

Adults' Media Use and Attitudes Report 2014

Section 7 Newer, narrow and non-users

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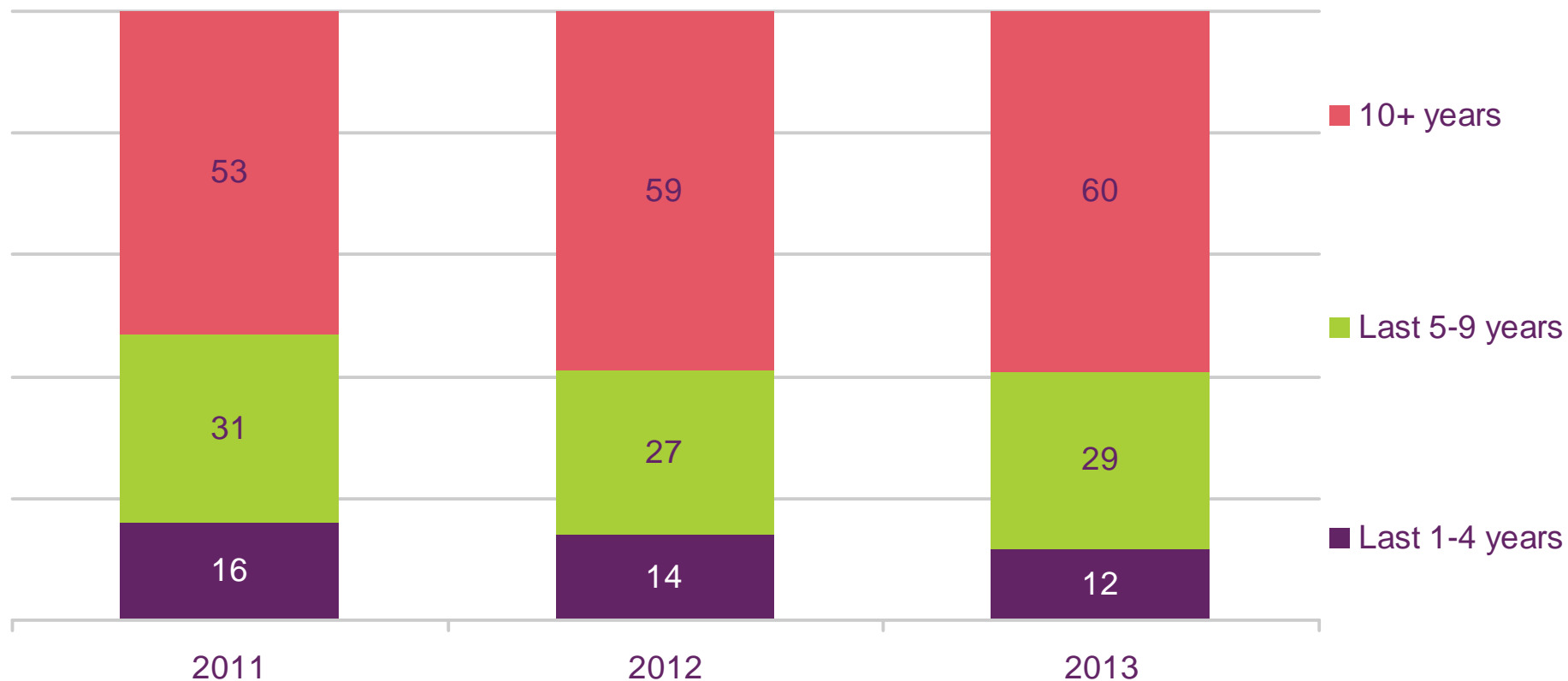
7.1 Key findings

New, narrow and non-users: Key findings

- Just over one in ten (12%) internet users are newer users of the internet
- One in six (17%) of all internet users are narrow users of the internet. This figure is the same as 2012 but has fallen since 2009, when almost three in ten internet users were narrow users (28%)
- Older internet users (aged 55-64 or 65+), those living in DE households and females are more likely to be narrow users. They are also more likely to be newer internet users
- Just over one in ten (12%) adults do not have access to the internet at home and say they don't intend to get it in the next 12 months. This is a decrease from 15% in 2012
- In 2013 over a quarter of non-users made a proxy use of the internet. This represents an increase since 2012 (from 18%)
- Cost' and 'ownership/availability' have increased as reasons for not having the internet at home, but lack of interest remains the most-mentioned reason

7.2 Newer users

Figure 7.2.1: Incidence of newer users within the online population: 2011-2013

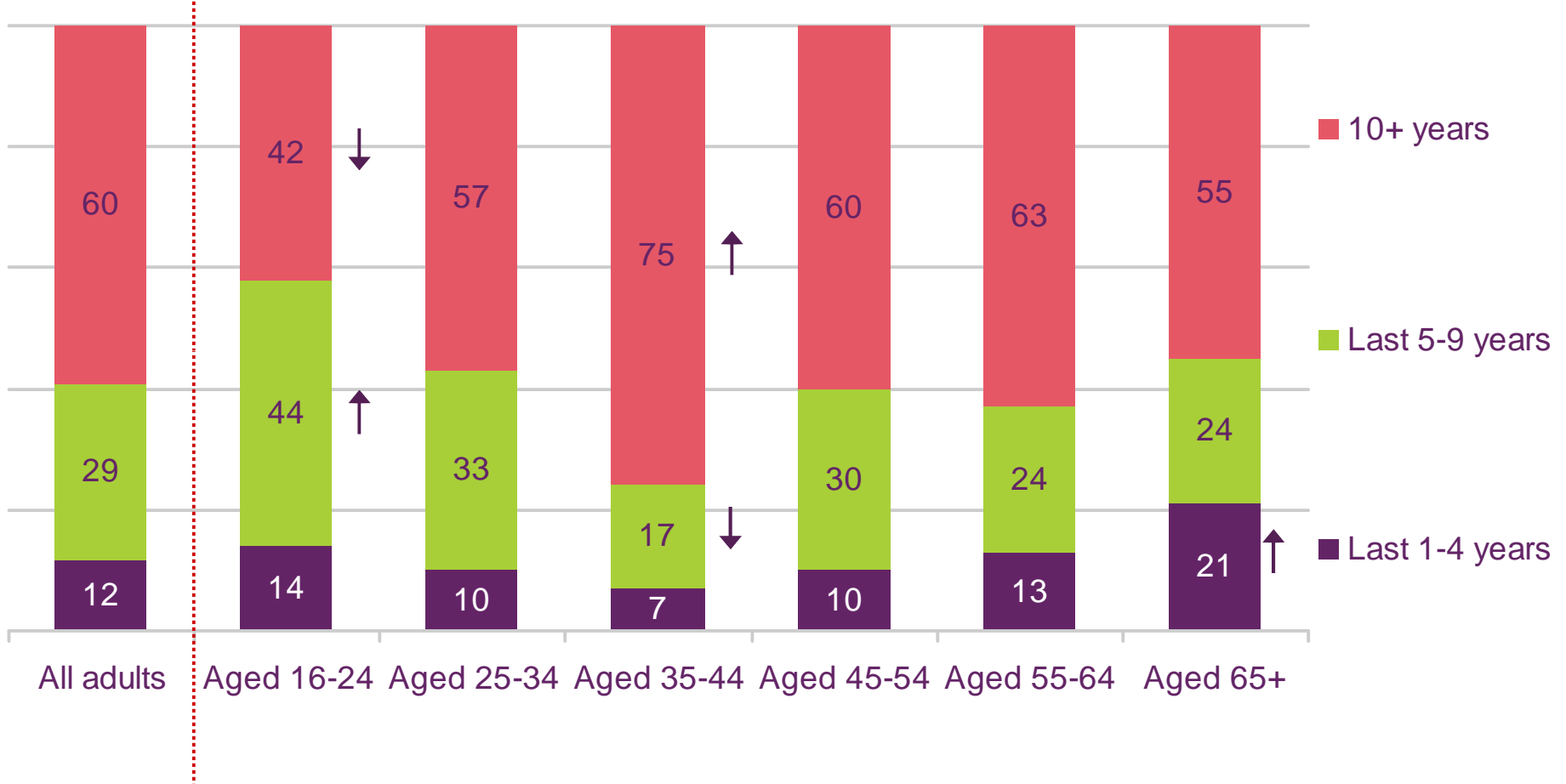


IN4 How long ago did you first start going online (Prompted responses, single coded)

Base: All adults who go online at home or elsewhere (1369 in 2011, 1381 in 2012, 1272 in 2013). Significance testing shows any change between 2012 and 2013

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.2: Incidence of newer users within the online population, by age: 2013



IN4 How long ago did you first start going online (Prompted responses, single coded)

Base: All adults who go online at home or elsewhere (1272 aged 16+, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+). Significance testing shows any difference between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.3: Incidence of newer users within the online population, by socio-economic group and gender: 2013

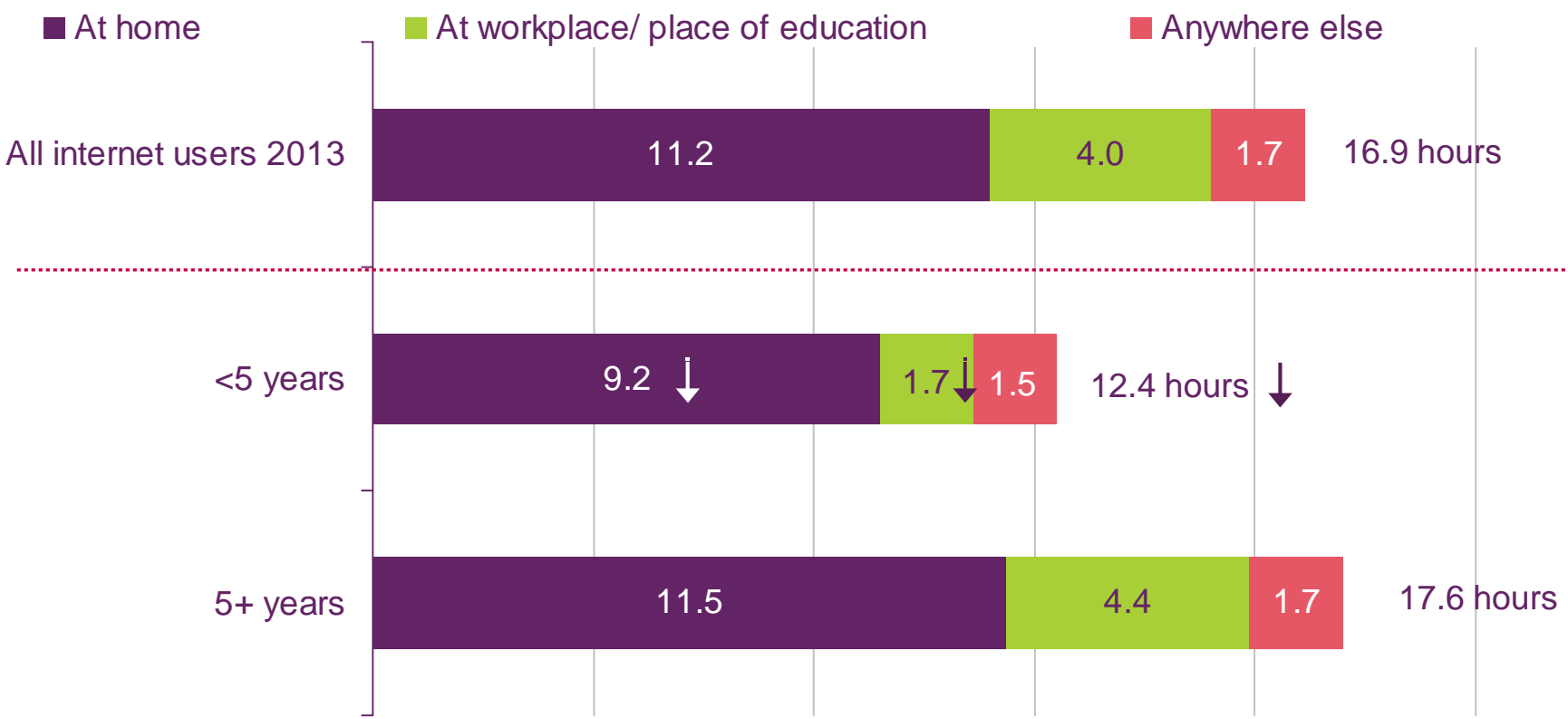


IN4 How long ago did you first start going online (Prompted responses, single coded)

Base: All adults who go online at home or elsewhere (1272 aged 16+, 325 AB, 407 C1, 242 C2, 298 DE, 613 males, 659 females) - Significance testing shows any difference between any socio-economic group and all adults aged 16+, between males and females

