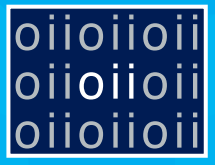
OxIS
Oxford Internet Surveys

Next Generation Users: The Internet in Britain

William H. Dutton and Grant Blank

Oxford Internet Survey 2011 Report



Acknowledgements

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The full report and the questionnaire are available at the OxIS website.

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Introduction

The Oxford Internet Surveys (OxIS) are core to the research of the Oxford Internet Institute (OII), a leading world centre for the multidisciplinary study of the Internet and society. A department within the Social Sciences Division of the University of Oxford, the OII focuses its research and teaching on the social shaping and implications of the Internet, and on informing related policy and practice.

The Oxford Internet Surveys

Launched by the Oxford Internet Institute in 2003, OxIS has become an authoritative source of information about Internet access, use and attitudes—and the difference this makes for everyday life—in Britain. Areas covered include: digital and social inclusion and exclusion; regulation and governance of the Internet; privacy, trust and risk concerns; and uses of the Internet, including networking, content creation, entertainment and learning.

The OxIS 2011 survey is the fifth in a series, with previous surveys conducted in 2003, 2005, 2007, and 2009. Each has used a multi-stage national probability sample of 2000 people in Britain, enabling us to project estimates to Britain as a whole. Although the response rate declined in 2011, our analyses of the pattern of responses show that the lower response rate does not influence the quality of the results.

	2003	2005	2007	2009	2011
Fielded in	June - July	February - March	March - April	February - March	February - March
Number of respondents	2,030	2,185	2,350	2,013	2,057
Response rate	66%	72%	77%	62%	51%

The UK in a Global Context

OxIS provides the UK's contribution to the World Internet Project (WIP), an international collaborative project that joins over two dozen nations in studies of the social, economic and political implications of the Internet. More information about WIP can be found at: http://www.worldinternetproject.net/.

Structure of this report

This report opens by describing the emergence of "next generation users" who are developing a new pattern of Internet use. We follow the emerging next generation users throughout the next eight sections that summarise the details and highlights of the 2011 survey. The report closes with a methodological appendix. The first detailed section of the report focuses on describing the diffusion of the Internet as an innovation in information and communication technology (ICT). The second section focuses on the characteristics and attitudes of Internet users. The third part describes how people with different backgrounds use the Internet, followed by a fourth part which looks specifically at the use of the Internet in politics and government. The fifth section turns to the question of how the Internet is reshaping friendships and social networks. The sixth section looks at the social implications of Internet use. The seventh section examines beliefs and attitudes of individuals about the control and regulation of the Internet. The final section examines the key issue of exclusion, either by social and economic divides or by personal choice, describing non-users and former users. Each section opens with an overview of the trends described in the section.

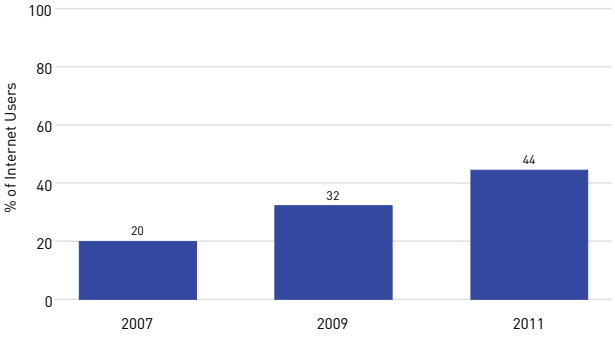
A description of the methodology is available at the end of this report, and on the OxIS website, where complete questionnaires are also available: http://microsites.oii.ox.ac.uk/oxis/

This report is not designed to replace the 2005, 2007, and 2009 OxIS Reports: readers are recommended to view these reports as supplements to this 2011 Report.

The Emergence of Next Generation Users

In 2011, two dramatic and interrelated shifts—in the portability and the range of available devices—have emerged to change how users access the Internet. Together they define the 'Next Generation User' (NGU), who comprises 42% of Internet users in Britain. Next generation users are not just teenagers: as a consequence of long-term trends in patterns of use they emerged across all age groups. They did not appear overnight: with the benefit of hindsight, we can look back and see that the proportion of next generation users grew from 20% in 2007, to 32% in 2009, to 44% in 2011 (Figure 1).

Figure 1: Next Generation Internet Users



Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

From the Oxford Internet Institute's (OII) first survey of Internet use in 2003, access has been based primarily on the use of a personal computer in one's household, linked to the Internet through a modem or broadband connection. For many, this was complemented by similar access at work. The major change in access since 2003 was the move from narrowband dial-up to broadband always-on Internet connections. By 2009, nearly all Internet users had a broadband connection, increasingly including wireless connections within the household, such as over a WiFi router. While speeds will continue to increase, such as through initiatives focused on superfast broadband, and wireless connections will expand, this pattern of Internet access characterizes the 'first generation user' in Britain.

Defining the 'Next Generation User'

In contrast to the first generation of Internet users the next generation user is defined by the emergence of two separate but related trends: portability and access through multiple devices.

First, there has been a continuing increase in the proportion of users with portable devices, using the Internet over one or another mobile device, such as a smart phone. In 2003 this was a small proportion. At that time, 85% of British people had a mobile phone but only 11% of mobile phone users said they accessed email or the Internet over their mobile phone. By 2009, 97% of British people owned a mobile phone, and the proportion of users accessing email or the Internet over their phone doubled to 24% – albeit still a minority of users. In 2011, this increased to nearly half (49%) of all users. Now in 2011, the mobile phone is one of a number of devices for accessing the Internet that are portable within and outside the household (see Section 1 of this report).

Secondly, Internet users often have more devices, such as multiple computers, readers, tablets, and laptop computers, in addition to mobile phones, to access the Internet. In 2009, only 19% had a PDA (Personal Digital Assistant). Since then, the development of readers and tablets has boomed, such as with Apple's successful introduction of the iPad. The very notion of a PDA has become antiquated. In 2011, almost one-third of Internet users had a reader or a tablet with 6% having both devices. Fully 59% have access to the Internet via one or more of these multiple devices other than the household personal computer (see Section 1).

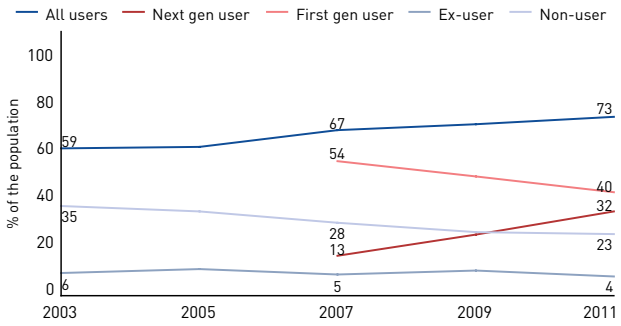
Most observers have treated these developments as separate trends. There are even academics who focus only on mobile communication, and others who focus on tablets or the use of smart phones. However, these two trends are not just related but are also synergistic. Those who own multiple devices are also more likely to use the Internet on the move and from multiple locations.

We have therefore defined the Next Generation User as someone who accesses the Internet from multiple locations and devices. Specifically, we operationally define the next generation user as someone who uses at least two Internet applications (out of four applications queried)[1] on their mobile or who fits two or more of the following criteria: they own a tablet, own a reader, own three or more computers. By this

1. The four applications are: browsing the Internet, using email, updating a social networking site, or finding directions.

definition, in 2011, 44.4% of Internet users in Britain were next generation users (Figures 1 and 2).

Figure 2: Next Generation Internet Users



OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

Why Does this Matter?

The following pages show how this transformation in Internet access is linked to important changes in patterns of use, and therefore in the social implications of use. We then show that Next Generation Users are not evenly distributed, but have higher incomes, indicating a new digital divide in Britain and most certainly in other nations.

Figure 2 shows that the rapid growth of next generation users has taken place amid slow growth in overall Internet use. Internet use in Britain grew from just over 60% in 2003 to 73% in 2011, leaving more than a quarter of the British population without access to the Internet. There has been a steady but slow decline in the proportion of people who have never used the Internet (non-users), and relative stability in the proportion of those who have used the Internet at one time but who no longer do so (ex-users). Despite multiple government and private initiatives aimed at bringing people online, digital divides remain in access to the Internet.

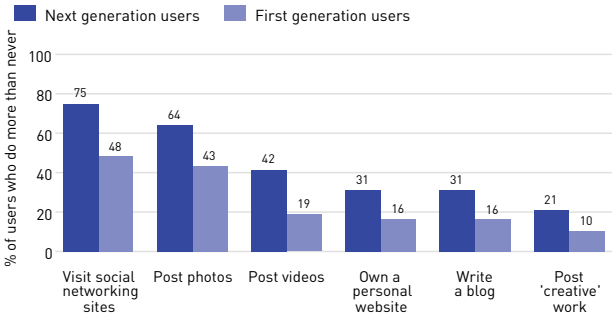
On the one hand, there is apparent stability, particularly visible in the proportion of British people with access to the Internet. On the other hand, a dramatic transition is occurring among users. The proportion of first generation users is declining, while the proportion of next generation users rises (Figure 2).

How individual users access the Internet shapes the ways in which they use the technology, and how people wish to use the Internet is shaping the technologies they adopt. This is shown by the contrast between first and second generation use of the Internet in three areas: content production, entertainment and leisure, and information seeking.

Content Production

Next generation users are more likely to be producers of content than are first generation users, who focus more on consumption rather than production. For many types of content, next generation users are as much as 25 percentage points more likely to be producers. Specifically, next generation users are more likely to update or create a profile on a social networking site (Figure 3). They are also more likely than first generation users to post pictures and videos, post messages on discussion boards or forums, and post stories, poetry or other creative work (Figure 3). For more demanding types of content, such as maintaining a personal website or writing a blog, next generation users are almost twice as likely to be producers than are first generation users.

Figure 3: Next Generation Users by Content Production

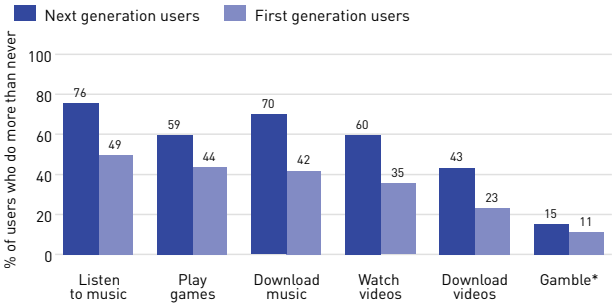


Current users. OxIS 2011: N=1,498

Entertainment and Leisure

Compared with first generation users, the NGU is much more likely to listen to music online, play games, download music, watch videos online, and download, as well as upload, videos or music files (Figure 4). As with content production, these are large differences, often exceeding 20 to 25 percentage points. To a far lesser degree, NGUs watch 'adult' sexual content and bet or gamble online. Next generation users seem to have integrated the Internet more extensively into their entertainment and leisure activities.

Figure 4: Next Generation Users by Entertainment and Leisure

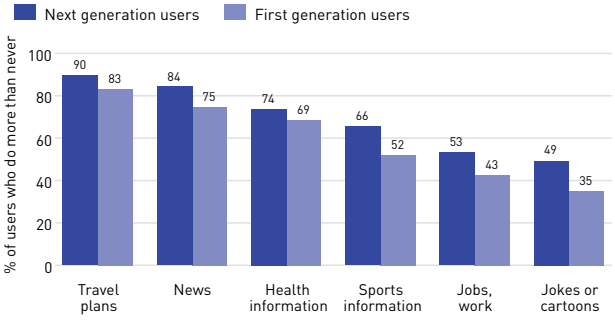


Current users. OxIS 2011: N=1,498
* In self-completion questionnaire.

Information Seeking

As interesting as how next generation users differ from first generation users is how they are similar. One of the major changes over the past decade has been the growing use of the Internet as a source of information, particularly with the rise of powerful and usable search engines such as Google. All Internet users increasingly go to the Internet for information. It is their first port of call (See Section 3). However, next generation users are more likely than first generation users to go to the Internet first for all kinds of information (Figure 5). For example, 84% of next generation users go online for news, compared with 75% of first generation users. The differences here are smaller than the differences observed above, only 7 to 15 percentage points, but statistically and substantively significant. Given that next generation users can access the Internet from more locations on more devices at more times of the day, it might be surprising that their use of the Internet for information is not more extensive. One major reason is that information seeking has become a common activity for all users.

Figure 5: Next Generation Users by Information Seeking



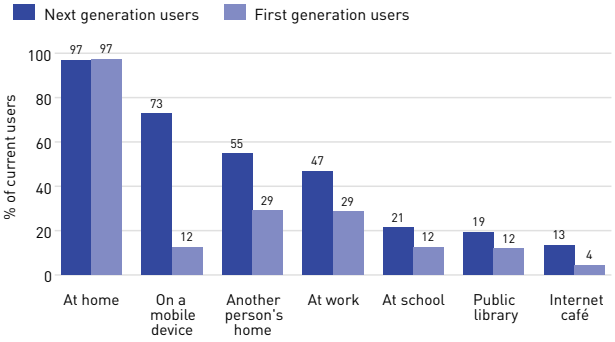
Current users. OxIS 2011: N=1,498

Portability and Mobility

Do next generation users access the Internet from more locations? Figure 6 shows that this is indeed the case. NGUs are no more likely than first generation users to access the Internet from their home, but – importantly – they are no less likely to do so. This underscores the continuing centrality of the household across the generations of users. However, NGUs are far more likely to access the Internet on the move and from all other locations, including another person's home, at work, at school or at university, at a library, or at an Internet café (Figure 6).

Next generation users appear to be empowered, relative to the first generation users, in creating content, enjoying entertainment online, and accessing information in ways and at times and locations that fit into their everyday life and work. Of course, those who want to create content and embed the Internet in more aspects of their everyday life are more likely to adopt next generation technologies. Through the social shaping of adoption and the empowerment of users, it is clear that the next generation user has a more advantageous relationship with the Internet and the resources it can provide for accessing information, people, services, and other technologies.

Figure 6: Next Generation Users by Locations



Current users. OxIS 2011: N=1,498

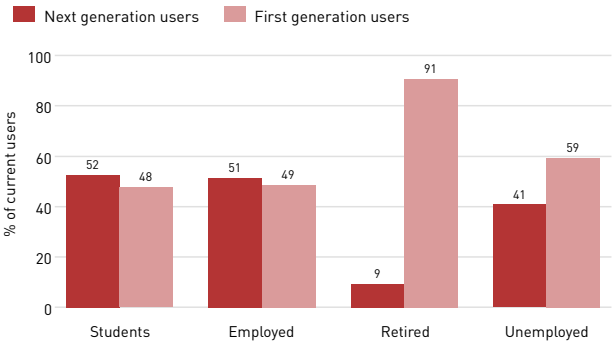
This leads to the question, who are the next generation users? Who is empowered by next generation access, and who is not?

Who are Next Generation Users?

Are next generation users simply the youth of the Internet age? Not really. Age and lifestage are related to next generation use, but primarily

in the degree that people who are retired or of retirement age are much less likely to be Next Generation Users. Those who are unemployed are also somewhat less likely to be part of the next generation, while students and the employed are equally likely to be next generation users. It is not simply a function of youth or age cohorts. For example, only 52 percent of students are Next Generation Users (Figure 7).

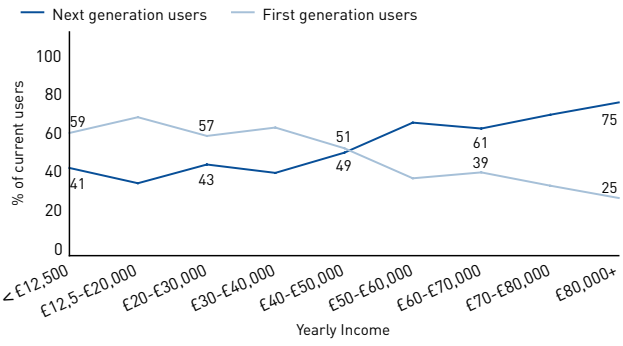
Figure 7: Next Generation Users by Lifestage



Current users. OxIS 2011: N=1,498

A major factor related to next generation users is household income. There are next generation users at every income level, but there is clearly a greater proportion of next generation users among the higher income groups in Britain (Figure 8). It helps to have more money when buying a variety of devices, many of which remain expensive. As this report will make clear, the next generation user is creating a new level of access to the Internet and the Web that supports active patterns of information production and the integration of the Internet into everyday life and work. It is more accessible to the more well-to-do, suggesting that there is a new digital divide developing in Britain, and other nations, between the first generation users and the next generation users identified in this report.

Figure 8: Next Generation Users by Income



Current users. OxIS 2011: N=1,498

The Future

Clearly, more mobile phone users will be accessing the Internet in the coming years, but this forecast misses the broader picture—the twin trends of mobility and the use of multiple devices, and the synergy of these two trends that creates next generation use. As Figures 1 and 2 suggest, these trends appear to be strong and likely to continue into the foreseeable future.

It is therefore important for research to begin to differentiate among Internet users in new ways. Speed remains one feature of new infrastructures that will shape patterns of access. But the days of narrow and broadband users are over, as nearly all British users have some level of broadband access. Wireless access will also grow as more households have multiple and portable devices. It is because of wireless broadband access that portable devices are so capable of being used for accessing entertainment and information on the move. However, speed and wireless access are primarily enablers of new patterns of use and not the key factors discriminating among Internet users.

The central, new distinction—from the perspective of this study—is between first and next generation use. It will be important to track the growth of next generation use in relation to non-users, former users, and first generation users. Research needs to look at the consequences of next generation use on patterns of use and their societal implications. If, as we find, this next generation is truly empowering users in new ways, then it will be equally important to address the new digital divides created by the next generation users.

The following sections of this report track key trends in who uses (and does not use) the Internet, how and with what consequences. They also show trends in attitudes and beliefs about the Internet and Web that are shaping the choices made by users and non-users alike. All of these sections add more texture and detail to the central theme of this report—the rise of 'next generation users'.

I. Adoption

The Plateau in Diffusion

The Internet has become an integral part of our lives and our society. While the Internet as such is a network of networks connecting a wide array of computers and other devices, it is much more than ensembles of equipment. The Internet connects a wide array of people, from computer scientists developing new standards, to individual users accessing the Internet from different locations and with different devices. Beyond mere access, however, navigating the Internet also requires certain experience and skills to use the technology and evaluate a variety of online contexts. Consequently, the first section of this report describes the diffusion of the Internet, how and where users access the Internet, and the experience and skills of British Internet users.

This section focuses first on the most common indicators of Internet diffusion: the proportion of households and individuals in Britain with access to the Internet. Internet access has increased by about 3% over the past two years, reaching 73% of the population in 2011. Part B of this section sheds light on where people use the Internet. Household use is common to all groups, but certain groups also make more use of Internet cafés and libraries. Part C shows how the Internet is accessed from many devices, including mobile phones and tablets. Both phone and tablet use are rising quickly. Finally, parts D and E describe the experience and skill of users. People develop more confidence in their skills as their experience with the Internet grows, however, there remain notable differences among groups: students and men tend to be the most confident; women and retired people are least confident.

Next generation use has risen much more quickly than use in general. Next generation users have adopted some devices more quickly than the rest of the user population, like web-cams, Internet connected TVs, and games consoles, but they are similar to other users in their ownership of mobile phones and digital cameras.

I.A. Diffusion

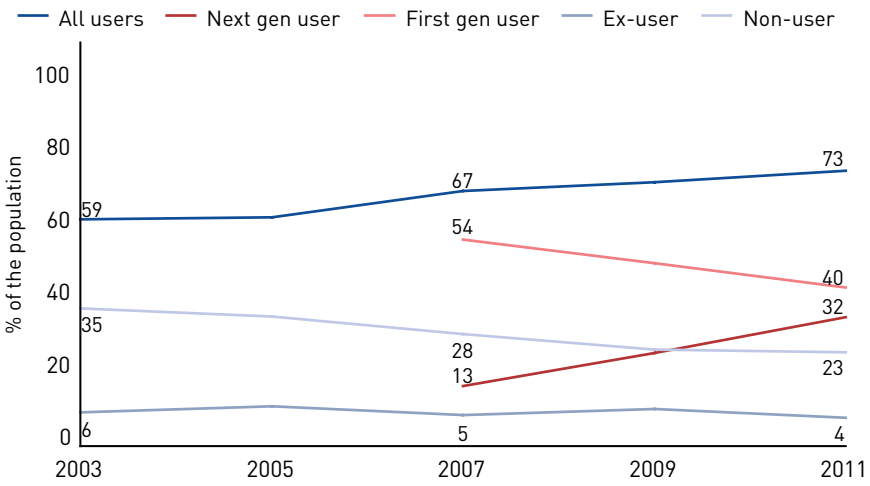
"Do you yourself personally use the Internet at home, work, school, college or elsewhere or have you used the Internet anywhere in the past?"

OxIS has consistently followed two indicators of internet access: (1) whether the individual respondent has access, and (2) whether anyone in the respondent's household has access. In Britain, both indicators have been quite close over the past decade.

Internet use by individuals has increased steadily to 73% in 2011, whereas the number of people who have never used the Internet (non-users) has fallen from 28% to 23%. Compared to households (21%) the proportion of individual non-users is slightly higher (23%), reflecting the fact that some people with Internet access in the household do not use the Internet. Household access is virtually identical to individual access in 2011, at 73%. 5% of individuals have had access in the past, a proportion that has remained stable since 2003.

Next generation users have increased steadily from 13% of the population in 2007 to 32% in 2011. This trend is much faster than the rise of users, so first generation users have declined. The decline of first generation users indicates a spreading interest in content creation, and a rising use of the Internet as more than just a source of information.

Internet Users in 2011

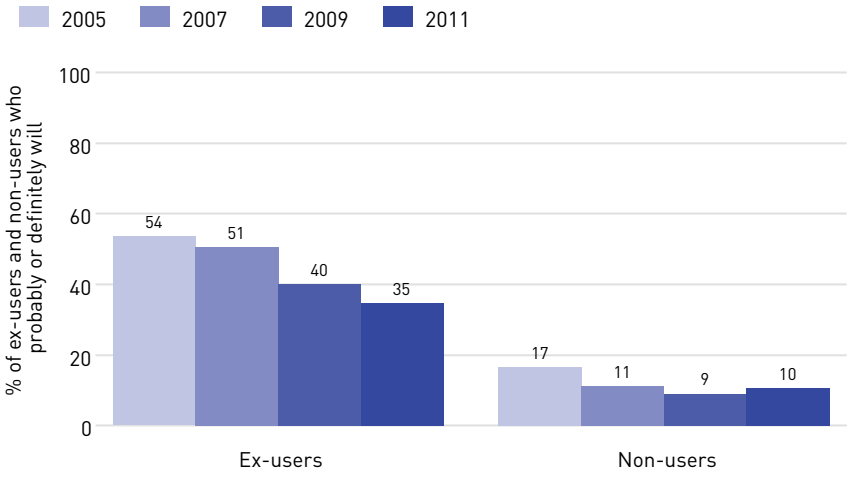


OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

"Are you planning to get access to the Internet in the next year or so?"

Ex-users (who have used the Internet before) are more likely than non-users (who have never used the Internet) to plan getting access in the next year: 35% of ex-users were planning to get access to the Internet in 2011 compared to 10% of non-users. For both non- and ex-users the likelihood of getting Internet access has dropped from 2005 to 2011, possibly because the rise of users is absorbing people who are most likely to migrate from the non-user to the user category. This illustrates the increasing challenge of getting the last quarter of the population online. An identical trend exists among households planning for future access.

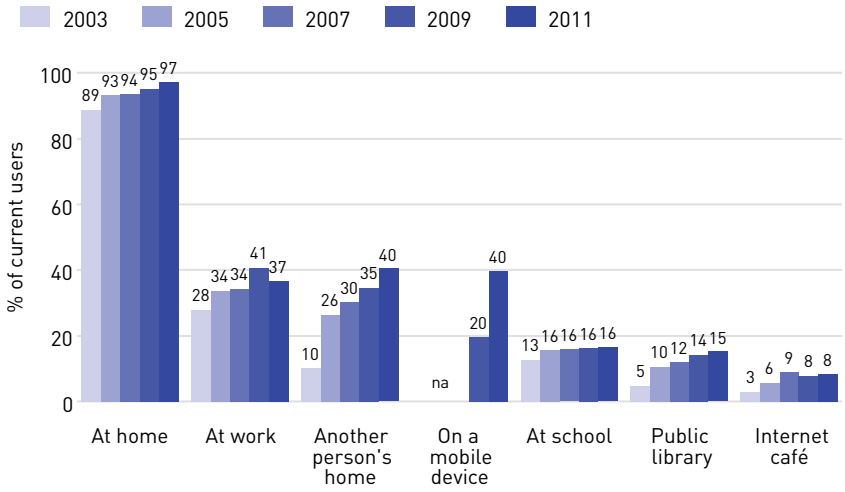
Likelihood that Ex-Users and Non-Users Will Get Internet Access (QE15 and QN8 by QH12)



Ex-users and non-users. OxIS 2005: N=876; OxIS 2007: N=772; OxIS 2009: N=612; OxIS 2011: N=559

I.B. Ubiquitous Access

Locations of Use (QC1)

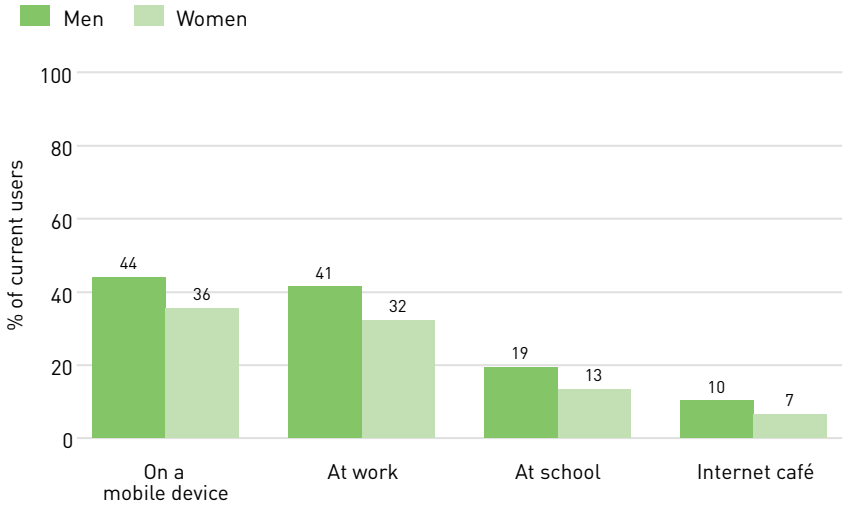


Current users. OxIS 2003: N=1,202; OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"Now, could I ask you about all the places where you access the Internet? Do you currently access the Internet...?"

While home access remains the primary way to access the Internet, other places such as schools, libraries and Internet cafés also remain important. With the exception of work access, all locations of use have remained stable or increased slightly compared to 2009. Most notable is the dramatic increase in the use of the Internet on the move, rising from 20% in 2009 to 40% in 2011.

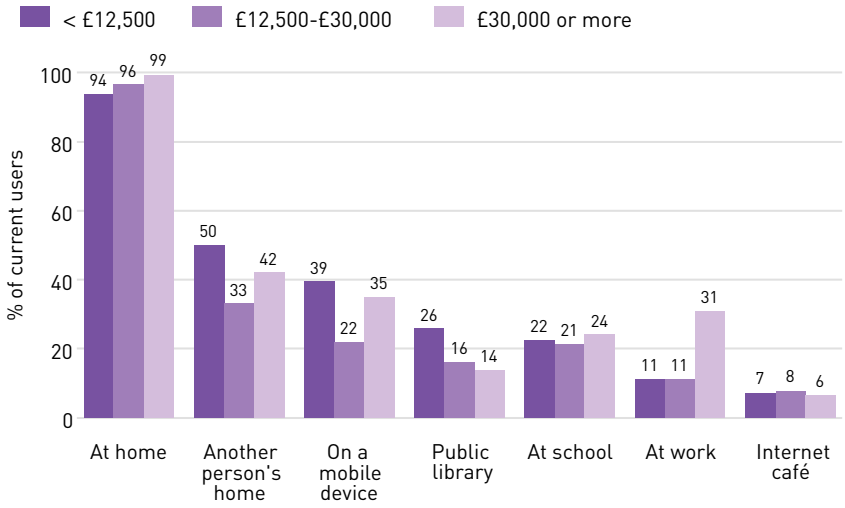
Locations of Use by Gender (QC1 by QD2)



Current users. OxIS 2011: N=1,498

Several access points are used differently by men and women. Men use the Internet more than women on mobile devices, at work, at school or university, and in Internet cafés. We omitted access points from this graphic because there were no gender differences: at home, at another person's home, and in public libraries.

Locations of Use by Household Income (QC1 by SC2)



Current users. OxIS 2011: N=1,498

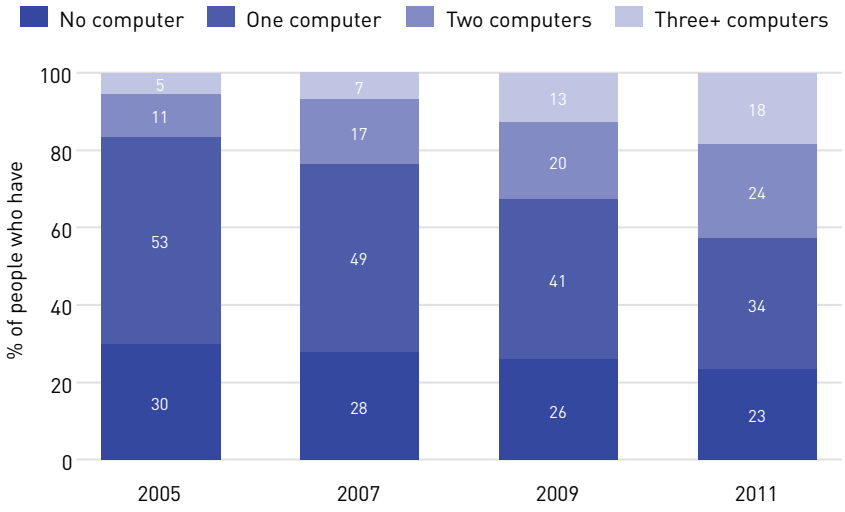
A different pattern of location of use emerges when looking at differences in income. Libraries, on mobile devices, and another person's home tend to be more important for people with lower incomes, whereas work and home access are more common among the higher income groups. Partially this would be expected as many students are part of the lower income groups, but use at another person's home and use on mobile devices show a different picture: they are more common among both lower and higher income categories.

I.C. Digital Households, Mobility & Changing Infrastructure

"Whether or not they are connected to the Internet, how many working computers are available for people to use in your household?"

Just as the locations of use have changed over time, the devices used to access the Internet have changed too: households have become more media-rich. One indicator is the increasing number of computers in the household. While only 16% of households had more than one computer in 2005, 42% of the population had more than one computer in the household in 2011, thereby allowing for more individual use. This rise is part of the growth in number of devices that defines the next generation user (see introduction).

