Internet use and attitudes

2014 Metrics Bulletin

Research Document

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Contents

Section 1

Introduction

1.1 Scope of the report

This purpose of this 2014 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 2013, 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 who use the internet, and by focusing on selected types of activity.

- Information on people's attitudes to internet safety and their understanding of potential problems relating to protection, 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

- More than three-quarters (77%) of UK adults aged 16+ say they have broadband internet access at home and 84% 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 2013. Differences by age group are considerable – 98% of 16-24s say they use the internet, compared to 30% of those aged 75+.

- More than half of UK adults (57%) say they go online via their mobile phone, an increase of eight percentage points on Q1 2013. Close to nine in ten (86%) of 16-24s say they do this, compared to 9% of those aged 65+. Sixty-six per cent of those in ABC1 households say they go online via their mobile, compared to 41% of those in DE households.

- Around one in five (21%) of those who use the internet at home or elsewhere are broad users of the internet (carrying out 11 to 16 of 16 types of activity). One quarter (25%) of those in ABC1 households are broad users, compared to 16% of those in DE households.

- Half (50%) of those who use the internet at home or elsewhere are narrow users of the internet (carrying out one to six of the 16 types of activity). Two in three (66%) of those aged 55 and over are narrow users, compared to around four in ten (38%) aged 16-24. Those in C2DE households are more likely than those in ABC1 households to be narrow users (55% vs. 46%).

- Sixty-four per cent of those who use the internet at home or elsewhere say they buy things online. A similar proportion of adults bank online (57%) or use social networking sites (54%), while over one third (39%) watch TV content online. Adults aged 65 and over continue to be less likely to use the internet at home for these activities, and adults in the DE socio-economic group are less likely to buy things online, bank or watch TV content online. Men are more likely than women to bank online and to watch TV content online, while women are more likely to use social networking sites.

- Among those accessing the internet at home through a PC, laptop or netbook, 48% say they use email filters to block unwanted or spam emails. This is less likely among those aged 65+ (34%) and among DE households (36%). Men are more likely than women to use email filters (53% vs. 43%).

- A majority of internet users (55%) say they make 'formal' judgements before entering personal details online, a decrease of six percentage points since 2012. Those in ABC1 households are more likely than those in C2DE households to say they do this (60% vs. 47%).It is also less likely among those aged 65 and over (38%).

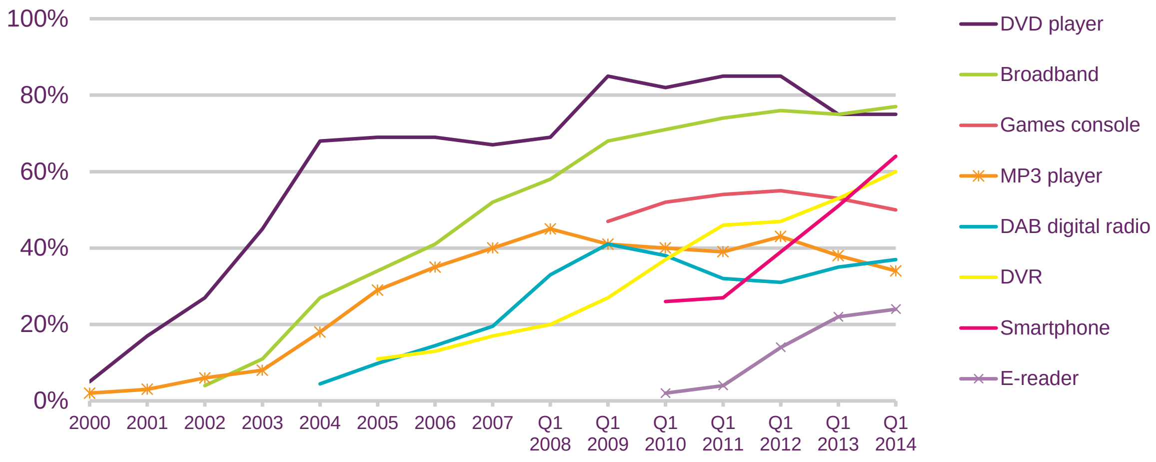
- More than one in five (22%) of all adult internet users say they read website terms and conditions and privacy statements thoroughly, which has increased by four percentage points since 2012. Adults aged 65+ are more likely to say they read website terms and conditions and privacy statements thoroughly (34%).