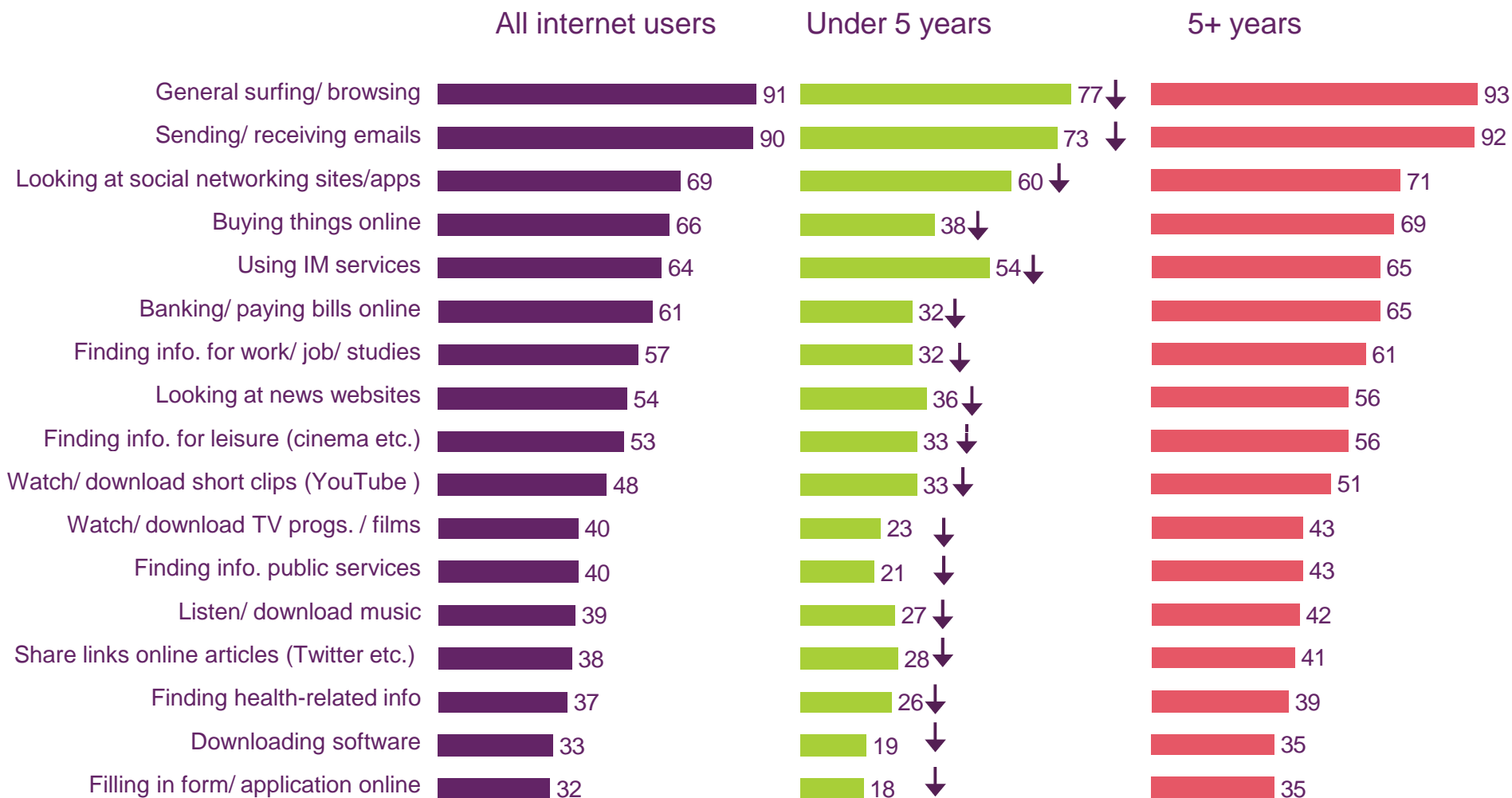
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.4 Volume of internet use per week by newer and more established users: 2013



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+), those who first used the internet under 5 years ago (179), 5+ years ago (1047). Significance testing shows any difference between newer and more established users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.5: Online activities undertaken at least quarterly, by newer and more established users: 2013

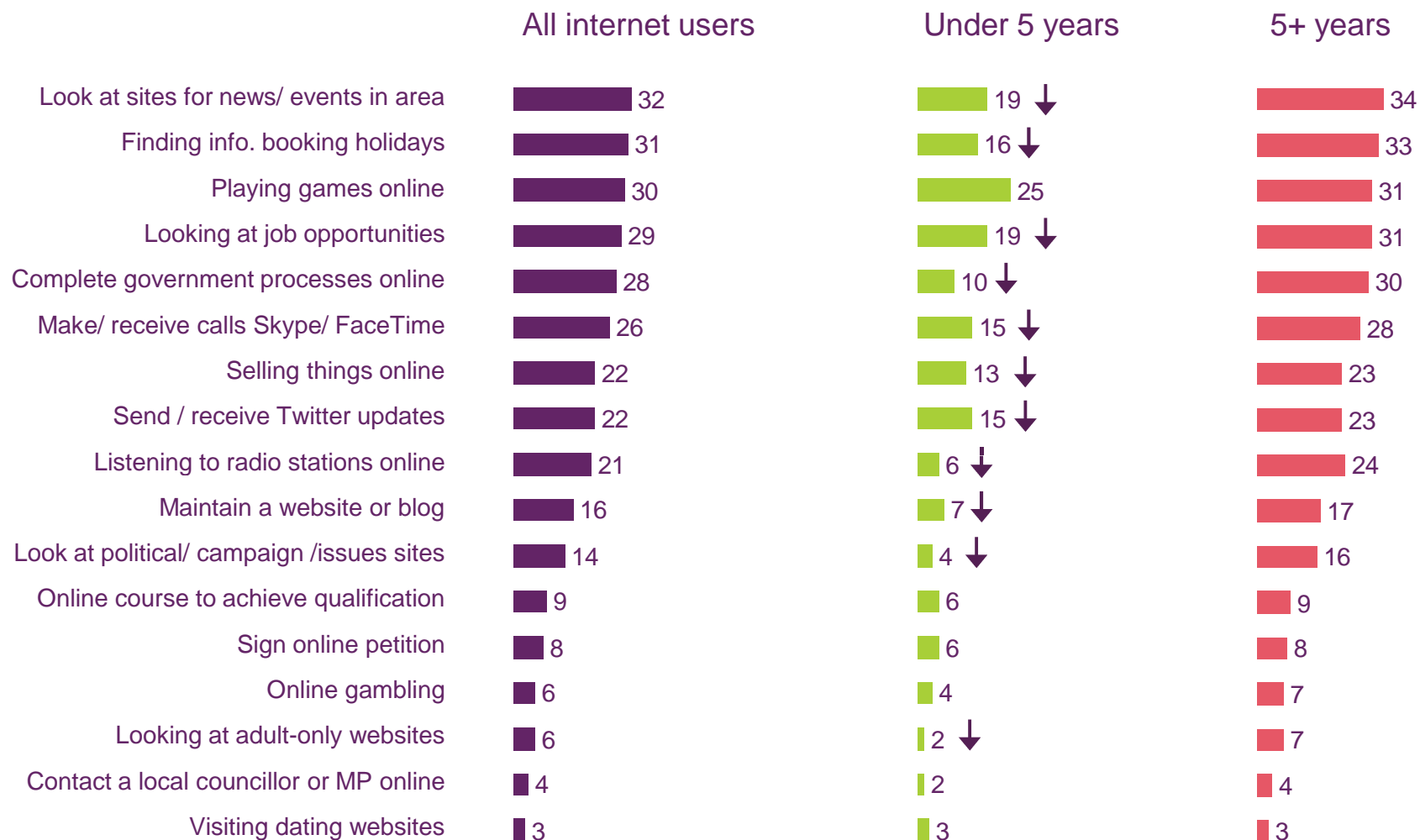


IN17/ 18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272), started using under 5 years ago (179), 5+ years ago (1047). Significance testing shows any differences between newer and more established internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.6: Online activities undertaken at least quarterly, by newer and more established users: 2013

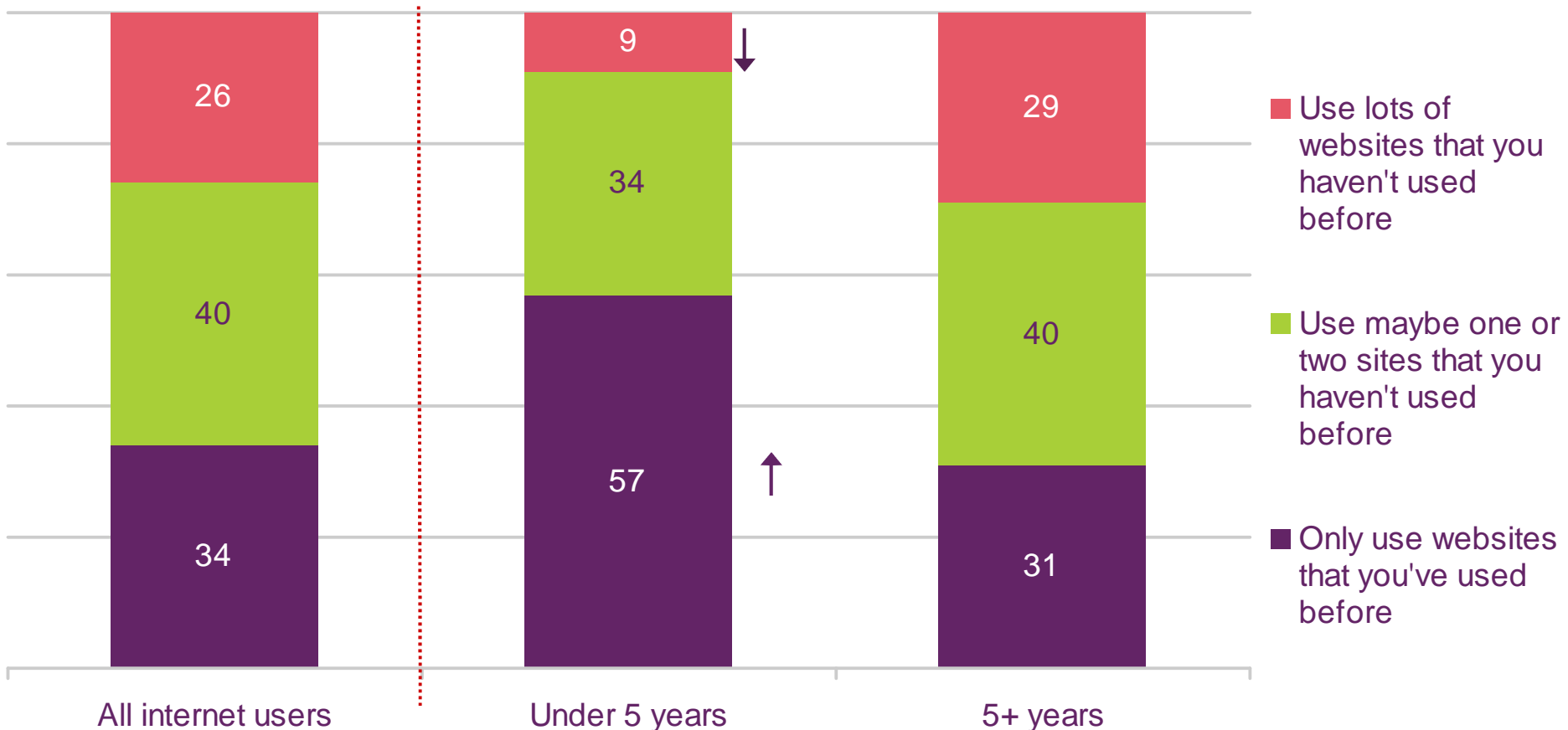


IN17/ 18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272), started using under 5 years ago (179), 5+ years ago (1047). Significance testing shows any differences between newer and more established internet users.

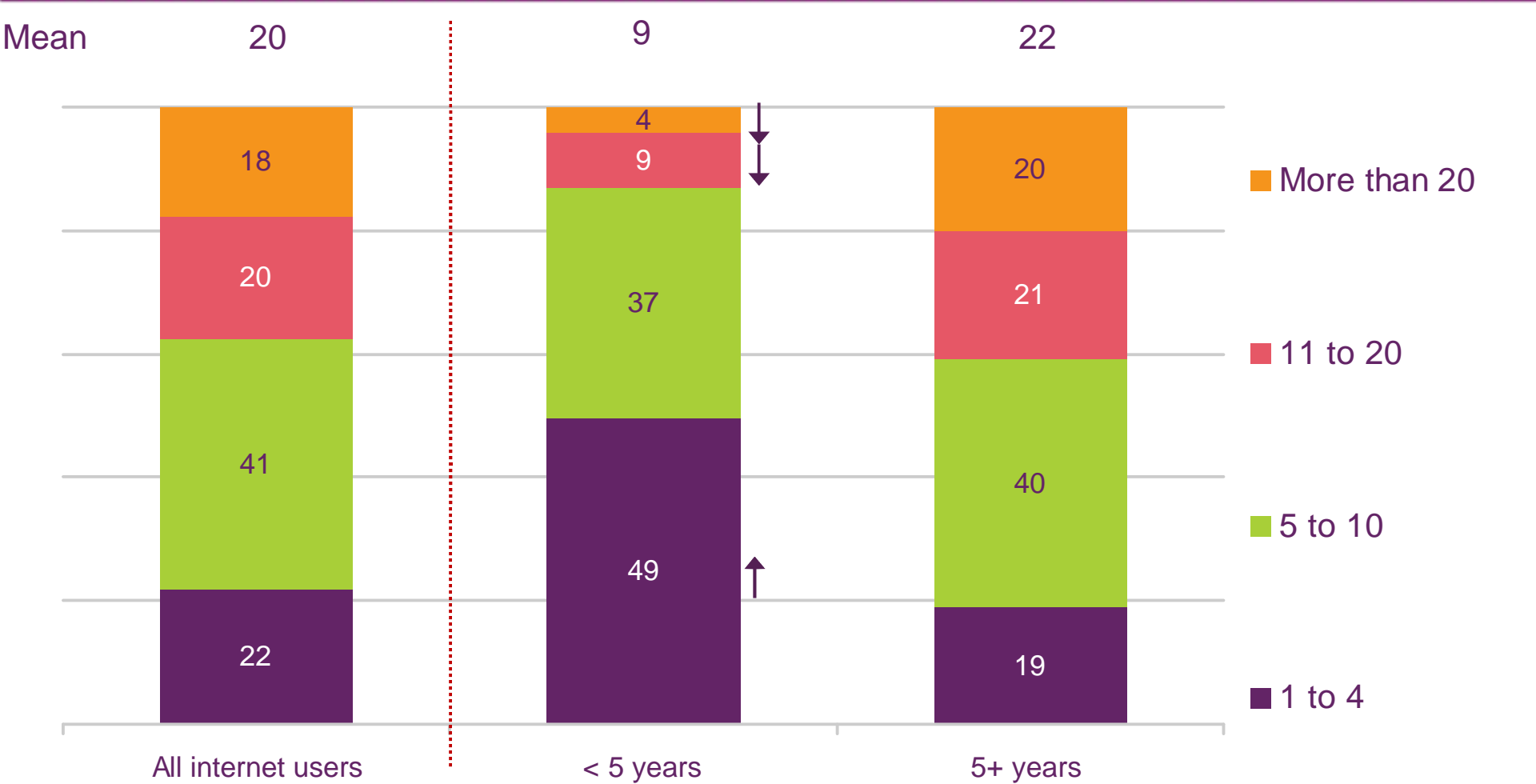
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.7: Visits to websites not used before, in most weeks when the internet is used, by newer and more established users: 2013



