OxIS
Oxford Internet Surveys

The Internet in Britain 2009

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Acknowledgements

The authors wish to thank the entire OII team for their support of OxIS research. Our particular thanks to Professor Helen Margetts, Dr Rebecca Eynon, Dr Eric Meyer, Dr Victoria Nash and Dr Bernie Hogan for their contributions to this report. We also wish to acknowledge Kunika Kono for her design input into the report and David Sutcliffe for his editorial support.

For their early involvement with OxIS we would like to thank Professor Richard Rose, Dr Adrian Shepherd and Dr Corinna di Gennaro. All have helped shape the evolution of this research.

We are particularly grateful for the financial support of OxIS 2009 by the Higher Education Funding Council of England (HEFCE), and sponsorship by The British Library, Ofcom, and Scottish and Southern Energy. Our colleagues from these sponsoring organisations offered useful suggestions and valuable comments, helping to ensure that OxIS continues to address issues of policy and practice.

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

Please cite the source of text and data excerpts as:
Dutton, W.H., Helsper, E.J., and Gerber, M.M. (2009) The Internet in Britain: 2009. Oxford Internet Institute, University of Oxford.

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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 2009 survey is the fourth in a series, with previous surveys conducted in 2003, 2005 and 2007. Each has used a multi-stage national probability sample of 2000 people in Britain, enabling us to project estimates to Britain as a whole. OxIS has achieved a high response rate for all four surveys.

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

The UK in a Global Context

OxIS provides the UK's link 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 with a brief summary followed by five substantive parts anchored in graphs summarising the results of the 2009 survey, and closes with a methodological appendix. The first part of the report focuses on describing the diffusion of the Internet as an innovation in information and communication technology (ICT). The second part focuses on the key issue of exclusion, either by social and economic divides or by personal choice, describing non-users and former users. The third part describes how people with different backgrounds use the Internet, followed by a fourth part which looks at the social implications of different patterns of use. The fifth section turns to key policy issues of access by focusing on understanding the circumstances of non-users. The final part examines beliefs and attitudes of individuals about the control and regulation of the Internet. Each part opens with an overview of the trends detailed in the section.

A description of the methodology is available at the end of this report, and on the OxIS website, with the full protocol for the interviews at:
http://www.oii.ox.ac.uk/microsites/oxis/

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

Overview and Summary: Reinventing the Internet

In 2009, the Internet celebrates its 40th anniversary, and the World Wide Web, its 20th. Since their inceptions, the Internet and Web have both moved well beyond their origins. Computer scientists and engineers, but also growing numbers of users and providers of Internet products and services, have reinvented the Internet and Web in fundamental ways. The 2009 Oxford Internet Survey (OxIS) describes aspects of the new, broadband, and more mobile, Internet and its Web 2.0 platforms. It shows how this evolving Internet is reconfiguring access to information, people and services in ways that are reshaping economic and social development. The social implications of the Internet, identified in this report, support current initiatives to bring those excluded into the UK government's vision of a 'Digital Britain', by reducing barriers to inclusion. However, the survey also underscores the difficulties in bringing a significant sector of non-users to the Internet, and in formulating approaches to regulation and control that will not undermine the very openness, privacy and freedom of expression that makes it such an innovative and valuable information and communication resource.

The 2009 OxIS study involved field interviews with a probability sample of over 2,000 individuals in England, Wales and Scotland of 14 years of age and older. The sample and a high response rate (62%) enable us to extend the findings to Britain as a whole. Interviewers went to the field in February–March 2009, a time shaped by the news of a deepening economic recession, balanced somewhat by optimism over the new US President, Barack Obama, whose Internet-supported election strategy was recognised around the world.

The following brief summary of key findings of this survey is tied to more detailed statistical results displayed in the full sections in the rest of this report.

Part I: Adoption of the Internet – A Cascading Array of Innovations

In recent years, most stories about the phenomenal growth of the Internet have emphasised its diffusion, as it has reached beyond the first one billion users worldwide. In Britain, the Internet has diffused only gradually since 2005 to reach 70 percent of households and individuals 14 and over in Britain, increasing from 58% in 2003 and 66% in 2007. As in previous years, Internet use in Britain has been based primarily in the household, with other locations being supplementary to household use. While access to the Internet and other digital devices has increased, divides remain, with 30% of Britons not using the Internet.

However, this diffusion of the Internet in Britain is one limited perspective on the Internet as innovation. The Internet is being reinvented year-by-year, if not week-by-week, as users and providers tag items, create applications, blog, set up and maintain websites, and search for information as a part of their everyday life and work. Focusing on ways the Internet is being reinvented, it can be seen as a cascading range of innovations. The dramatic changes that have occurred in the Internet of 2009 involved the transformation of its infrastructure, including:

- The move to broadband by nearly all (96%) Internet households
- The increasing use of wireless and mobile devices, doubling since 2007, to enable more flexible and mobile Internet access

As a whole, Internet users in Britain were more experienced in 2009, with twice the percentage of users having had more than 7 years experience in using the Internet as compared with 2003. In line with this experience, most Internet users in Britain express a high level of confidence in their skills and proficiency in use, such as in judging the credibility of a source of information.