Number of Computers in Household (QH7)

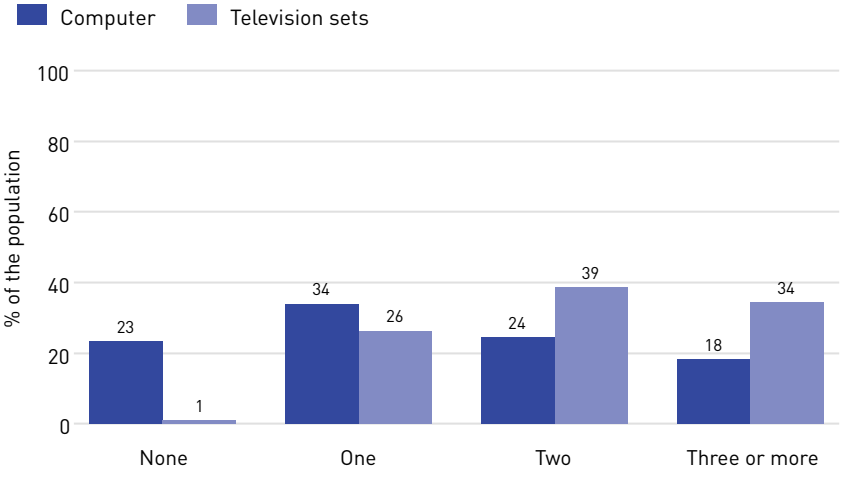


OxIS 2011: N=2,057

"How many television sets are there in this household?"

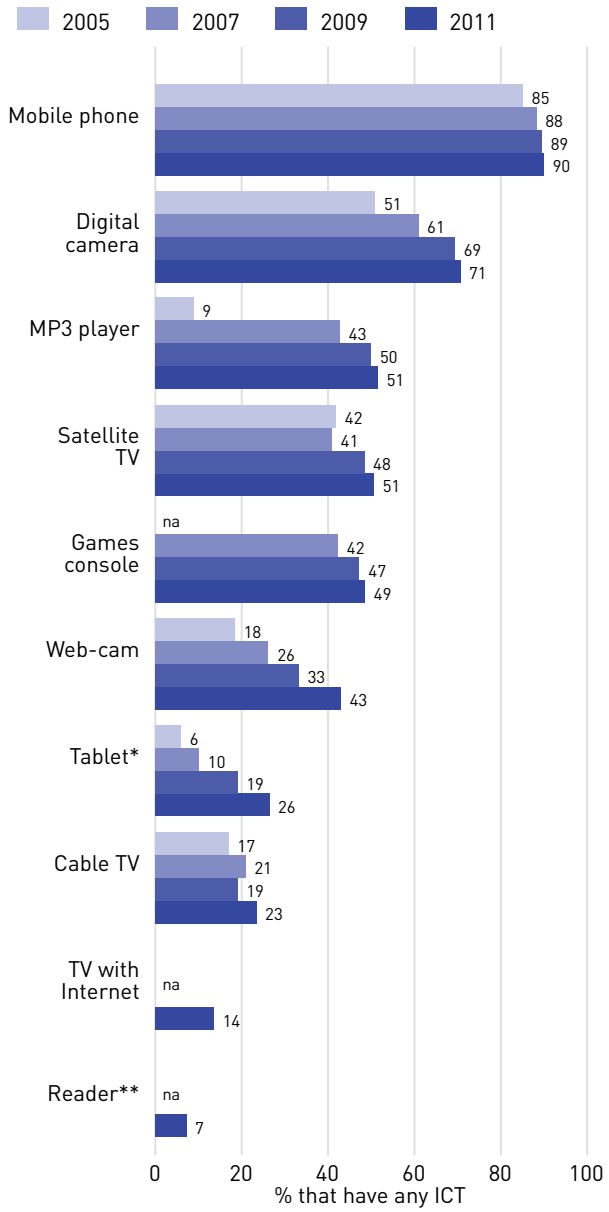
Despite rapid growth, the number of computers in the household has not reached the level of televisions: only 1% of households do not have a TV set in 2011, whereas 23% do not have a computer. Similarly, while 73% have two or more TV sets in the household, only 42% of households have two or more computers.

Computer and Television Access in the Household (QH7 and QH8)



OxIS 2011: N=2,057

ICTs in the Household (QH6 and QH10)



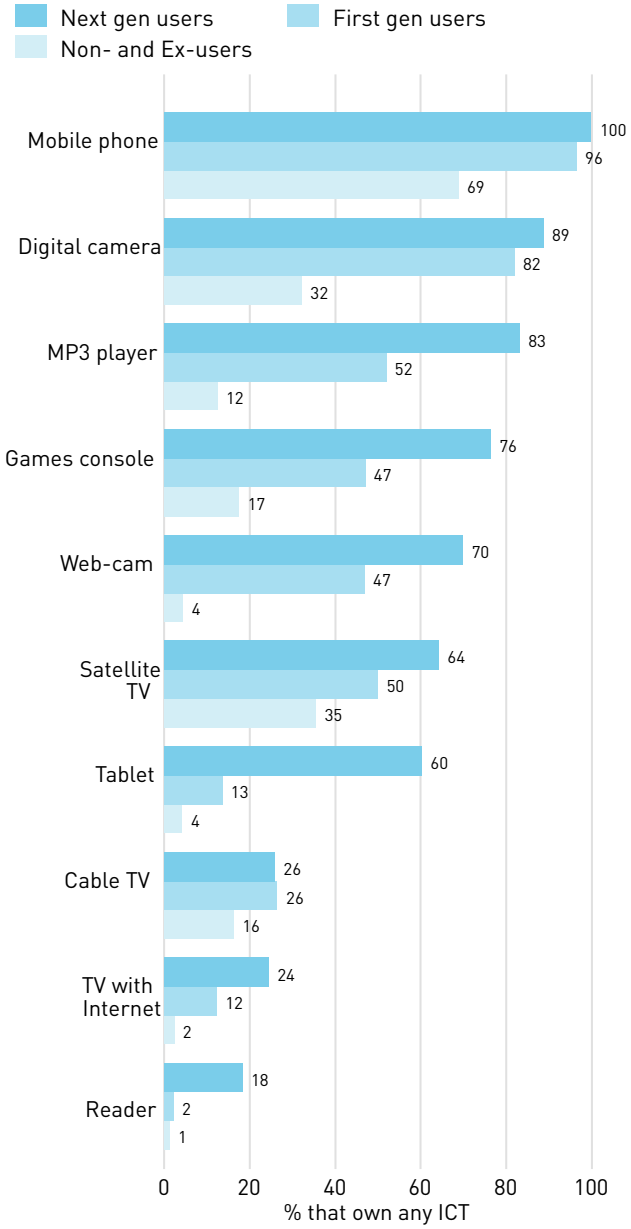
OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057
*Note: Called a 'PDA' prior to 2011.
**Note: TV with Internet and Reader asked in 2011 only.

"Can you tell me if your household has...?"

"Do you yourself have a mobile phone?"

British households are rapidly acquiring all sorts of digital devices. Almost all households have mobile phones (90%), and more than half have digital cameras (71%), MP3 players (51%) and satellite TV sets (51%).

ICTs by Internet Users and Non-Users (QH6 and QH10 by QH12)



OxIS 2011: N=2,057

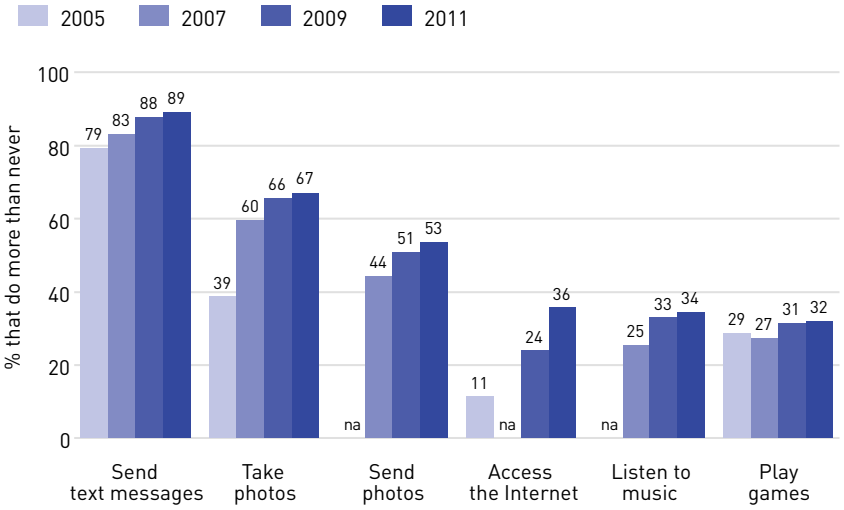
As in previous years, Internet users tend to live in more media-rich households than non-users. The difference is especially marked for devices connecting to a computer, such as digital cameras (85% vs 32%), MP3 players (66% vs 12%) or webcams (57% vs 4%). The difference is smaller for mobile phones (98% vs 69%) and TV-related equipment such as satellite TV (56% vs 35%) or cable TV (26% vs 16%).

Interestingly, next generation users do not differ greatly from first generation users in ownership of mobile phones (100% vs 96%), digital cameras (89% vs 82%) or cable TV (both 26%). Next generation users are far more likely to own MP3 players (83% vs 52%), games consoles (76% vs 47%), web-cams (70% to 47%), and they are twice as likely to own Internet-connected TVs (24% to 12%).

"How frequently do you use your mobile phone for...?"

The range of ICT use has increased. As the example of the mobile phone shows the use of both Internet- and non-Internet-related functions has increased steadily from 2005 to 2011. Especially strong growth is apparent for accessing email or the Internet: only 11% used their mobile phone to access the Internet in 2005 compared to 36% in 2011.

Use of Features on Mobile Phones (QH11)

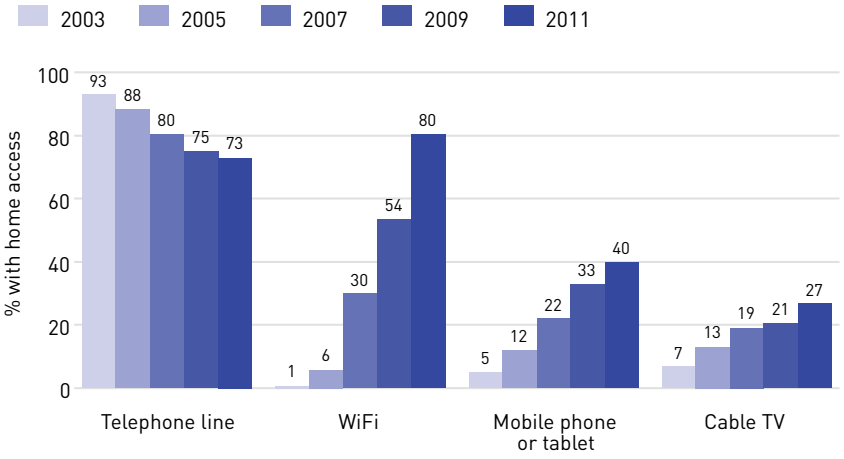


Mobile phone users. OxIS 2005: N=1,857; OxIS 2007: N=2,070; OxIS 2009: N=1,789; OxIS 2011: N=1,831

"In which of the following ways can members of your household get access to the Internet at home?"

As the increasing number of devices in the household and the different locations of use suggest, wireless connectivity has radically transformed the way people connect to the Internet. 80% of users access the Internet in the household with WiFi connections, and 40% via mobile phones. WiFi access now exceeds telephone line access, which has dropped to 73% in 2011. We are uncertain whether this drop is meaningful because we suspect that many respondents may not realize that WiFi is linked to cable or telephone lines. The key finding is the rise of wireless access in the household, enabled by cable and telephone links to WiFi. This facilitates portability and the use of multiple devices in the household.

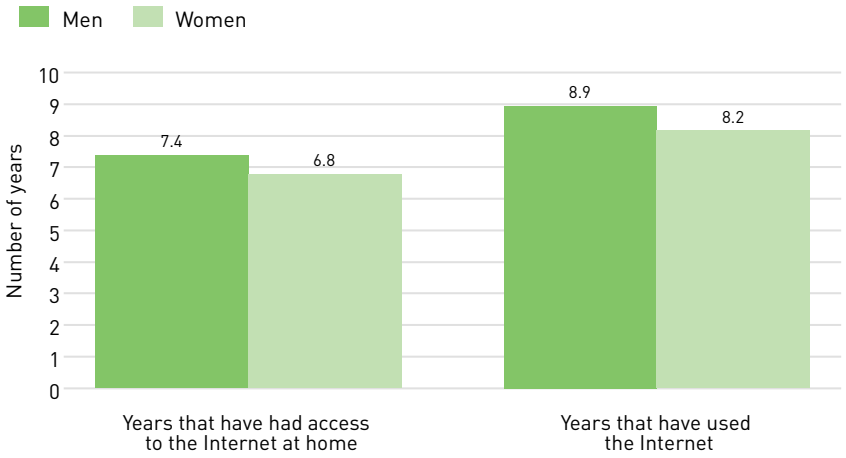
Different Types of Access in the Household (QH4, QH5 and QH6)



Households with home access. OxIS 2003: N=1,173; OxIS 2005: N=1,330; OxIS 2007: N=1,557; OxIS 2009: N=1,397; OxIS 2011: N=1,510

I.D. Experience

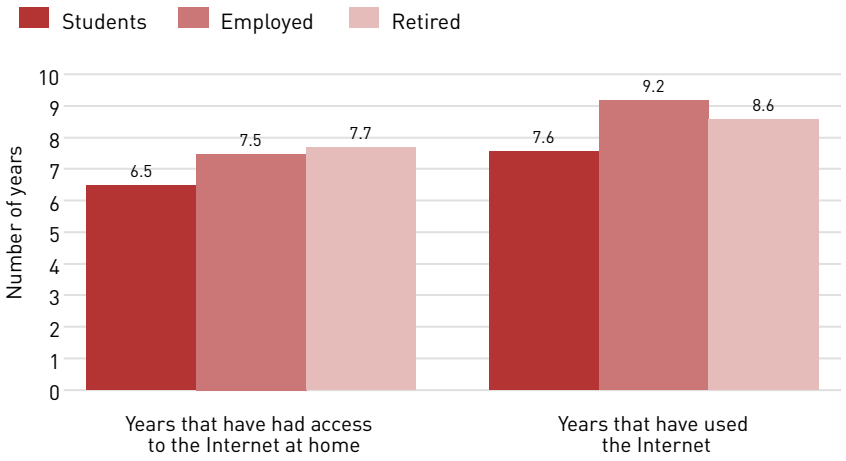
Access to and Use by Gender (QH3 and QC2 by QD2)



Households with home access. OxIS 2011: N=1,510
Current users. OxIS 2011: N=1,498

On average all current Internet users have used the Internet about 1.5 years longer than they have had it in their household. Men have more experience than women, both in the household (7.4 vs 6.8 years) and as individuals (8.9 vs 8.2 years).

Access to and Use by Lifestage (QH3 and QC2 by QO1)

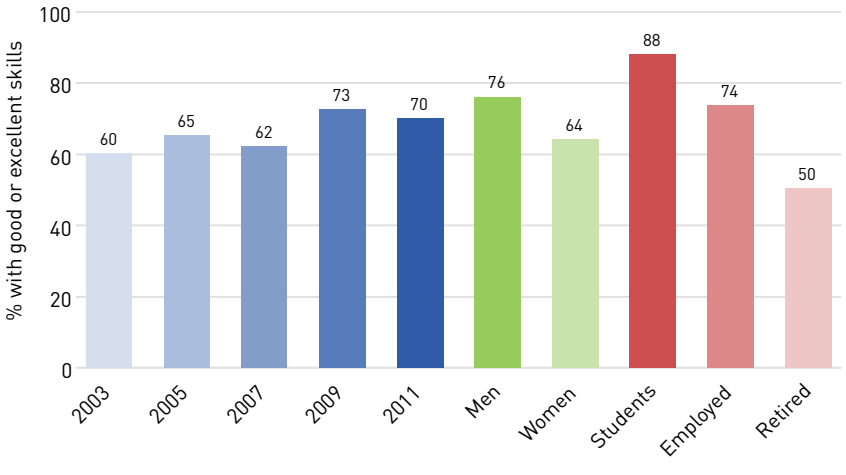


Households with home access. OxIS 2011: N=1,510
Current users. OxIS 2011: N=1,498

Looking at access to and use of the Internet by individuals at different stages of their lives shows that employed users do not differ considerably from others in terms of household access. Years of Internet use, however, shows that employed users have used the Internet the longest.

I.E. Skill and Expertise

Self-Rated Ability by Gender and Lifestage (QC5 by QD2 and QO1)



Current users. OxIS 2011: N=1,498

"How would you rate your ability to use the Internet?"

The percentage of Internet users with good or excellent self-rated Internet skills has increased from 60% in 2003 to 70% in 2011. However, self-rated ability still varies by gender and lifestage: men (76%) judge their ability higher than women (64%), and students (88%) are more confident of their skills than employed (74%), and much more confident than retired people (50%).

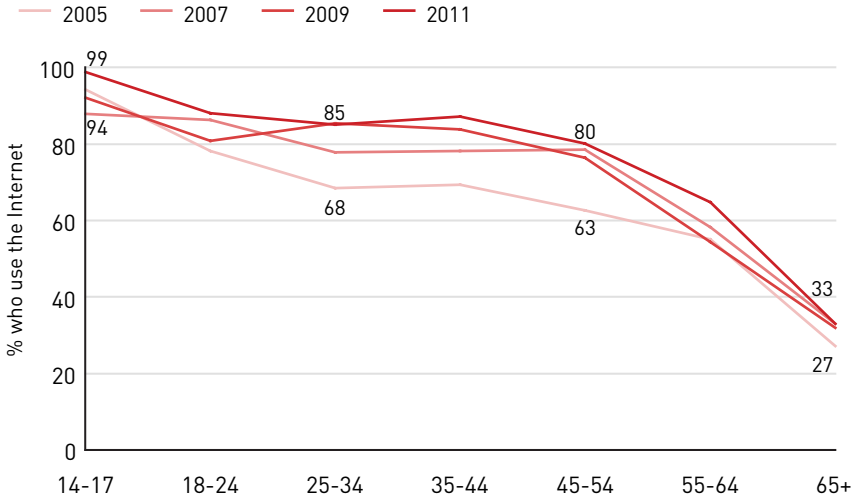
II. Characteristics and Attitudes of Internet Users

Behavioural trends among Internet users are broadly positive, with some major exceptions around digital divides. The overall gender divide has disappeared into the margin of error of the survey, although there remain gender differences in some specific areas. Age, education, occupation and income continue to divide users. The young, wealthy and well-educated continue to be the most engaged online. Work use of the Internet varies widely across different occupations from almost 100% to virtually zero. The elderly, the retired and the poorly educated tend to be least likely to use the Internet, and they are the most fearful of technology 'breaking' or 'failing' when they need it most. Over half of non-users express fears about the Internet or technology, making the digital divide very difficult to bridge. Next generation users are more positive and less negative on all dimensions.

II.A. Characteristics of Users and Non-users

All age groups, except the oldest, use the Internet more than they did in 2009. The increase is generally small and we see little change in the general pattern of use by age. As in previous years, younger people continue to use the Internet most. Usage is stable at about 85% for people in prime working years, age 25-55, before declining in older age groups. Among the oldest, age 65 and over, the level of use has not changed since 2005: it continues to hover between 25-35%.

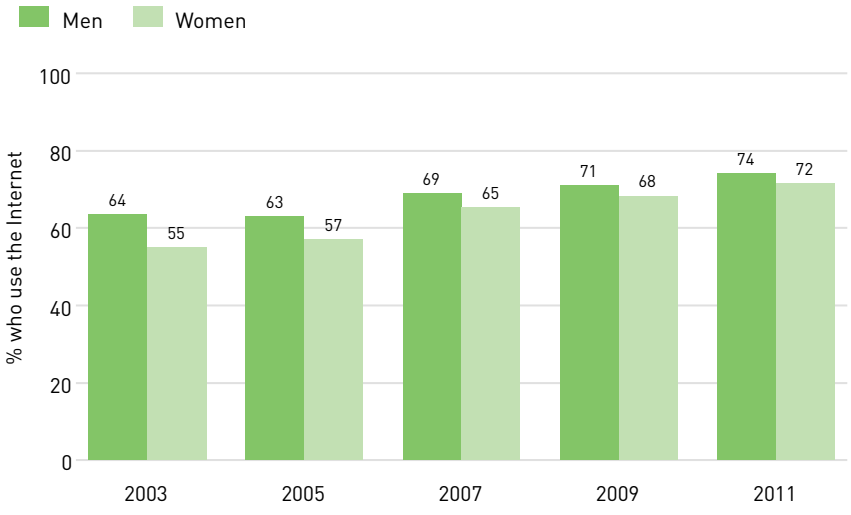
Use by Age (QH12 by QD1)



OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

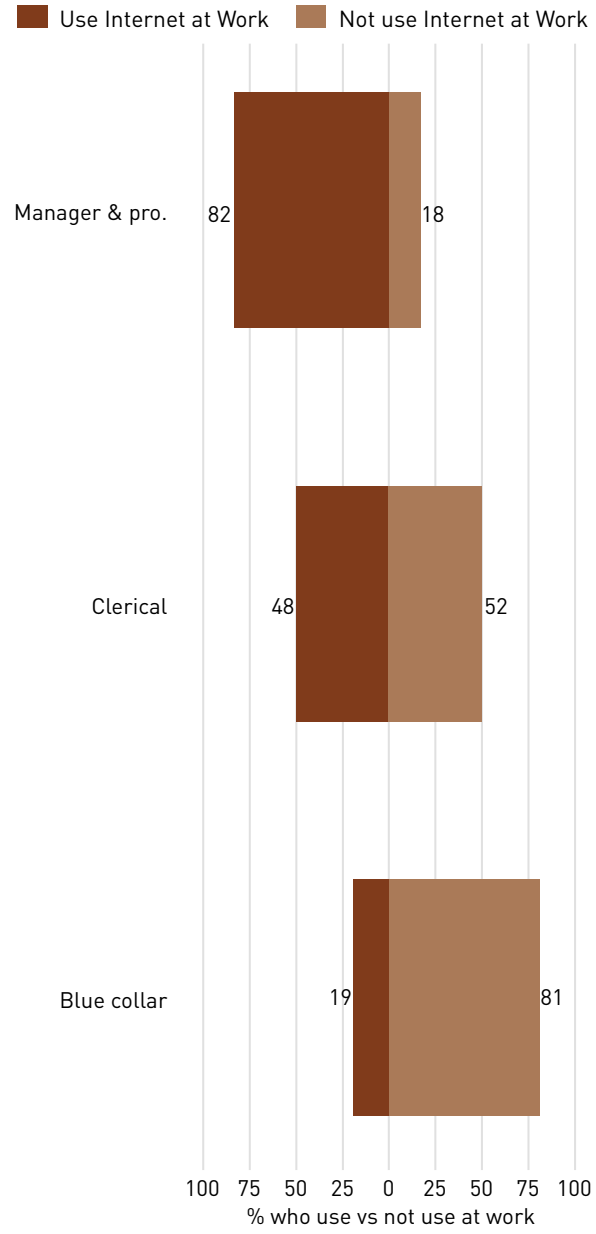
The gender divide that has been present in the data across all years continues to decrease, with men and women currently only separated by two percentage points: 74% of men and 72% of women use the Internet. This is within the margin of error of the data, so there is essentially no gender gap left in Britain with respect to mere adoption of the Internet.

Use by Gender (QH12 by QD2)



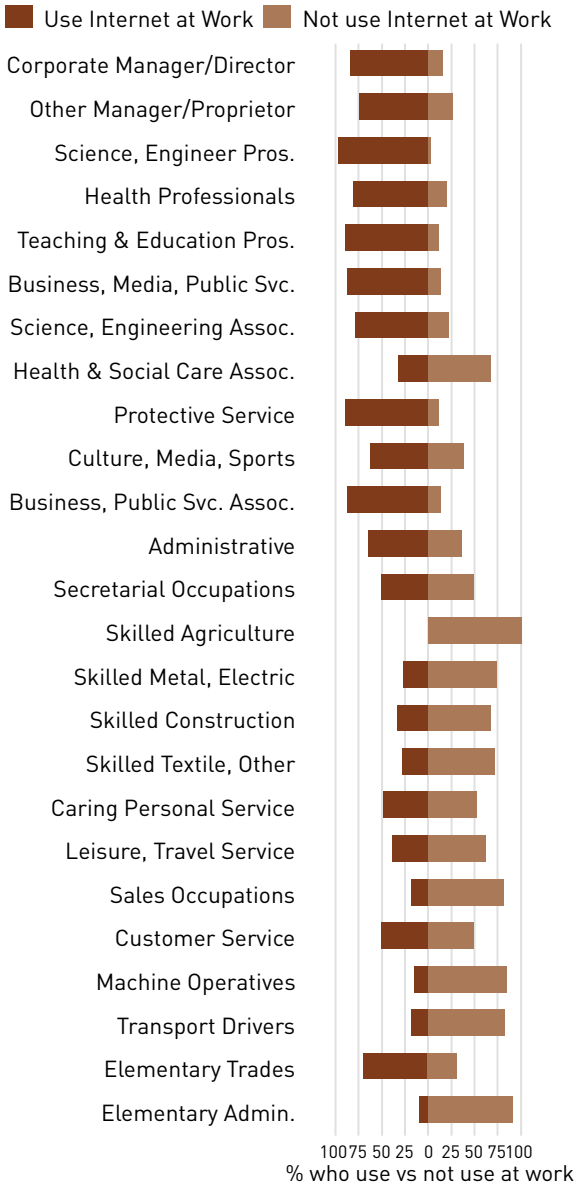
OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

Occupation by Internet Use at Work (QO4 by QO10)



Current users who work. OxIS 2011: N=875

Occupation Detail by Internet Use at Work (QO4 by QO10)



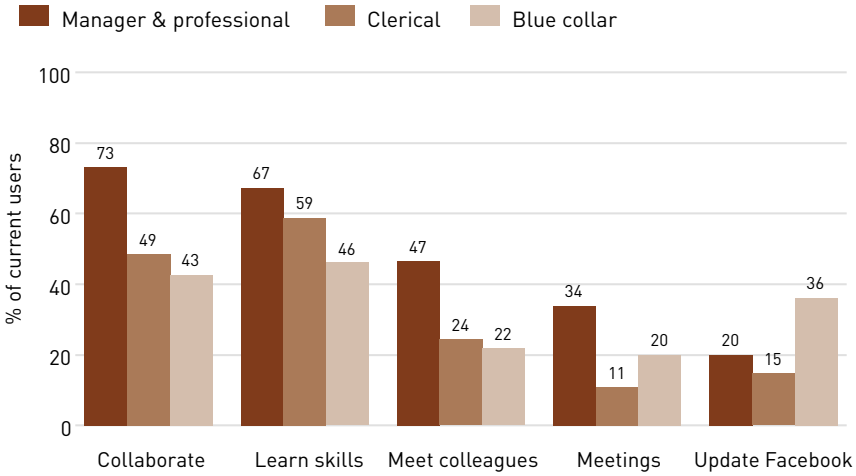
Current users who work. OxIS 2011: N=875
Categories are the two-digit codes from the Standard Occupation Classification 2010.

Occupation has a strong influence on use of the Internet at work. Each of the bars above total 100%, so they are the same length. Their relative position to the right or left shows the extent of work use of the Internet: the left side indicates work use, the right no use at work. The broad pattern shows that managers and professionals are far more likely than blue collar workers to use the Internet at work. Administrative and clerical workers are in-between, with about half reporting that they use the Internet at work.

The three broad categories in the previous graph reflect only the broad patterns of what is actually a great deal of diversity in occupational use of the Internet. The graph on the right shows the two-digit categories from the British Standard Occupational Classification 2010 (SOC2010). The order of the categories follows the SOC2010 to maintain the conceptual link to the classification. The general pattern is that occupants of white collar jobs at the top of the graph use the Internet more than the unskilled jobs at the bottom of the graph. But notice the jobs that don't fit: Health and Social Care Associates and Sales occupations are less likely to be Internet users. Respondents in Elementary (i.e. unskilled) Trades and Customer Service occupations are more likely to use the Internet than occupations near them. Surprisingly, no Skilled Agricultural worker respondents use the Internet. The striking note is the diversity of Internet use across occupations. Some occupations have virtually 100% Internet use (Science and Engineering Professionals, Teaching and Education Professionals) while in others Internet use is rare (Elementary (i.e. unskilled) Administration, Machine Operatives).

How is the Internet used at work? These data show that email and search predominate. Managers and professionals stand out in several categories. For instance, 73% of managers use the Internet to collaborate at work, compared with less than half of people in other occupations. Similarly, nearly half of managers and professionals use the Internet at work to meet colleagues, compared with about one-quarter of administrative and blue collar workers. The one category where blue collar workers represent the highest proportion of users is updating Facebook, with 36% of blue collar workers reporting updating Facebook, compared with 15% of administrative occupations and 20% of managers and professionals.

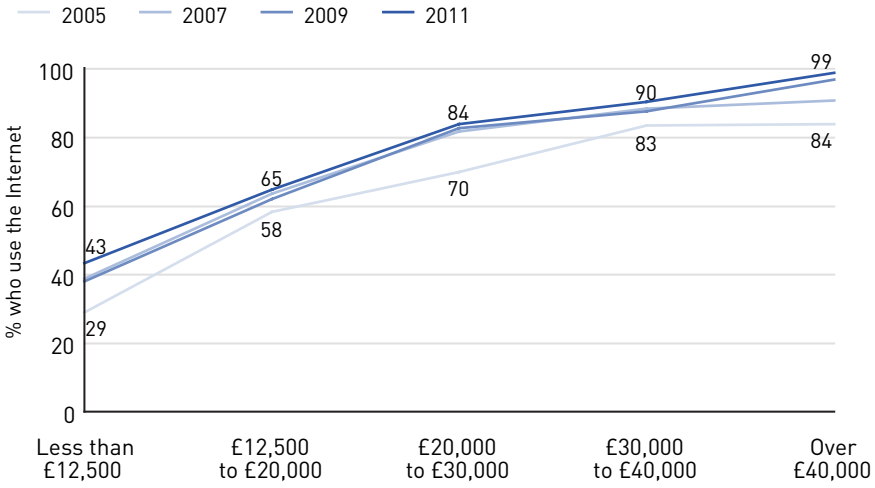
Work Activities by Occupation (QC13 and QC14 by QO10)



Current users who work. OxIS 2011: N=875

Consistent with previous years, people in the highest income category are more than twice as likely in 2011 to use the Internet than the lowest income category, by 99% versus 43%. Across all income groups, Internet use increased slightly between 2009 and 2011, with all groups showing a similar 2-3 percentage point increase.

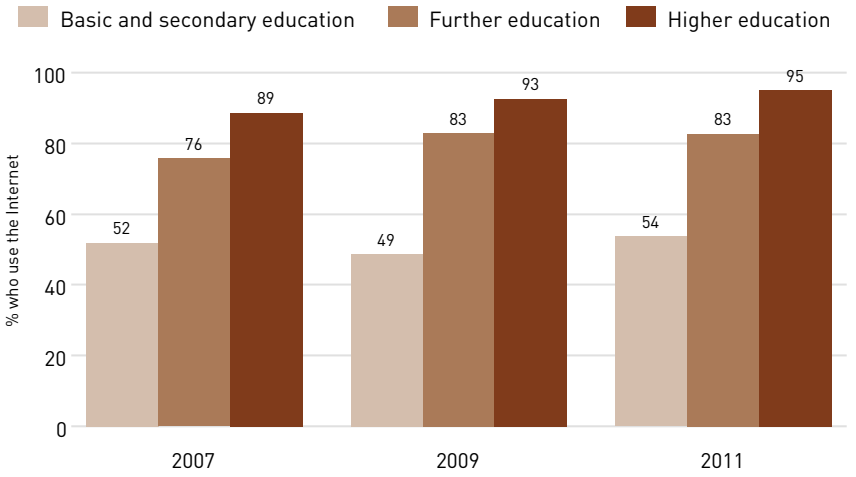
Use by Household Income (QH12 by SC2)



OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057
Note: The income scale changed in 2009.