IN16 – In most weeks when you use the internet, would you say that you... (Prompted responses, single coded) – Bases exclude Don't know responses
 Base: All adults aged 16+ who use the internet at home or elsewhere (1248), started using under 5 years ago (175), 5+ years ago (1028) . Significance testing shows any differences between newer and more established internet users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.8: Estimated number of different websites visited in a typical week, by newer and more established internet users: 2013



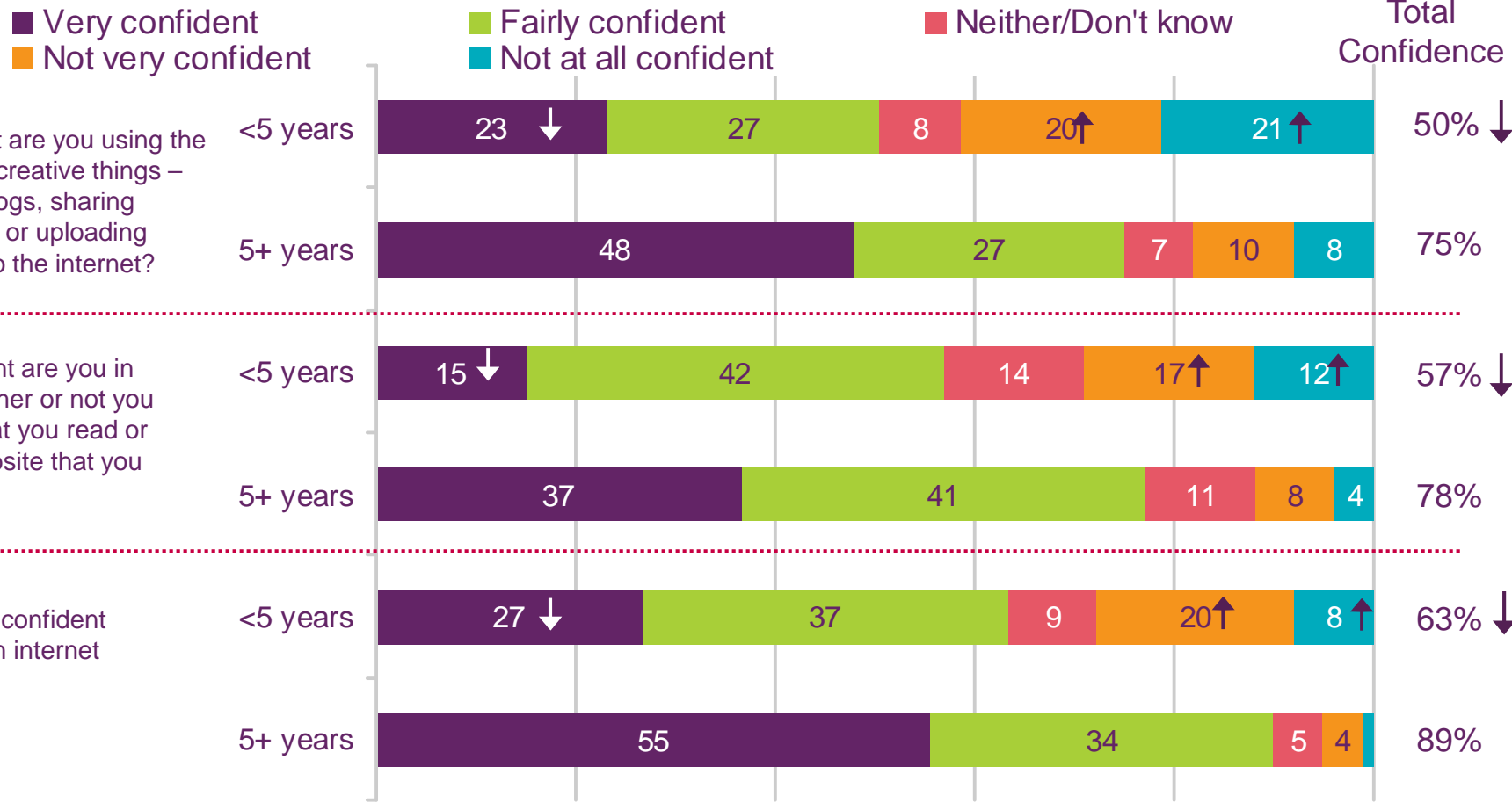
IN22 - Thinking now about all the different websites that you visit in a typical week for whatever purpose, whether that's at work, at home or elsewhere? How many different websites would you say you visit in a typical week? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 179 first used the internet under 5 years ago, 1047 first used the internet 5 or more years ago).

Significance testing shows any difference between newer and more established users.

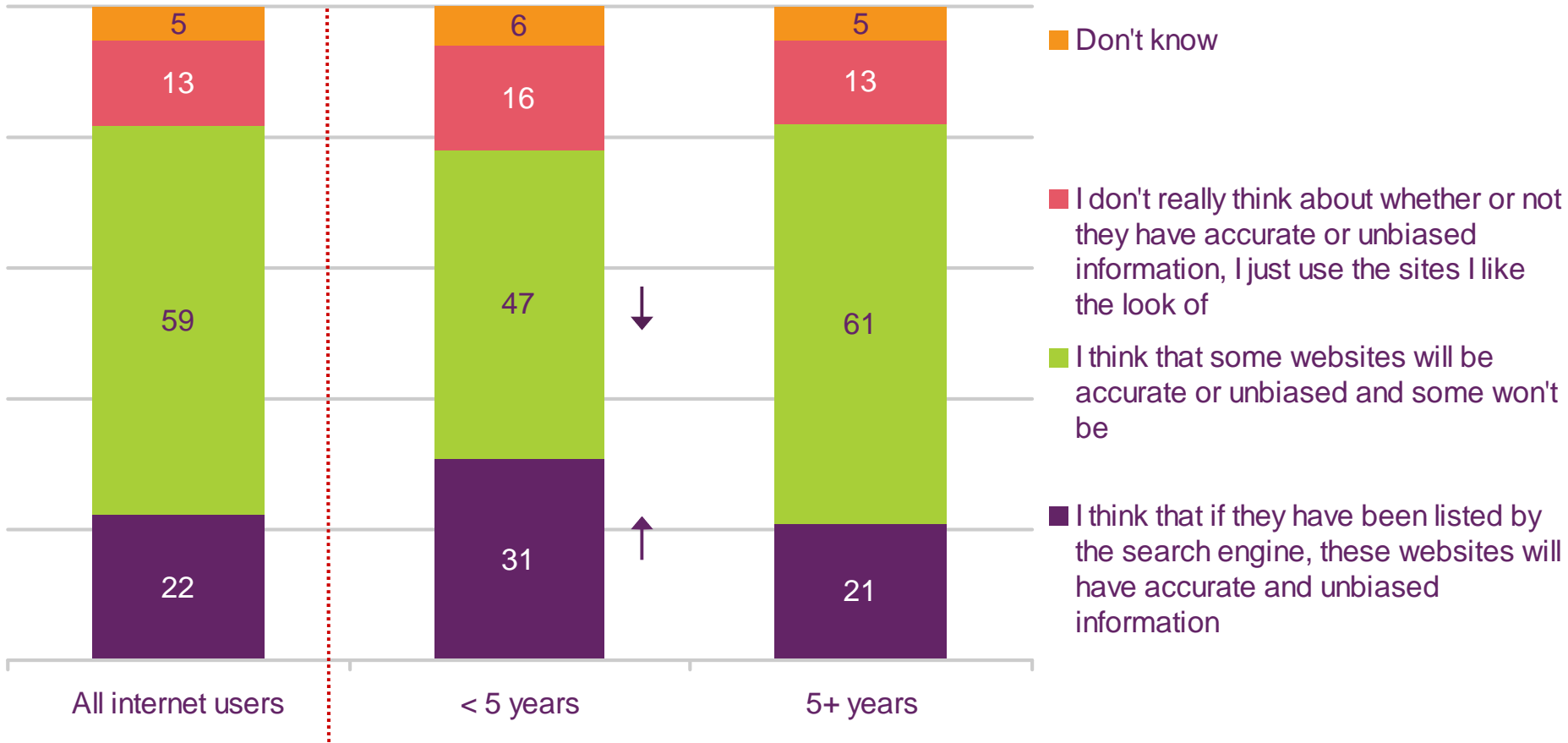
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.9: Confidence as an internet user, by newer and more established users: 2013



IN15A-C – I'm going to read out some questions about confidence using the internet, for each one please say which of the options on the card applies to you. (Prompted responses, single coded)
 Base: Adults aged 16+ who first started using the internet under 5 years ago (179), 5+ years ago (1047). Significance testing shows any differences between newer and more established internet users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.10: Search engine users' attitudes towards the accuracy or bias of the websites returned by a search, by newer and more established users: 2013



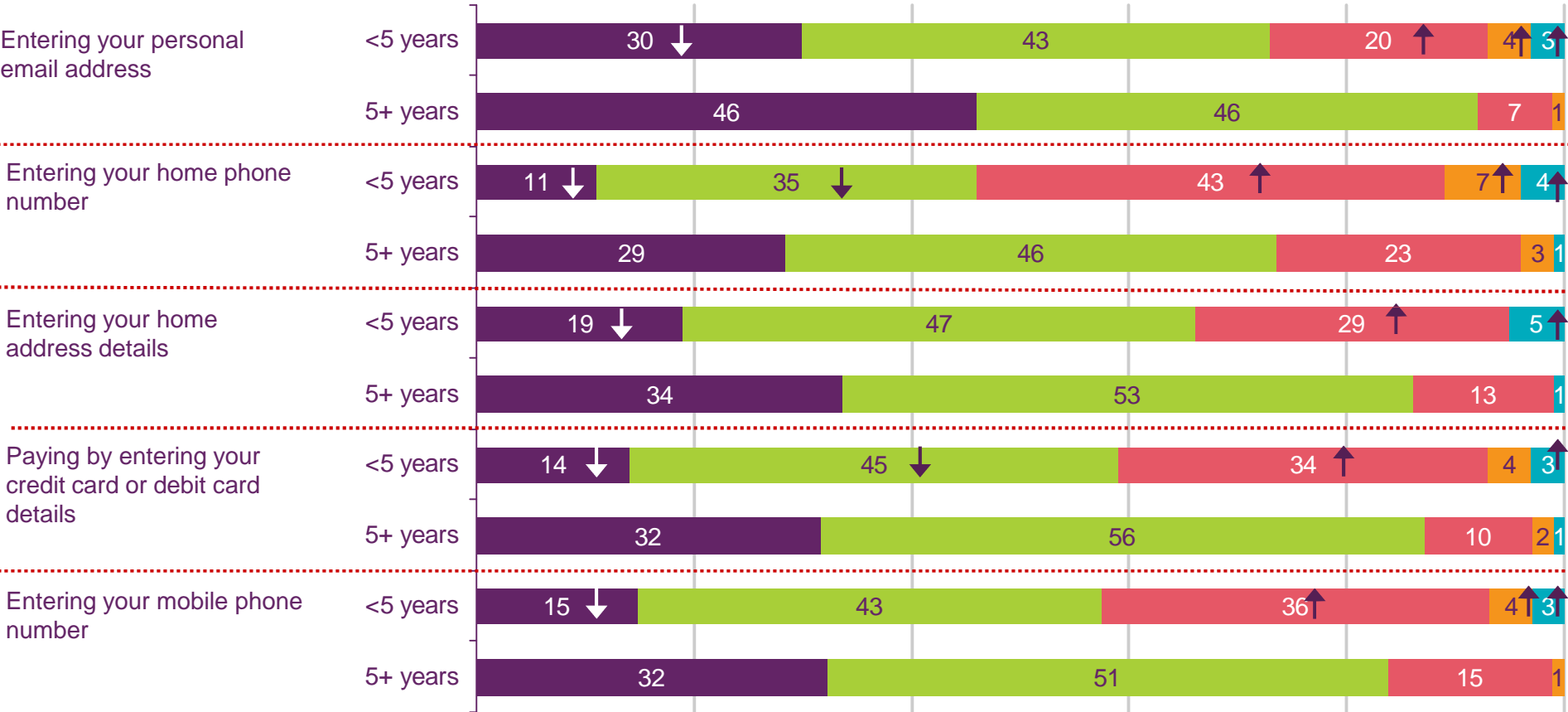
IN41 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded)

Base: All adults aged 16+ who ever use search engines (1199 aged 16+, 152 first used <5 years ago, 1004 first used 5+ years ago). Significance testing shows any differences between newer and more established internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