- Among non-users, 'proxy' use of the internet by someone else on their behalf stands at 27%, which has increased since 2012 by nine percentage points. Fifteen per cent of those not intending to get the internet cite cost as their main reason, while a majority (57%) cite lack of interest.

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. Figure 1 sets out how take-up has increased across a range of digital media.

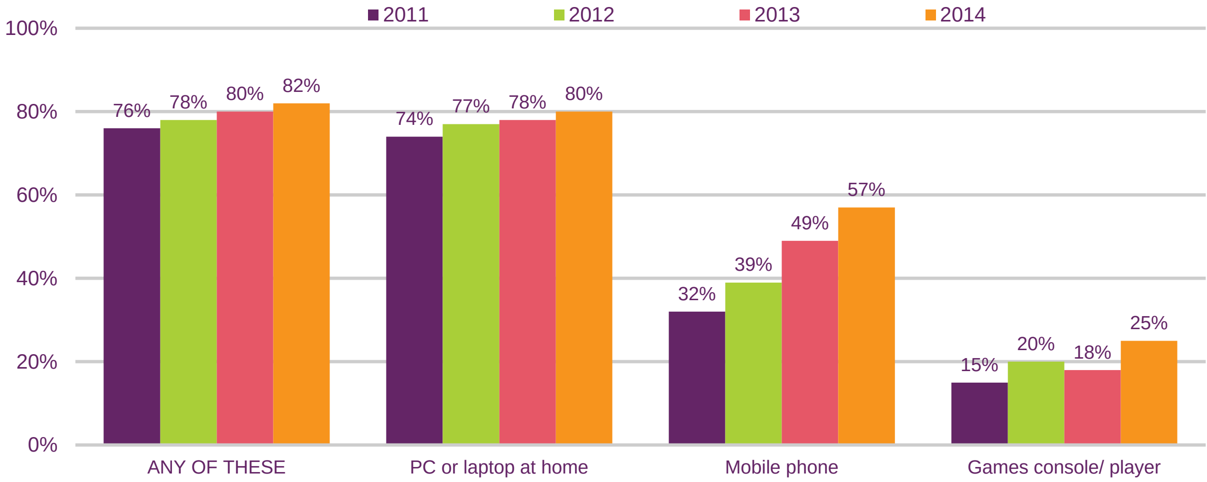
Figure 1: Take-up of key media since 2000



Source: Ofcom research. (Technology Tracker Q1, 2014)
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 2011, 2012, 2013 and 2014 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: 2011, 2012, 2013 and 2014



Source: Ofcom research. (Technology Tracker Q1, 2014)

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 98% of those aged 16-24 use the internet (anywhere), only 30% of over-75s do so, and users in ABC1 households are more likely than those in DE households to 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, so 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, we use UK Geographics' Locale Classification instead. 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 surveying all these groups to provide robust individual measures would be prohibitive in terms of cost. There are no internal controls for sub-category, resulting in a degree of uncontrolled variation, so we do not report trend data. 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. We provide this summary information as an indicative measure, to show differences in take-up or attitudes, which 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 2014, 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, data from 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. 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 2013. 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 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 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, privacy and critical understanding.

Finally, we look at non-users of the internet in some detail. We report on their levels of interest in different types of internet activity, and the extent to which they agree that the internet "makes life easier". The section indicates levels of likely internet take-up, the proportions of non-users without any intention of getting home internet access who give reasons relating to cost and to interest/ need, and the incidence of proxy use in the past year.

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 Ofcom's Media Literacy Tracker[2]. Data from the Technology Tracker survey are from January – February 2014, while data from the Media Literacy Tracker are from October – November 2013.

1.7 Understanding the results

Measures from Ofcom's 2013 Media Literacy Tracker are reported alongside measures from Q1 2014 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, we compare 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 is 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.