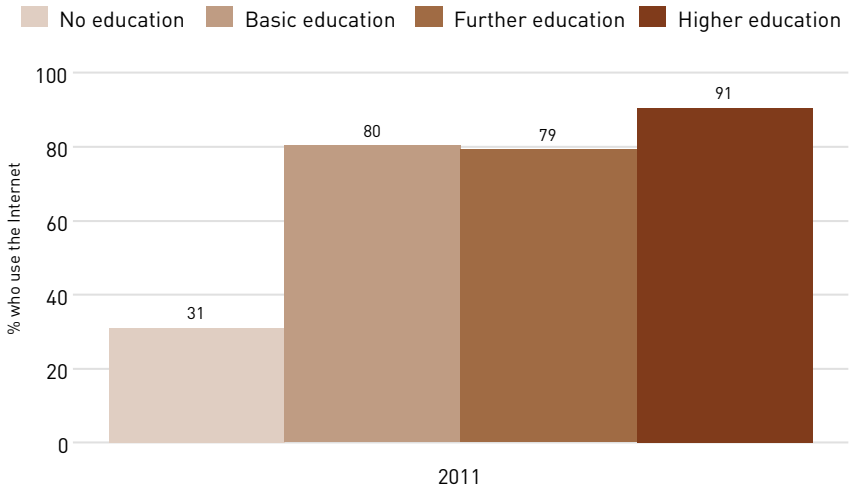
Increased education is strongly associated with increased likelihood of using the Internet. While the vast majority (95%) of those with a higher (university) education use the Internet, only about half (54%) of those with a basic or secondary school education use the Internet in 2011.

Use by Educational Institution (QH12 by QL2)



OxIS 2007: N=2,081; OxIS 2009: N=1,760; OxIS 2011: N=1,789
(Basic and Secondary: N=952; Further: N=445; Higher: N=392)
Note: Students were excluded.

Use by Educational Qualifications (QH12 by QL1)



OxIS 2011: N=1,869 (No qualifications: N=473; Basic: N=646; Further: N=283; Higher: N=467)
Note: Students were excluded.

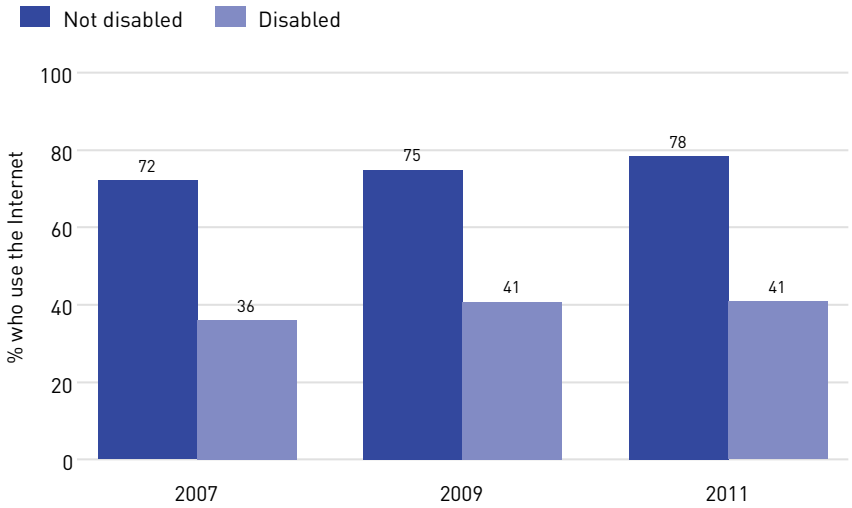
In the 2011 data, it is possible to separate those with no educational qualifications from those with a basic education, and we can see that the differences in the previous table narrow for those who have completed any level of education. Those with basic qualifications are just as likely (80%) to use the Internet as those who have completed further education (79%), and are only 11 percentage points less likely to use the Internet than those who have completed higher education (91%). Relatively few respondents with no qualifications use the Internet (31%).

Use by Lifestage (QH12 by QO1)

OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

As in previous years, retired respondents are the least likely to be Internet users, with 37% of retirees using the Internet, up slightly from 34% in 2009. Students are still the most likely to use the Internet: essentially every student uses the Internet. Employed respondents showed little change from 2009 to 2011. We see Internet use levelling off in all lifestage categories.

Disability and Internet Use (QH12 by QD16)



OxIS 2007: N=2,327; OxIS 2009: N=1,993; OxIS 2011: N=2,043 (Disabled: N=301; No disability: N=1,742)

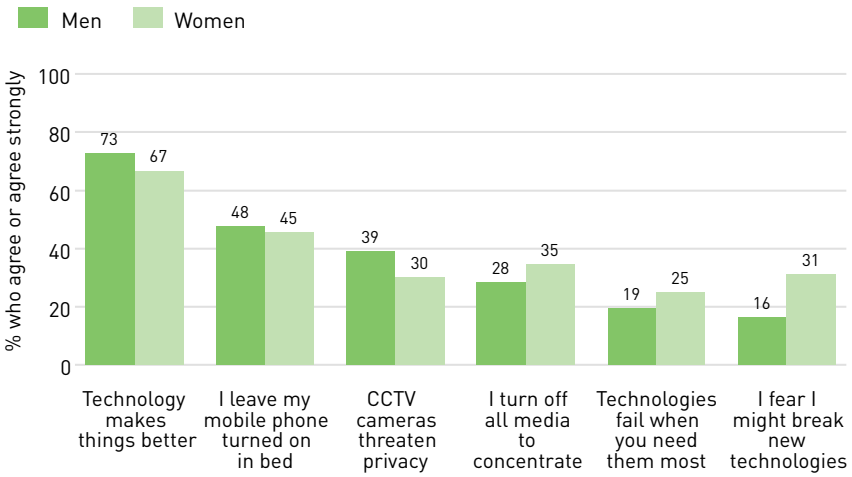
Disability, such as health-related problems, remains a key source of digital exclusion. Internet use by people with a disability remained steady from 2009 to 2011, at 41%, and is about half that of non-disabled (78%).

II.B. Attitudes Toward Technology and the Internet

Attitudes towards the Internet are generally positive among both men and women, with men slightly more positive than women: 73% of men and 67% of women feel that technology is "making things better". Conversely, distrust of technology is low: 19% of men and 25% of women believe that "technologies fail when you need them most".

Although there is no gender gap in use, there is a gender gap in attitudes. Women are somewhat less trusting and less positive. 31% of women say they are likely to "get nervous using technologies, because I might break something" compared to 16% of men, and men are more likely (39% versus 30% of women) to think that security cameras threaten personal privacy.

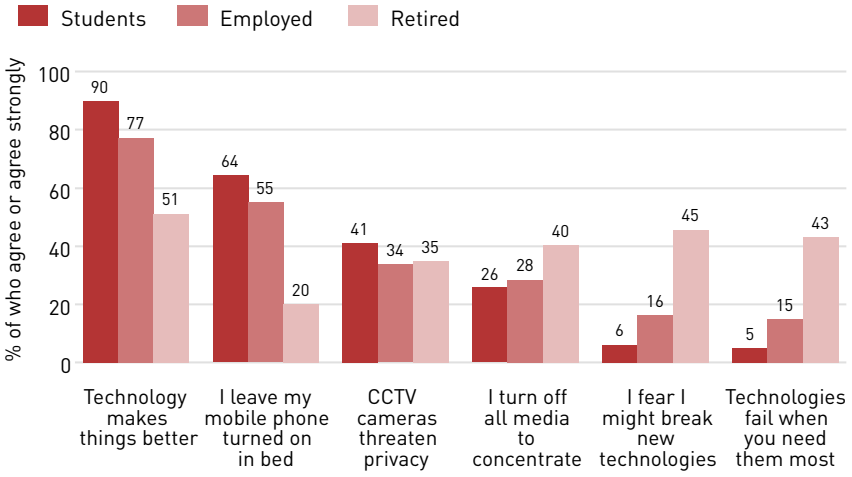
Technology Attitudes by Gender (QI1 and QB1 by QD2)



OxIS 2011: N=2,057

Retired respondents differ markedly from students and employed respondents in several of their attitudes toward technology. In particular, retirees are much more likely to get nervous about using technologies because they might break something (45%, compared to 16% of employed respondents and only 6% of students), that technologies cannot be trusted because they fail in times of need (43%, compared with 15% of employed respondents and 5% of students). While a majority (51%) of retirees agree that technology is making things better, this is considerably lower agreement than that expressed by employed respondents (77%) and students (90%).

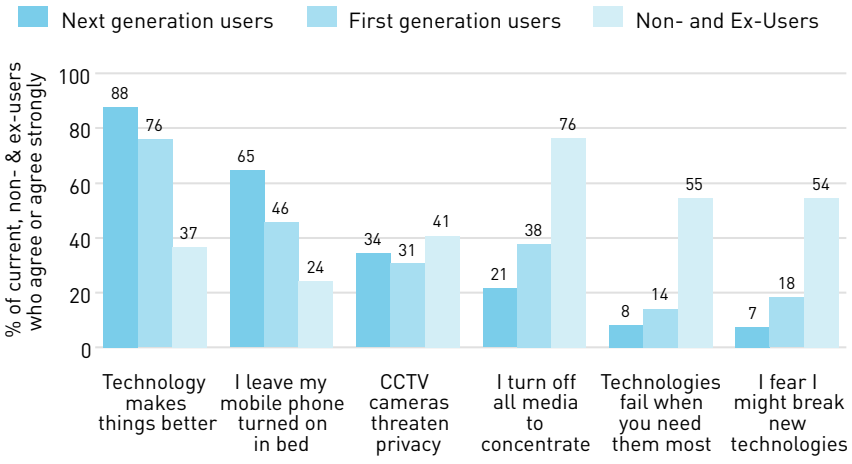
Technology Attitudes by Lifestage (QI1 and QB1 by Q01)



OxIS 2011: N=2,057

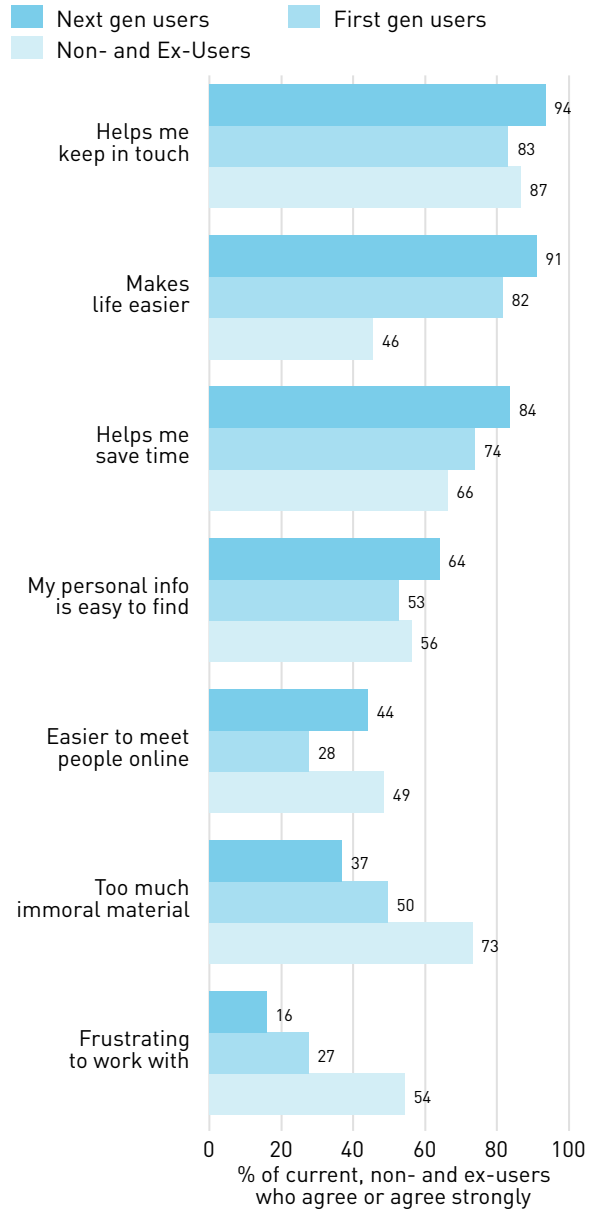
When comparing users and non-users (including ex-users) of the Internet regarding their general attitudes towards technology, we see some expected differences. Non-users are far less likely to think technology is making things better (37%, compared with 76% of ordinary users and 88% of next generation users), and far more likely to think that technologies can't be trusted because they fail in times of need (55%, compared to 14% of first generation users and 8% of next generation users). Compared to the other variables, there are only small differences in perceptions of CCTV security cameras: 31% to 41% believe they are a privacy threat.

Technology Attitudes by Users and Non-Users (QI1 and QB1 by QH12)



OxIS 2011: N=2,057
Note: Phrasing differed for current, ex- and non-users.

Attitudes of Users & Non-Users
(QI2, QC18, QE16 & QN9 by QH12)



OxIS 2011: N=2,057
Note: Phrasing differed for current, ex- and non-users.

On a number of topics, Internet users and non-users (including ex-users) share attitudes, although the areas of greatest difference suggest some of the reasons why the non-users may have decided not to use the Internet. Both groups (even non-users) agree that the Internet is an efficient way to find information, that the Internet helps people keep in touch (94% of NG users, 83% of FG users, and 87% of non-users), and that the Internet can help save time (84% of NG users, 74% of FG users and 66% of non-users). The biggest differences may indicate some of the reasons for non-use: non-users are far more likely to feel the Internet is frustrating (54%, compared to 27% of FG users and 16% of NG users), and that there is too much immoral material (73%, compared to 50% of FG users and 37% of NG users). Non-users are also far less likely to think the Internet makes life easier (46%, compared to 82% and 91% of FG and NG users).

Next generation users are more positive and less negative on all dimensions.

III. Use

Use of the Internet is increasing, but the really interesting finding is where it is increasing and where it seems to have stabilised. There are continuing differences in how different groups use the Internet. In 2011 we observed the first ever drop in search engine use. It is not a large drop, but we suspect it may be related to the growth of social networking: use of social networking sites represent the single largest increase in Internet use over the past two years, now reaching 60%. The popularity of social media is such an important development that we devote most of Section V to analysis of its implications.

Ease of finding information is one of the major reasons to go online, and people tend to turn to the Internet first when they are looking for information. Searching for news and local events information has increased the most compared to other things searched for since 2009. Employed people are the most likely to seek information on the Internet, compared to students or retired respondents.

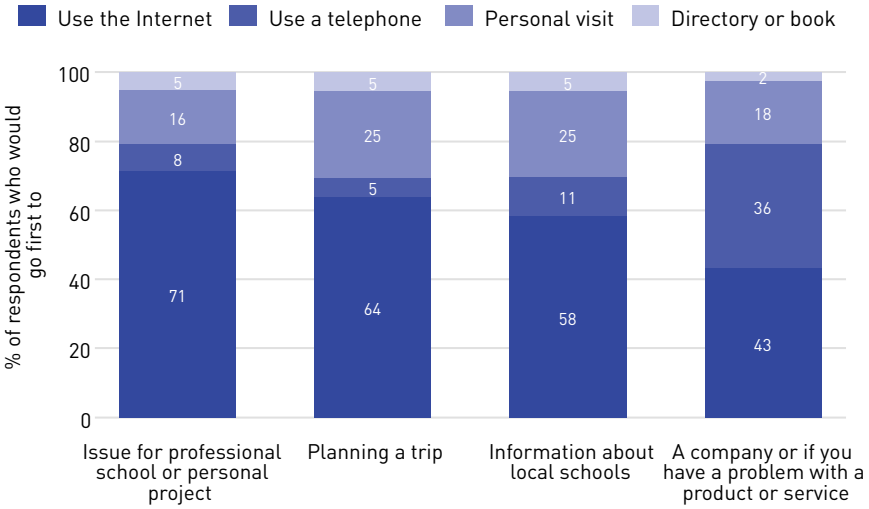
Entertainment uses of the Internet are common. In this area, we are seeing few changes since 2009: the proportion of respondents who use the Internet for entertainment seems stable. In contrast to information seeking, where employed respondents dominate, students are more likely than employed to use the Internet for entertainment. Interestingly, men are more likely than women to use the Internet for entertainment by margins of up to 15 percentage points.

Use of online services such as shopping or bill paying are becoming more common. The sole exception is investing in stocks and bonds online, which peaked in 2007 and continues to decline, perhaps an effect of the recession. As you might expect, employed people are the most likely to use all kinds of services, as are people with higher incomes.

Creative activities and production of content are generally increasing. This is one effect of the considerable simplification of production made possible by social media. More complex and difficult forms of content production such as blogs and personal websites seem to have stabilised at under 25% of the population. Students, with their large amounts of free time, are the largest producers of content.

III.A. Information Seeking

Looking for Information on Different Media (QA1)



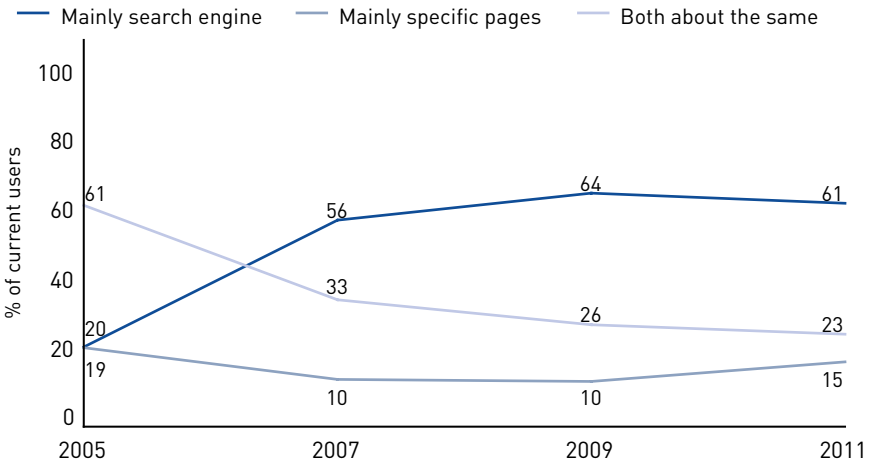
OxIS 2011: N=2,057

"Where would you go first, if you were looking for information on..."

People continue to turn first to the Internet when looking for professional and personal information. In 2011, they used the Internet first especially when looking for information on issues for a professional, school or personal project (66%), planning a trip (58%), seeking information about local schools (54%) or about a company (39%), although those with a problem with a product or service are as likely to phone a company as use the Internet.

The proportion of use of different media for information-seeking remained relatively consistent between 2009 and 2011: for example, when looking for information when planning a trip, use of a telephone decreased from 8% in 2009 to 7% in 2011 and a personal visit to find information about local schools changed from 28% to 27% from 2009 to 2011.

Ways to Look for Information Online (QC22)



Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498
Note: Question changed in 2007.

"In general, when you look for information on the Internet, do you go to specific pages, use a search engine, such as Google or Yahoo!, or do you do both about the same?"

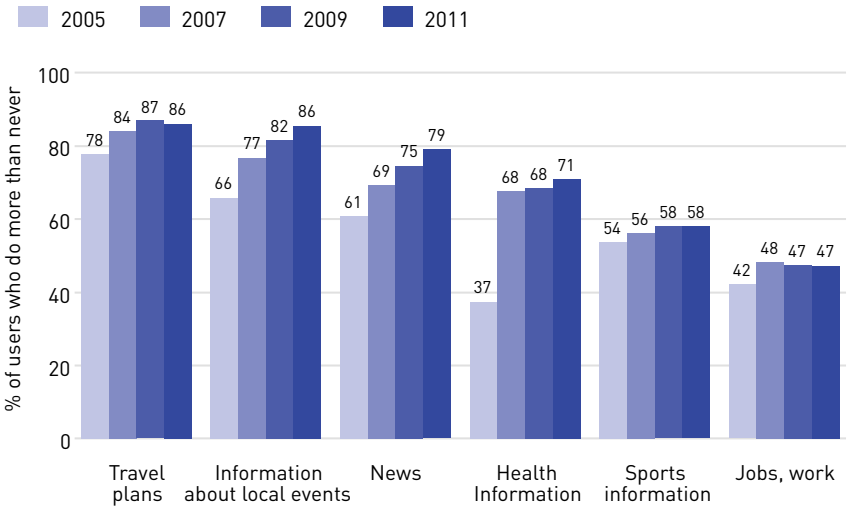
From 2009 to 2011 we saw the first decline in search engine use, a small drop from 64% to 61%. Nonetheless, Internet users in Britain started their information seeking with search engines: 23% reported they search engines about half of the time. Starting with a specific page increased to 15% in 2011, compared with 10% in 2009.

"How frequently do you use the Internet for the following purposes?"

Use of the Internet to find certain kinds of information continues to increase: looking for news increased the most (79% in 2011 vs 75% in 2009) followed by getting information about local events (86% in 2011 vs 82% in 2009). Search for health information rose modestly to 71% after a sharp rise in 2007 to 68%, when there was a major increase in looking for health information as compared with earlier years (37% in 2005). About half of the categories showed no increase, including making travel plans, looking for sports information and looking for a job.

The most popular types of information seeking online were making travel plans (86%) and getting local events information (86%).

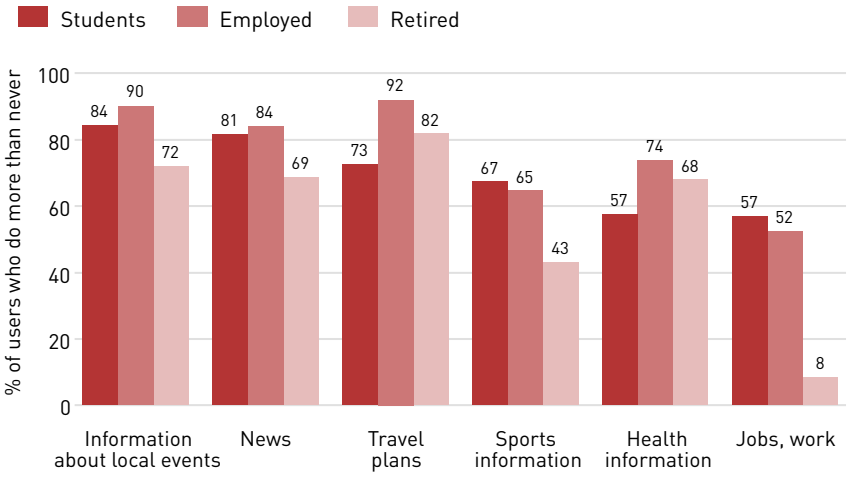
Information Seeking Online (QC19)



Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

Employed respondents tend to use the Internet most widely. They seek information more frequently on local events (90%), news (84%), travel (92%), and health (74%), although these are popular among all groups. Students continued to use the Internet more frequently than the other groups to look for jobs or work (57%). Retired users looked the least frequently for all types of information, with the exception of health information, which they were just as likely to do as employed people (68% vs 74% of employed) and more frequently than students (57%).

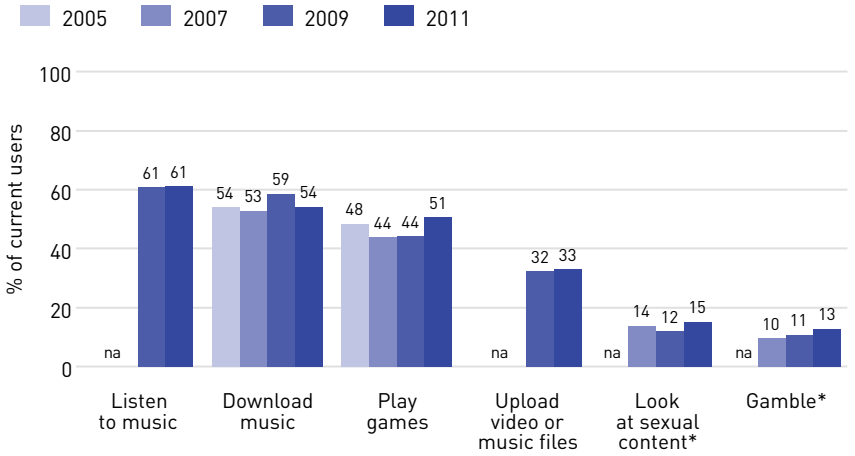
Information Seeking by Lifestage (QC19 by QO1)



Current users. OxIS 2011: N=1,498

III.B. Entertainment

Entertainment and Leisure Online (QC28 and SC6)

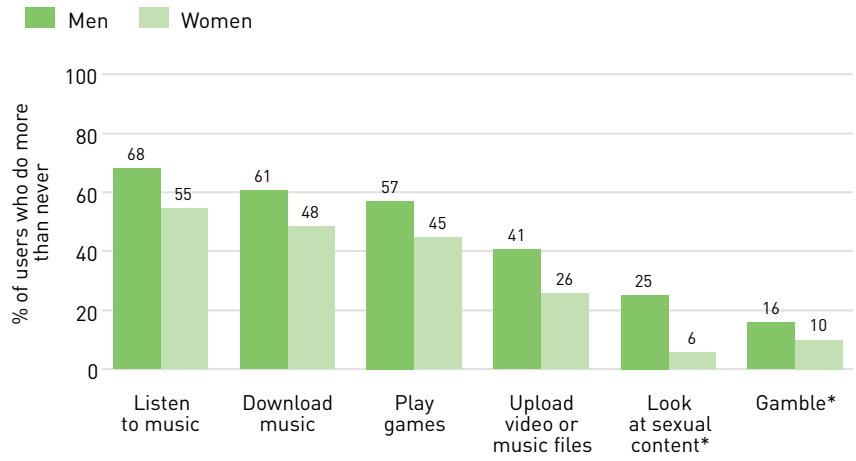


Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498
* In self-completion questionnaire in 2009 and 2011.

"How frequently do you use the Internet for the following purposes?"

Engagement in leisure and entertainment activities has remained relatively consistent since 2005. The most popular leisure and entertainment activities on the Internet in Britain continue to be listening to music (61%), downloading music (54%), and playing games (51%). The largest change in activities was in playing games: 44% in 2009 compared to 51% in 2011. The largest decrease was in downloading music (54% vs 59% in 2009), yet it remains popular. The least popular activities remain online gambling and viewing sexual content, with less than 15% of users saying that they engage in these activities.

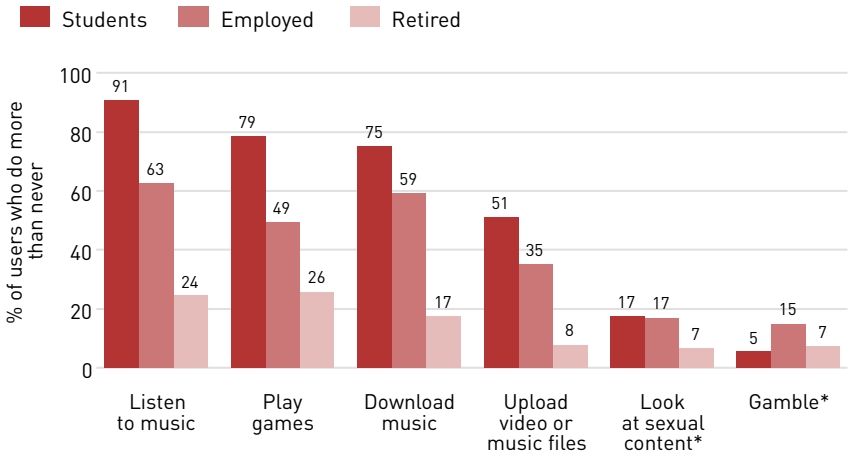
Entertainment and Leisure Online by Gender (QC28 and SC6 by QD2)



Current users. OxIS 2011: N=1,498
* In self-completion questionnaire.

Men are much more likely to use the Internet for entertainment and leisure activities than are women. This continues a gap observed in prior waves of the OxIS survey. The largest differences are looking at adult sites (25% men vs 6% women), and uploading videos or music (41% men vs 26% women) and playing games (57% men vs 45% women). The most frequent entertainment activities are music-related, followed by games and videos.

Entertainment and Leisure by Lifestage (QC28 and SC6 by QO1)

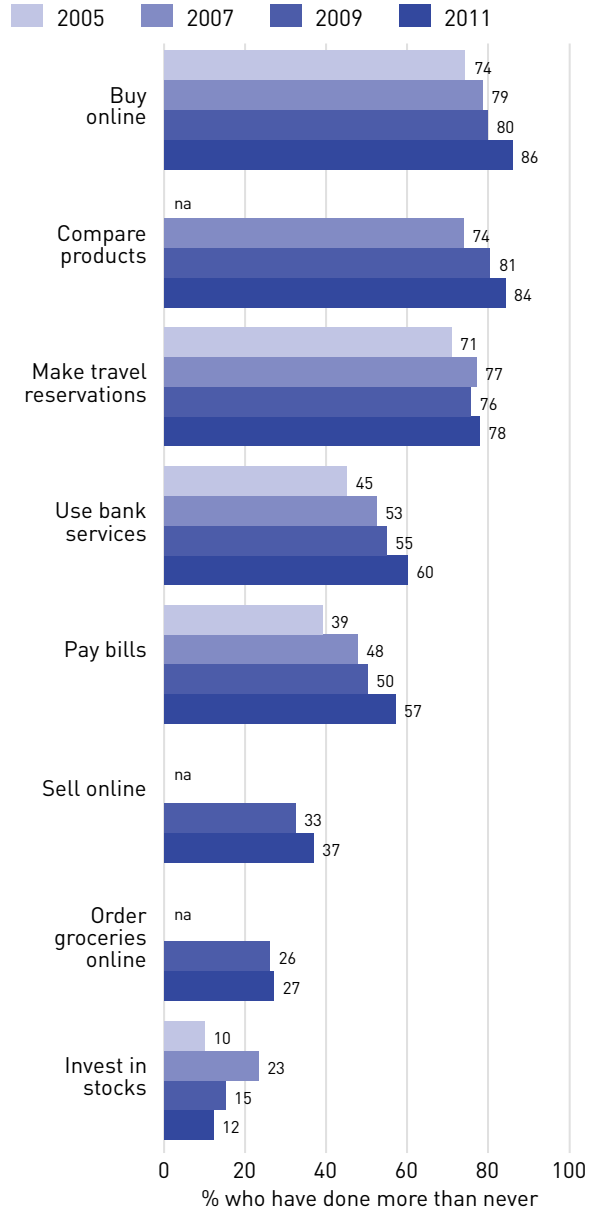


Current users. OxIS 2011: N=1,498
* In self-completion questionnaire.

Students most frequently participated in online entertainment and leisure activities. They were more likely to listen to music (91%), play games (79%), and download music (75%). Gambling increased among employed users, from 12% in 2009 to 15% in 2011, while it decreased among students (5% vs 8% in 2009) and retired users (7% vs 11% in 2009). With the exception of gambling (7%), retired users engage in fewer online entertainment and leisure activities than employed or student respondents.

