*	*1234*	*1300*	*1529*	*1005*	*504*	*146*	*315*	*141*	*1787*	*747*	*1493*	*329*	*334*	*378*	*183*	*304*
Purchase goods/ services/ tickets online[11]	71	64	76	77	72	68	64	65	58	**	70	72	76	63	56	59	58	54	71	72	71	74	66	69	66	67
% change (UK) since 2010	+1																									
Bank online[9]	60	55	66	65	63	55	51	51	44	**	59	60	67	49	44	37	48	46	60	62	61	56	54	51	53	52
% change (UK) since 2010	+1																									
Use social networking sites[11]	59	83	72	67	55	35	22	29	21	**	57	61	59	59	58	67	59	69	60	51	60	51	65	59	58	46
% change (UK) since 2010	+5																									
Information for personal reasons e.g. news, weather[11]	58	52	59	60	60	63	50	58	51	**	61	56	66	45	38	41	44	40	59	54	58	58	66	46	58	57
% change (UK) since 2010	+3																									
Watching TV content online[11]	41	50	46	45	36	35	30	32	26	**	45	37	49	29	26	35	39	30	41	42	42	31	36	37	48	37
% change (UK) since 2010	+4																									
Look up information/ services on government or council websites[11]	39	29	39	43	41	45	32	40	31	**	40	38	48	24	19	23	29	26	39	36	41	31	29	23	44	35
% change (UK) since 2010	+3																									
Use Twitter[11]	13	22	17	14	9	10	6	7	4	**	14	12	15	11	11	8	11	6	14	9	13	16	12	11	18	8
% change (UK) since 2010	+2																									

[11] (TT Q1 2011, QE5A) Q: Which, if any, of these do you or members of your household use the internet for whilst at home?

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

% of all internet users	%	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
Base	*1489*	*271*	*287*	*338*	*245*	*214*	*100*	*348*	*134*	*34*	*752*	*737*	*911*	*578*	*300*	*71*	*218*	*79*	*1142*	*347*	*1004*	*162*	*156*	*167*	*121*	*256*
Internet users who have signed an online petition[12]	23	22	22	22	27	24	20	21	17	**	23	22	27	16	15	**	18	**	23	18	24	14	17	19	17	25
% change (UK) since 2009	+1																									
Internet users who feel they have made significant savings online in the last 6 months[13]	66	59	71	71	67	62	65	61	56	**	66	67	69	61	63	**	52	**	67	65	66	66	76	54	61	67
% change (UK) since 2009	+1																									

[12] (MLT 2010, IN23) Q: I'm going to read out a number of things people might do online. Please tell me for each one if you've done it, or you'd be interested, or not interested

[13] (MLT 2010, IN43) Q: Now, thinking about possible savings you might make by going on to the internet, in the last six months would you say you have saved money by doing any of these? Which of these best describes the savings you have made [very significant to not at all significant, 5-point scale plus don't know]

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

Internet attitudes and understanding

This section provides information relating to people's attitudes towards their internet safety, and also to their understanding of issues relating to protection and privacy, trust and critical understanding. Coloured cells indicate whether the sub-group response is different to the all-UK figure[14].

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all internet users	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
Base	*1489*	*271*	*287*	*338*	*245*	*214*	*100*	*348*	*134*	*34*	*752*	*737*	*911*	*578*	*300*	*71*	*218*	*79*	*1142*	*347*	*1004*	*162*	*156*	*167*	*121*	*256*
Internet users who say they are confident in installing security features[15]	64	67	67	63	65	58	56	57	49	**	72	56	69	55	51	**	51	**	63	66	64	65	61	59	62	63
% change (UK) since 2009	+5																									
Internet users who say they make judgements before entering details based on "professional" signs such as padlock signs[16]	55	57	54	56	63	53	46	55	41	**	56	55	63	44	42	**	44	**	54	63	54	67	60	42	46	50
% change (UK) since 2009	+4																									
Internet users who say they are confident in judging whether a website is truthful[17]	74	85	79	75	73	65	52	61	45	**	79	70	79	67	66	**	61	**	74	75	75	72	77	60	69	64
% change (UK) since 2009	+4																									

[14] 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
[15] (MLT 2010, IN8) Q: I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one please say which of the options on the card applies to you: install security features like a firewall, anti-spy or antivirus software
[16] (MLT 2010, IN37) Q: Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ email address). How would you judge whether a website is secure?
[17] (MLT 2010, IN10) Q: How confident are you in judging whether a website you use is truthful?
** = Sub-group base size lower than 100 and therefore excluded from the analysis

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all social networking site users	**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
Base	*756*	*236*	*195*	*181*	*82*	*50*	*10*	*62*	*12*	*2*	*364*	*392*	*447*	*309*	*169*	*52*	*127*	*47*	*607*	*149*	*500*	*91*	*87*	*78*	*60*	*103*
Social networking site users who say only their friends can see their personal information[18]	68	60	73	70	**	**	**	**	**	**	62	73	66	71	70	**	71	**	68	64	68	**	**	**	**	63
NOT ASKED IN 2009	n/a																									
Social networking site users who say only their friends can see their contact information[19]	57	59	60	53	**	**	**	**	**	**	54	60	57	58	57	**	61	**	57	59	57	**	**	**	**	60
NOT ASKED IN 2009	n/a																									