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

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 2013 for measures from the Technology Tracker, and since 2012 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 less than 100 interviews, these responses have been excluded from the analysis and are indicated '**' within the grid of measures.

Section 2

Internet reach: 2014

This section provides information about who is online, and how this has changed since 2013. 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[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	*3740*	*536*	*567*	*624*	*541*	*644*	*466*	*1472*	*828*	*362*	*1816*	*1924*	*1892*	*1842*	*1042*	*296*	*727*	*179*	*2725*	*1015*	*2249*	*501*	*491*	*499*	*238*	*648*
Ever use the internet anywhere[4]	84	98	95	94	89	80	65	63	48	30	85	84	91	75	71	80	65	87	84	83	84	86	80	79	88	61
% change since 2013	+2	+3					+12		+6			+3										+6			n/a	n/a
Broadband take-up[5]	77	83	83	87	83	76	65	61	49	31	78	75	87	65	58	56	51	67	76	78	77	76	71	73	79	57
% change since 2013	+2						+11		+7																n/a	n/a
Use mobile phone to go online[6]	57	86	81	72	59	34	14	21	9	4	58	56	66	46	41	46	40	66	58	51	57	56	52	51	64	29
% change since 2013	+8	+11	+7	+8	+13	+7	+7	+6	+4		+8	+8	+10	+6			+10		+9		+8	+12			n/a	n/a
Use internet at work/ college[7]	37	62	49	48	42	20	3	11	2	0	42	33	50	21	14	6	16	22	38	32	37	38	35	33	47	16
% change since 2013	+1																					+10			n/a	n/a
Use internet at a library[7]	7	15	8	7	5	4	2	3	2	2	6	7	7	6	7	18	10	7	7	4	7	8	4	3	12	7
% change since 2013	+3	+6		+4							+2	+3	+2	+3	+4	+11	+5		+2	+3	+3	+4			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 2014, IN6) 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 2014, QE9) Q: Which of these methods does your household use to connect to the internet at home?
[6] (TT Q1 2014, QD28) Q: Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?
[7] (TT Q1 2014, IN6) Q: Do you ever access the internet anywhere other than in your home at all?

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[8]. The types of activity are ranked by the percentage of those saying that they ever do such things.

	%	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
Base	*2976*	*523*	*538*	*582*	*465*	*487*	*279*	*868*	*381*	*102*	*1440*	*1536*	*1666*	*1305*	*684*	*235*	*433*	*154*	*2178*	*798*	*1802*	*415*	*369*	*390*	*207*	*358*
Carrying out 1-6 of the 16 types of internet activity[9]	50	38	40	44	54	64	69	66	70	73	48	51	46	55	55	54	61	58	49	53	49	55	46	51	45	54
% change (UK) since 2013	+4																									
Carrying out 7-10 of the 16 types of activity[9]	25	31	28	27	21	18	17	18	16	12	24	25	27	22	21	18	16	16	25	24	25	23	30	29	28	21
% change (UK) since 2013	-2																									
Carrying out 11-16 of the 16 types of activity[9]	21	29	29	24	19	11	7	9	6	4	25	18	25	16	16	22	15	16	22	20	22	18	20	16	21	18
% change (UK) since 2013	-1																									