Part II: Digital Divides – Shaped by Exclusion and Choice

As in previous years, the 2009 survey reinforces two separate but related explanations for the continuing divide among Internet users and non-users. Some are excluded on the basis of social or economic barriers to access. Britons with lower incomes, lower socioeconomic status, and less schooling are more likely to be non-users. Medical and other physical disabilities remain barriers as well. Others are excluded by choice, such as individuals with the Internet available in their household, but which they choose not to use. These choices are often linked closely with social situations, such as the degree that older people, particularly retired persons, have been less likely to use the Internet. These choices are shaped by cultures, such as generational cohorts, which can value different media practices and undermine or support interest in the Internet. Age has a dramatic impact on digital choices but gender differences have been declining as a factor underpinning digital divides, particularly with respect to access to the Internet.

Part III: Use – Reconfiguring Information Access, Social Networks and Services

The Internet can support a wide variety of purposes, which lead individuals to use the Internet in markedly different ways. Communication remains the single most common use, with almost all users saying they send or receive email or messages, such as through instant messaging or a social

networking site. There have been major trends in the uptake of a number of other uses even since 2005, including:

- Continued growth in reliance on search engines to look for information, rather than choosing to go to specific Web pages.

- An increased centrality of the Internet as a first and often major source of information about a widening variety of matters, from local events to health and medical information.

- A remarkable rise in social networking with nearly half (49%) of all Internet users having up-dated or created a social networking profile in the last year, up from 17% in 2007.

- Steadily increasing proportions of users employing the Internet to obtain services, from online shopping and banking to government services.

- A marked increase in the creation and production of content by users, linked to the increasing facility of new, Web 2.0 platforms to support user-generated content.

Despite journalistic focus on the use of the Internet for entertainment, levels of use for such leisure and entertainment activities as downloading music and videos increased only marginally in 2009, which is not as significantly as the growth in other areas, such as social networking and user generated content.

Nevertheless, individuals and groups vary in their use of the Internet for information, communication and services. Men are more likely to search for news, for example, while women are more likely to search for health information. Retired people are less likely to look for any types of information, when compared to the employed and students. Students were more likely to use the Internet for instant messaging, chatting, blogging and social networking, as well as for entertainment and leisure, than were older individuals, whether employed or retired.

Part IV: Social Shaping and Implications of the Internet – A Tipping Point

The 2009 findings reinforce the growing perception that the social implications of the Internet are beginning to be increasingly significant, such as in the area of media use and social networks. Perhaps it has begun to approach, if not pass, a tipping point at which the social shaping and implications of the Internet are becoming more apparent. The social significance of the Internet is suggested in findings across a number of areas.

Information, News, Learning and Entertainment

The Internet is becoming a central source of information, for example, OxIS found that among users in 2009 that:

- There is a continuing trust in the Internet and Web as a source of information, relative to other media, such as newspapers with many users considering it to be more important than television or newspapers for information, but not as significant as a source of entertainment, when compared to spending time with other people or watching television.

- There is a trend in media habits, with the Internet playing a more central role in such activities as obtaining the news, being entertained, and learning, which is related to perceived declines in viewing television and reading books.

- There is a concern about how much time users spend on the Internet, with 36% feeling that they spend too much time, although most users do not feel over-loaded, or unusually distracted by the Internet, and often find ways to multi-task, doing more than one activity while they are online, such as listening to music, albeit multi-tasking is more prominent among younger users.

Communication and Social Networking

The significance of the Internet was also apparent in its value for communication and social networking. Internet users believed that the Internet enabled them both to reinforce their communication with their families and existing social networks, but also to meet new people, some of whom they go on to meet face to face. In 2009, 38% of Internet users had met someone on the Internet they did not know before, most commonly on social networking sites, but also through email, messaging or chat rooms. While not as common, 13% of Internet users who had met a new friend on the Internet met them on an online dating site.

The social significance of the Internet is most dramatically suggested by the finding that users who felt lonely were less likely to use a wide range of communication platforms. Non-users of the Internet feel lonelier than do Internet users, even though this relationship might diminish when we control for the degree non-users are less well off and older.

Work and Everyday Life Chances

The implications of the Internet extend into the workplace, and its relationship with everyday life. Many studies of high-intensity users of the Internet, such as professionals who even take their mobile email devices to bed with them, suggest that the Internet erodes the boundaries

between work and home. Clearly, in such ways the Internet can be used in ways that diminish boundaries between work and home. However, this applies to a minority of Internet users. Responses to OxIS indicate that most users believe that they keep their work and family life separated and bounded.