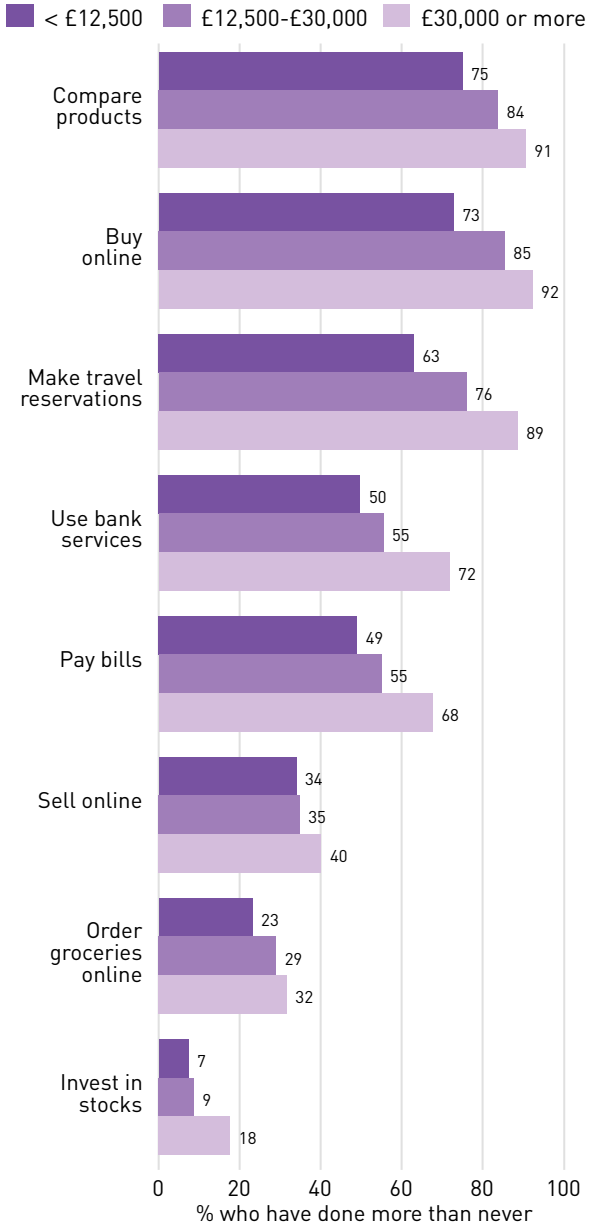
III.C. Online Services

Buying and Using Services Online (QC31)



Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

Buying and Using Services Online by Income (QC31 by SC2)



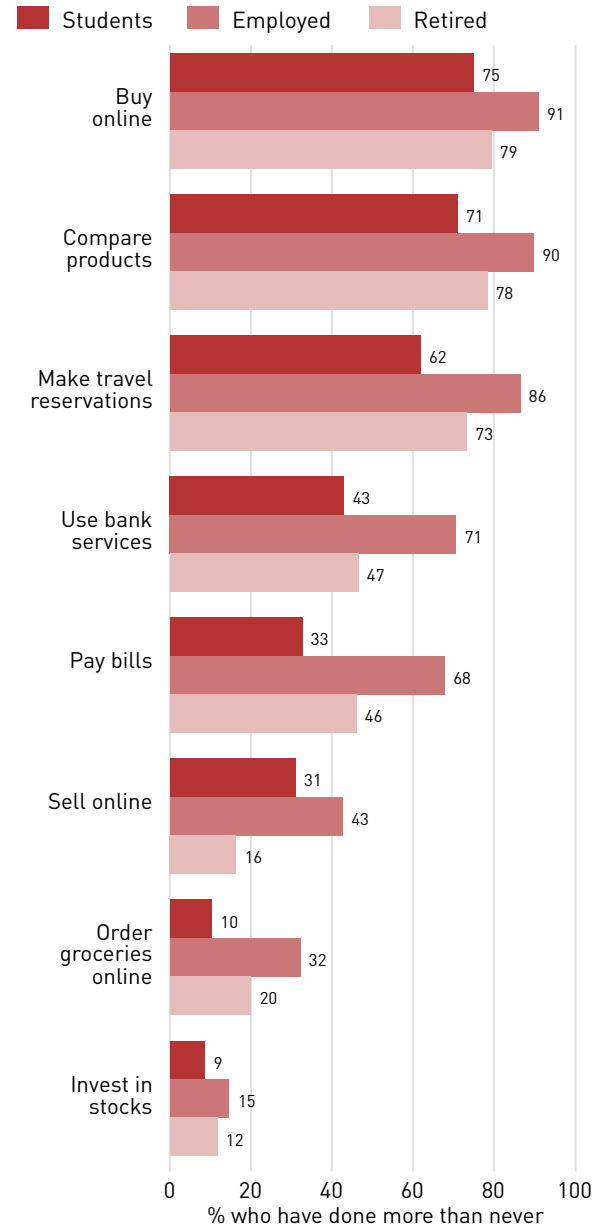
Current users. OxIS 2011: N=1,498

"Within the last year, how frequently have you used the Internet for the following purposes?"

Participation in personal finance and e-commerce activities increased gradually amongst Internet users. This increase was strongest for paying bills (57% vs 50% in 2009), and buying products online (86% vs 80% in 2009). Some activities stabilised since 2009: 27% ordered groceries (26% in 2009) and 37% sold things online (33% in 2009). Checking investments online decreased to 12% from a high of 23% in 2007, possibly one effect of the decline in the broader economy.

Those earning over £30,000 were the most active participants in e-commerce. They were especially likely to compare products and prices (91%), buy products (92%), sell items online (40%), use online banking services (72%), pay bills online (68%), and check investments (18%). Differences among income levels, with lower levels participating less in e-commerce, were consistent across activities.

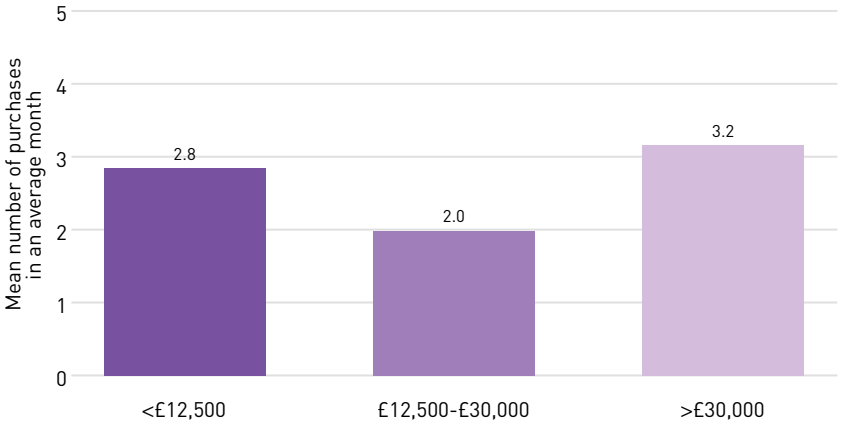
Buying and Using Services Online by Lifestage (QC31 by QO1)



Current users. OxIS 2011: N=1,498

The most common e-commerce activities are buying or comparing products, and making travel reservations: for all groups participation ranges from 62% to 91%. Users with the largest buying power, the employed, are always the most active participants in e-commerce. The percentage difference between employed, students, and retired people is largest for using online banking services (71% vs 43% and 47%), paying bills online (68% vs 33% and 46%), and ordering groceries (32% vs 10% and 20%). Retired people are more likely than students to order food online (20% vs 10%).

Buying and Using Services Online by Income (QC31 by SC2)



Current users. OxIS 2011: N=1,498

"In an average month, how many times do you purchase products or services over the Internet? Do not include payments for your Internet connection or bill payments for non-Internet services like gas or phone."

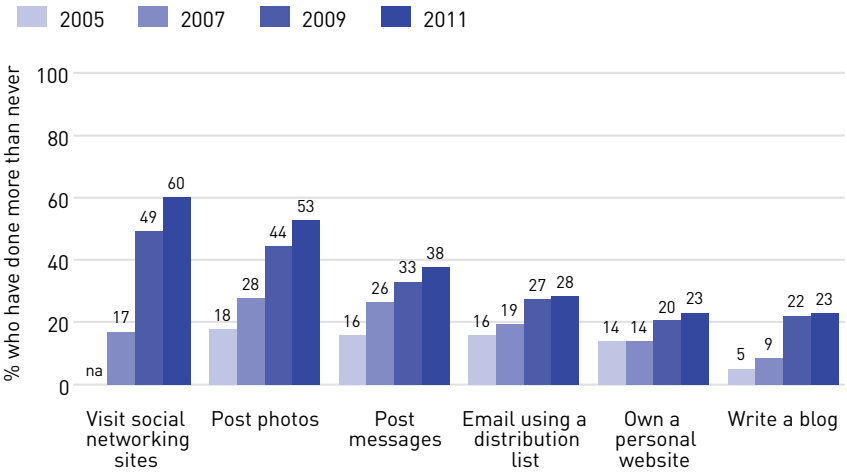
Users in households earning less than £12,500 per year make more online purchases per month (av=2.8), than those earning between £12,500 and £30,000 (av=2.0). Users in households earning more than £30,000 per year made an average of 3.2 purchases over the Internet in an average month.

III.D. Creativity and Production

"How often do you use the Internet for the following purposes?"

60% of all Internet users in Britain participate in social networks, a major increase from 49% in 2009 and 17% in 2007. Posting photos also significantly increased, from 44% in 2009 to 53% in 2011. More established communicative uses of the Internet appear to be stabilizing after growing between 2007 and 2009, such as using distribution lists for emails (28%), writing a blog (23%), and maintaining a personal website (23%). The lower percentages for established communication forms also indicate the strong attraction for online social networking, which has some capabilities that previously required a personal website or blog.

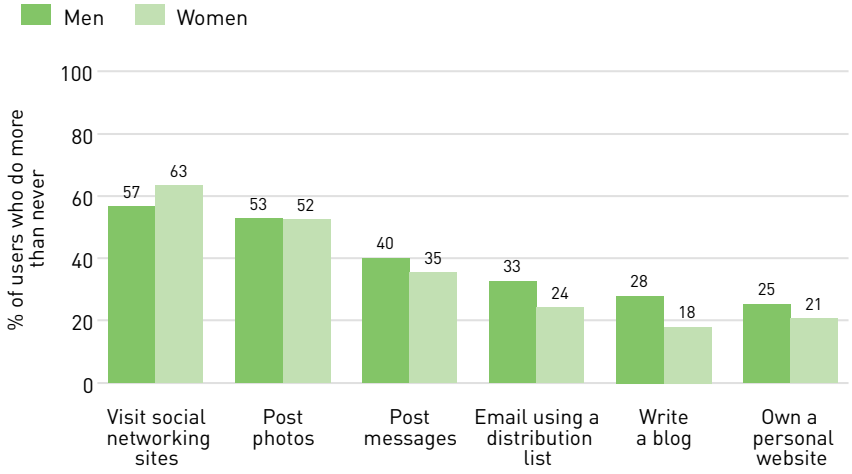
Creativity and Production Online by Year (QC9 and QC28)



Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

In 2011, women (63%) surpassed men (57%) in social networking use. Men undertook other online communication activities more frequently than women, especially writing a blog; 28% of men and 18% of women report blogging.

Creativity and Production Online by Gender (QC9 and QC28 by QD2)



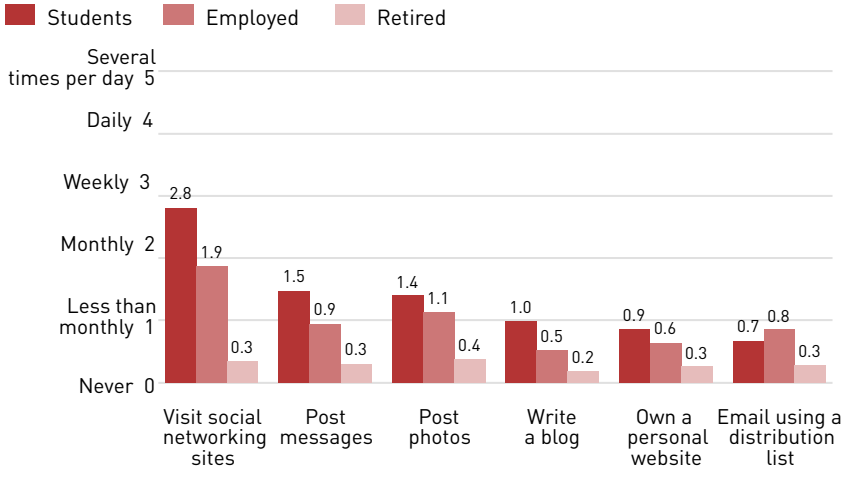
Current users. OxIS 2011: N=1,498

Students were the most frequent producers of online content. On average, they posted messages on discussion boards (av=1.5) and uploaded photos (av=1.4) less than monthly. Most students worked on their social networking sites on a weekly basis (av=2.8).

Employed users were less likely than students to undertake most creative activities. Like students, their most popular activities were social networking (av=1.9), posting pictures (av=1.1) and posting messages (av=0.9).

Retired people were the least frequent producers of online content. On average, they were least likely to ever produce content; only a tenth of them wrote a blog (av=0.2), posted pictures (av=0.4) or visited social networking sites (av=0.3).

Creativity and Production Online by Lifestage (QC9 and QC28 by QO1)



Current users. OxIS 2011: N=1,498

IV. Government and Politics

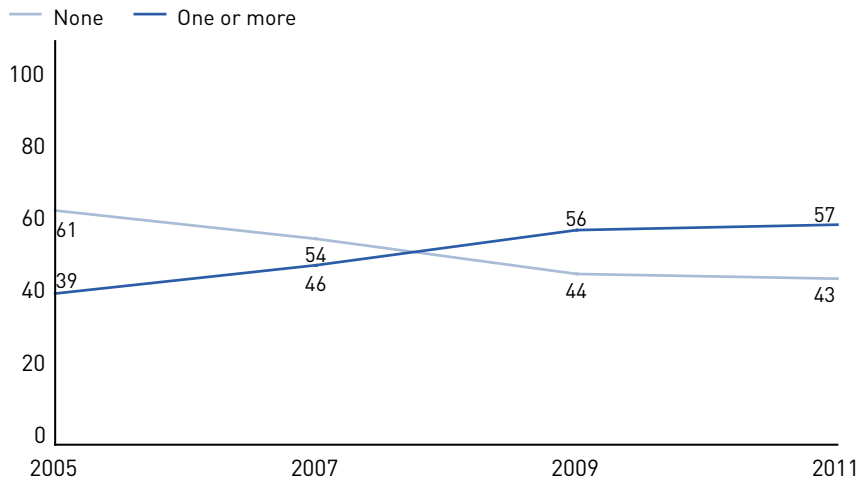
Use of the Internet is positively associated with involvement in politics and government, but there are many nuances. Use of online government services overall has been increasing since 2005, but use of specific services is remarkably low. Despite recent attempts to encourage online payment of fees and taxes, for example, less than one-quarter of respondents have done so in the past year.

Political participation is not a common activity: the highest participation is about 20% for signing a petition, and that was offline. Online participation is lower. There seems to be some shift from offline to online participation but offline participation remains more common across all income categories, although the gap has been narrowing for higher income groups. Political efficacy—the belief that your personal efforts can influence politics—influences participation, and it is positively associated with Internet use. This relationship of political efficacy to online and offline participation is well known and supported by a wide variety of studies. Only at the highest levels of political efficacy does online participation outpace offline participation. The national election in the Spring of 2010 seems to have had no measurable effect on online political participation, although Twitter and Facebook played significant roles in complementing coverage of Britain's first televised debates.

Next generation users are more involved in politics than other users, but the differences are small. Despite the abundance of devices available to them, they have not used them for political or civic purposes: this is not an area that distinguishes next generation users from other Internet users.

IV.A. Use of Government Services

Use of Online Government Services by Year (QC34)



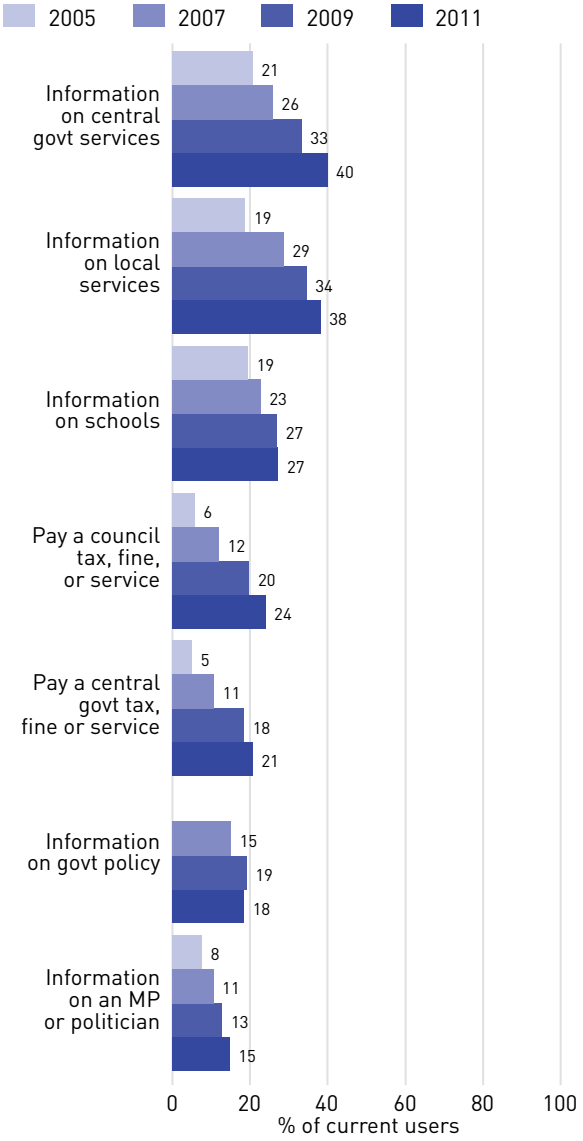
Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"Talking now about government information and services, have you done any of the following in the past year?"

Use of government services online has been rising steadily since 2005, with the greatest jump between 2007 and 2009, when the proportion of Internet users who had used at least one service online rose by 10 percentage points. From 2009 to 2011 there was no change, with a resilient 43% of users reporting no use of government online services, even information seeking, in the past year.

Online use of government services increased uniformly from 2009 to 2011. The biggest increase in use is for getting information about central government services, which has risen by seven percentage points to 40%, followed by obtaining information about or making payments for local government services, both of which rose by four percentage points. Despite recent attempts to encourage more people to pay government fees or taxes online, only 24% report doing so for local councils and only 21% for central government. An exception to the general pattern of increases is using the Internet to get information about government policy, which actually fell by one percentage point, possibly reflecting the lack of policy information on the heavily centralised and service-oriented portal, www.direct.gov.uk.

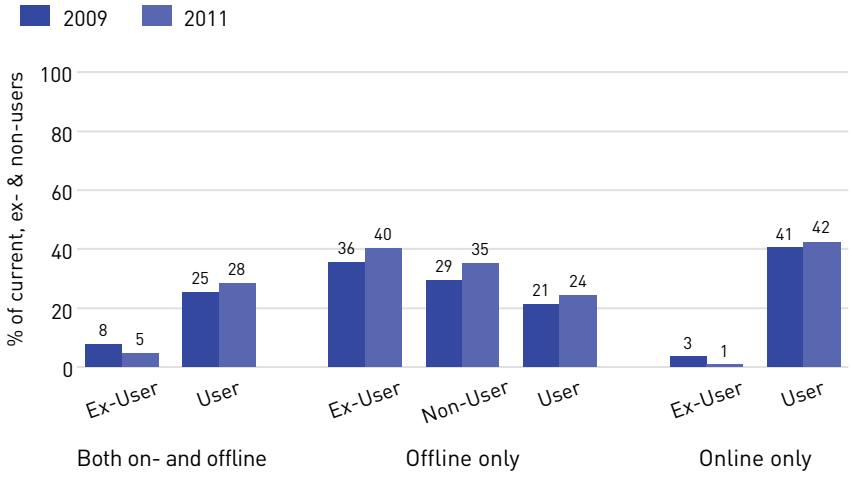
Detailed Use of Online Government Services (QC34)



Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

The majority of Internet users (71%) deal with government online, with 43% reporting having used online services exclusively. As might be expected, the majority of ex-users who have used government services report doing so offline (40%), and in fact a greater percentage than in 2009 (36%), possibly reflecting the smaller 'core' of non-users who remain resistant to using the Internet. By comparison, 35% of non-users report using government services, so Internet users are much heavier consumers of government services.

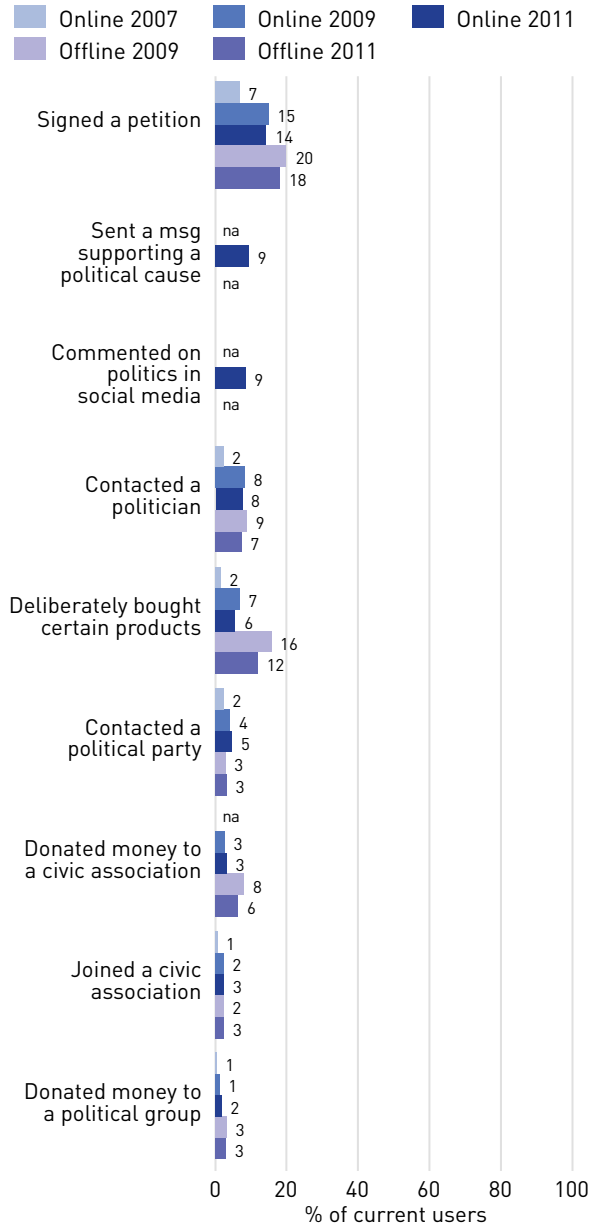
Use of Government Services by Users and Non-Users (QC34 and QE18 by QH12)



OxIS 2011: N=2,057

IV.B. Political Participation

Civic Participation by Year
(QP2 by QH12)



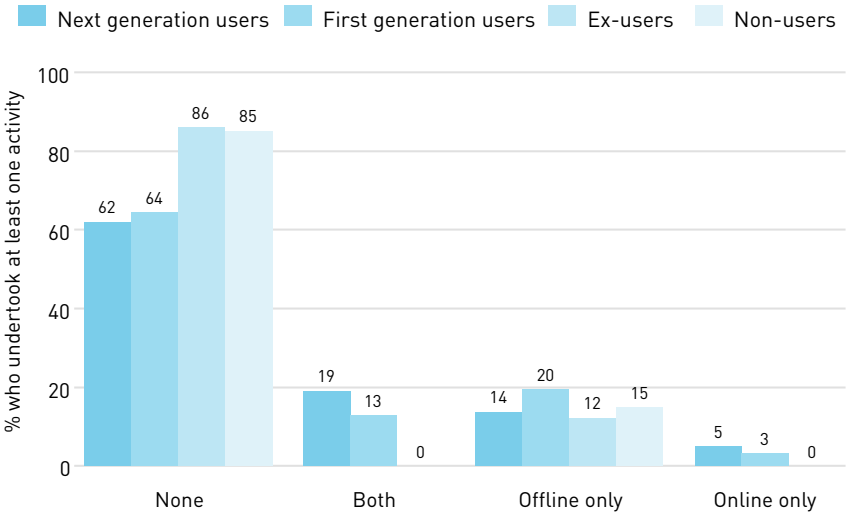
Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"There are different ways of trying to improve government or help prevent things from going wrong. In the last year, have you done any of the following?"

The most frequent online activity continues to be signing a petition; 14% of Internet users signed an online petition in 2011, similar to 2009, and 18% did so offline (down two percentage points on 2009). These figures suggest a steady shift from offline to online participation; most offline activities have declined on the 2009 figures (particularly the deliberate buying of certain products for political reasons, which is down by four percentage points) and the others have stayed constant. Meanwhile, two new online political activities appear: 9% report having sent an electronic message supporting a political cause, and 9% report commenting on politics in new social media, such as a blog, twitter or a social networking site. For Internet users then, these activities have jumped to the second most frequent form of political participation. A final notable point is the low level of participation in the political process despite the national election held in the past year.

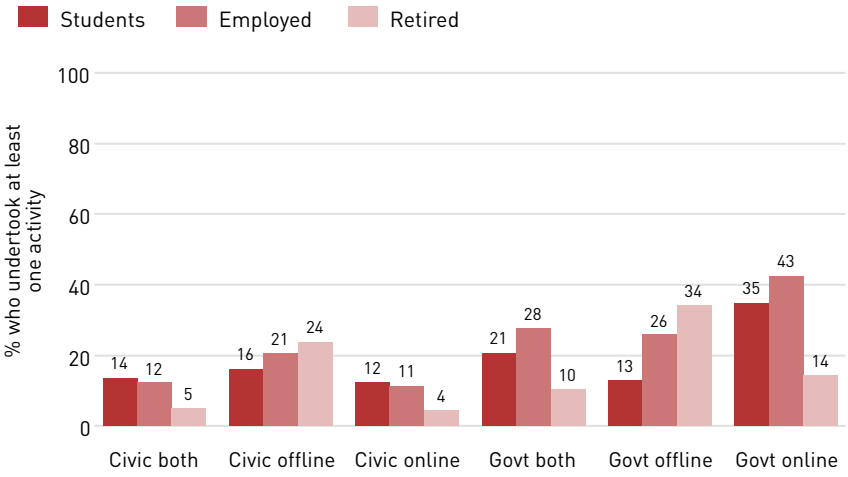
"Civic" activity refers to participation in non-political associations such as sports clubs. About one fifth of Internet users undertook at least one civic action on the Internet, about the same as those who acted only offline (14% next generation users and 20% first generation users). Both numbers are dwarfed by the over 60% of users who participated in no civic activity at all. Users are far more likely to participate than non-users and ex-users, of whom 85% have not participated at all. Next generation users are slightly more likely to participate in online civic activities, but the largest difference is six percentage points, which is not small given the overall low levels.

Civic Activities Offline and Online (QP2)



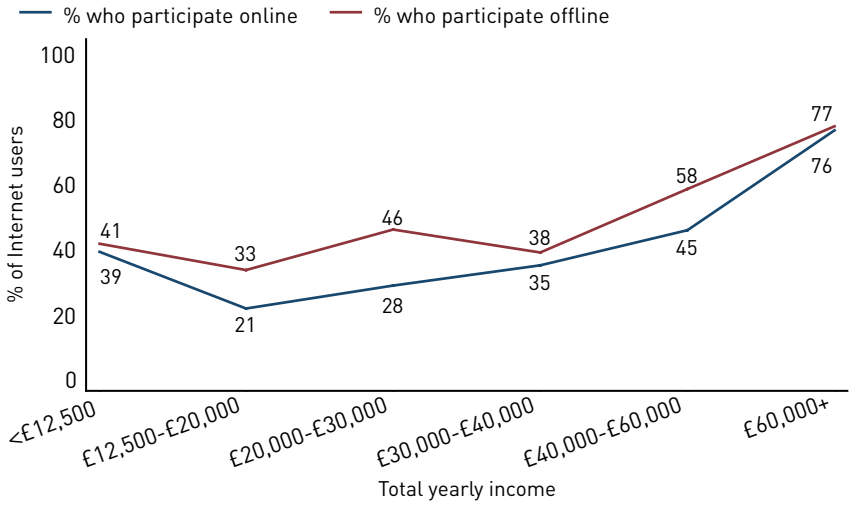
Although students are less likely to participate in civic activity offline (16%) than employed (21%) or retired people (24%), they are actually more likely to participate online, with 14% reporting civic participation both offline and online and 12% reporting online civic participation. Students understandably have fewer interactions with government and are much less likely than the other categories to interact with government offline (13% of students interacted with the government offline, compared to 26% of employed and 34% of retired respondents). Employed people are most likely to use online government services (43% use government services online, 28% use them both online and offline). Retired respondents are the least likely to use online government services: only 14% used online services and 10% used both online and offline services. Students are in the middle, somewhat closer to the employed: 35% used online government services and 21% used both online and offline services.

Civic and Government Participation by Lifestage (QP2, QC34, QE18 and QN11 by QO1)



OxIS 2011: N=2,057

Political Participation by Income (QP2 by S2)

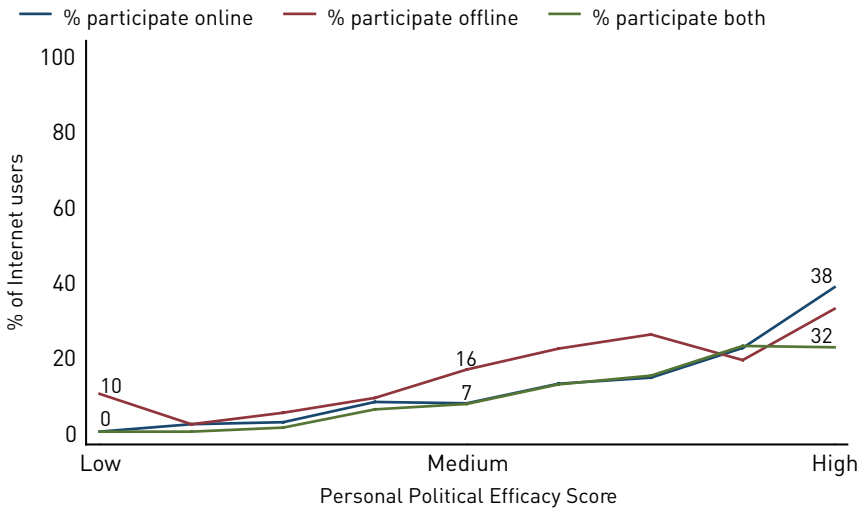


Current users. OxIS 2011: N=1,498

"Talking now about government information and services, have you done any of the following in the past year?"

To measure participation we looked at users who participate in at least one activity. It is notable that offline participation has remained more common than online participation. In the highest and lowest income brackets, levels of online and offline participation are similar, although participation is almost twice as high for those who earn more than £60,000 per year (almost 80%) than those who earn below £12,500 per year (about 40%). The income bracket for which there is the greatest difference is the £20,000 – £30,000 per year range, where 46% participate offline, but only 28% participate online.