[8]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
[9](TT Q1 2014, QE5A) Q: Which, if any, of these do you use the internet for?
The 16 types of internet activity are: social networking sites, Twitter, email, communications, purchasing, banking, radio/ audio services, games, health, Government sites, information (work/ school/ college), watching TV content, watching short video clips, downloading music, 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
Base	*2976*	*523*	*538*	*582*	*465*	*487*	*279*	*868*	*381*	*102*	*1440*	*1536*	*1666*	*1305*	*684*	*235*	*433*	*154*	*2178*	*798*	*1802*	*415*	*369*	*390*	*207*	*358*
Purchase goods/ services/ tickets online[10]	64	62	67	67	66	58	58	57	56	51	63	64	70	55	51	46	49	45	63	66	63	65	71	68	56	56
% change (UK) since 2013	+2																									
Bank online[10]	57	53	66	65	57	52	45	47	41	32	62	54	66	46	40	36	41	41	58	52	57	57	63	51	55	47
% change (UK) since 2013	+2																									
Use social networking sites[10]	54	74	68	59	45	32	25	28	23	20	50	57	56	50	49	51	47	55	54	54	53	52	61	55	50	50
% change (UK) since 2013	+1																									
Watching TV content online[10]	39	52	43	41	31	30	30	29	27	20	42	36	43	32	30	36	29	24	39	34	39	35	43	40	38	38
% change (UK) since 2013	+3																									
Look up information/ services on Government or council websites[10]	32	25	32	36	35	33	34	33	32	26	34	31	38	24	25	23	22	19	32	33	33	24	35	19	31	33
% change (UK) since 2013	-3																									
Information on health related issues[10]	36	31	38	38	36	34	36	34	34	30	34	37	41	28	30	24	27	33	36	34	36	31	39	29	31	34
% change (UK) since 2013	+2																									
Use Twitter[10]	19	34	27	19	13	7	3	5	3	1	21	17	21	16	15	16	14	17	19	17	19	18	23	21	25	13
% change (UK) since 2013	+1																									

[10](TT Q1 2014, QE5A) Q: Which, if any, of these do you use the internet for?

Internet attitudes and understanding

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

	%	Age									Gender		Socio-economic/ income						Location/ nation							
% of all using the internet at home through a PC/ laptop/ netbook	**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	*1202*	*202*	*230*	*236*	*196*	*182*	*105*	*338*	*156*	*51*	*585*	*617*	*709*	*493*	*263*	*41*	*137*	*47*	*1026*	*176*	*785*	*131*	*156*	*130*	*94*	*104*
Home internet users who have/ use email filters on their home PC/laptop/ netbook[12]	48	45	46	51	56	47	37	42	34	**	53	43	51	42	36	**	40	**	48	46	47	59	39	34	**	57
% change (UK) since 2012	n/a																									

[11]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
[12](MLT 2013, 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 PC/ laptop/ netbook you use at home? : Email filters that can block unwanted or spam emails NB Changes were made to this question in 2013 which means that it is not possible to make comparisons with the 2012 findings
** = Sub-group base size lower than 100 and therefore excluded from the analysis

% of all internet users[13]	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	*1272*	*219*	*254*	*243*	*201*	*192*	*111*	*355*	*163*	*52*	*613*	*659*	*732*	*540*	*298*	*50*	*163*	*60*	*1082*	*190*	*824*	*150*	*163*	*135*	*99*	*112*
Internet users who say they make 'formal' judgements before entering details [14]	55	54	59	59	53	56	35	50	38	**	56	55	60	47	45	**	44	**	55	53	55	55	56	52	**	46
% change (UK) since 2012	-6																									
Internet users who say they read thoroughly website terms and conditions or privacy statements[15]	22	18	22	20	22	24	38	29	34	**	23	22	23	21	24	**	23	**	23	20	22	20	28	20	**	22
% change (UK) since 2012	+4																									

[13]These measures are shown on a separate page as the base is all internet users whereas the base on the previous page was all who use the internet at home through a PC/ laptop/ netbook

[14](MLT 2013, IN34) 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 to enter these types of details? (In this context, formal judgements relate to looking for a padlock symbol on the website or other system/ software messages)

[15](MLT 2013, 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

% of all search engine site 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	*1199*	*216*	*242*	*236*	*189*	*180*	*97*	*316*	*136*	*39*	*576*	*623*	*700*	*499*	*270*	*47*	*150*	*55*	*1020*	*179*	*777*	*147*	*151*	*124*	*94*	*97*
Search engine users who understand that the accuracy of the information in the websites shown in results is variable[16]	59	59	56	64	57	59	**	60	59	**	60	58	64	51	53	**	66	**	60	55	59	64	64	51	**	**
% change (UK) since 2012	-1																									

[16](MLT 2013, IN41) 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, the extent of their agreement that the internet "makes life easier" and any proxy use in the past year. 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[17].