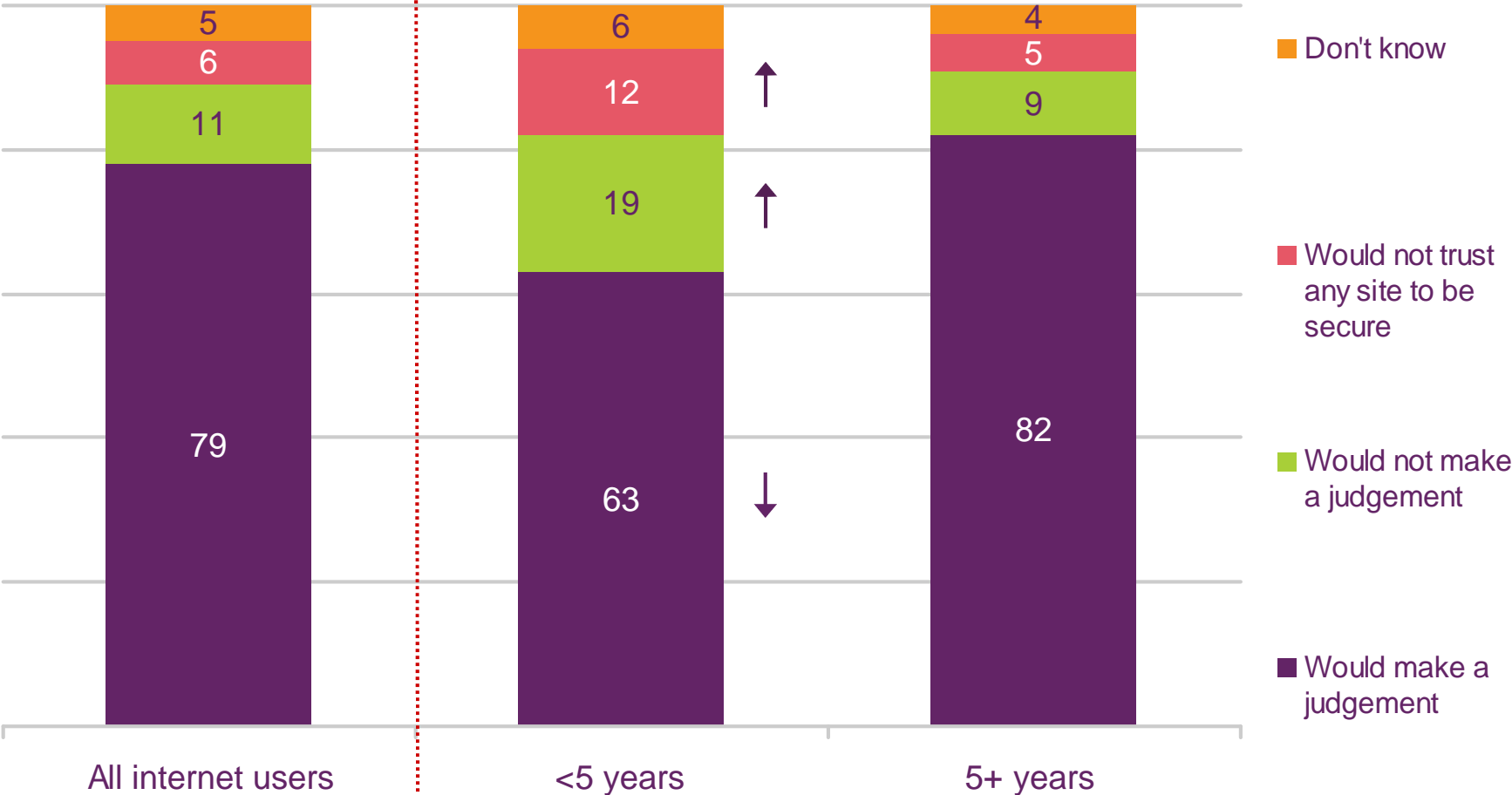
Figure 7.2.11: Personal details prepared to enter online, by newer and more established users: 2013

- Happy to do this
- Have some concerns about doing this, but would do it
- Would never do this because I have security concerns
- Not applicable/ I don't have this
- Don't know



IN33A-E – I'm going to read out some types of information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
 Base: Adults aged 16+ who use the internet at home or elsewhere (1272), those who first started using the internet under 5 years ago (179), 5+ years ago (1047). Significance testing shows any difference between newer and more established internet users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.12: Judgements made about a website before entering personal details online, by newer and more established users: 2013

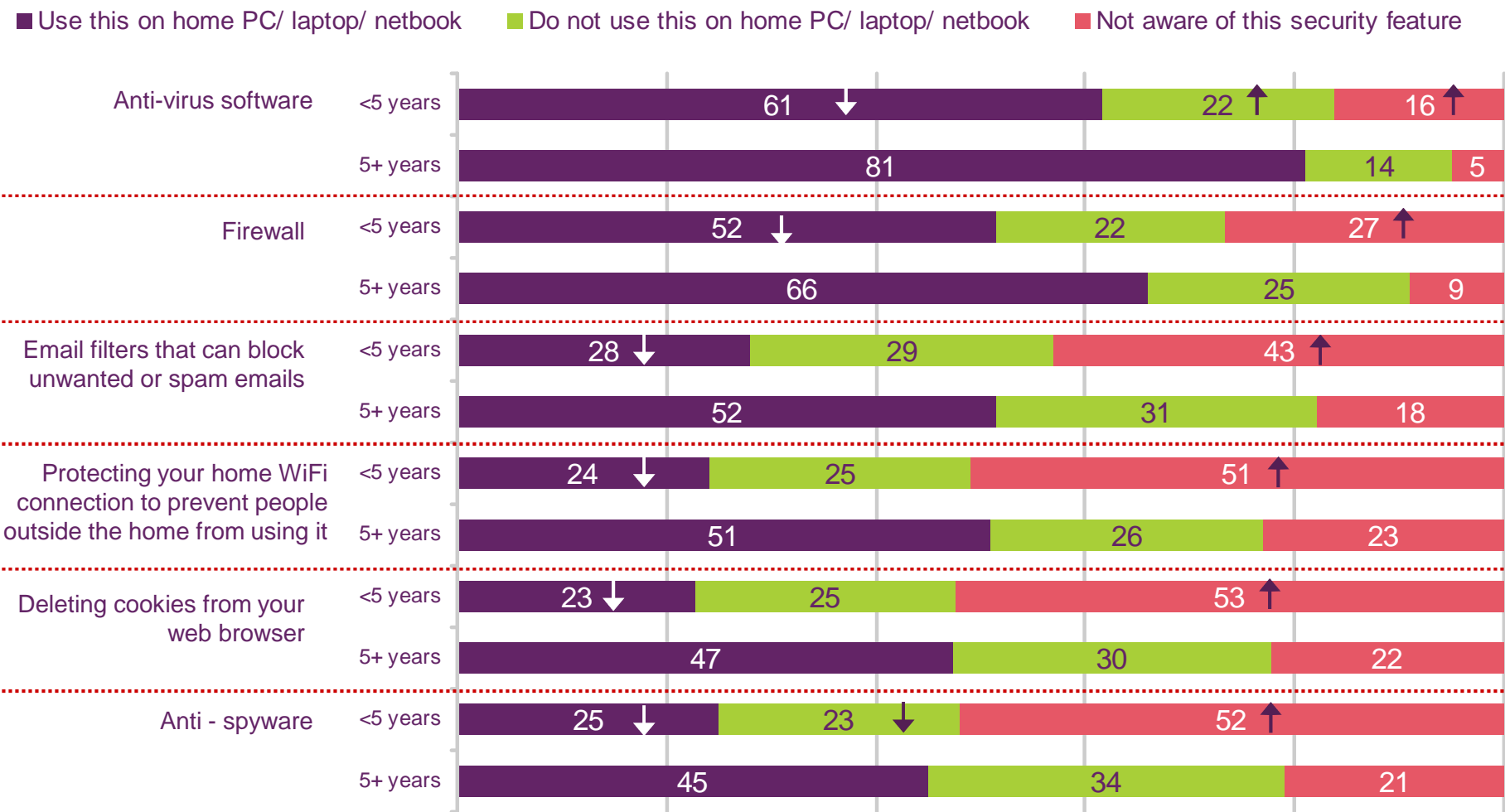


IN34 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure to enter these type of details? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1272), those who first started using the internet under 5 years ago (179), 5+ years ago (1047). Significance testing shows any difference between newer and more established internet users

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.13: Security measures/ safety features installed on PC/ laptop used at home, by newer and more established users: 2013



IN7/ IN8 Before today, which, if any, of the following online security measures or safety features had you heard of? And which if any, of those measures or features do you have or use on the PC/ laptop / netbook that you use at home? (prompted responses, multi-coded)
 Base: Adults aged 16+ who use the internet at home on a PC/ laptop/ netbook (1202 aged 16+, 156 first used the internet under 5 years ago, 1003 first used the internet 5 or more years ago). Significance testing shows any difference between newer and more established users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.2.14: Experience of negative types of online activity, by newer and more established users: 2013



IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 179 first used the internet under 5 years ago, 1047 first used the internet 5 or more years ago). Significance testing shows any difference between newer and more established users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

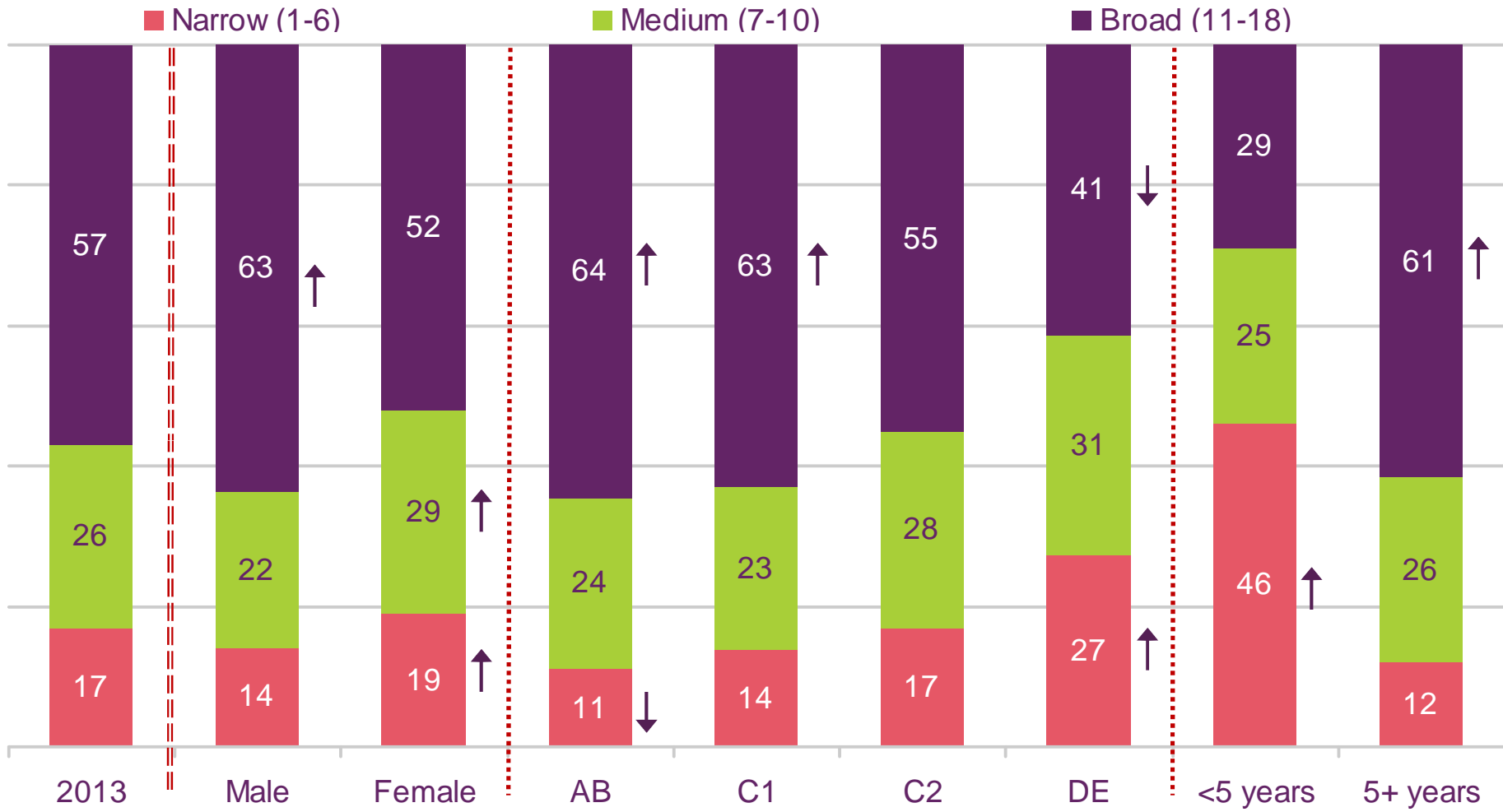
7.3 Narrow users

Figure 7.3.1: Breadth of use of the internet: 2009, 2011, 2012 and 2013, and by age in 2013



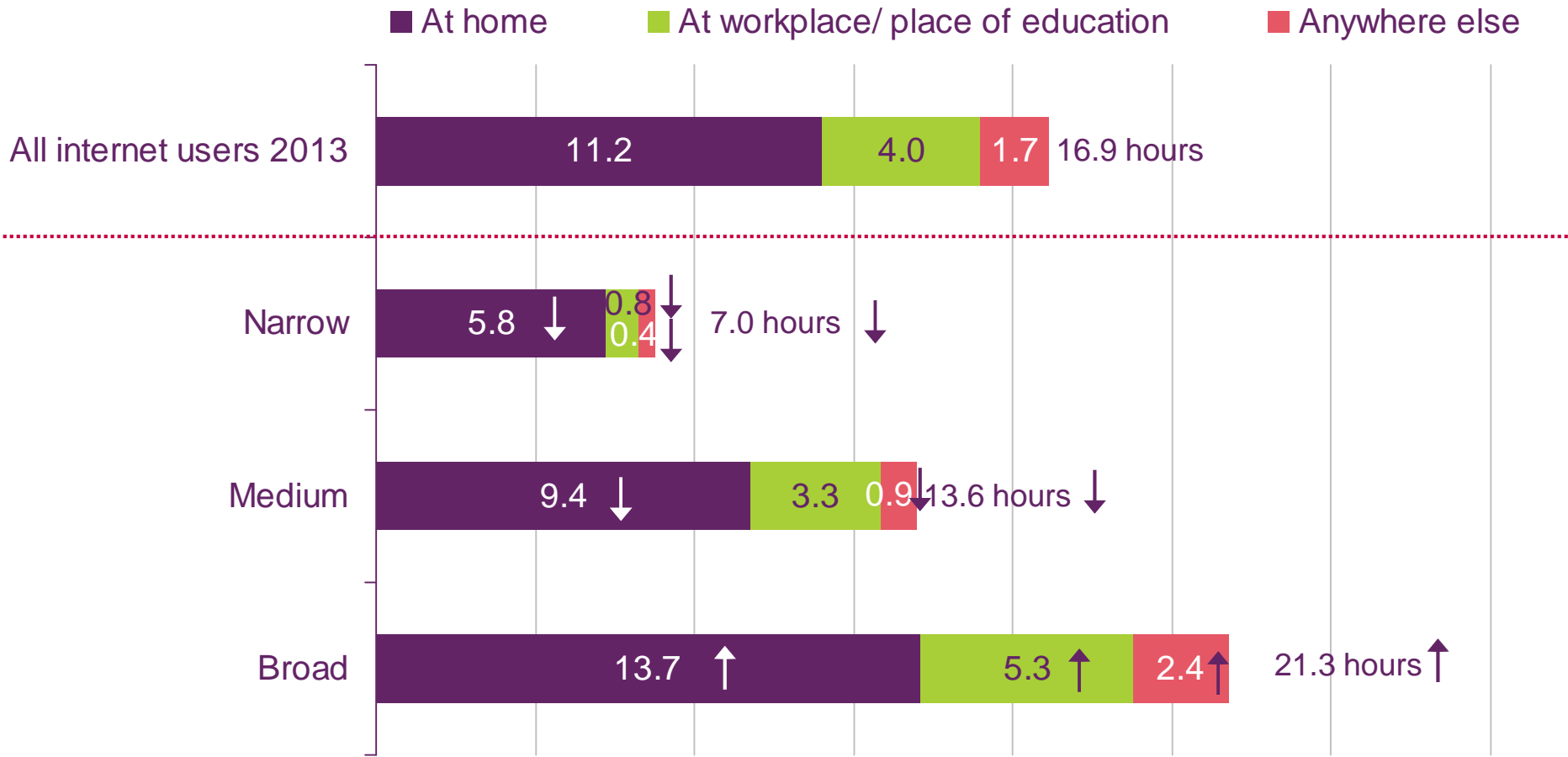
IN17/18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1282 in 2009, 1369 in 2011, 1381 in 2012, 1272 in 2013, 219 aged 16-24, 254 aged 25-34, 243 aged 35-44, 201 aged 45-54, 192 aged 55-64, 163 aged 65+) . Significance testing shows any change between 2012 and 2013, and between any age group and all adults aged 16+
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.2: Breadth of use of the internet, by gender, socio-economic group and by newer and more established internet users: 2013