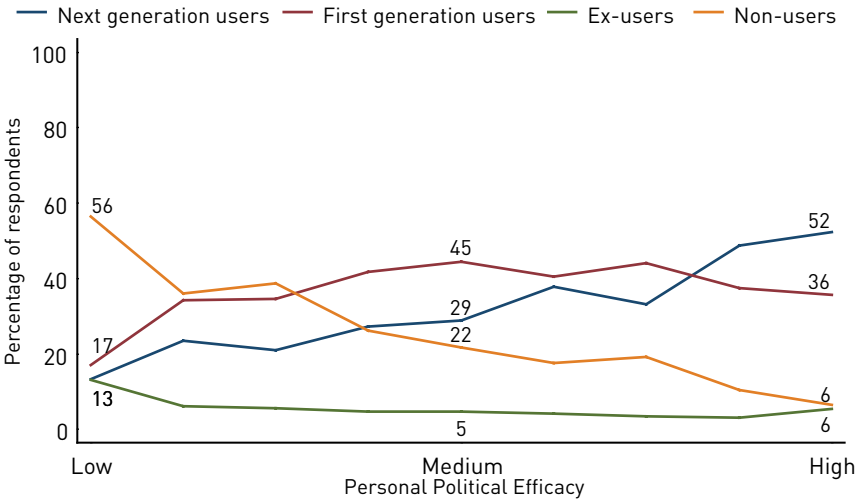
Political Participation by Political Efficacy (QC34)



Current users. OxIS 2011: N=1,498

Efficacy refers to people's belief that they can influence politics. Internet users with high personal political efficacy are much more likely to participate politically online (38% online and 22% both online and offline), with about 60% participating either both online and offline, or online only. In contrast, respondents with low political efficacy are less likely to participate politically. When they do participate, they participate entirely offline (10% offline participation vs 0% online participation).

Internet Use by Political Efficacy (QC34)



OxIS 2011: Current users N=1,498; Ex-users N=93; Non-users N=466

There is a positive relationship between Internet use and political efficacy. Respondents with high political efficacy are far more likely to be next generation Internet users (52%) or first generation users (36%), whereas those with low efficacy are far more likely to be non-users (56%). Next generation use is positively related to political efficacy. There is no relationship between political efficacy and the use of the Internet for ex-users.

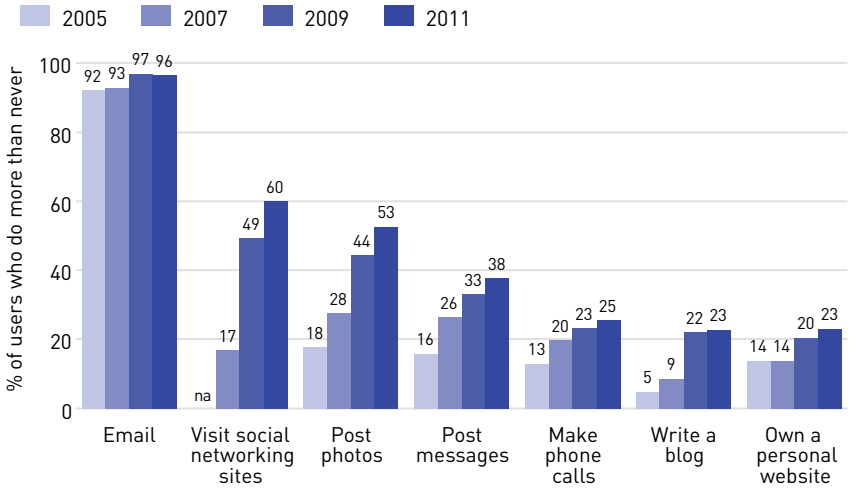
V. Reshaping Social Networks and Friendships

Use of social networking sites has increased sharply since 2009 (see Section III). This is one of the most dramatic developments in use of the Internet in recent years. In one sense social networking sites are nothing new: they are simply personal websites, and anything that can be done in a social networking site can be done on a personal website. But two things about them are new. First, they make a lot of attractive social activities—like writing personal thoughts, commenting on friends' thoughts, and posting pictures—very easy. Contributing content in such ways is so easy that anyone can do it without learning technical details. This makes them accessible to a much larger number of people who would never have had the technical skill or interest to make this possible on a personal website. Second, as large numbers of people have begun to use them, social networking sites have drawn in additional people just because their friends, neighbours, family, or business associates all have a presence there. This "network effect", where something becomes proportionally more valuable when more people use it, has been a powerful force promoting social network use, as well as other applications of the Internet that support communication.

In this section we look at social networking sites in more depth, including how are they used, who uses them, and what impact, if any, have they had on friendships, family relations, and meeting people.

V.A. Communication and Social Networking

Communication Online (QC9)

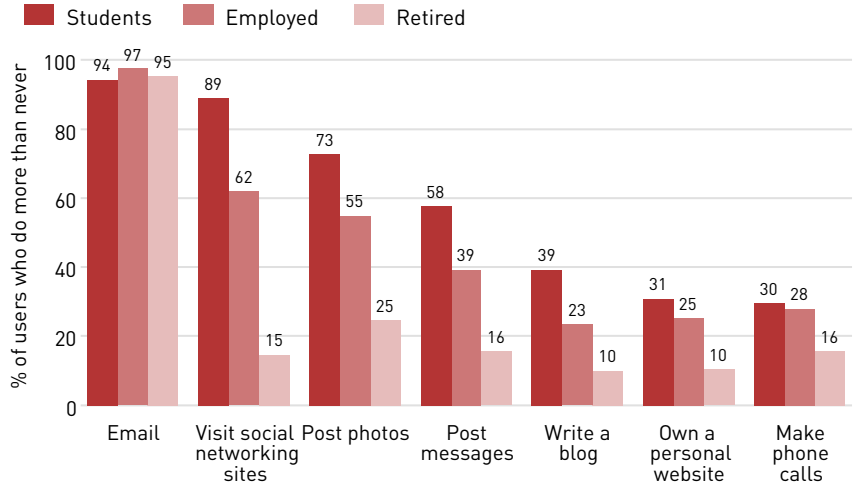


Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"How often do you use the Internet for the following purposes?"

2011 continues the trend of increased social participation on the web. Email use has stabilized near 100%. Writing a blog and maintaining a personal website have also stabilized, but at much lower levels, around 20%. This may reflect that blogging and personal websites are more complex than email and are not required for communication. New ways of communicating online have increased considerably. The rapid rise of social networking is the most striking. Considering the rise in just about every other activity, we see evidence of growing comfort with online participation, particularly with one's friends.

Communication Online by Lifestage (QC9 by QO1)

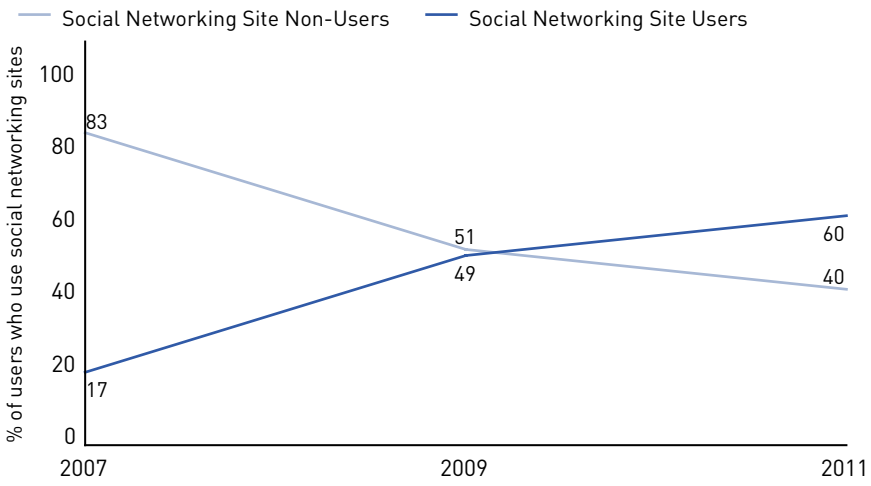


Current users. OxIS 2011: N=1,498

Lifestage differences in Internet use are especially large. Students are the most active participants everywhere except email, which is common to all users. Social networking is especially conspicuous: students participate 27 percentage points more than employed respondents. They do not substitute social networking for other online activities: they are also the most active users of message boards, blogs and photo sharing sites. However, student use of social networking levelled off in the last two years. The employed increased their use of social networking sites from 48% to 62%. Retirees are less likely to participate in every aspect of Internet activities apart from checking email.

V.B. Social Networking Sites

Use of Social Networking Sites (QC9)

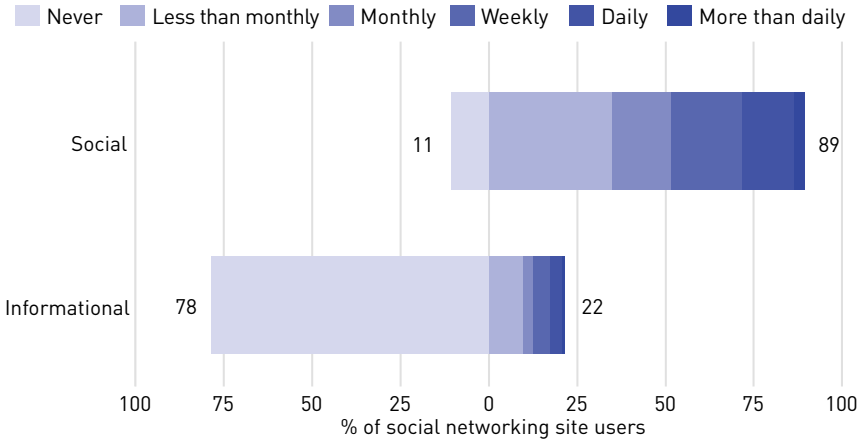


Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

Social network sites continue to diffuse through the online population, although the change is not as dramatic in the past two years as it was between 2007 and 2009. Nevertheless, as this graph shows, the diffusion of social network sites has crossed over from being something done by a minority of the population in 2007 (17%) to a majority activity in 2011 (60%).

What do people do on social networking sites? Each of the bars above represents 100%. The divisions within the bars show how often respondents do each activity. The length of the bar to the left of zero represents the proportion who 'never' do an activity. Unsurprisingly social networking sites are overwhelmingly dominated by social activities. 89% of social networking site users use their social features, while only 22% use them as information resources. In fact, 78% of respondents say they never use the informational capabilities of social media.

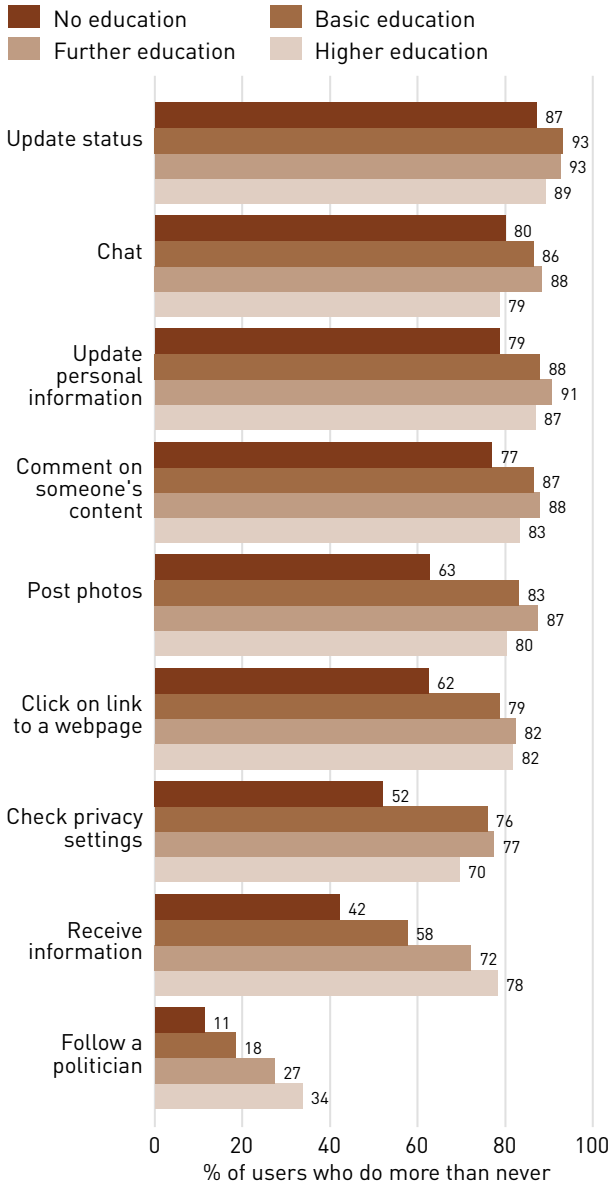
Informational and Social Activities on Social Networking Sites (QC36)



Current social networking site users. OxIS 2011: N=897
Social activities are chatting, commenting on status, updating status or personal information, and posting pictures.
Informational activities include receiving news, learning about issues, clicking on links, and commenting on issues.

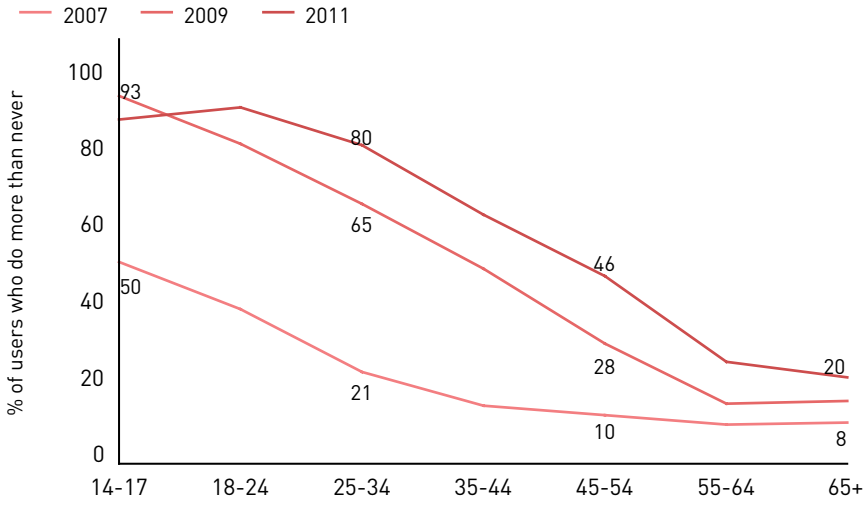
Schooling is not related to posting content on social networking sites in a consistent and linear fashion. While those with the least education are the least likely to participate overall, those with the most education are not the most likely to participate. Instead, those with further education tend to be the most active on social network sites. Respondents with a university degree or more tend to be more active in using the sites to engage with the public sphere by reading the news or following politics. However, the greatest differences are between those with no schooling and those with any level of educational qualification.

Social Networking Site Use by Education (QC36 by QL1)



Current social networking site users. OxIS 2011: N=897

Use of Social Networking Sites by Age (QC9 by QD1)



OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

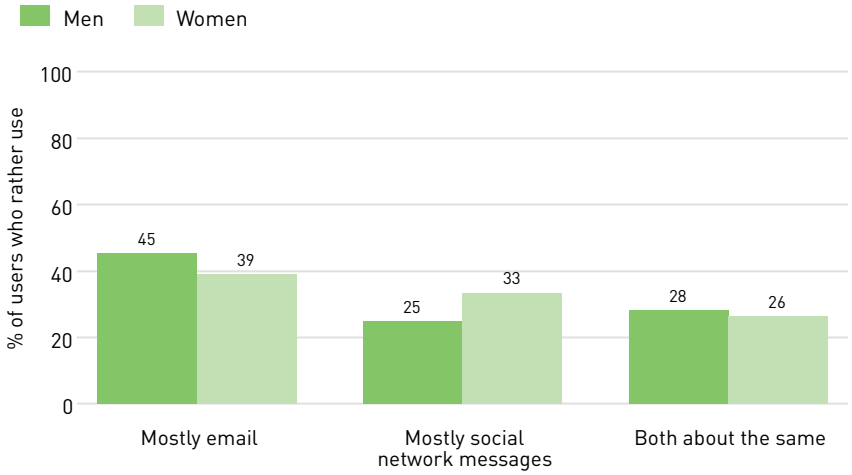
There are three stories in this graph. First, is the dramatic growth in social networking site use from 2007 to 2009, where use increased among the young by almost 50 percentage points.

Second, social networking is most common among the young, and in 2011 it seems to have reached a plateau at around 90% among people aged 24 or less.

Finally, the young are not the primary source of growth from 2009-2011. The older age groups (from age 25 to 65) are uniformly about 10 percentage points higher in 2011 than in 2009. Since these users are the bulk of the employed, growth in these ages is consistent with most of the rise in social networking taking place among employed people.

Use of social networking among older age groups, age 65+, is quite low—around 20%. Although it has doubled since 2007, it has grown from a very small base.

Communication via Email or Social Networking Sites by Gender (QC37 by QD2)

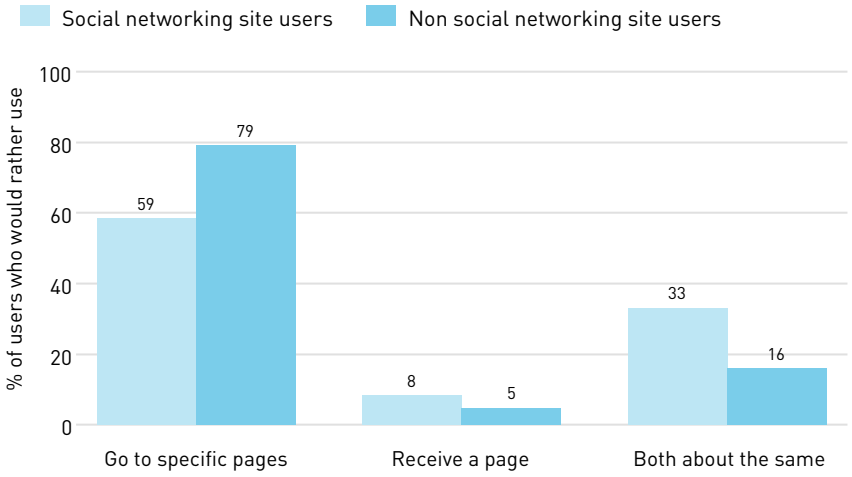


Current social networking site users. OxIS 2011: N=897

Women tend to use social network site messages about eight percentage points higher than men (33% vs 25%). On the other hand, 45% of men use email more than social networking site messages, compared to 39% of women. For both groups, email is the dominant means of communication.

We have seen that use of search engines declined for the first time between 2009 and 2011. Here we see a possible reason for the decline. Social networking site users—now 60% of all Internet users—may use search less because they are more likely to go to a social networking site and to pages that they received as links from other users.

Going to Specific Pages by Social Networking Site Users and Non-Users (QC23 by QC9)



Current users. OxIS 2011: N=1,498 (social networking users: N=897)

V.C. Reconfiguring Social Networks

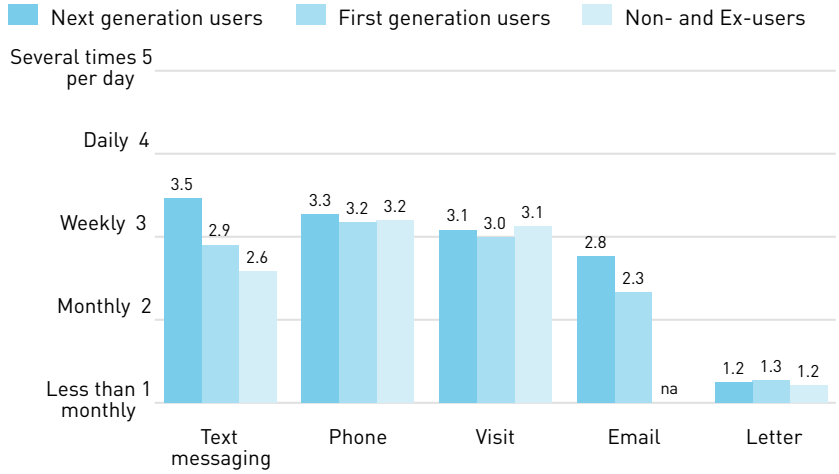
"How often do you contact family or friends who live nearby by...?"

"How often do you contact family or friends who live far away by...?"

The Internet does not seem to replace other forms of interaction with family or friends, such as interaction through visits, phone conversations and written communication. Instead, the Internet most often complements, supplementing other forms of contact.

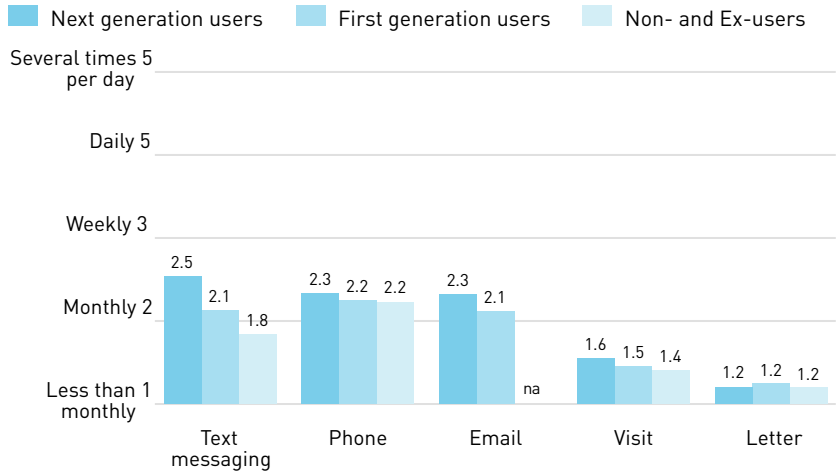
Next generation users make more use of text messages and email, but they do not differ from other users, non-users or ex-users in non-electronic forms of communication. On average, next generation Internet users contacted family and friends via email on a weekly or monthly basis. This was fairly similar for friends and family who lived far away (av=2.3) and those who lived close by (av=2.8). Other users also contacted friends via email at about the same rate regardless of whether they lived nearby (av=2.3) or far away (av=2.1).

Communication with Family and Friends Who Live Nearby by Users and Non-Users (QB3 by QH12)



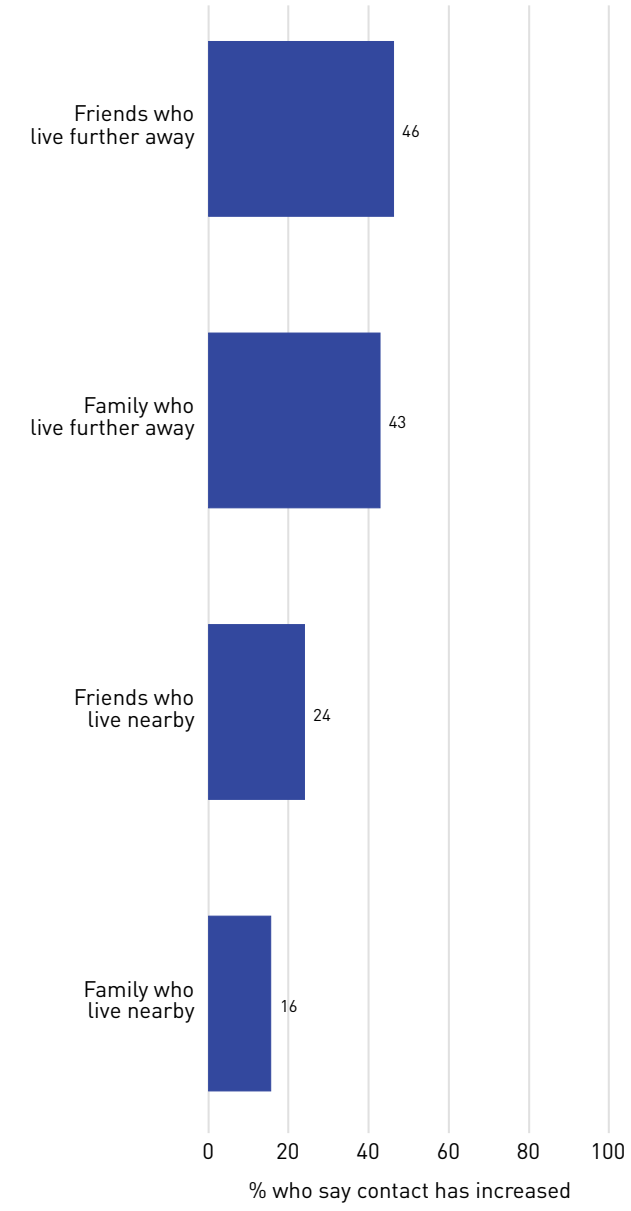
OxIS 2011: N=2,057

Communication with Family and Friends Who Live Far Away by Users and Non-Users (QB4 by QH12)



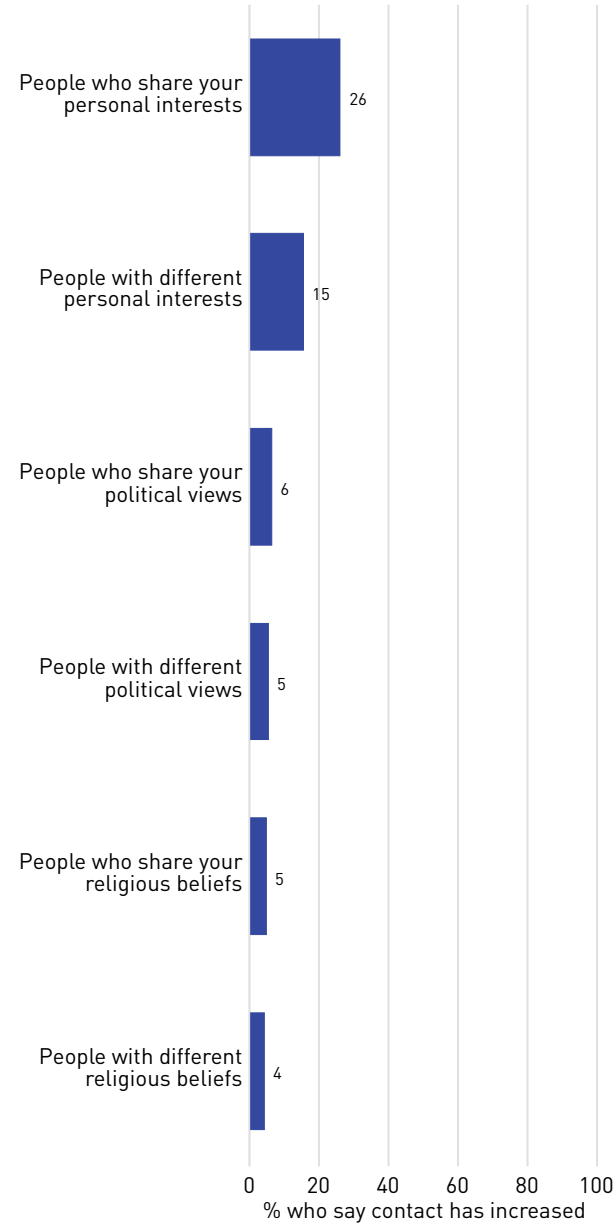
OxIS 2011: N=2,057

Influence of the Internet on Offline Relationships (QC16)



Current users. OxIS 2011: N=1,498

Influence of the Internet on Offline Social Networks (QC17)



Current users. OxIS 2011: N=1,498

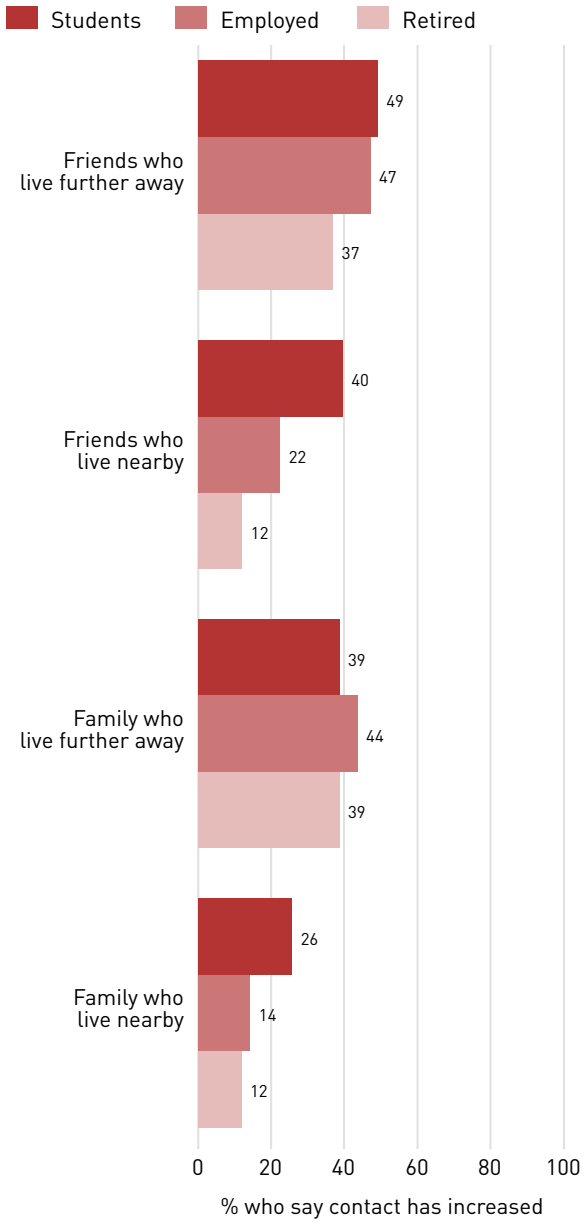
"Has the use of the Internet increased or decreased your contact with the following groups of people or has your contact remained the same?"

Internet users say that the Internet has influenced their relationships with friends and family. In 2011, a considerable proportion said that access to the Internet had increased the contact they had with friends (46%) and family (43%) who lived further and about one-quarter said it had increased contact with friends (24%) and family (16%) who lived nearby. These are modest increases of 1% to 4% over the reported percentages from OxIS 2009.

The impact of the Internet on connecting to people with similar or different beliefs is not as clear. Internet users were more likely to say it had increased their contact with people who share their personal interests (26%), political views (6%) and religious beliefs (5%) than they were to say it increased contact with people who had different personal interests (15%), political views (6%) or religion (4%). The number of people who say it has decreased contact (not shown) is under 2% in all categories.

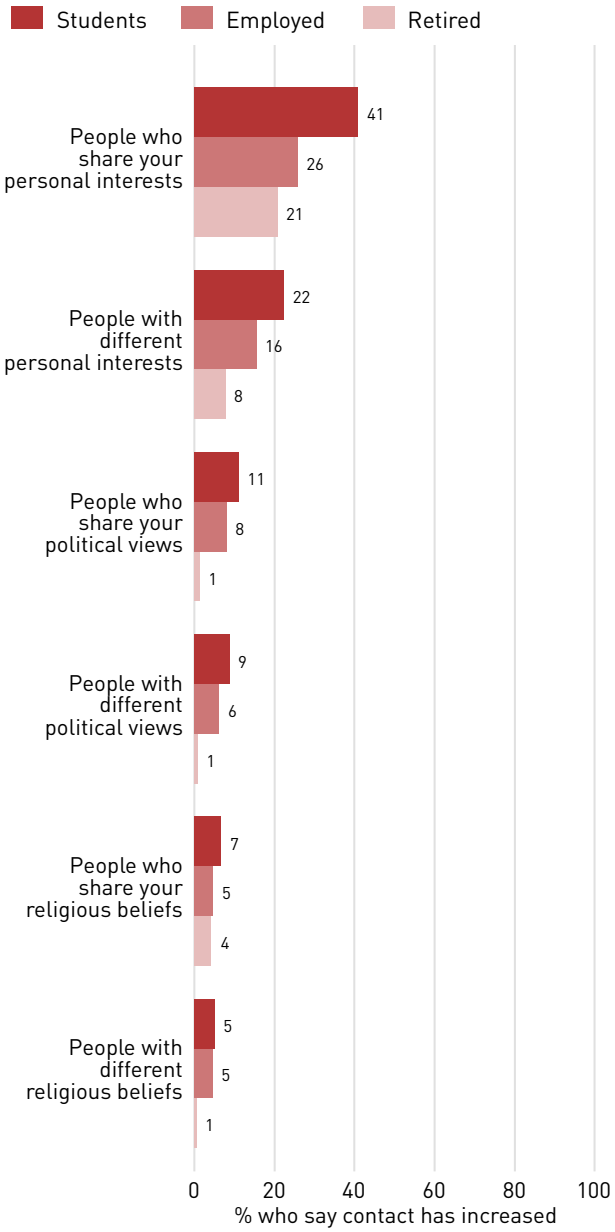
All these numbers are slightly higher than those reported in 2009, by between 1% and 5%. The Internet may be increasing contact with all kinds of people, both similar and different, in contrast to popular notions of creating a virtual "echo chamber".