	%	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	*370*	*5*	*6*	*27*	*25*	*70*	*100*	*307*	*237*	*137*	*177*	*193*	*97*	*273*	*184*	*2*	*144*	*10*	*309*	*61*	*227*	*53*	*38*	*52*	*13*	*132*
Interest in using email to contact friends and relatives[18]	8	**	**	**	**	**	9	6	6	4	5	10	**	7	6	**	9	**	8	**	9	**	**	**	**	10
% change (UK) since 2012	n/a																									
Interest in buying things online[18]	7	**	**	**	**	**	5	5	4	3	8	7	**	7	6	**	8	**	7	**	8	**	**	**	**	8
% change (UK) since 2012	n/a																									
Interest in looking at information on hobbies or interests [18]	7	**	**	**	**	**	3	6	3	4	9	6	**	7	7	**	10	**	8	**	8	**	**	**	**	13
% change (UK) since 2012	n/a																									

[17]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
[18](MLT 2013, IN10 Q: 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 you are interested in. NB Changes were made to this question in 2013 which means that it is not possible to make comparisons with the 2012 findings
** = Sub-group base size lower than 100 and therefore excluded from the analysis

% 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	*370*	*5*	*6*	*27*	*25*	*70*	*100*	*307*	*237*	*137*	*177*	*193*	*97*	*273*	*184*	*2*	*144*	*10*	*309*	*61*	*227*	*53*	*38*	*52*	*13*	*132*
Proxy use of the internet in the past year[19]	27	**	**	**	**	**	30	24	24	20	26	28	**	23	21	**	25	**	26	**	28	**	**	**	**	32
% change (UK) since 2012	+9																									
Agreement that "the internet makes life easier"[20]	38	**	**	**	**	**	43	36	35	30	41	35	**	35	35	**	40	**	39	**	39	**	**	**	**	37
% change (UK) since 2012	+5																									

	%	**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	*794*	*32*	*48*	*60*	*71*	*157*	*174*	*583*	*426*	*252*	*391*	*403*	*232*	*559*	*383*	*82*	*326*	*32*	*583*	*211*	*476*	*97*	*114*	*107*	*37*	*273*
Likelihood of getting internet access at home in the next 12 months[21]	13	**	**	**	**		7	6	4	3	12	14	15	12	13	**	11	**	13	11	15	**	9	5	**	6
% change since 2012	-2																									

[19](MLT 2013, 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?
[20](MLT 2012, IN36A) 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?
[21](TT Q1 2014, 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	*656*	*15*	*22*	*35*	*55*	*133*	*156*	*529*	*396*	*240*	*325*	*331*	*194*	*459*	*317*	*54*	*281*	*15*	*472*	*184*	*371*	*87*	*99*	*99*	*21*	*250*
Cost as main reason for not having the internet at home†[22]	15	**	**	**	**	12	7	7	4	3	15	16	9	18	22	**	21	**	16	13	13	**	**	**	**	14
% change since 2012	+4																									
Perceived lack of interest as the main reason for not having the internet at home†[23]	57	**	**	**	**	71	64	61	58	55	58	57	62	55	49	**	50	**	57	56	61	**	**	**	**	50
% change since 2012	-6																									

[22](TT Q1 2013, QE25B) Q: Why are you unlikely to get internet access at home in the next 12 months?/ And which one of these reasons is your main reason for not getting internet access at home?

† = 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 survey.

Ofcom commissioned Saville Rossiter-Base to carry out both of these surveys. Interviewing for both surveys was conducted by RED/ Quadrangle Operations, 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 3,740 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 2014.

For the Media Literacy Tracker, a total of 1,642 adults aged 16+ were interviewed at 200 different sampling points in the UK. All interviews were conducted between 16 October and 22 November 2013.

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 uses 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 ten miles of larger settlement (A,B,C)	17.3%	2k to 14.9k
E	Small town more than ten miles from larger settlement (A,B,C)	1.8%	2k to 14.9k
F	Rural area within ten miles of larger settlement (A,B,C)	11.6%	Less than 2k
G	Rural area more than ten 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.