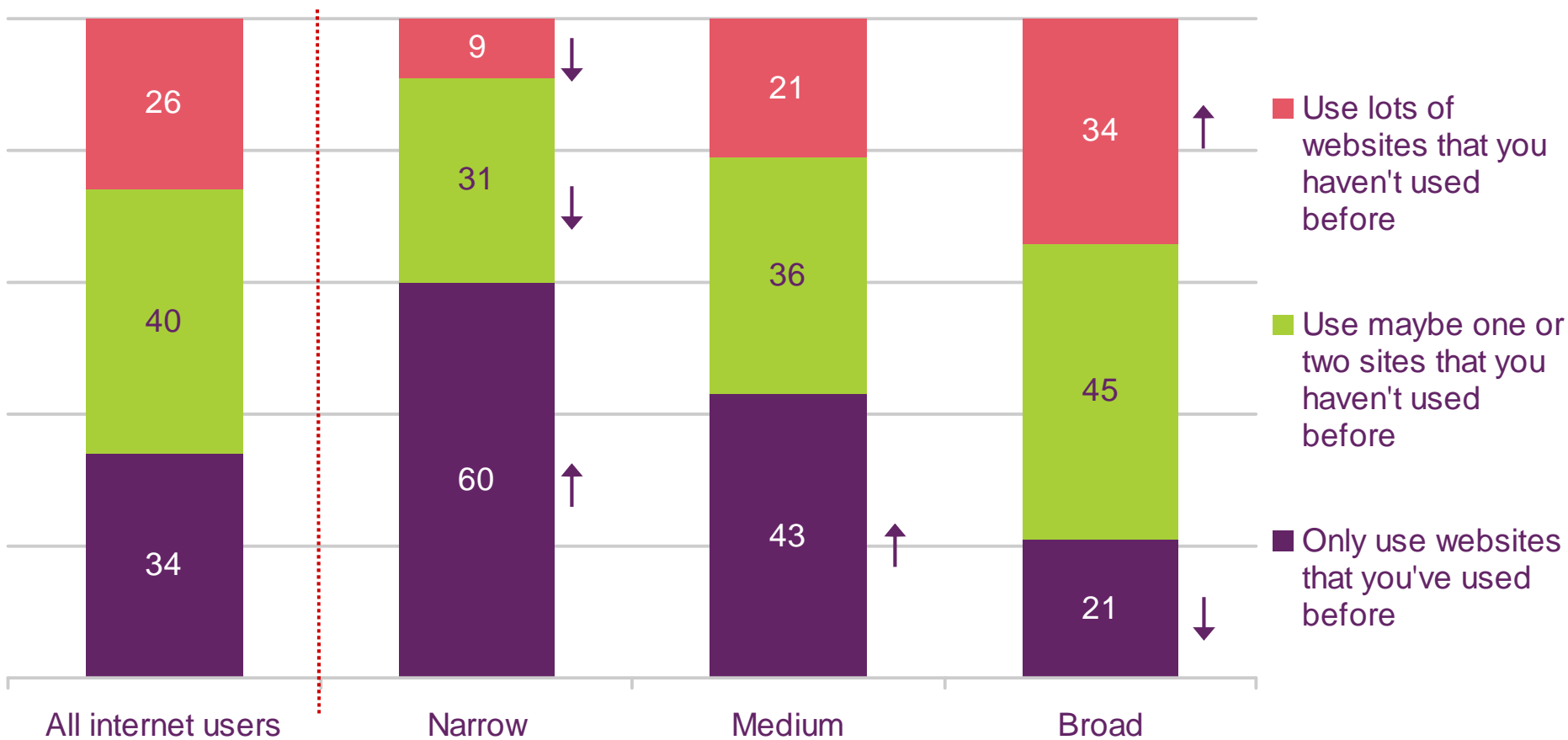
IN17/18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 in 2013, 613 males, 659 females, 325 AB, 407 C1, 242 C2, 298 DE), started using under 5 years ago (179), 5+ years ago (1047) . Significance testing shows any change between males and females, between any socio-economic group and all adults aged 16+, between newer and more established internet users
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.3: Volume of internet use per week, by narrow, medium and broad users: 2013



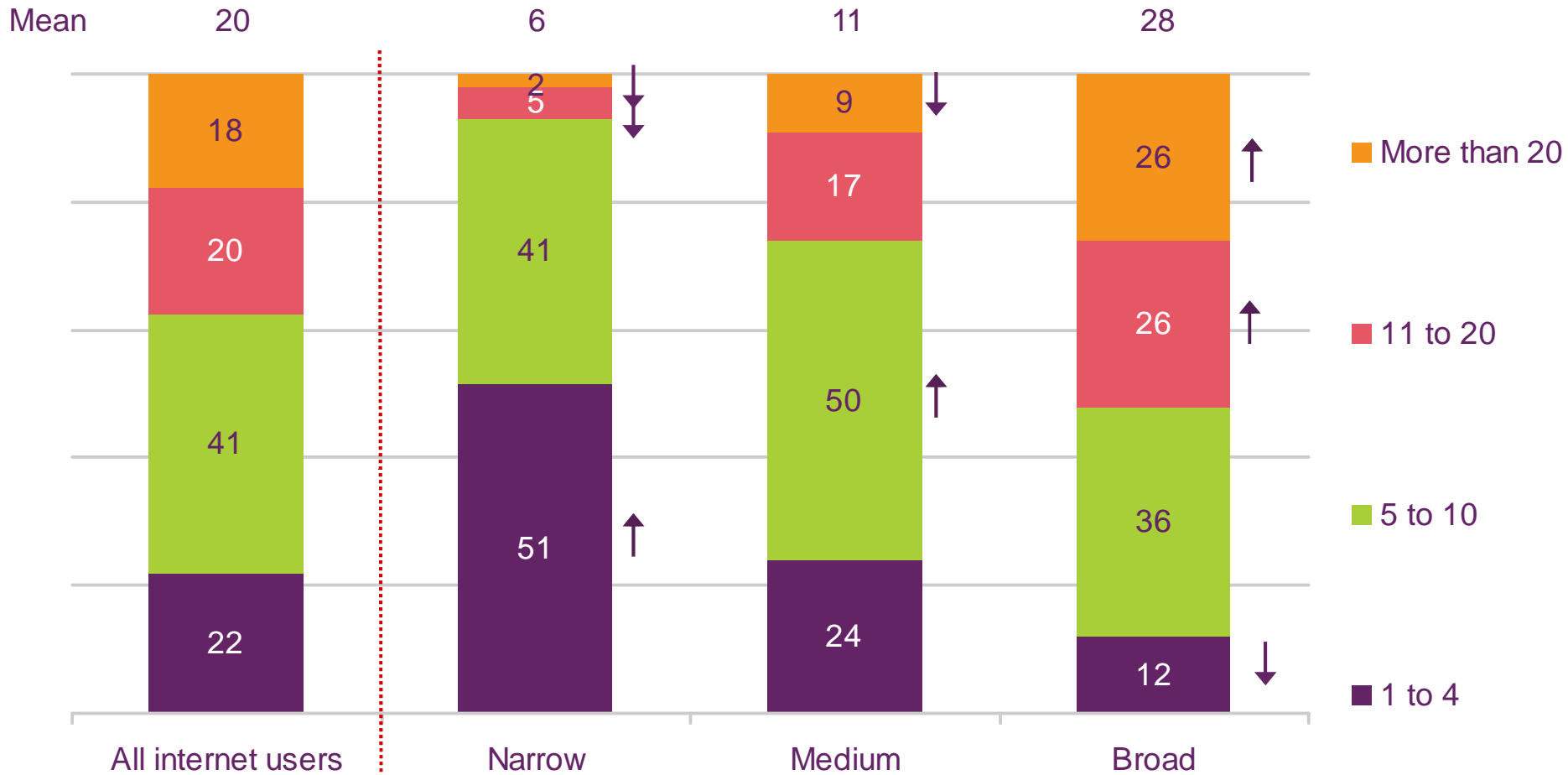
IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+), Narrow (248), Medium (345) and Broad users (671).
 Significance testing shows any difference between any of the breadth of user categories and all adults
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.4: Visit to websites not used before, in most weeks when the internet is used, by narrow, medium and broad users: 2013



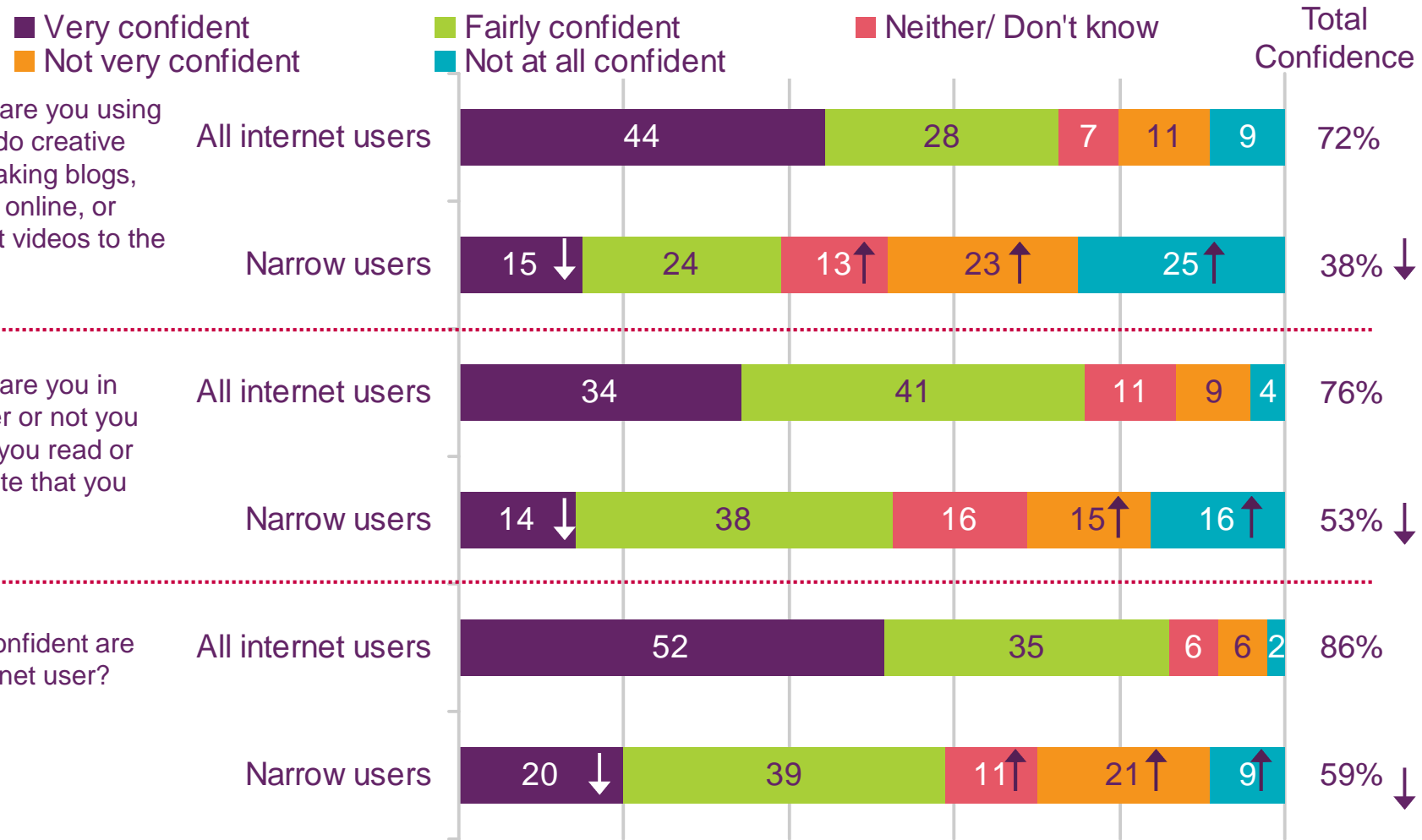
IN16 – In most weeks when you use the internet, would you say that you... (Prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1248 aged 16+), narrow (236), medium (344) and broad users (663) – excludes don't know responses
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.5: Estimated number of different websites visited in a typical week: narrow, medium and broad users: 2013