Influence of Internet on Relationships by Lifestage (QC16 by QO1)



Current users. OxIS 2011: N=1,498

Influence of Internet on Offline Social Networks by Lifestage (QC17 by QO1)



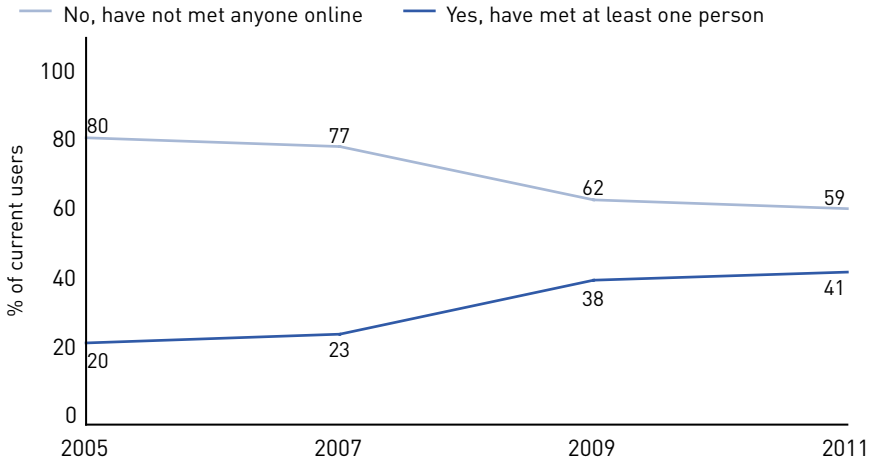
Current users. OxIS 2011: N=1,498

Students are most likely to think that the Internet has increased the amount of contact they have with friends. The difference between students and other lifestyle groups was especially large for friends who live nearby: 40% of students, which is almost double the 22% of employed and 12% of retired. Since almost all students are under age 25, fewer will have a clear basis for comparison to any period before the Internet: they are really saying that they are likely to use the Internet for contact with friends who live nearby.

Students are also most likely to think that their contact with others has increased, and almost twice as many say the Internet fosters contact with people who share their interests (41%), compared to people with different interests (22%). Employed and retired users show a similar pattern but with considerably smaller percentages. 26% of employed people said the Internet increased contact with people of similar interests, compared to 16% who saw an increase in contact with people with different interests. Most of these percentages are higher than similar percentages in 2009, showing an overall increase in the role of the Internet in connecting people.

Less than 2% of users said that the amount of contact with any of these groups had decreased (not shown).

Online Contacts (QC11)

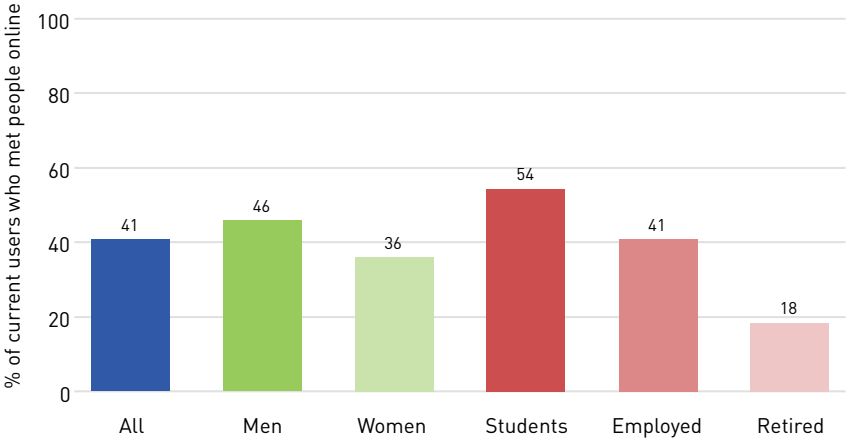


Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498
Note: Question changed in 2009.

"Have you ever met someone on the Internet you did not know before, through...?"

People were about as likely to meet new people online in 2011 as in 2009. Over 40% of Internet users have met a friend online, compared to 38% in 2009, 23% in 2007, and 20% in 2005. This seems to be another case where a change caused by the Internet is being sustained after reaching a plateau.

Online Contacts by Gender and Lifestage (QC11 by QD2 and QO1)



Current users. OxIS 2011: N=1,498

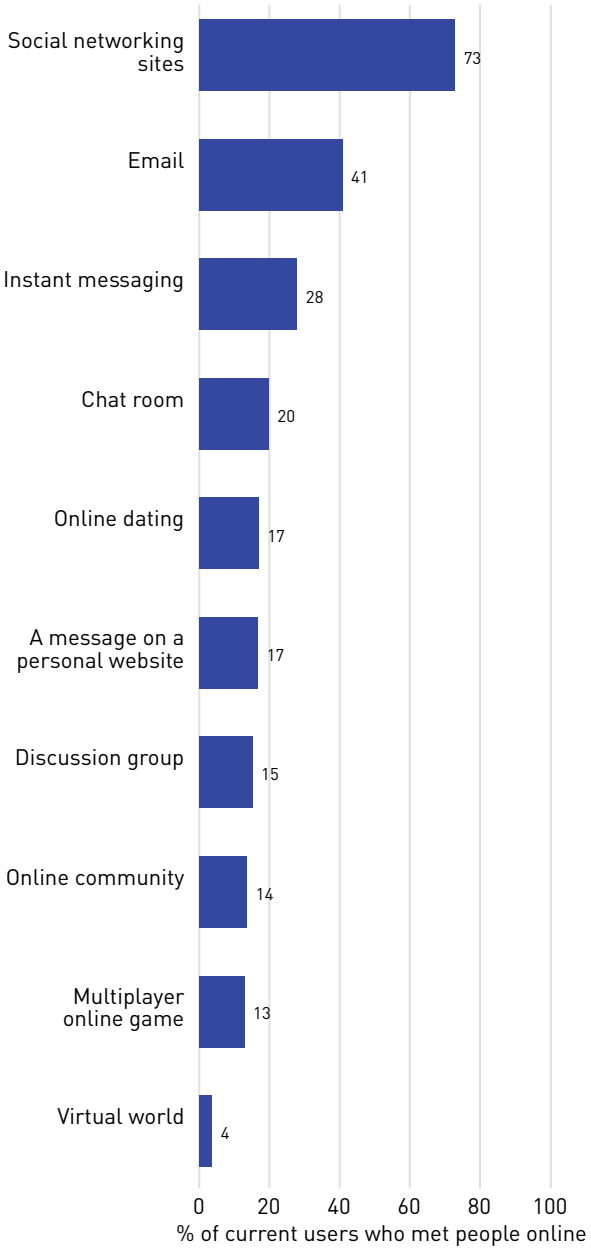
Men were more likely to meet people online (46%) than were women (36%). Since 2009, men have remained the same (46%) while the percentage of women who met someone online has increased by six percentage points, from 30% in 2009 to 36% in 2011. This particular gender gap has shrunk from 16 percentage points to 10 percentage points in the past two years.

Retired users continue to be the least likely to meet people online (18%) followed by employed users (41%), with students the most likely (54%). Since 2009, the major change for the lifestage percentages is the decline in students reporting they met someone online, from 66% in 2009 to 54% in 2011.

Social networking sites are unambiguously the most popular way to meet someone new online: 73% report meeting someone through a social networking site. Perhaps having friends in common blunts concerns about anonymity. Virtual worlds have not lived up to initial expectations with only 4% of people meeting someone this way.

Since 2009, meeting people via a social networking site has increased from 65% to 73%. This is an exception, however. Most other ways of meeting people have declined since 2009: email shrunk from 48% to 41%; instant messaging decreased from 38% to 28%; chat rooms dipped from 30% to 20%, most likely due to the shift to social networking sites.

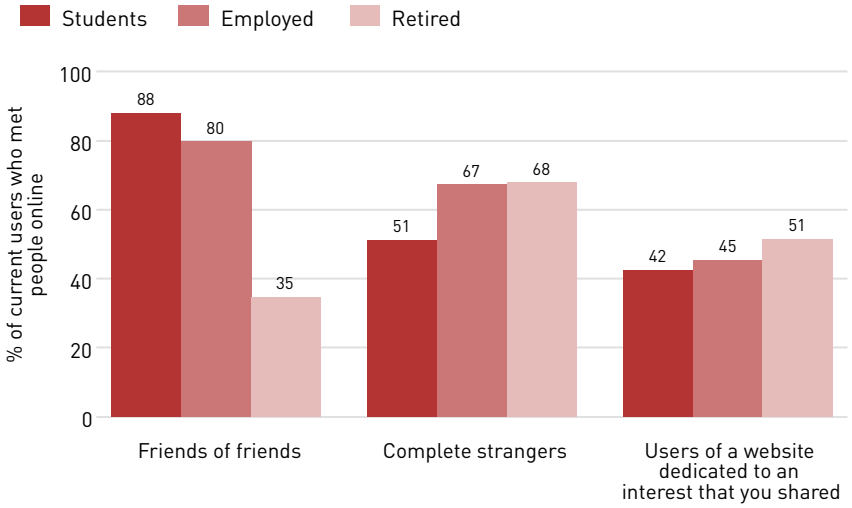
Places to Meet People Online (QC11)



Current users who met people online. OxIS 2011: N=551

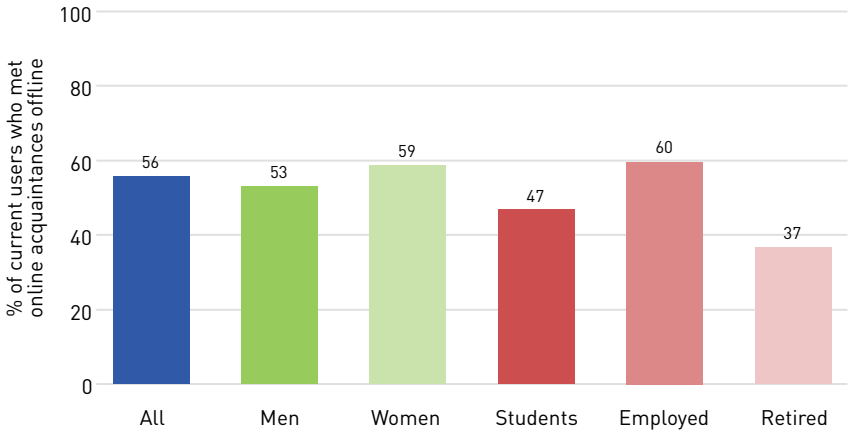
V.D. Reconfiguring Friendships

People Met Online by Lifestage (QC14 by QO1)



Current users who met people online. OxIS 2011: N=551

Meeting Online Acquaintances Offline by Gender and Lifestage (QC15 by QD2 and QO1)



Current users who met people online. OxIS 2011: N=551

"When you first met them online were any of these people...?"

Friends of friends are the dominant mediator when people first meet online. This is a sharp contrast to 2009, when complete strangers dominated. What happened is that the percentage of students meeting via friends hasn't changed much since 2009 (91% in 2009 compared to 88% in 2011); nor has the percentage of retired people (50% in 2009, 35% in 2011). There has been a sharp rise of almost 30 percentage points in the proportion of employed meeting through friends, from 52% in 2009 to 80% in 2011. Since we know that employed people showed the largest increase in use of social networking sites in the past two years, this probably reflects yet again the importance of social networking sites.

While retired people tend to be less active users of technology overall, they are more likely than younger people to meet kindred spirits in hobby groups (51% vs 45% for employed and 42% for students).

"Thinking back to all the people who you have met on the Internet, have you gone on to meet any of them in person?"

Over half (56%) of those who met someone online had gone on to meet them in person. This is 13 percentage points higher than in 2009. Thus, while meeting someone online has levelled, a larger proportion of users are likely to meet someone that they then meet offline. The Internet is therefore playing a more important role in reconfiguring who we know.

The breakdowns by gender and lifestage tell three important stories. Despite media concerns about cyber-stalking, women have become more likely than men to meet an acquaintance offline whom they met online. Women's willingness to meet offline has increased substantially in the past two years. In 2009, 40% of women had met someone offline, compared to 59% in 2011, a 19 percentage point rise. Men have also increased (from 46% to 53%) but that is a much smaller percentage point change.

Second, this is one online activity where youth does not prevail. While 47% of students met an online acquaintance offline, 60% of employed people have done so. The employed are the only lifestage group who have increased since 2009. In 2009, only 44% of employed people had gone to meet someone offline; now it is 16 percentage points higher at 60%. The employed do this more than students.

Finally, given that retired people are much less likely to actively participate online, discovering that 37% of retirees met an online acquaintance offline is noteworthy. This has not changed since 2009.

VI. Impact of Internet Use

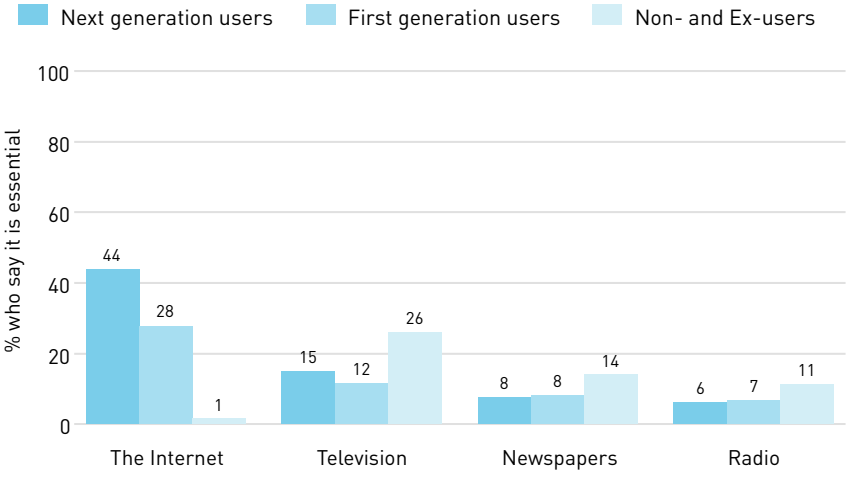
Some of the most pressing questions about the Internet concern its social implications. What difference does the Internet make, not only for how we do things but also for the outcome of those activities? OxIS research has shown how the Internet reconfigures the way we do things, such as meeting people, as noted in Section V. With respect to media use, for some people the Internet has replaced television and newspapers to become the most important medium. Internet users and non-users are spending comparable amounts of time reading books and socialising in person, but Internet users report watching less television. Next generation users are particularly likely to report that they save both time and money, as well as find information that improves their health. Experience with the Internet is leading to greater trust in it as a source of information and as a medium of communication. In this way the Internet reconfigures our actions, and the outcomes of our activities, sharing what we know as well as how we find information.

VI.A. Centrality of the Internet

"For information in general, how important is each of the following to you as a source? Would you say they are essential, very important, important, not so important or not important at all?"

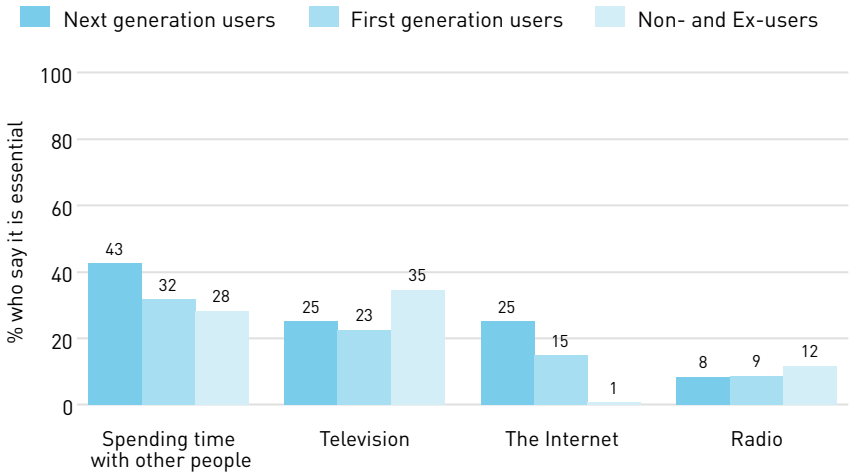
Users consider the Internet the most important source for information. 44% of next generation users said it is essential, compared to 15% for television, 8% for newspapers and 6% for radio. The Internet is the only medium where next generation and first generation users differ: first generation users are 16 percentage points less likely to consider it essential. Only 1% of non- and ex-users thought the Internet was essential for information. Non-users are significantly more dependent on television, radio and newspapers.

Average Importance of Media for Information by Users and Non-Users (QA2 by QH12)



OxIS 2011: N=2,057

Average Importance of Media for Entertainment by Users and Non-Users (QA3 by QH12)



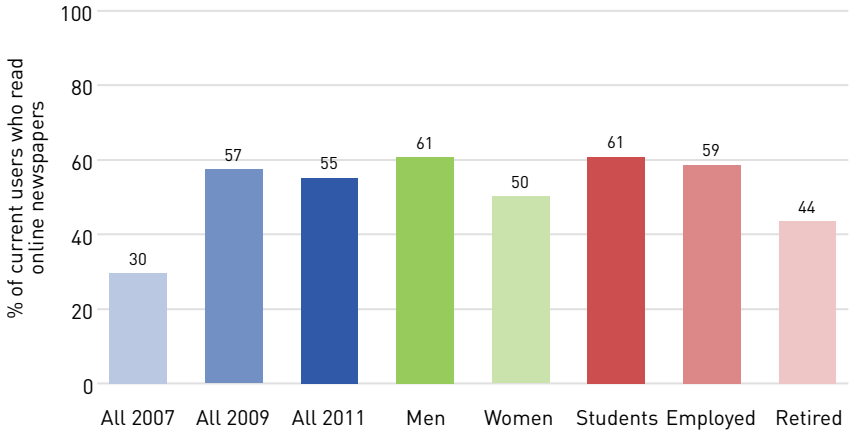
OxIS 2011: N=2,057

"For entertainment in general, how important is each of the following to you as a source? Would you say they are essential, very important, important, not so important or not important at all?"

In 2011 the Internet remained less important for entertainment than spending time with other people and watching television. Next generation users assigned most importance to spending time with other people (43% said it is essential). They are 11 percentage points more likely than first generation users to say that other people are essential (32%), suggesting they are likely to be social. Both percentages are higher than watching television (25% and 23%) or using the Internet (25% and 15%). For non- and ex-users these differences were wider: 28% said that spending time with other people is essential, 35% said this for television, 12% for radio and 1% for the Internet. These results parallel the 2009 results.

VI.B. Media Habits: The Internet, Television and Newspapers

Reading Online Newspapers by Gender and Lifestage (QC24 by QD2 and QO1)



Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"How frequently do you... read any newspaper or news service on the Internet?"

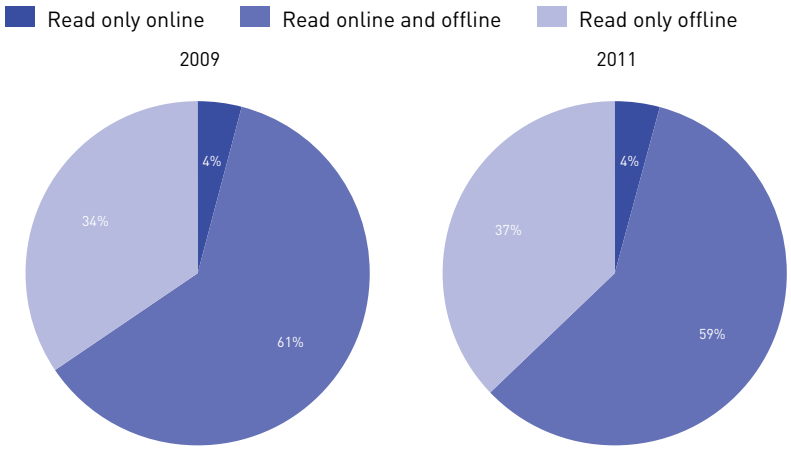
Remarkably, online newspaper reading has stabilised since 2009. Possibly due to the increased use of SNS, just over half (55%) of Internet users said they read a newspaper or news service online in 2011, compared to 57% in 2009. More men (61%) than women (50%) read online newspapers. Students (61%) were about as likely as employed (59%) to read an online newspaper. Retired Internet users were less likely (44%) to read online newspapers.

"How frequently do you.... read any newspaper or news service on the Internet?"

"How frequently do you... read any newspaper in print?"

The stability of reading online newspapers is reflected in a comparison of online vs. offline reading. The percentage who read newspapers only offline is in the mid-30%s in both 2009 and 2011. The percentage who read only online is at exactly 4% in both years, and the percentage who read both online and offline is about 60%, supporting notions of their complementarity.

Unique Reading of Online Newspapers (QC24)

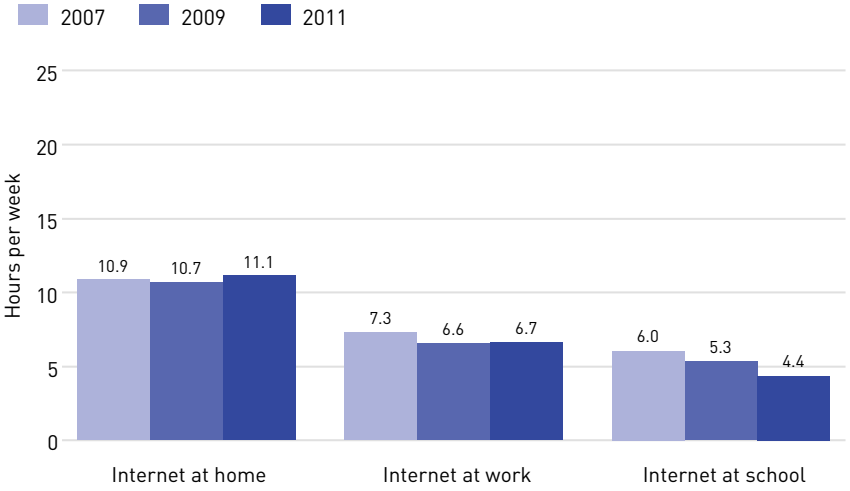


Current users who read newspapers. OxIS 2009: N=1,215; OxIS 2011: N=1,290

"During a typical week, including weekdays and weekends, about how many hours do you usually spend...?"

The number of hours spent on the Internet at home remained the same as in 2007 and 2009, at 11 hours per week. Employed users spend about seven hours a week online at work, while at school students spend about four hours per week, which could be a decline of over an hour since 2007.

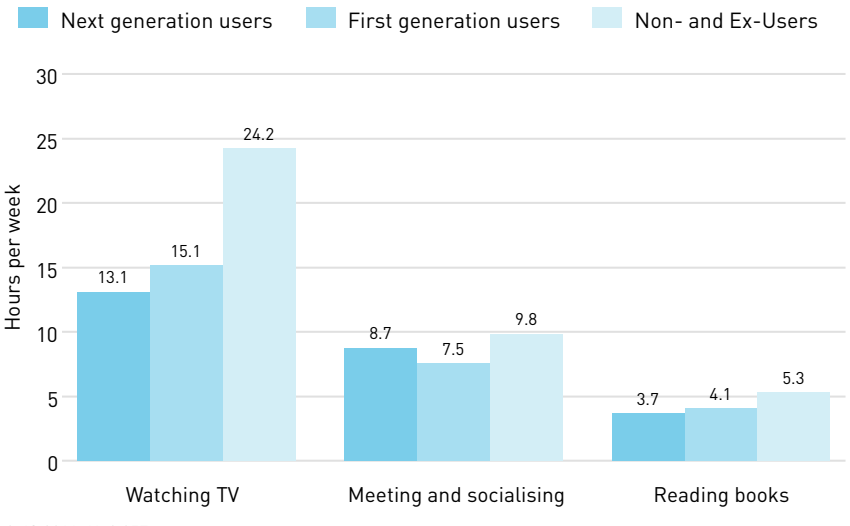
Hours of Use of the Internet (QS1)



Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498
Note: Internet at school only for student users. Internet at work only for employed users.

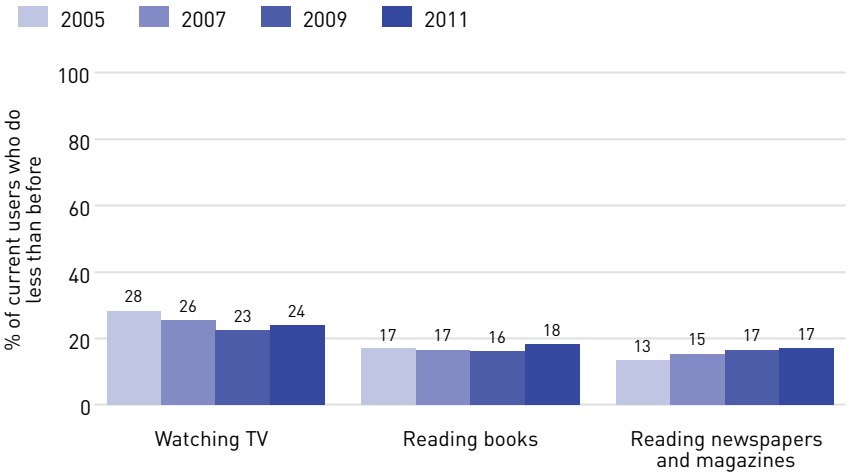
Non-users reported spending much more time watching television and socialising with friends and family than did Internet users. This difference was especially large for TV viewing: non-users spend an average of 24 hours a week watching TV, while first generation users spend an average of only 15 hours a week, and next generation users spend two hours less (about 13 hours) in 2011. The 2009 results are largely identical. This suggests that the Internet has had a strong impact on watching TV, but a much smaller impact on socialising with friends and family, and reading books. However, next generation users spend about an hour more socialising than do first generation users.

Use of Media by Users and Non-Users (QS1 by QH12)



OxIS 2011: N=2,057

Perceived Influence of Internet Use on Media Use (QC29)



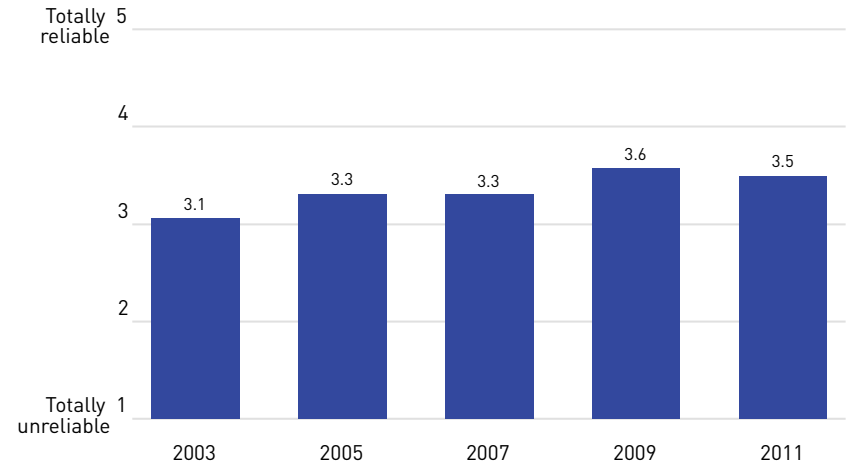
Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"Do you think your use of the Internet influences the amount of time you spend on the following activities? Do you engage in the following activities less than before, about the same or more than you did before you started using the Internet?"

In general, users did not think that the Internet influenced the time they spent on other media. The largest perceived effect was on television watching: 24% thought that the Internet decreased the time they watched television (compared to 23% in 2009, 26% in 2007 and 28% in 2005). About one in six users believed that the Internet decreased the time they spent reading newspapers (17%) and books (18%).

VI.C. Trust

Reliability of Information on the Internet (QA4)

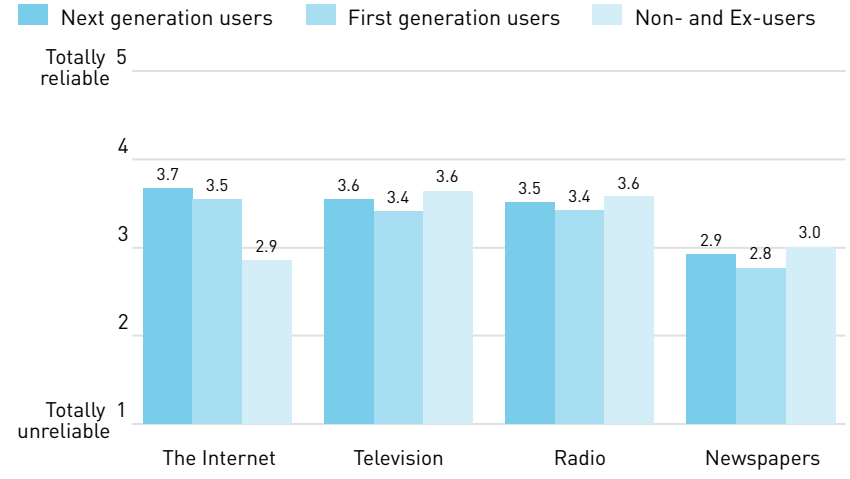


OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057
Note: The scale changed from a 10 point scale in 2007 to a five point scale in 2009.

"On a scale of 1 to 5, where 5 is totally reliable and accurate and 1 is totally unreliable and inaccurate, how reliable and accurate would you rate the information found in...?"

Trust in the reliability of information on the Internet has increased slightly from 2003 to 2011 (av=3.1 vs av=3.5). A far greater increase would be challenging, as users should have a learned level of trust, rather than high levels of distrust or blind faith in the Internet.

Reliability of Information by Users & Non-Users (QA4 by QH12)



OxIS 2011: N=2,057

Users trust the Internet as much as other media. Next generation and first generation users do not differ substantially in their trust. Trust in the Internet is higher among Internet users (NG av=3.7; FG users av=3.5) than among non- or ex-users (av=2.9). This is relatively similar to earlier years.

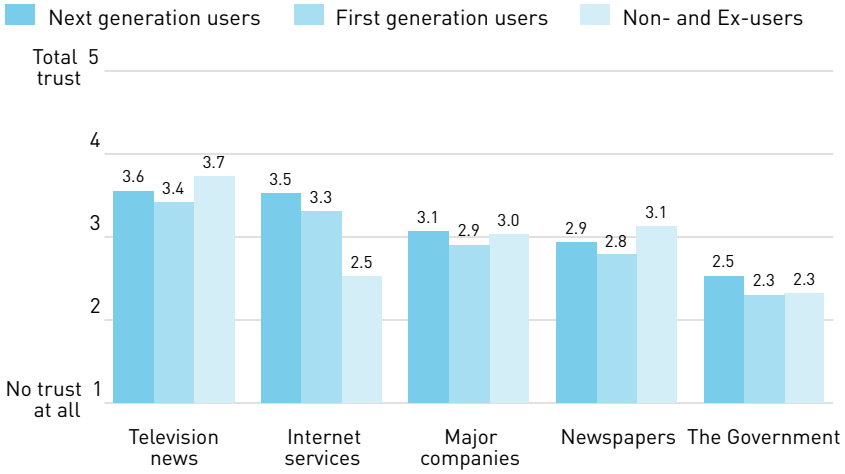
With the exception of the Internet, users and non-users showed similar levels of trust in media in 2011. For users the most trusted medium was the Internet, while non and ex-users trusted television and radio the most (av=3.6). Newspapers were trusted the least by both users and non-users (av=2.9, av=2.8, and av=3.0).