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all search engine site users	**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
Base	*1090*	*205*	*227*	*235*	*183*	*147*	*70*	*240*	*93*	*23*	*545*	*545*	*682*	*408*	*209*	*51*	*153*	*55*	*835*	*255*	*738*	*114*	*120*	*118*	*89*	*171*
Search engine users who understand that the accuracy of the information in the websites shown in results is variable[20]	50	46	47	54	52	46	**	50	**	**	48	52	55	42	38	**	45	**	49	54	51	48	33	41	**	51
% change (UK) since 2009	-4																									

[18] (MLT 2010, IN25A) 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?
[19] (MLT 2010, IN25C) Q: Which of these options apply in terms of who can see... Your contact details – such as your email address, home address, telephone number, and so on?
[20] (MLT 2010, NIN46) 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

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 last year, and the extent of their 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[21].

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all non-internet users	**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
Base	*628*	*24*	*41*	*71*	*69*	*122*	*162*	*422*	*300*	*138*	*285*	*343*	*213*	*415*	*278*	*27*	*238*	*41*	*482*	*146*	*378*	*94*	*84*	*72*	*33*	*258*
Interest in using email to contact friends and relatives[22]	16	**	**	**	**	16	14	11	8	3	15	17	17	15	17	**	12	**	16	12	16	**	**	**	**	11
% change (UK) since 2009	-2																									
Interest in buying things over the internet[22]	13	**	**	**	**	12	8	7	6	4	11	15	12	14	14	**	13	**	14	12	13	**	**	**	**	10
% change (UK) since 2009	-3																									
Interest in finding out about local services such as cinemas or restaurants[22]	12	**	**	**	**	8	6	5	4	3	11	12	11	12	13	**	10	**	12	7	12	**	**	**	**	10
% change (UK) since 2009	-3																									
Interest in finding out information from your local government or local council[22]	10	**	**	**	**	9	10	7	6	4	11	9	10	10	11	**	8	**	11	4	9	**	**	**	**	10
% change (UK) since 2009	-3																									

[21] 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
[22] (MLT 2010, IN9) 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

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all non-internet users	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
Base	*628*	*24*	*41*	*71*	*69*	*122*	*162*	*422*	*300*	*138*	*285*	*343*	*213*	*415*	*278*	*27*	*238*	*41*	*482*	*146*	*378*	*94*	*84*	*72*	*33*	*258*
Proxy use of the internet in the past year[23]	21	**	**	**	**	22	20	21	17	15	17	24	23	20	22	**	21	**	21	24	22	**	**	**	**	19
% change (UK) since 2009	+2																									
Agreement that “the internet makes life easier”[24]	37	**	**	**	**	44	34	36	32	30	34	39	34	38	39	**	39	**	36	38	37	**	**	**	**	31
% change (UK) since 2009	+3																									

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all those without internet at home	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
Base	*920*	*82*	*76*	*72*	*86*	*163*	*189*	*604*	*441*	*252*	*434*	*486*	*263*	*657*	*464*	*111*	*378*	*37*	*655*	*265*	*475*	*158*	*154*	*133*	*55*	*294*
Likelihood of getting internet access at home in the next 12 months[25]	15	**	**	**	**	7	7	5	5	3	15	16	17	15	14	25	12	**	15	19	16	14	18	17	**	7
% change since 2010	-5																									

[23] (MLT 2010, NIN40A) Q: Please use this card to tell me the extent to which you agree or disagree with some things that other people have said about the internet.
[24] (MLT 2010, NIN40) 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?
[25] (TT Q1 2011, 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

	%	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
Base	*687*	*34*	*30*	*37*	*49*	*133*	*163*	*537*	*404*	*241*	*327*	*360*	*187*	*500*	*365*	*71*	*305*	*16*	*490*	*197*	*349*	*118*	*114*	*106*	*29*	*258*
Cost as main reason for not having the internet at home† [26]	11	**	**	**	**	12	1	3	1	0	11	11	3	14	17	**	15	**	11	10	10	14	16	7	**	6
% change since 2010	-1																									
Perceived lack of interest as the main reason for not having the internet at home† [26]	47	**	**	**	**	42	58	49	51	47	49	46	52	45	42	**	42	**	47	48	49	38	51	58	**	47
% change since 2010	-8																									

[26] (TT Q1 2011, 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 quarterly survey of take-up and trends (the Technology Tracker), and Ofcom's Media Literacy survey.

Ofcom commissioned Saville Rossiter-Base to carry out both of these surveys. Interviewing for both surveys is 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 3,474 adults aged 16+ were interviewed for the Technology Tracker at 294 different sampling points in the UK. All interviews were conducted between 4th January 2010 and 28th February 2011.

For the Media Literacy Tracker, a total of 2,117 adults aged 16+ were interviewed in two waves of research; with 1,063 interviews conducted from April to May 2010 and 1,054 interviews conducted from September to October 2010. Interviews were carried out at 268 different sampling points in the UK.

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.