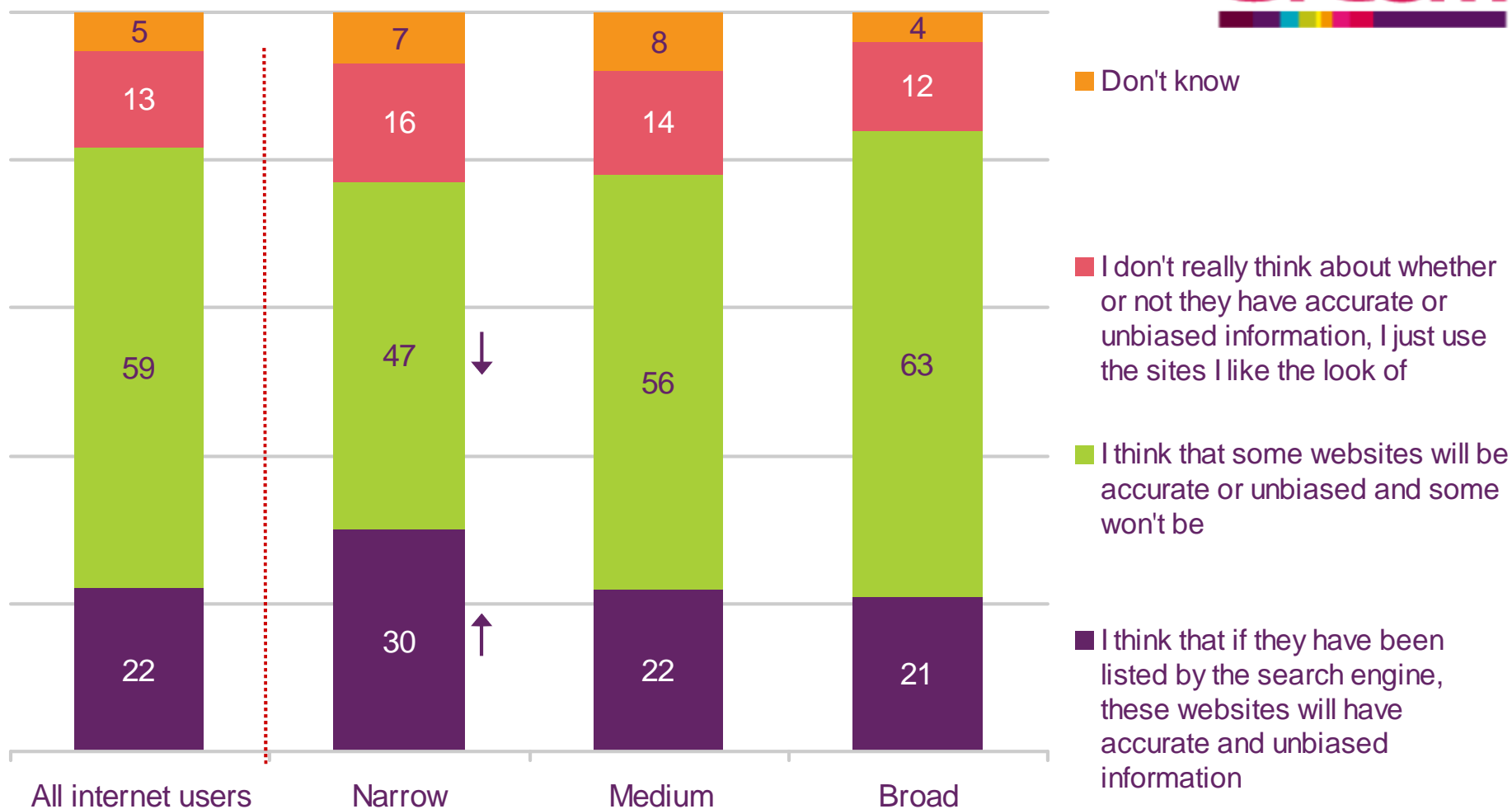
IN22 - Thinking now about all the different websites that you visit in a typical week for whatever purpose, whether that's at work, at home or elsewhere? How many different websites would you say you visit in a typical week? (Prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 248 narrow users 345 medium users, 671 broad users).
 Significance testing shows any difference between any breadth of use category and all internet users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.6: Confidence as an internet user, narrow users: 2013



IN15A-C – I'm going to read out some questions about confidence using the internet, for each one please say which of the options on the card applies to you. (Prompted responses, single coded)
 Base: Adults aged 16+ who use the internet at home ore elsewhere (1272), narrow users (248)
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.7: Search engine users' attitudes towards the accuracy or bias of the websites returned by a search: narrow, medium and broad users: 2013



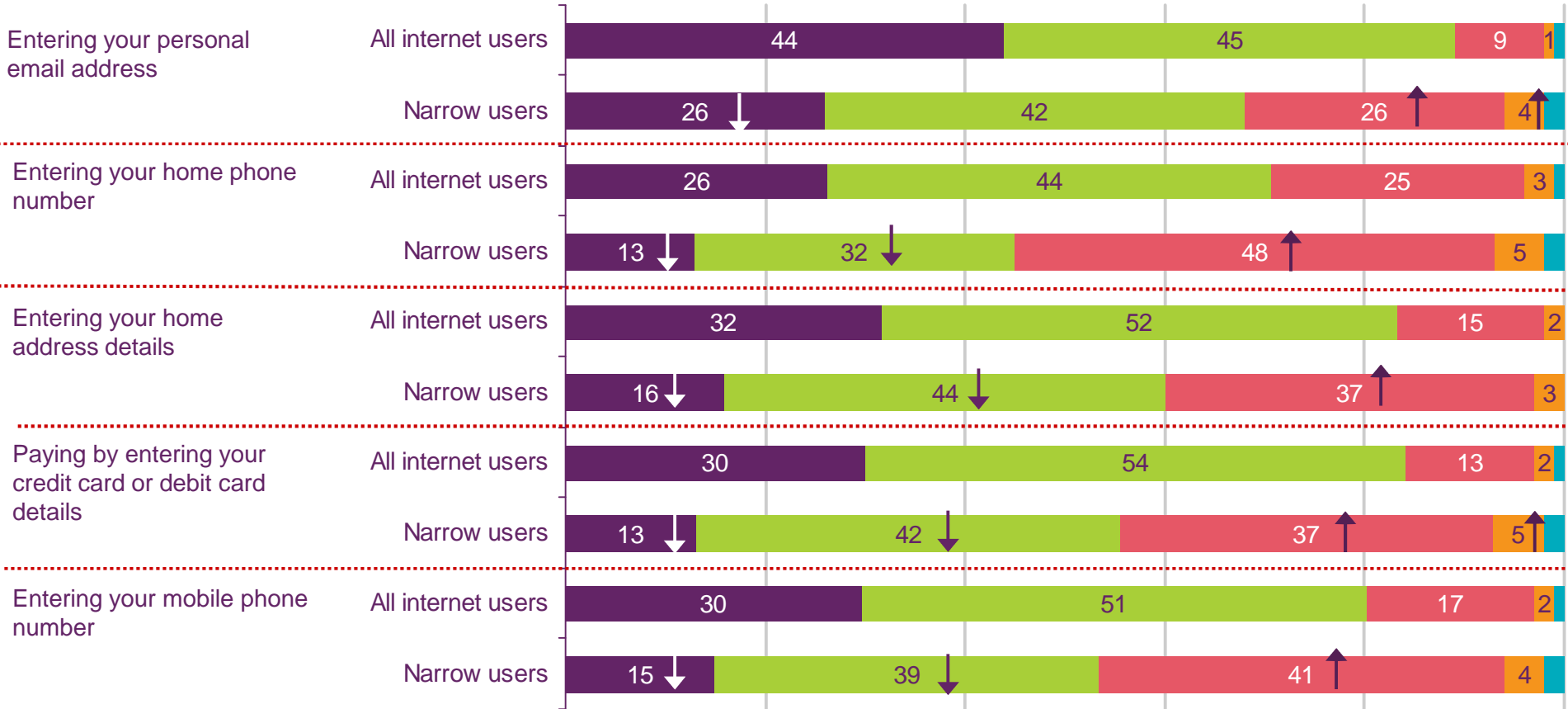
IN41 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded)

Base: All adults aged 16+ who ever use search engines (1199 aged 16+, 212 narrow, 326 medium, 659 broad). Significance testing shows any differences between any breadth of use category and all users

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

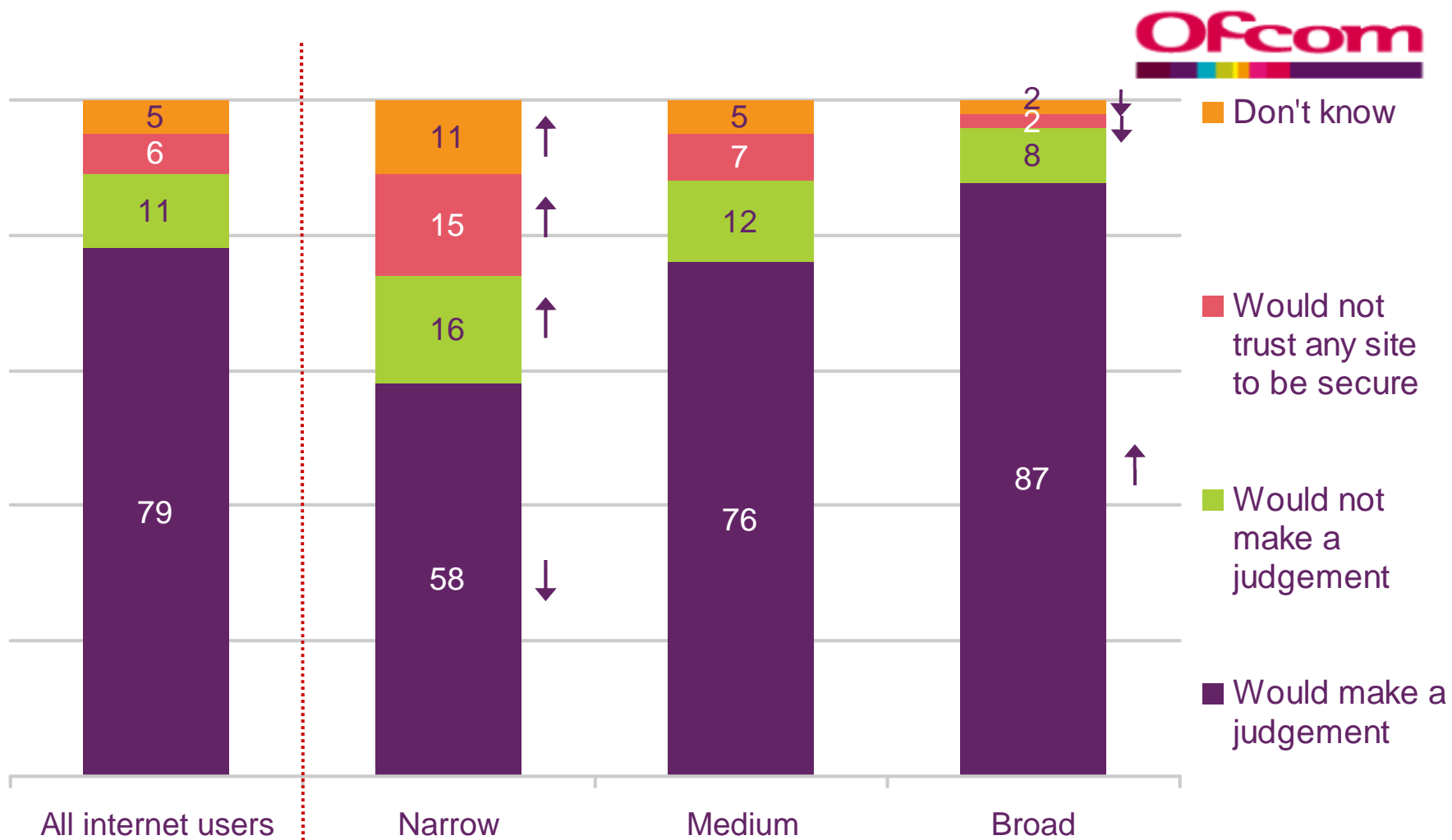
Figure 7.3.8: Personal details prepared to enter online, narrow users: 2013

- Happy to do this
- Have some concerns about doing this, but would do it
- Would never do this because I have security concerns
- Not applicable/ I don't have this
- Don't know



IN33A-E – I'm going to read out some types of information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
 Base: Adults aged 16+ who use the internet at home or elsewhere (1272), Narrow users (248). Significance testing shows any difference between Narrow users and all users
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.9: Judgements made about a website before entering personal details online, narrow, medium and broad users: 2013