"Now I'd like to ask you about some organisations. Please tell me how much trust you have in the people running each. Use a 5 point scale where 1 means you have no trust at all and 5 means you have total trust."

"What about the Internet? How much trust do you have in the people providing Internet services?"

The Government remains the least trusted institution in Britain (NG users av=2.5; FG users av=2.3; non-users av=2.3). The most trusted media is television news (NG users av=3.6; FG users av=3.4; non-users av=3.7). Trust in Internet service providers was considerably higher among users than among non-users (NG users av=3.5; FG users av=3.3; non-users av=2.5). These results are the same as 2009.

Average Trust in Institutions by Users and Non-Users (QA5 and QA6 by QH12)



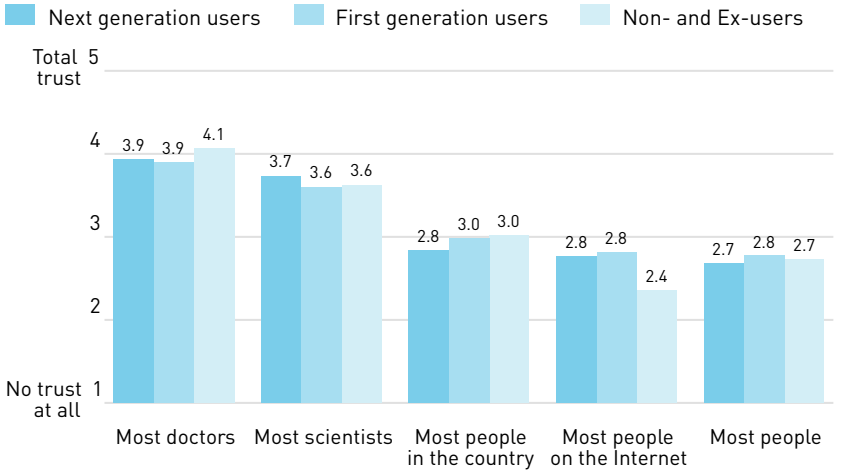
OxIS 2011: N=2,057

"Now I'd like to ask you about different groups of people. Please tell me how much trust you have in the following groups of people whether or not you have ever been in contact with them. Use a 5 point scale where 1 means you have no trust at all and 5 means you have total trust."

Doctors remained the most trusted of the individuals that people are in contact with (av=3.9 for users, 4.1 for non- and ex-users) followed by scientists (av=3.7 for NG users; 3.6 for FG users and non-users).

Internet users trusted people they can communicate with on the Internet more (av=2.8) than non- and ex-users (av=2.4). In all other types of people, users and non- and ex-users are almost identical. On trust in people, next generation users differ little from first generation users.

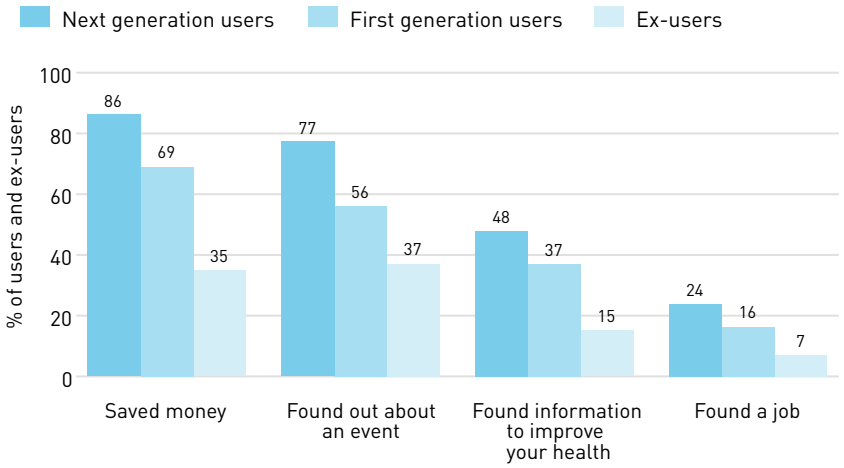
Average Trust in People by Users and Non-Users (QA7 and QA8 by QH12)



OxIS 2011: N=2,057

VI.D. Personal, Financial and Economic Opportunities

Effectiveness of Use (QC20 and QE9 by QH12)

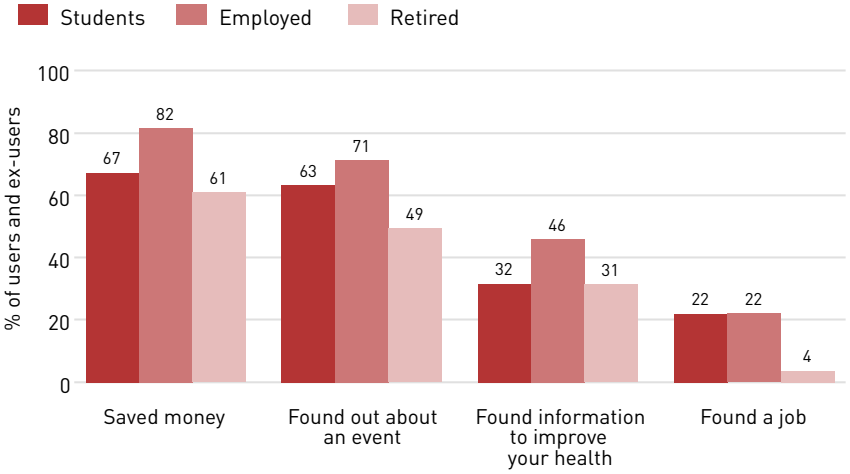


Current and ex-users. OxIS 2011: N=1,591

"Have you ever ...?"

Users strongly agree that the Internet improves their life. Next generation users are particularly convinced: 86% have saved money by buying something online and 77% found out about an event, about 20 percentage points higher than first generation users (69% and 56%, respectively). 48% found information that helped improve their health and 24% found a job, again much more than first generation users (37% and 16%). All users took better advantage of the Internet than ex-users. Only 7% of ex-users found a job through the Internet and only 35% saved money by buying online.

Effectiveness of Internet Use by Lifestage (QC20 and QE9 by QO1)

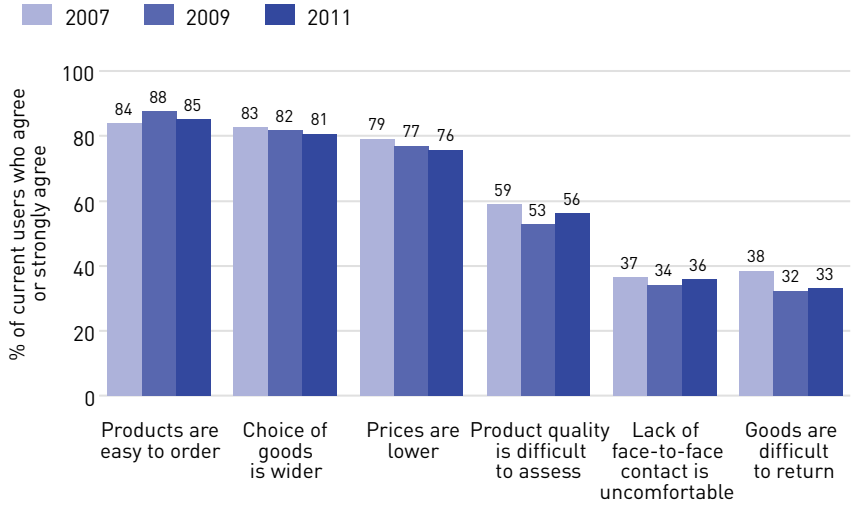


Current and ex-users. OxIS 2011: N=1,591

Employed people were more likely than other groups to have saved money buying something online (82%), found out about an event (71%), and found information that helped them improve their health (46%).

The employed were as likely as students to have found a job (22%). Students said more frequently than retired people that they saved money (67%), found out about an event (63%), or found information that helped improve their health (32%).

Attitudes Regarding e-Commerce (QC33)



Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"Here are some comments that people make about online shopping. Whether you shop on the Internet or not, how much do you agree or disagree with the following statements?"

Confidence in the Internet and the commercial services that it offers has remained high. Over three-quarters agreed that it was easy to order products (85%), that there was a wider choice of goods (81%), and that prices were lower (76%).

Users continue to find it difficult to assess product quality (56%), difficult to return goods (33%), and find the lack of face-to-face contact uncomfortable (36%).

VII. Regulation and Control

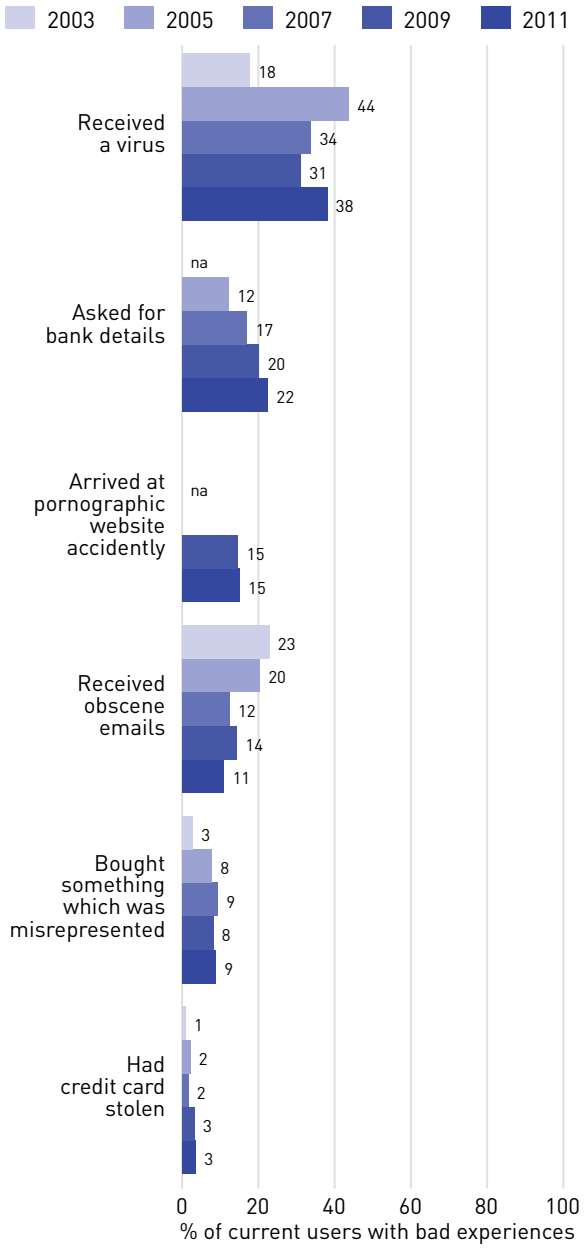
The Internet has always been a contentious site, where groups have struggled over regulation and control versus free speech and free expression. Wrangling over copyrights has been particularly intense. The Internet has always been regulated by existing legal systems, such as laws against fraud or misrepresentation as well as regulation in support of national telecommunications policy. Many feel that existing laws do not fit well in the environment of cyberspace, so there has been a continuous effort to modify existing laws or introduce new regulations, including the control of content.

The 2011 OxIS survey suggests that there are at least three trends. Some common threats to Internet users, such as spam, seem to be declining. This may be due in part to Internet Service Providers (ISPs) and users taking action to install more effective spam-filtering software. Second, we see stability emerging in norms of personal action. There are almost no changes in the average user's judgements of the appropriateness of activities like unauthorized downloads, forwarding chain letters, or sending electronic cards instead of paper cards. The proportion of parents who establish rules to control their children's access to the Internet has remained steady as well. The final trend is an increase in certain activities. Phishing attempts, where an email attempts to entice the reader to click on a link that sends them to a site which asks for banking or credit card details, have continued their steady rise. Parents are increasingly likely to install filtering software.

Privacy remains a complex area of concern. Almost half of all respondents agreed that the current use of the Internet is a threat to privacy. Yet, in an almost contradictory attitude, people still seem happier to give out information such as their postal address and date of birth—which is very useful to ID fraudsters—than they are to provide photographs or a phone number. Do we need to do more to educate people about the sensitivity and usefulness of different types of information, or do people appreciate the tangible value of services provided, such as via social networking services, and believe that they outweigh the potential risks?

VII.A. Concerns: Bad Experiences and the Internet

Bad Experiences Online (QC8)

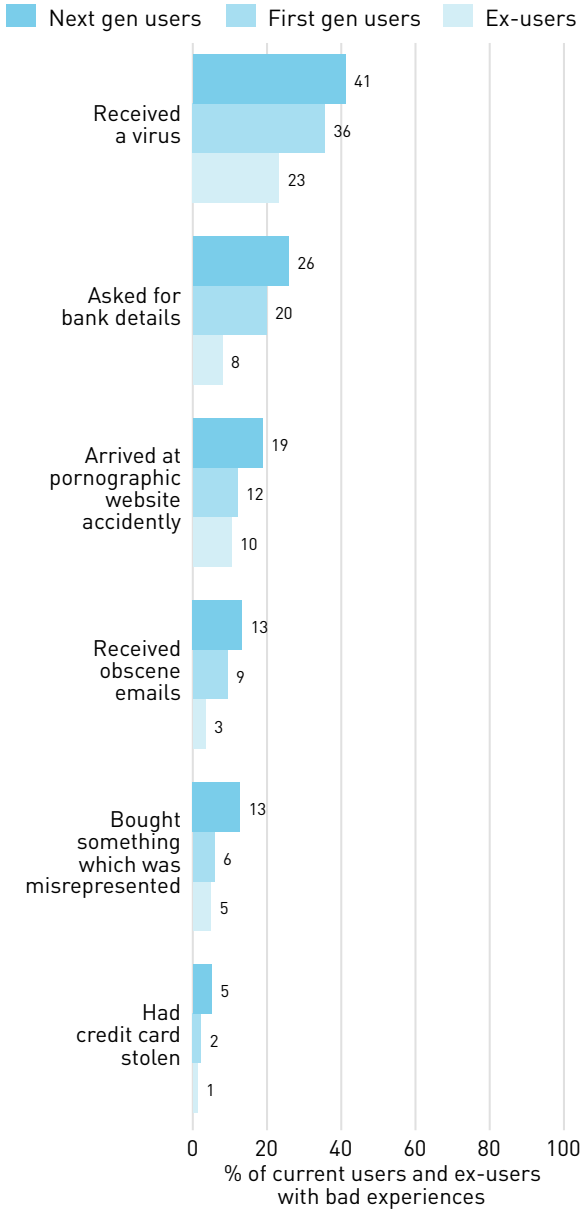


Current users. OxIS 2003: N=1,202; OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

"In the past year have you ever...?"

Unfortunately, there does not seem to be any clear reduction in the frequency of users' negative experiences online in the past two years; indeed there is some evidence that these may be increasing. The most common bad experience is still receiving a computer virus, which is reported by 38% of users, compared to 31% in 2009—a substantial rise. Perhaps more interesting though is the slow but steady increase in the number of Internet users reporting 'phishing' attacks where a third party tries to obtain their bank details. Only 12% of users claimed to have experienced such an attempt in 2005, compared to 22% in 2011. Email problems seem to have declined, perhaps reflecting the widespread use and effectiveness of anti-spam software.

Bad Experiences by Users & Ex-Users (QC8 and QE7 by QH12)



Current and ex-users. OxIS 2011: N=1,591
Note: Phrasing differed for current and ex-users.

"In the past year have you ever...?"

"When you used the Internet did you...?"

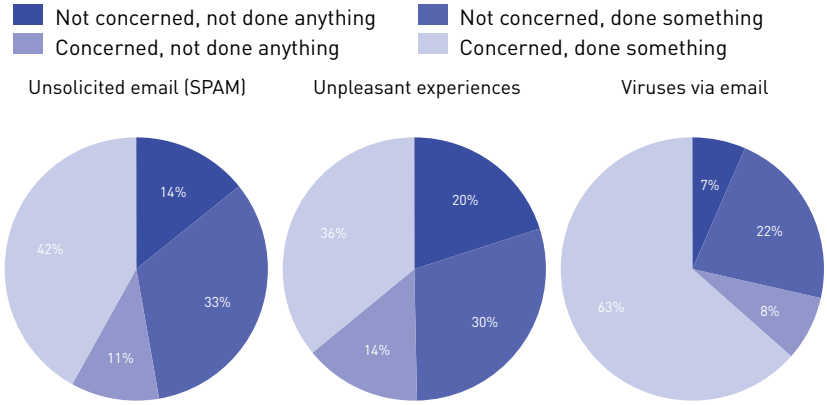
As in previous years, Internet users were more likely to report bad experiences online, although almost one-quarter of ex-users reported that they had received a computer virus, and 10% said they had ended up on a pornographic website accidentally. Next generation users were uniformly more likely to have had negative experiences: for example, 41% had received a virus (compared to 36% of first generation users and 23% of ex-users) while 26% had been asked to provide bank details (20% of first generation users; 8% of ex-users).

"How concerned, if at all, are you about..."

"And have you done something to prevent..."

Most Internet users were concerned or very concerned about bad experiences when using email. 53% were concerned about spam, 71% about viruses and 50% were concerned about unpleasant experiences such as receiving obscene messages. Users were more likely to have taken action against viruses (85%) than against spam and other unpleasant experiences (about 75% in each case).

Concern and Action About Bad Experiences (QC6 and QC7)

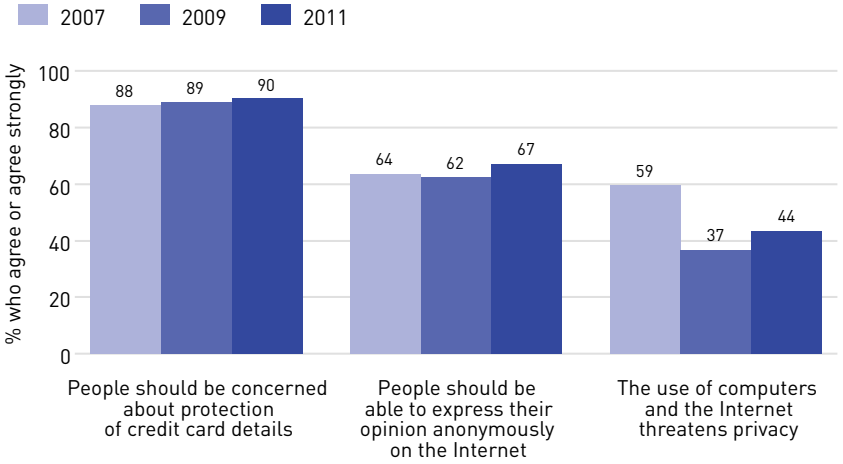


Current users. OxIS 2011: N=1,498

"People have different views towards technology and the protection of information. Please tell me how much you agree or disagree with each of the following statements."

Perhaps unsurprisingly, the vast majority of people (90% in 2011) continue to agree that we should be concerned about protecting credit card details online. There is far less consensus around other aspects of the Internet's implications for privacy: 44% of people agreed this year that the present use of computers and the Internet is a threat to privacy, compared to 37% in 2009 and 59% in 2007. Support for the right to express opinions anonymously online has increased in the past two years from 62% to 67%.

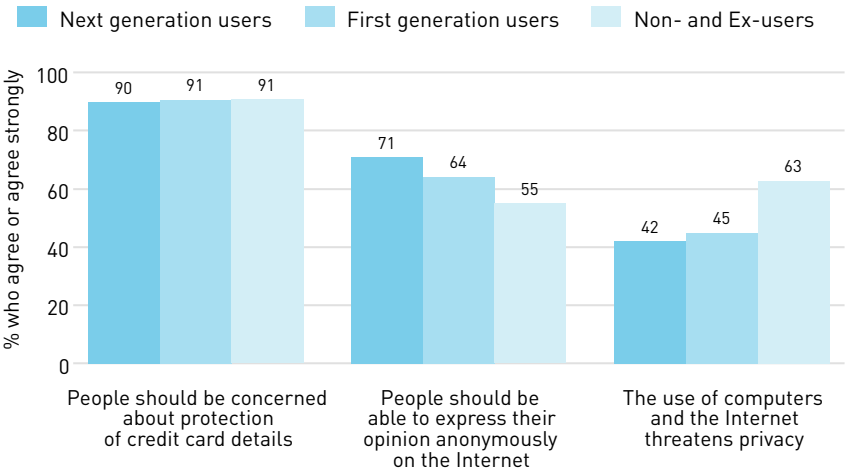
Privacy Attitudes (QB1)



OxIS 2007: N=2,350; OxIS 2009: N=2,013; OxIS 2011: N=2,057

Non- and ex-users were considerably more worried about threats to privacy than Internet users: 63% of non- and ex-users agreed that the present use of computers and the Internet is a threat to privacy, compared to just 45% of first generation users and 42% of next generation users. When it comes to freedom of speech, however, users were more worried: 71% of next generation users agreed that people should be able to express their opinion anonymously online compared to 64% of first generation users and 55% of non-users. Almost everyone was worried about the possibility of credit card fraud, however (about 90% of all respondents).

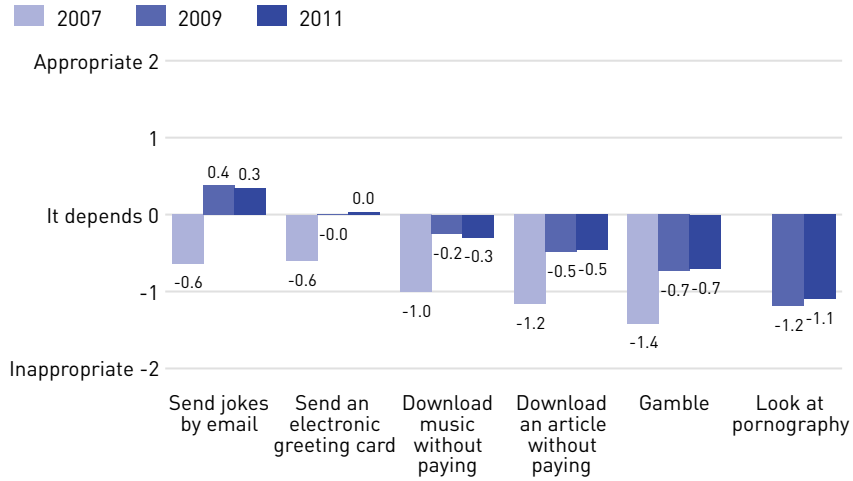
Privacy Attitudes by Users and Non-Users (QB1 by QH12)



OxIS 2011: N=2,057

VII.B. Evolving Norms: Self-Regulation

Appropriate Online Activities (SC4)

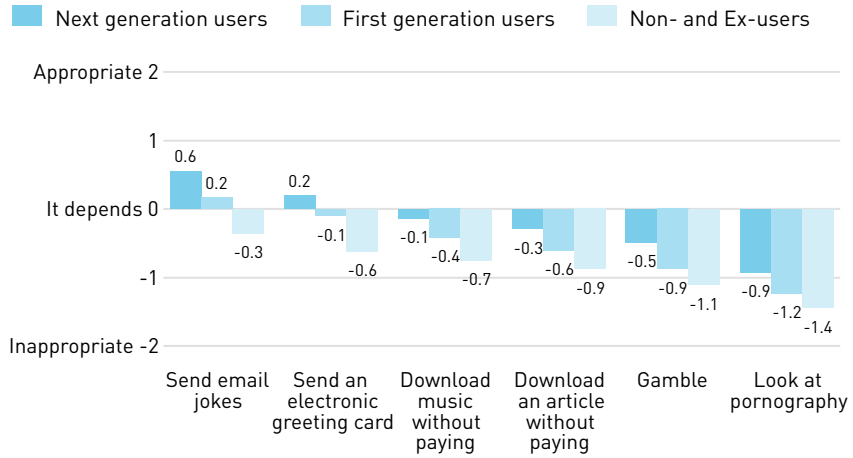


Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498
Note: All questions were part of the self-completion section in 2009 and 2011.

"Do you think the following activities are appropriate, not appropriate or does it depend on the circumstances?"

Although it is too early to tell whether norms of Internet use are stabilising, there has been little change since 2009. There was no change in people's judgements about the appropriateness of gambling online (av=-0.7), or downloading a book or article without paying for it (av=-0.5), and only marginal change in judgements about the appropriateness of downloading music without paying for it (av=-0.3 in 2011, av=-0.2 in 2009).

Appropriate Online Activity by Users and Non-Users (SC4 by QH12)

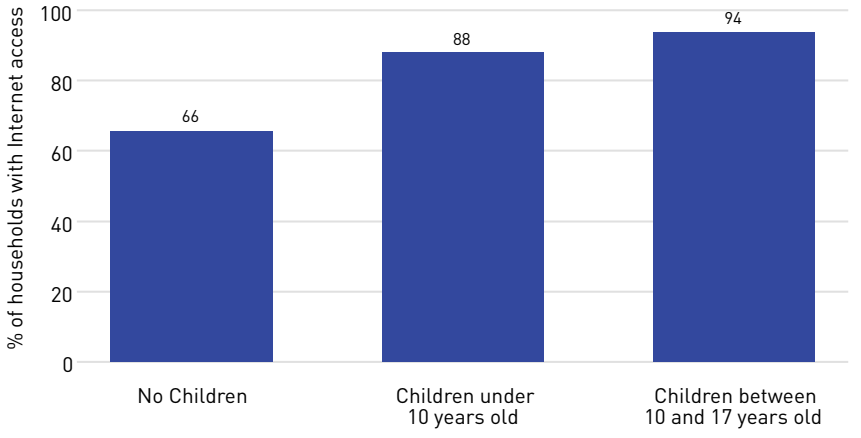


OxIS 2011: N=2,057
Note: All questions were part of the self-completion section.

Non- and ex-users were more critical about the appropriateness of certain online activities than users. For example, next generation users considered it more appropriate to send jokes (av=0.6 vs av=0.2 vs av=-0.3) or electronic cards (av=0.2 vs av=-0.1 vs av=-0.6), download music without paying for it (av=-0.1 vs av=-0.4 vs av=-0.7) and to gamble online (av=-0.5 vs av=-0.9 vs av=-1.1) than first generation users or non- and ex-users. There has been almost no change in these numbers since 2009.

VII.C. Children's Regulation

Household Access by Children in the Household (QH1 by QD5 and QD6)



OxIS 2011: N=2,057

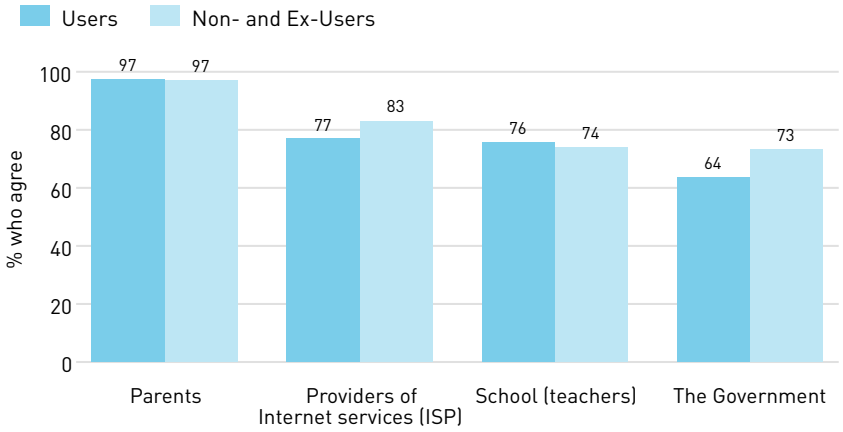
"Does this household have access to the Internet?"

The presence of children makes it more likely that a household will have Internet access. 94% of households with children between 10 and 17 years old had Internet access, compared to 88% of those with children aged under 10, and just 66% of those with no children. Whilst 94% is clearly the large majority of households, this still means that 6% of households with children between 10 and 17 have no Internet access, a recognised source of educational disadvantage.

"People have different opinions on regulating children's content on the Internet. Which of the following do you think should be responsible for making restrictions or do you think that no one should restrict children's content?"

There seems to be a stable consensus that parents should be responsible for restricting children's access to Internet content (97% have agreed to this since 2007). Support for other organisations taking responsibility remains high, however, it seems to have dropped since 2009, with 75% now agreeing that teachers should be responsible (84% in 2009), 78% agreeing that this is an ISP responsibility (81% in 2009) and 66% accepting a role for the Government (71% in 2009).

Responsibility for Restricting Children's Content by Users and Non-Users (QI5 by QH12)

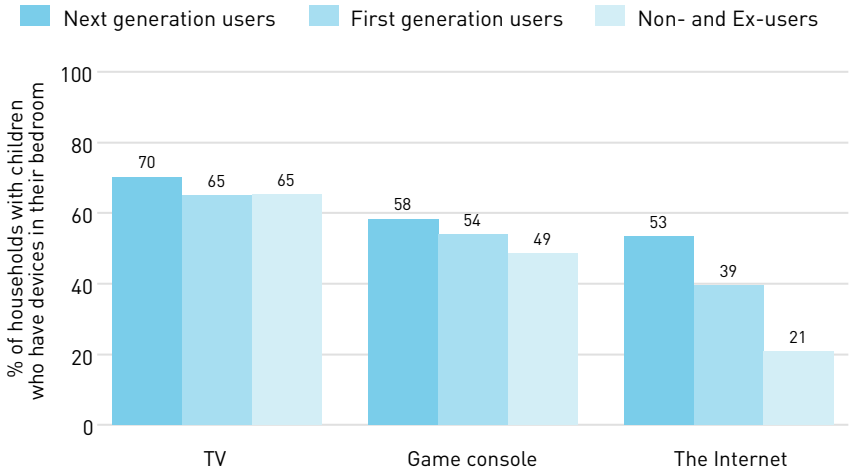


OxIS 2011: N=2,057

"Does this child/Do any of these children have access to any of the following in their bedroom?"

The trend towards privatisation of media seems to continue, supported by the widespread presence of media in children's bedrooms. Two-thirds of households with children provide televisions in a child's bedroom. This does not differ substantially between types of users and non- or ex-users. Other technologies such as game consoles (58%) and Internet access (53%) are more likely to be found in the children's bedrooms of next generation users' households than in the households of first generation users (54% and 39% respectively) or non- and ex-users (49% and 21% respectively). The latter figure is notable, highlighting that even in families where the respondent is a non- or ex-user, many children have Internet access in their own room.

Technology in Children's Bedrooms by Users and Non-Users (QD7 by QH12)



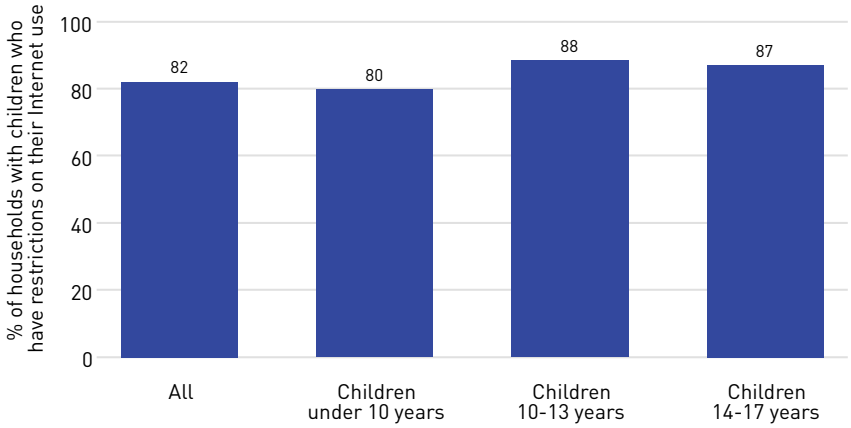
People who have children in the household. OxIS 2011: N=1,343

"Have you ever been told by your parents or caretakers..." or "Have you ever told your child/your children..."