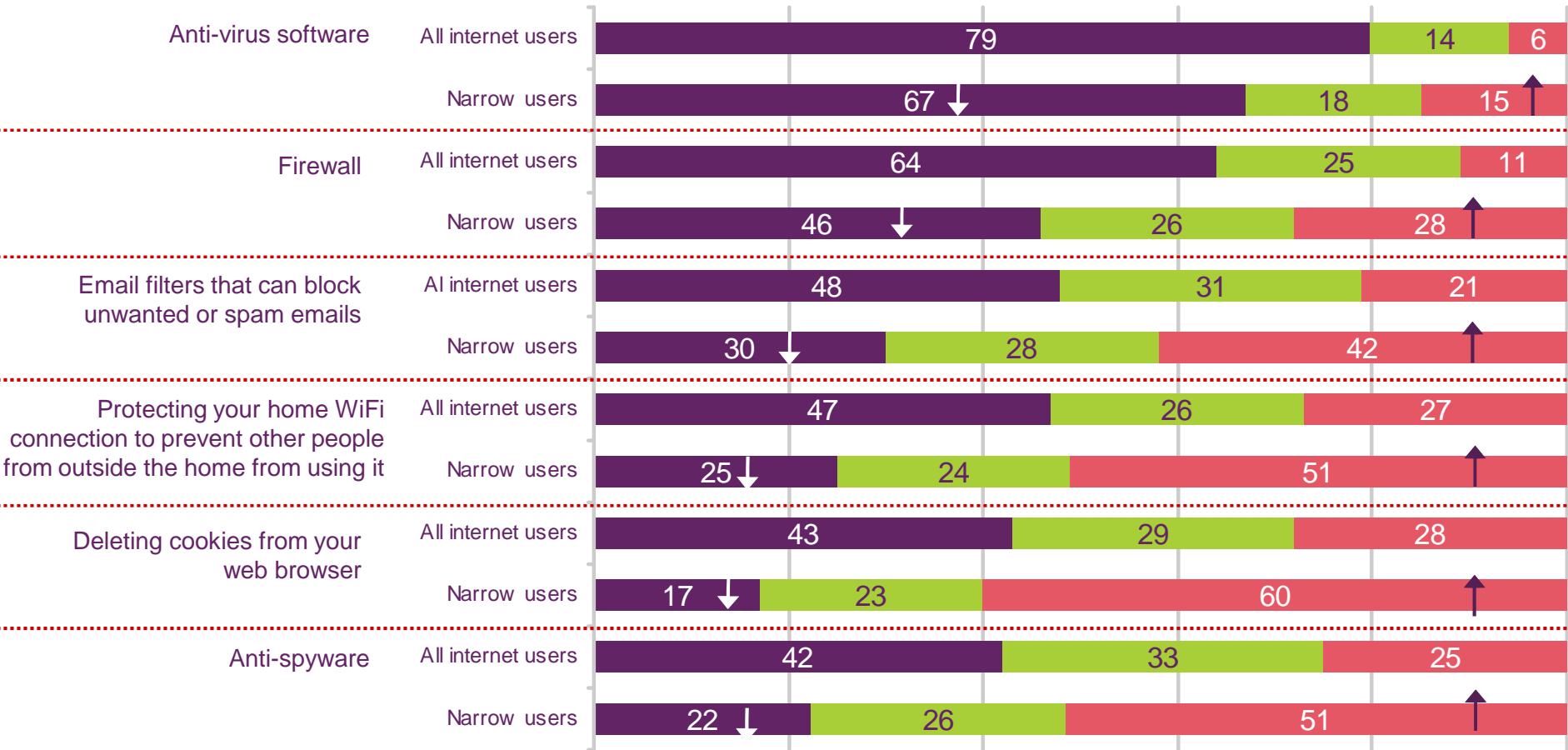
IN34 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure to enter these type of details? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1272), Narrow users (248), Medium users (345), Broad users (671). Significance testing shows any difference between any breadth of use category and all internet users

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.3.10: Security measures/ safety features installed on PC/ laptop used at home by narrow users: 2013

■ Use this on home PC/ laptop/ netbook ■ Do not use this on home PC/ laptop/ netbook ■ Not aware of this security feature



IN7/ IN8 – Before today, which, if any, of the following online security measures or safety features had you heard of? For each of these measures or features 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 that you use at home? (prompted responses, single coded)
 Base: Adults aged 16+ who use the internet at home through a PC/ laptop/ netbook/ tablet (1272 aged 16+), narrow users (248). Significance testing shows any difference between narrow users and all internet users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

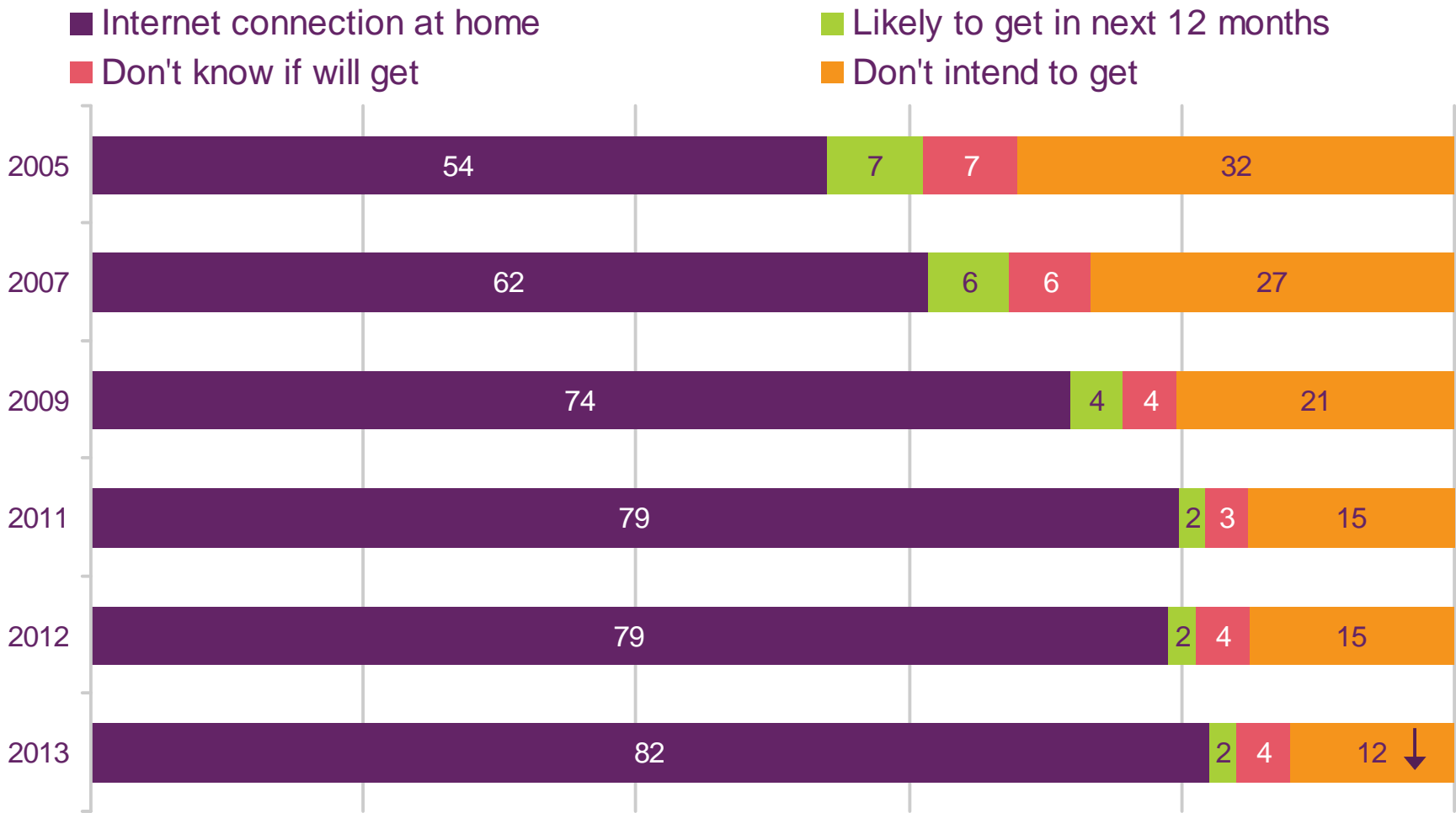
Figure 7.3.11: Experience of any negative types of online activity, narrow users: 2013



IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 aged 16+, 248 narrow users). Significance testing shows any difference between narrow users and all internet users.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

7.4 Non Users

Figure 7.4.1: Internet take-up and intentions: 2005, 2007, 2009, 2011, 2012 and 2013

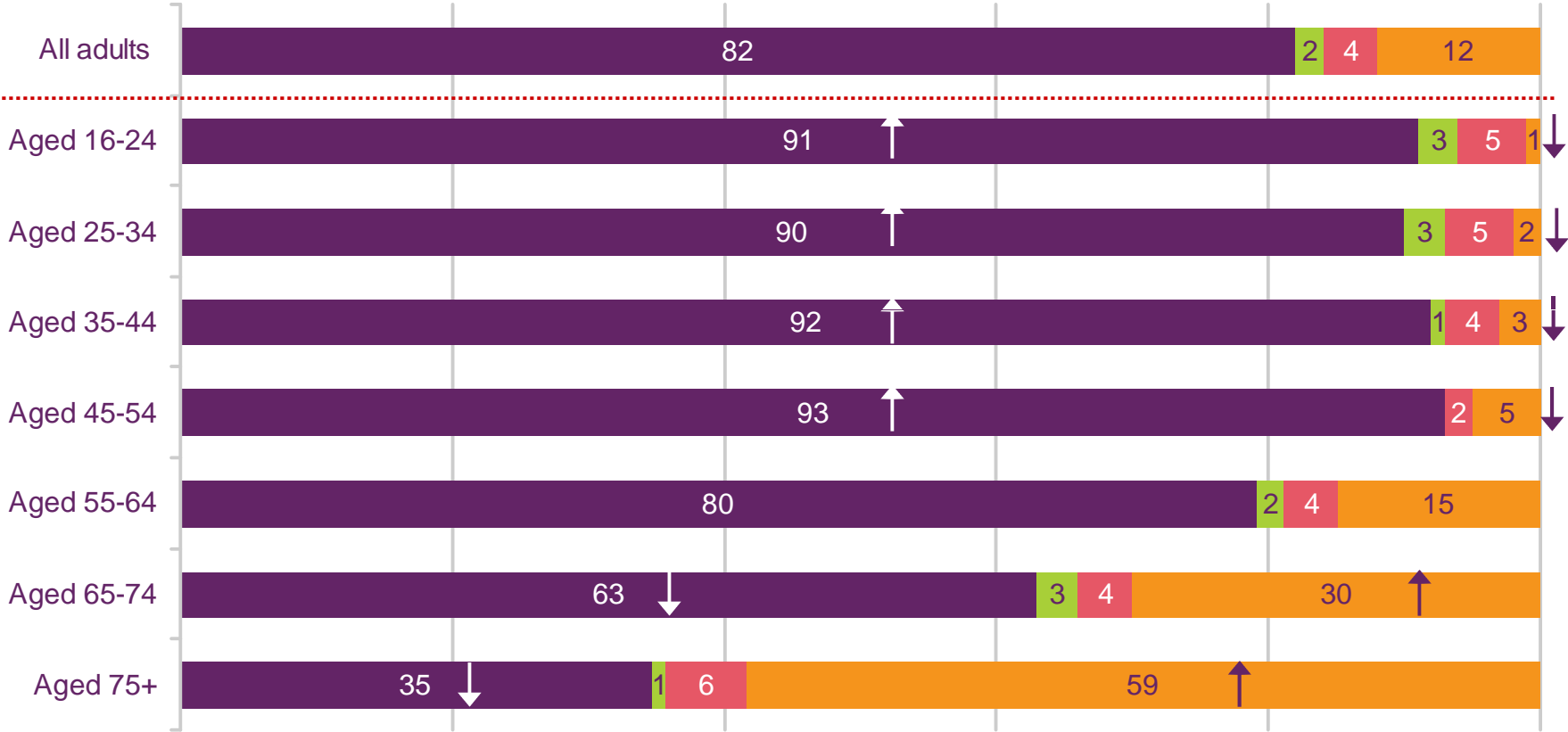


IN1/ IN12 – Do you or does anyone in your household have access to the internet at home through a laptop or computer?/ Can you tell me if you intend to get internet access at home in the next year or so?
 Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 1824 in 2009, 1823 in 2011, 1805 in 2012, 1642 in 2013). Significance testing shows any change between 2012 and 2013
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.4.2: Internet take-up and intentions, by age: 2013



■ Internet connection at home ■ Likely to get in next 12 months
■ Don't know if will get ■ Don't intend to get



IN1/ IN12 – Do you or does anyone in your household have access to the internet at home through a laptop or computer?/ Can you tell me if you intend to get internet access at home in the next year or so?

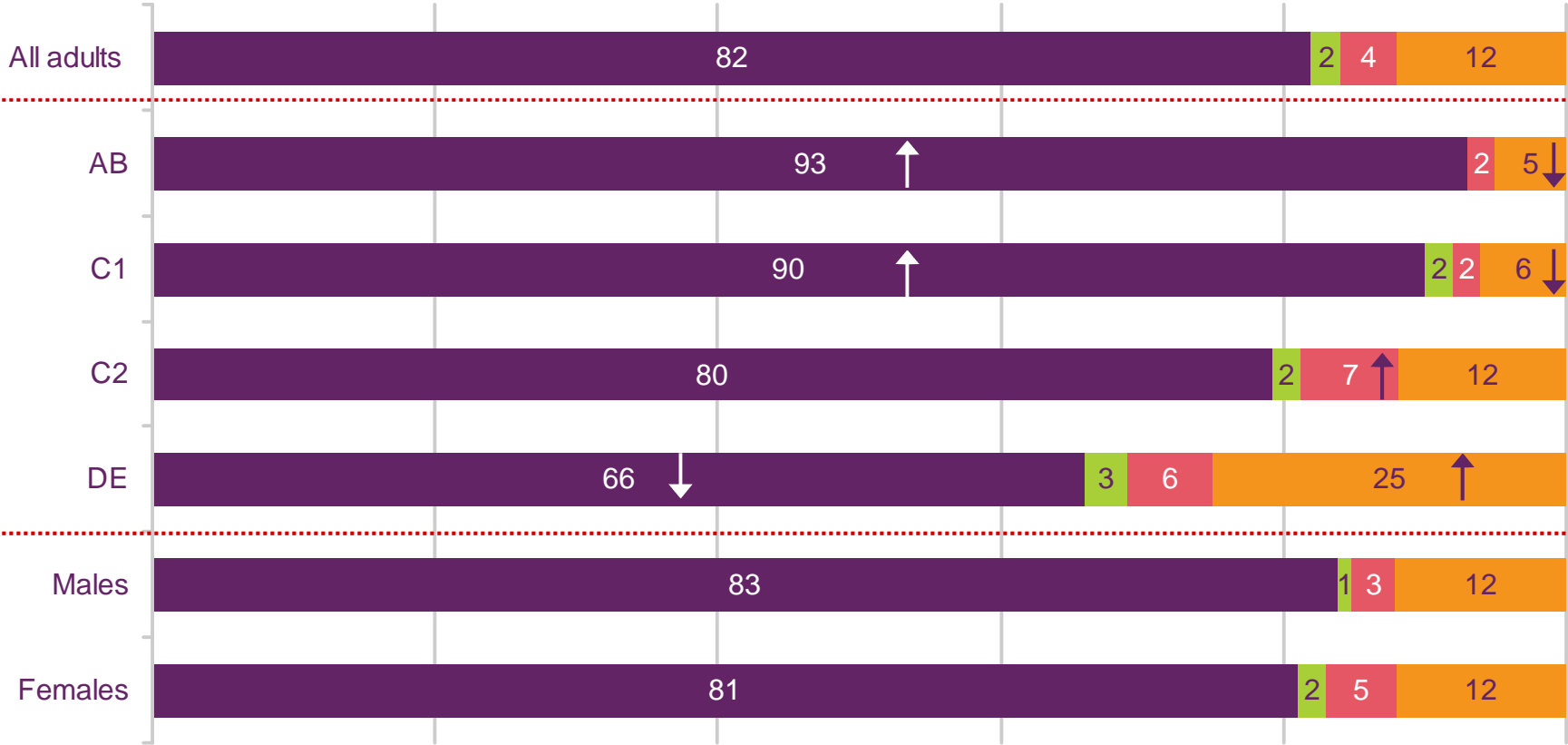
Base: All adults aged 16+ (1642 aged 16+, 224 aged 16-24, 260 aged 25-34, 270 aged 35-44, 226 aged 45-54, 262 aged 55-64, 211 aged 65-74, 189 aged 75+). Significance testing shows any difference between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.4.3: Internet take-up and intentions, by socio-economic group: 2013



■ Internet connection at home ■ Likely to get in next 12 months
■ Don't know if will get ■ Don't intend to get

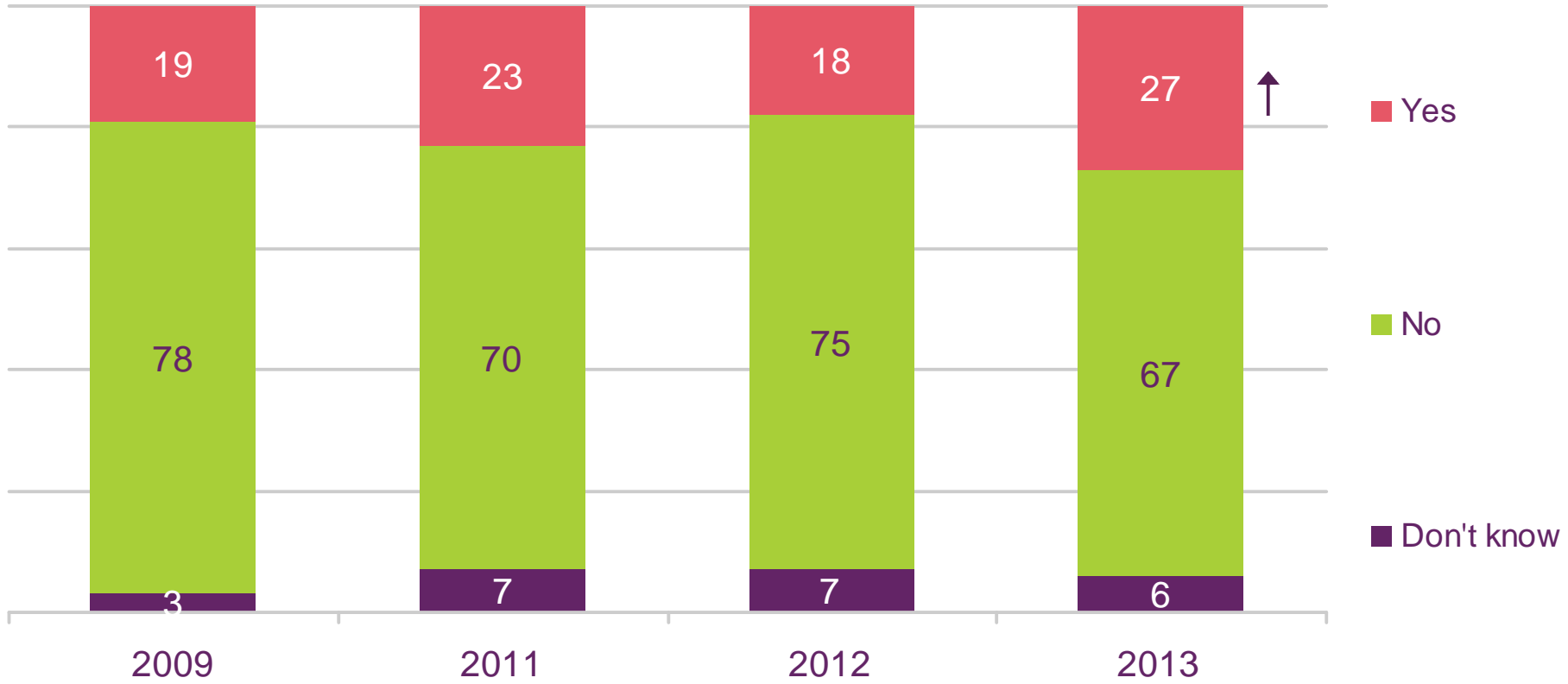


IN1/ IN12 – Do you or does anyone in your household have access to the internet at home through a laptop or computer?/ Can you tell me if you intend to get internet access at home in the next year or so?

Base: All adults aged 16+ (1642 aged 16+, 368 AB, 461 C1, 331 C2, 482 DE, 790 males, 852 females). Significance testing shows any difference between any socio-economic group and all adults aged 16+, between males and females

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.4.4: Proxy use of the internet in the past year among non-users: 2009, 2011, 2012 and 2013



IN11 – 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? (Prompted responses, single coded)
Base: All adults aged 16+ who do not use the internet at home or anywhere else (310 in 2009, 454 in 2011, 424 in 2012, 370 in 2013) Significance testing shows any change between 2012 and 2013
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.4.5: Interest in internet functions among non-users: 2013

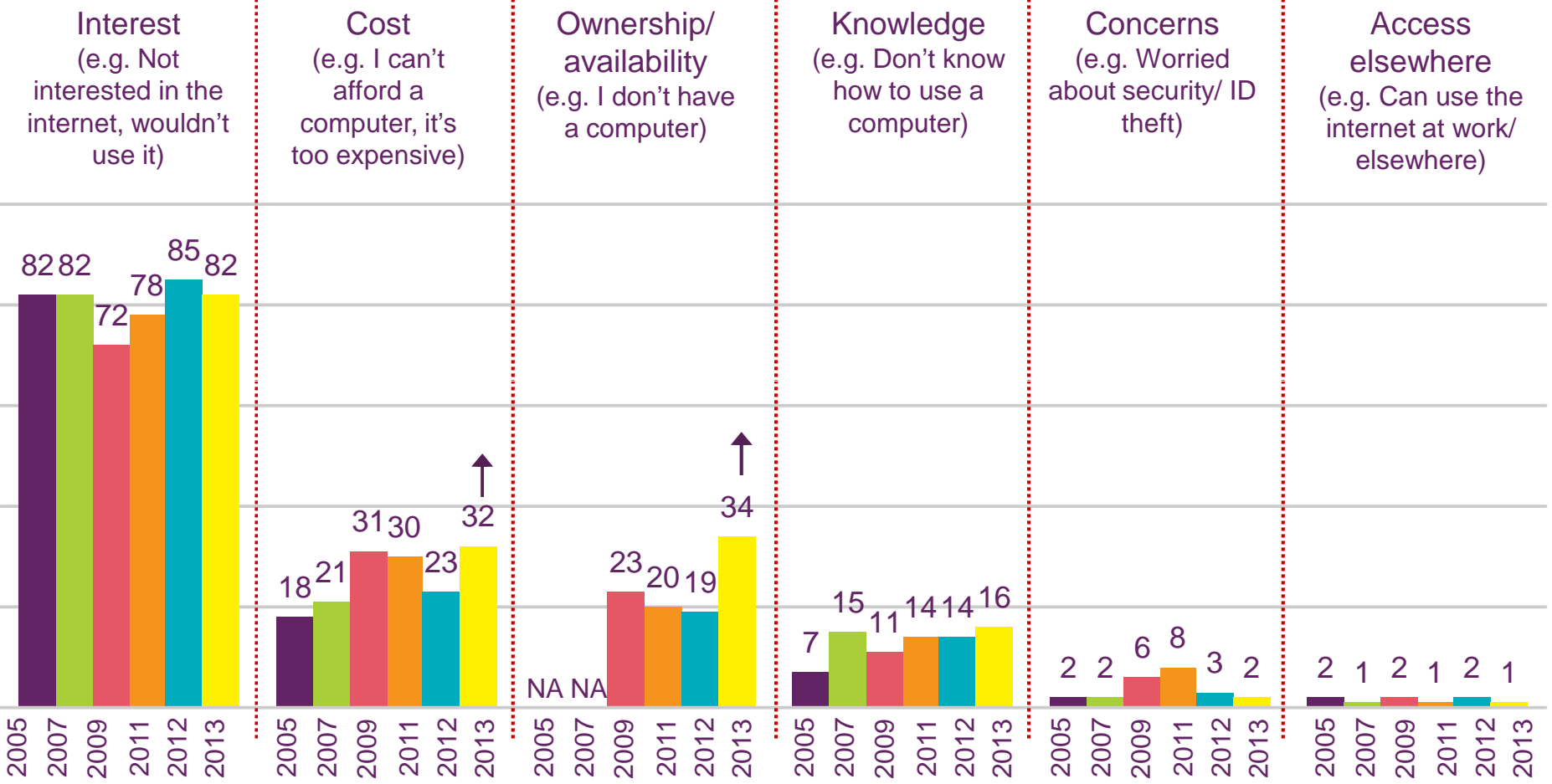


IN10 I'm going to read out some different types of things you can do online and for each one I'd like you to say if this is something that you are interested in (prompted responses, multi-coded)

Base: Those who do not go online at home (on any device) and do not use elsewhere (370)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.4.6: Stated reasons for not intending to get home internet access in the next 12 months: 2005, 2007, 2009, 2011, 2012 and 2013

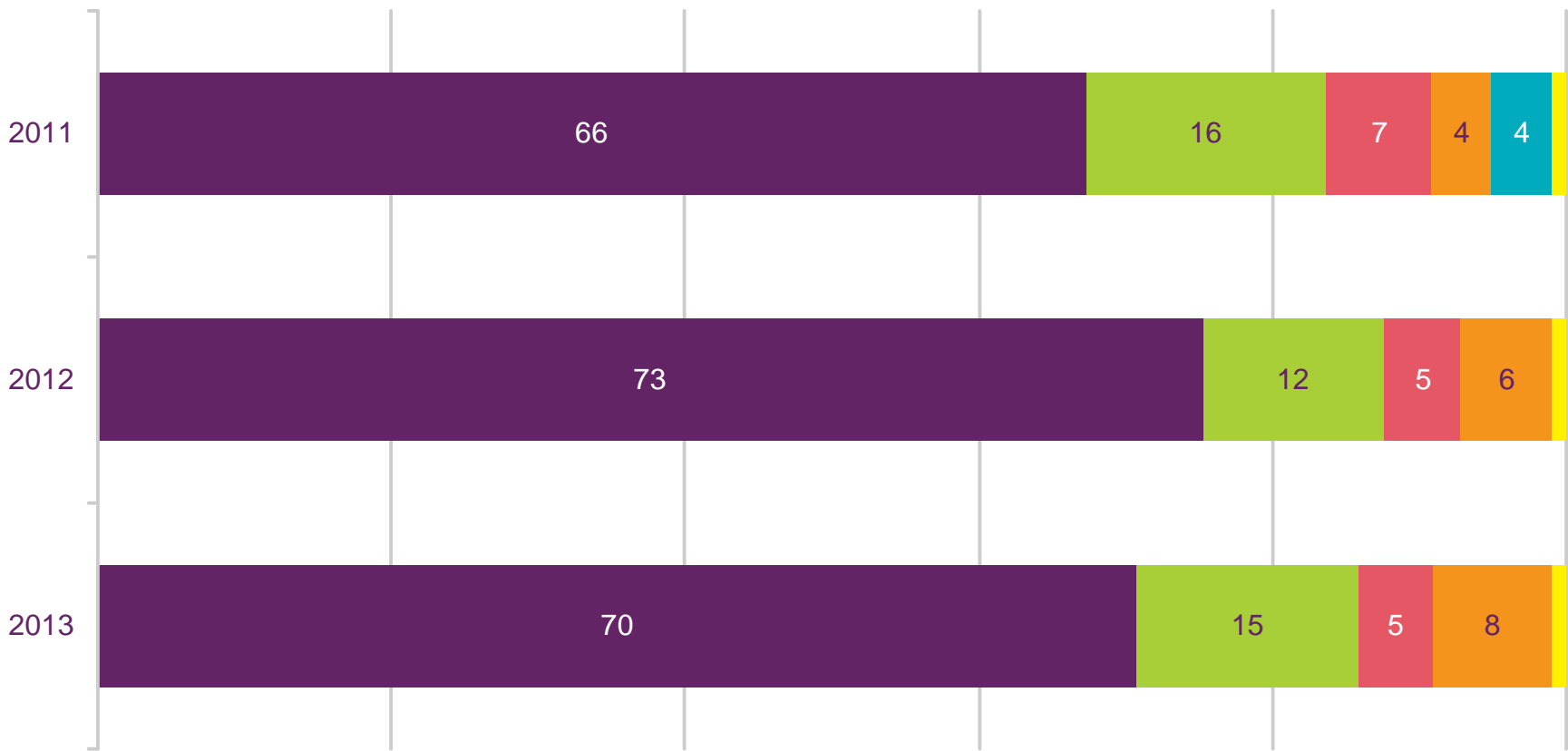


IN13- Can you tell me what your reasons are for not getting internet access at home? (Unprompted responses, multi-coded (Unprompted responses, single coded)
 Base: All adults aged 16+ who do not intend to get internet access at home (930 in 2005, 743 in 2007, 410 in 2009, 328 in 2011, 305 in 2012, 267 in 2013). Significance testing shows any change between 2012 and 2013. Percentages may add to more than 100% as respondents can nominate more than one reason.
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7.4.7 : Stated main reason for not intending to get home internet access in the next 12 months: 2011, 2012 and 2013



Interest Cost Ownership/ availability Knowledge Concerns Access elsewhere



IN14– Can you tell me what your reasons are for not getting internet access at home? (Unprompted responses, multi-coded (Unprompted responses, single coded)
 Base: All adults aged 16+ who do not intend to get internet access at home (328 in 2011, 305 in 2012, 267 in 2013). Significance testing shows any change between 2012 and 2013.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013