"And does your household use parental control filters, such as 'Net Nanny' or other filters provided by your ISP to prevent children from accessing certain websites?"

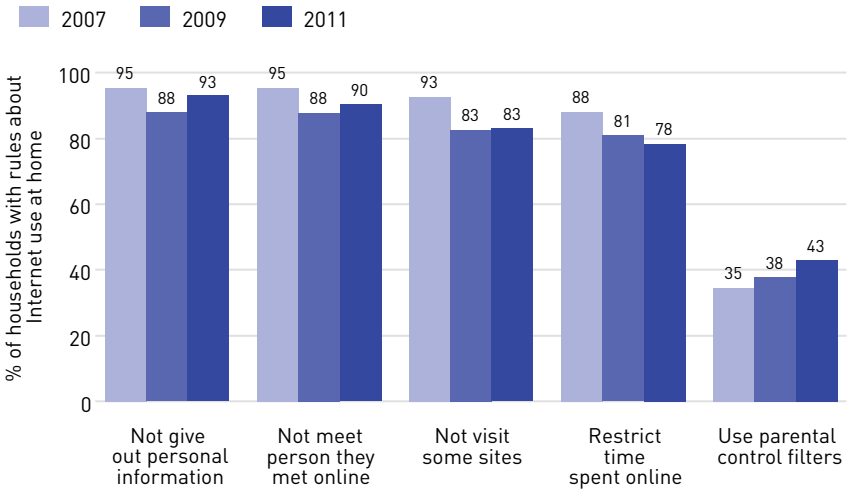
About 18% of connected households with children claimed to have no rules regarding children's use of the Internet. Those households where children were under 10 were less likely to have rules (80%) than those with children between the ages of 10 and 13 (88%) or aged 14-17 (87%).

Parents' Restrictions on Use by Children's Age (QD9 and QD10 by QD6)



Households with children who have access to the Internet. OxIS 2011: N=473
Note: Question changed in 2011.

Rules About Children's Internet Use (QD9 and QD10)

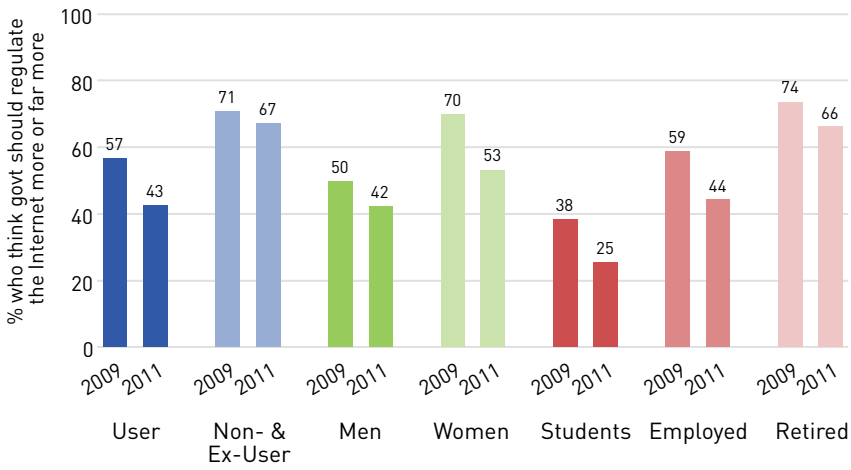


Households with Internet rules for children. OxIS 2007: N=389; OxIS 2009: N=399; OxIS 2011: N=388
Note: Question changed in 2009.

Most households have rules to protect children from grooming and to restrict the use of the Internet. In general, these proportions are about the same as 2009. 93% of households with rules told their children not to give out personal information (88% in 2007) and 90% tell their children not to meet someone they met online (88% in 2009). Since 2007 parents seem less inclined to dictate how much time their children spend online (78% in 2011, 81% in 2009, 88% in 2007) or which sites to visit (83% in 2011 and 2009, 93% in 2007). The use of parental control filters is still low (43%), but it is the one variable that has risen consistently since 2007 (35% in 2007, 38% in 2009).

VII.D. Government Regulation

Attitudes Toward Government Regulation (QI4 by QH12, QD2 and QO1)



OxIS 2011: N=2,057

"Some people think governments should regulate the Internet more than they do today, others think governments should regulate the Internet less. Do you think the British government should regulate the Internet far more, more, about the same, less or far less?"

There has been a general decline in support for regulation of the Internet from 2009 to 2011, with lower percentages of all groups thinking that government should regulate the Internet 'more' or 'far more'. This decline is particularly marked for Internet users, where 14 percentage points fewer hold this view in 2011 than 2009, but also for some groups of users and non-users; students, women and employed people. Overall, students are particularly resistant to the idea of regulation, with only 25% thinking that the Internet should be regulated more.

Section VIII. Digital Divides

There is no single stated reason for not using the Internet; instead reasons are multiple and interrelated. Cost, access, interest and skills are all important; however, their relative importance varies depending on the situation of the non-user and ex-user. For example, for ex-users who are employed the most important stated reason for non-use is no longer having a computer available. But for retired ex-users the most important reason is lack of interest. For non-users, lack of interest is by far the most important single reason for non-use. Previous OxIS studies have viewed these people as having exercised a choice—they have chosen to remain offline—instead of being excluded even though they actually want to be online. For ex-users expense and access (the traditional exclusion barriers) are much more important. As this example illustrates, non-use is both shaped and reinforced by individual circumstances and contexts.

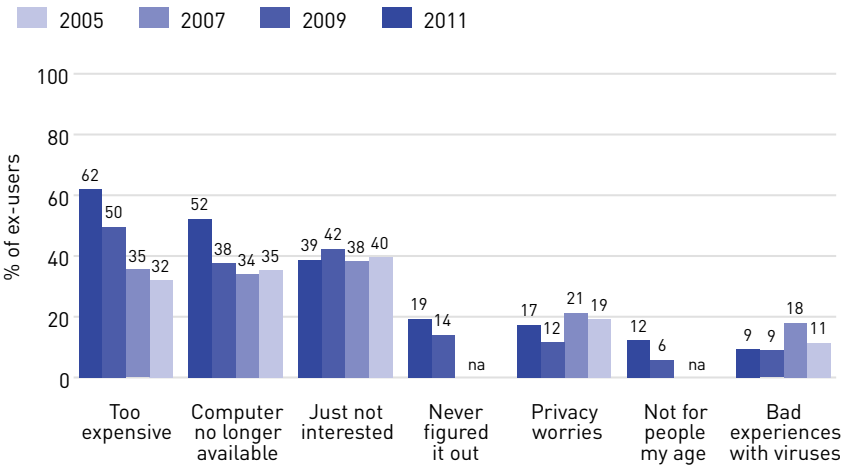
Proxy use remains a very important link to the Internet for over two-thirds of people who do not use the Internet themselves. This is a point that is often lost in public discussions over Internet use: non-users often have access if they need it, but the access is via another, proxy user.

Internet users tend to be quite self-reliant. People who find they are unable to do something online most often work it out themselves. However, other networks such as friends and family, and school and work remain important. Those who are better networked in these spaces (i.e. those who work with others or have family members who use the Internet) are more likely to have more access to help and benefit from it.

Finally, while public access points are not frequent sources of help, libraries are the exception particularly for those on low incomes.

VIII.A. Rationales for Non-Use

Reasons Ex-Users Stopped Using the Internet (QE4)



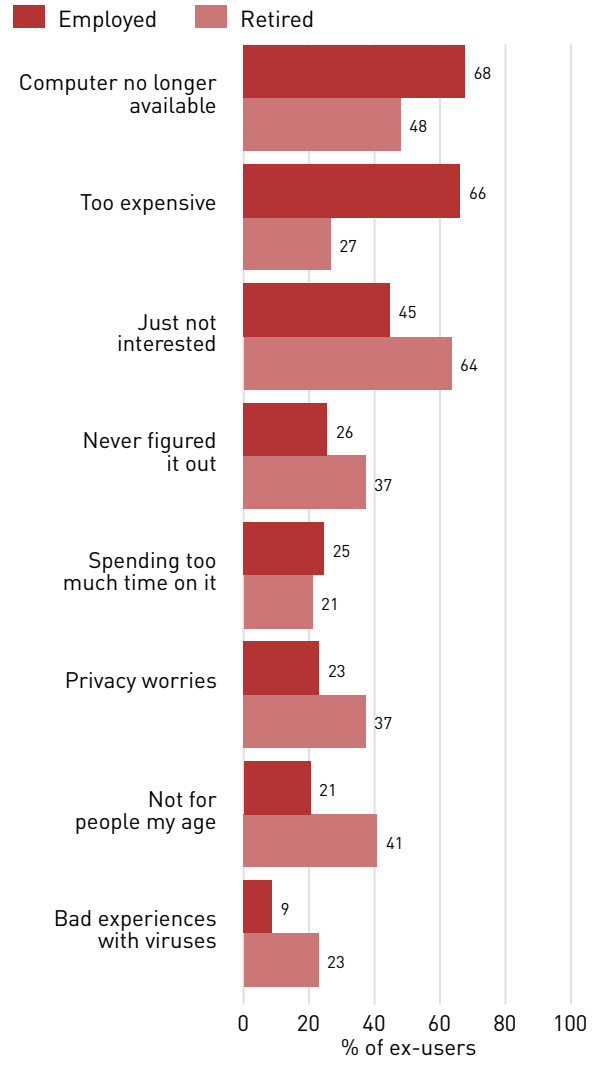
Ex-users. OxIS 2005: N=167; OxIS 2007: N=124; OxIS 2009: N=141; OxIS 2011: N=93

"People have given a number of reasons for stopping use of the Internet. We would like to know if any of these reasons were important to your decision."

"I will read a number of reasons that some people give to explain why they don't use the Internet. Could you tell me which of these reasons apply to you?"

The most striking result is the continuous steady rise in the proportion of users who say the Internet is too expensive; it now approaches two-thirds of ex-users (62% in 2011, 50% in 2009, and 35% in 2007). No longer having a computer is given as a reason by over half of ex-users, possibly suggesting that they used a computer at school or work, and lost use of it upon leaving school or retiring. Most other reasons are stable from year to year, including moved house or job and just not being interested. Not having enough time has declined steadily and is now given as a reason by only 11% of respondents in 2011.

Reasons Ex-Users Stopped Using the Internet by Lifestage (QE4 by QO1)



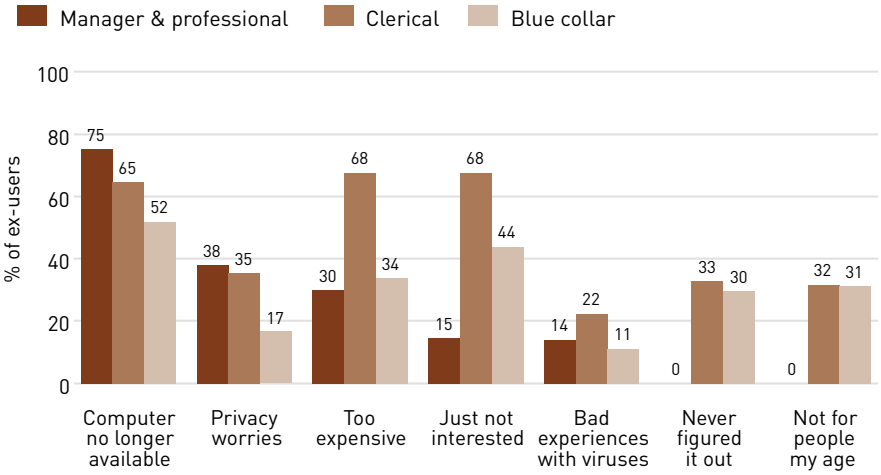
Ex-users. OxIS 2011: N=93

"People have given a number of reasons for stopping use of the Internet. We would like to know if any of these reasons were important to your decision?"

Employed ex-users were more likely than retired ex-users to say that the most important reasons for stopping the use of the Internet was not having access to a computer (68% vs 48%), cost (66% vs 27%) and spending too much time on it (25% vs 21%). Retired ex-users were more likely than employed ex-users to state that a lack of interest (64% vs 45%), lack of skills (37% vs 26%), privacy concerns (37% vs 23%), age (41% vs 21%) and bad experiences (23% vs 9%) as the main reasons to stop using the Internet.

For managerial and professional ex-users, the main reason to stop using the Internet was not having a computer available (75%). Blue collar and clerical ex-users were more likely than managerial ex-users to say that cost (34% blue collar, 68% clerical, 30% managerial), lack of interest, lack of skills, time and age were the main reasons to stop using the Internet. One striking measure of how widespread and important computers have become in managerial and professional occupations is that that not a single person said they did not have the skills or that it was not for people their age, compared to about one-third in other occupations.

Reasons Ex-Users Stopped Using the Internet by Occupation (QE4 by QO4)

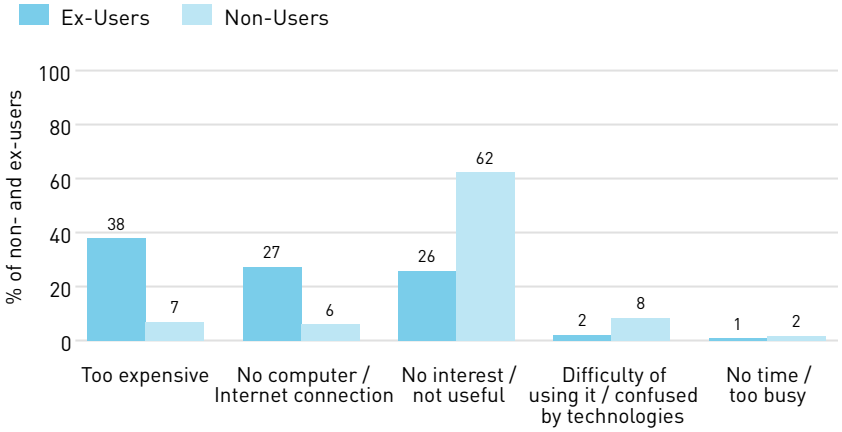


Ex-users. OxIS 2011: N=93

"Which is the most important reason you are currently not using the Internet?"

Cost, access and interest in using the Internet are the most important reasons why ex-users and non-users do not use the Internet. Ex-users mentioned the costs involved (38%) a lack of access (27%) and a lack of interest (26%) as the most important reasons to stop using the Internet. Non-users referred far more frequently than ex-users to not being interested (62% vs 26%) and to their lack of skills (8% vs 2%). These results are essentially identical to 2009.

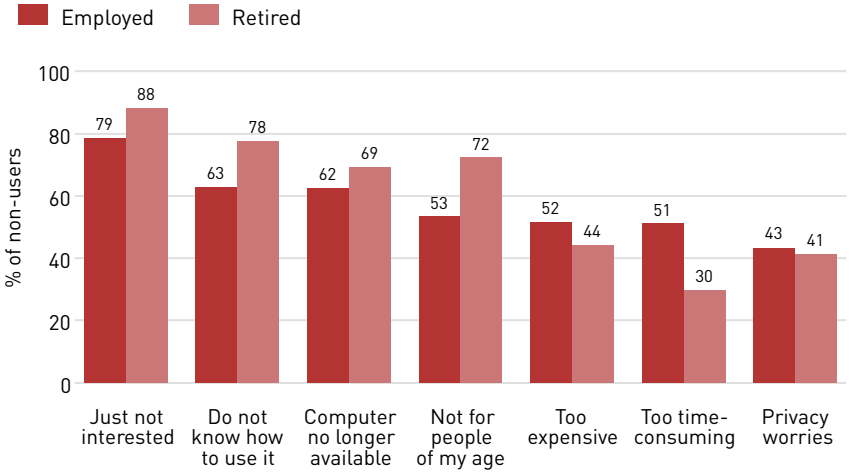
Most Important Reason Ex- and Non-Users Do Not Use the Internet (QE5 and QN2 by QH12)



Ex-users and non-users. OxIS 2011: N=559

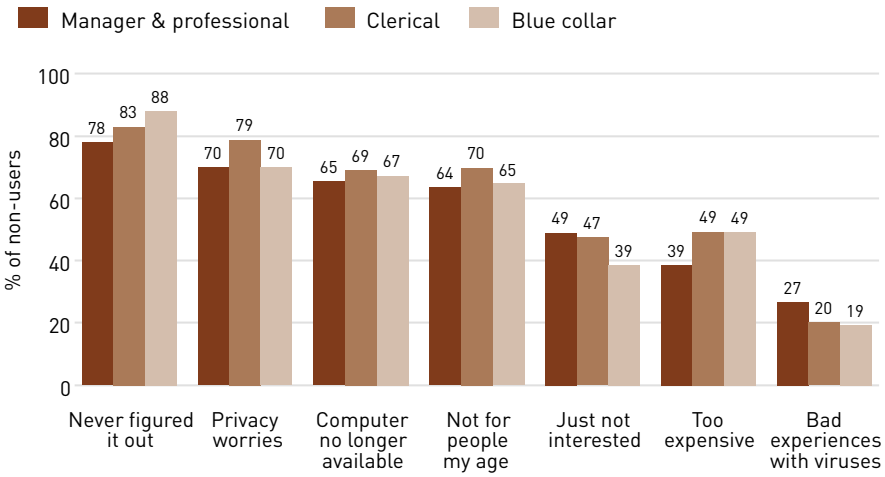
Retired non-users were more likely than employed non-users to state a lack of interest (88% vs 79%), lack of skills (78% vs 63%), not having a computer available (69% vs 62%) and age (72% vs 53%) as reasons for not using the Internet. In contrast employed non-users were more likely than retired users to say that they didn't use the Internet because of cost (52% vs 44%) and time (51% vs 30%). Concerns about privacy were a reason offered by a similar proportion of non-users in each group: 43% of employed non-users and 41% of retired non-users.

Reasons Non-Users Do Not Use the Internet by Lifestage (QN1 by QO1)



Non-users. OxIS 2011: N=466

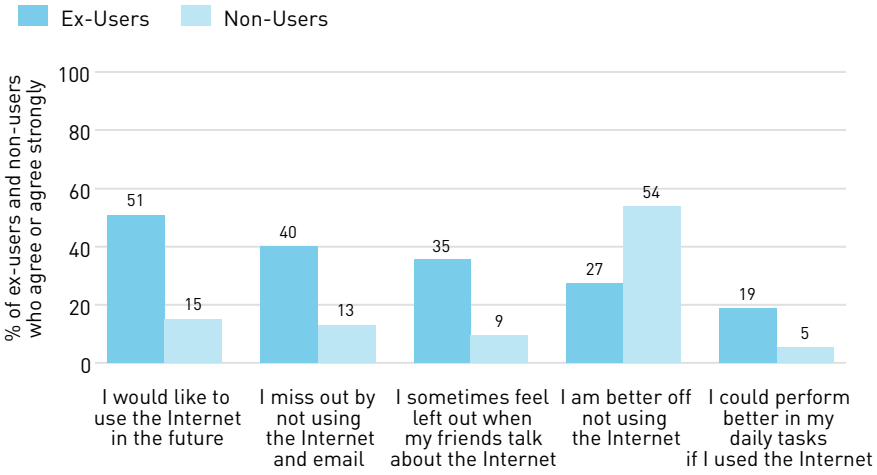
Reasons Non-Users Do Not Use the Internet by Occupation (QN1 by Q04)



Non-users. OxIS 2011: N=466

Blue collar non-users were more likely than other groups to identify a lack of interest (88%) and less likely than other groups to identify privacy concerns (39%) and time (31%) as reasons not to use the Internet. Clerical workers were more likely than other groups to suggest skills (79%) and age (70%) as reasons not to use the Internet. Blue collar and clerical non-users were more likely than managerial and professional non-users to say not having a computer available (67% blue collar, 69% clerical) and cost (49% for both blue collar and clerical) were reasons not to use the Internet.

Attitudes of Ex- and Non-Users (QE10 and QN3 by QH12)



Ex-users and non-users. OxIS 2011: N=559

"Please tell me how much you agree or disagree with the following statements."

Internet ex-users felt more strongly that they would miss out by not using the Internet than did non-users: 51% of ex-users said they would like to use the Internet in the future (15% of non-users), 40% said that they missed out by not using the Internet (13% of non-users), 35% felt sometimes left out when their friends talked about the Internet (9% of non-users) and 19% thought they could perform better in their daily tasks if they used the Internet (5% of non-users). Non-users were more likely than ex-users to say that they were better off not using the Internet (54% vs 27%).

VIII.B. Proxy Use

"We are interested in the kinds of help people get to use the Internet. In the past year, have you..."

In 2011, Internet users were most likely to work things out for themselves before they asked for help with the Internet (75%). The most frequently used sources of help were family and friends (50%), followed by asking people at work / school for help (27%), then taking a training course (14%). The least common approach was to pay someone for help (3%).

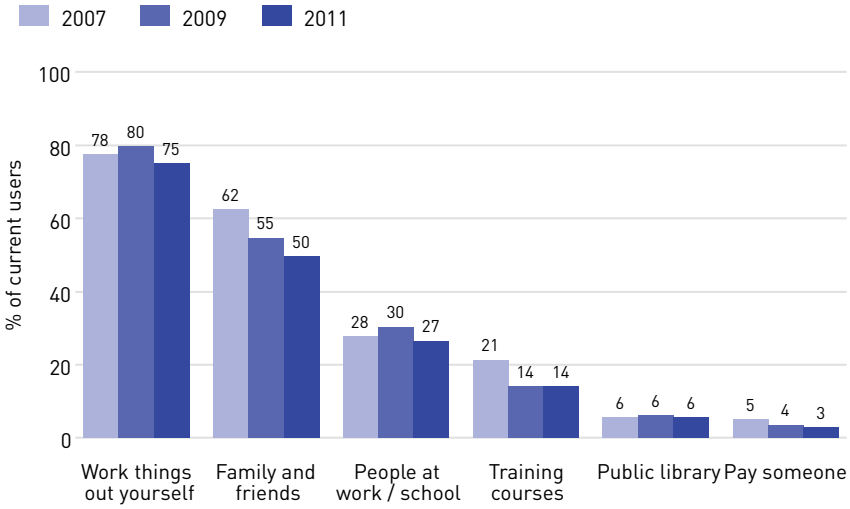
Overall, there have been few changes in this pattern of help-seeking behaviour since 2007. In 2011, asking family and friends for help was less popular than in 2007 (62% in 2007 vs 50% in 2011) as was taking courses (21% in 2007 vs 14% in 2009 and 2011).

Women are as likely as men to sort things out for themselves before they ask for help with the Internet. 75% of men and women said they worked out a problem this way. The largest gender difference was that women were more likely than men to ask family and friends for help (57% vs 42%). These results are essentially identical to 2009.

"If you needed to use the Internet to send an email or something now, do you know someone who could do this for you?"

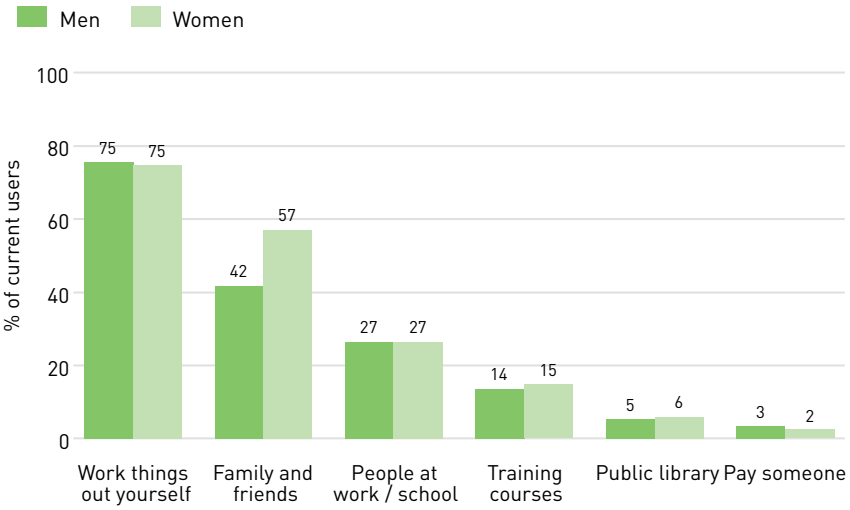
Ex-users were more likely than non-users to know someone who they could ask for help using the Internet, by 62% vs 44%. Non-users were much more likely to definitely not know a proxy user by 17% vs 3%. These results have not changed since 2009.

Asking for Help (QC4)



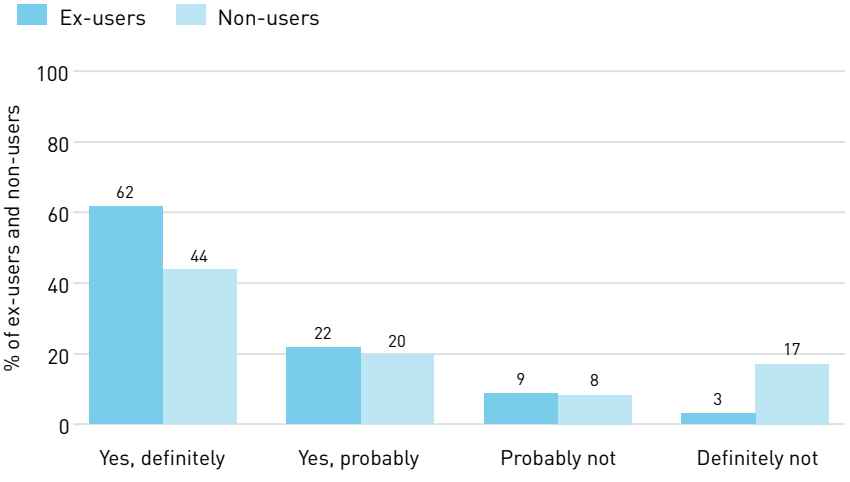
Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401; OxIS 2011: N=1,498

Asking for Help by Gender (QC4 by QD2)



Current users. OxIS 2011: N=1,498

Availability of Proxy Users to Ex-Users & Non-Users (QE11 and QN4 by QH12)



Ex-users and non-users. OxIS 2011: N=559

Methodology

Sampling was based on a two stage design. Firstly a random sample of 175 paired Output Areas (OAs) stratified by region was selected. Then within each selected OA a random sample of 10 addresses were selected from the Postal Address File (PAF).

First Stage. Selection of ED Sample points

1) Sampling points were allocated to each of the 10 Government Regions in proportion to the population in each region.

2) In each Government Region all OAs were paired with an adjacent OA that is most similar in terms of its ACORN type

3) Within 2) above all paired OA with a combined population of 60 or more people were listed in descending order of ACORN type, the most affluent pair at the top of the list and the least affluent pair at the bottom.

4) The populations of each set of paired OAs (of all adults aged 14+) were accumulated down this list. Using a random start and fixed sampling interval the required number of paired ED's was selected giving each OA a probability of selection proportionate to its size.

Second stage

Within each selected OA, interviewers were issued with 10 randomly selected addresses from which they were asked to achieve a 60% response rate. An additional 10 addresses were issued to be used in full or in part if only if six interviews could not be achieved with the original 10 addresses. Interviewers had to contact the office to request them before they could be issued. An additional 990 addresses were issued.

Out of a total of 4,490 addresses issued, 330 lay in areas that interviewers felt unable to work in. Overall, 4,160 addresses were visited by ICM staff. The outcome of these visits is shown in the table below.

Address Occupied	96.3%	4,005
Interviewer unable to locate address	1.8%	75
Commercial Property	0.5%	21
Property vacant/no longer a dwelling/new build not occupied	0.5%	21
Property vacant – old building	0.8%	35
Property vacant – new building	0.1%	3
Total	**100%**	**4,160**

In cases where the selected addresses proved to be vacant, demolished or were commercial property interviewers were allowed to go to the closest inhabited dwelling. In all, 155 addresses visited by ICM staff for the purpose of this research were substitute addresses used because the original address proved to fall into one of these categories.

Selection of respondent

At each address respondents for interview were selected by asking the person who answered the door if it would be possible to interview the person normally resident at that household aged 14 or over with the next birthday.

A person normally resident was defined as someone living in the household who is related to the person answering the door or living with someone in the household as a partner. In cases where the person answering the door did not know which household member had the next birthday a respondent was selected by choosing the person with a first name starting with a letter nearest the beginning of the alphabet. This rule was employed by interviewers on the first such occasion, and a person with a first name starting with a letter nearest the end of the alphabet on the second such occasion and so on.

In all, only 201 respondents were selected by the alphabet rule.

Outcome

The results of the successful contacts made at each address are shown in the table below.

Addresses visited	4,160	100%
Productive interview obtained	2,057	49.4%
Refusal by person answering the door	482	11.6%
Refusal by selected respondent including terminated interviews	842	20.2%
Quit during interview	41	1.0%
Unable to contact after repeated visits to address during fieldwork period	583	14.0%
Replacement address	155	3.7%

The response rate achieved on this survey was aided by the fact that respondents understood that the research was being conducted for Oxford University and by the promise that ICM would pay £1 to Oxfam for every successful interview.

Reasons for refusal are given in the table below

Not interested. No wish to participate	1032	77.9%
Too busy	64	4.8%
Ill/Not well	70	5.3%
Away for duration of fieldwork	55	4.2%
Language barrier	39	2.9%
Not stated unavailable	60	4.5%
Institutionalised	4	0.3%
Total refusals	1,324	100%

Weighting

The profile of the sample achieved and the targets to which the sample was rim weighted are shown in the table below

	Unweighted	Weighted
Gender		
Male	43%	48%
Female	57%	52%
Age		
14-17	3%	6%
18-24	9%	10%
25-34	14%	18%
35-44	16%	18%
45-54	14%	16%
55-64	16%	12%
65+	28%	19%
ACORN Group		
Wealthy Executives	8%	9%
Affluent Greys	9%	8%
Flourishing Families	7%	9%
Prosperous Professionals	2%	2%
Educated Urbanites	4%	6%
Aspiring Singles	3%	4%
Starting Out	4%	3%
Secure Families	14%	16%
Settled Suburbia	7%	6%
Prudent Pensioners	3%	3%
Asian Communities	-	-
Post Industrial Families	5%	5%
Blue-collar Roots	9%	8%
Struggling Families	12%	14%
Burdened Singles	6%	4%
High Rise Hardship	3%	1%
Inner City Adversity	2%	2%
Govt office region		
North East	5%	5%
North West	11%	12%
Yorks and H'side	9%	9%
East Midlands	7%	7%
West Midlands	8%	9%
Eastern	10%	10%
London	10%	13%
South East	15%	14%
South West	8%	9%
Wales	6%	5%
Scotland	13%	9%

	Unweighted	Weighted
ACORN		
A Wealthy Executives	9%	8.6%
B Affluent Greys.	8%	7.8%
C Flourishing Families	8%	9.0%
D Prosperous Professionals	2%	2.1%
E Educated Urbanites	5%	5.8%
F Aspiring Singles	3%	3.8%
G Starting Out	2%	3.4%
H Secure Families	15%	15.5%
I Settled Suburbia	7%	6%
J Prudent Pensioners	2%	2.9%
K Asian Communities	-	1.5%
L Post Industrial Families	5%	4.7%
M Blue Collar Roots	8%	7.5%
N Struggling Families	13%	13.2%
O Burdened Singles	5%	4.2%
P High Rise Hardship	1%	1.5%
Q Inner City Adversity	2%	2.1%
U Unclassified	3%	0.3%

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