Most Internet users who worked did not believe that the Internet improved their productivity at work, but many (38%) did. More commonly, users believed that the use of the Internet was of value in creating opportunities for personal, financial and economic advantages, from finding useful information about health to saving money on their shopping. For example, the perceived value of Internet shopping has increased since 2007.

Civic Participation

In contrast to many other areas, the Internet did not seem to play an important role in civic activities, except for a minority of users. Interest in politics tended to be a more significant determinant of involvement in civic or political affairs.

Generally, any inferences drawn from these links between use of the Internet and their implications need to be tempered by the cross-sectional, one-point-in-time data collected in 2009. More detailed statistical analyses will enable the OxIS team to assess the validity of these links more critically as the study continues. Nevertheless, the data fit a growing concern that those who are on the wrong side off the digital divide are disadvantaged in a variety of ways, from access to information in everyda y life to their success in the workplace.

Part V: Digital Inclusion Policy: Understanding the Excluded

In the UK, there is a range of government policy initiatives aimed at greater digital inclusion – diminishing the digital divide. In 2009, OxIS focused more on identifying the characteristics of groups of individuals, more or less excluded from direct access to the Internet. There were ex-users (people who formerly used the Internet but have stopped); proxy users (people who have someone else who can use the Internet on their behalf); and non-users (people who presently do not use the Internet, whether or not they know someone who could use it for them).

Our surveys of these individuals point out the multiple and often interconnected reasons for their non-use. There is no one simple approach, but an array of individual and household circumstances that compound one another. In many ways, moving a significantly greater segment of Britons online will require work on a case-by-case basis, new ways to communicate the value of the Internet to non-users, and a major breakthrough in the accessibility of the Internet, such as advances in user interface designs, which would dramatically enhance the usability of the Internet for those non-users who presently do not see the benefits of inclusion.

Part VI: Regulation and Control – Image and Reality

In addition to actions aimed at addressing the digital divide, public debate in Britain has increasingly focused on whether there is a need for greater government regulation and control of the Internet in order to address the darker side of the Internet, such as measures to protect children from negative experiences.

OxIS has found that concerns over many online negative experiences, such as spam, viruses and fraud, are not as great as portrayed in the media, and the 2009 survey reinforces the degree that users are experiencing fewer problems and are doing more to address them. That is, there is an increasingly effective self-regulation by users, such as by installing anti-virus software.

Self-regulation is further supported by an apparent trend toward the development of more conventional norms concerning online practices, such as downloading protected books or music without paying for it. In general, however, non-users were more critical of Internet activities, such as viewing pornography or gambling online, than were Internet users. In line with this difference, non-users of the Internet were more likely to favour more government regulation of the Internet than were users. Users were also less concerned over threats to privacy and more concerned with freedom of expression than were non-users, which is likely to contribute to their greater reluctance to support more government regulation of the Internet.

More generally, when asked about protecting children from harmful, unwanted content, non-users expressed more support for regulation and control of the Internet at a variety of levels, by government, Internet service providers, schools, and families. In reality, it is becoming more difficult to control children's use of the Internet in that, as the case for television, more households enable more children to have less moderated access to the Internet and other digital media, like games consoles, such as by permitting their use in the children's bedrooms. Nevertheless, households with children under 13 were more likely to have set rules on Internet use, than were families with children from 14 to 17 years of age.

Attitudes Toward Technology and the Internet – Digital Britain

Despite concerns, and significant support for regulation and control of the Internet, most Britons have quite positive attitudes toward technology in general and the Internet in particular. This squares with the widespread diffusion of the Internet, the take-up of broadband and more mobile access, and the increasing centrality of the Internet for information, communication and services.

I. Adoption

Information and communication technologies, like the Internet, are far more than ensembles of equipment. The Internet is concretely embodied in equipment, like computers and networks, but it also entails a wide array of people, from computer scientists developing new standards, to users, learning how to access the Web or send an email. Even basic use of the Internet entails an understanding of techniques, such as how to send or receive an email, to use the Internet effectively. This first section of the report describes the diffusion of the Internet, but also looks beyond mere access to equipment to the experience and skills in order to use it. Initially, this section focuses on the most common indicators of Internet diffusion required, that is the proportion of households and individuals in Britain with access to the Internet. It then places Internet adoption within the wider array of information and communication technologies entering the household and every day life, ranging from games consoles to mobile phones. This section then describes the major changes that have occurred in the network infrastructures that households utilize, which have increased in speed and mobility with broadband Internet and mobile systems – two of the most dramatic changes since 2007. Finally, this part describes the experience and skills of users, which are critical components of this evolving technological infrastructure.

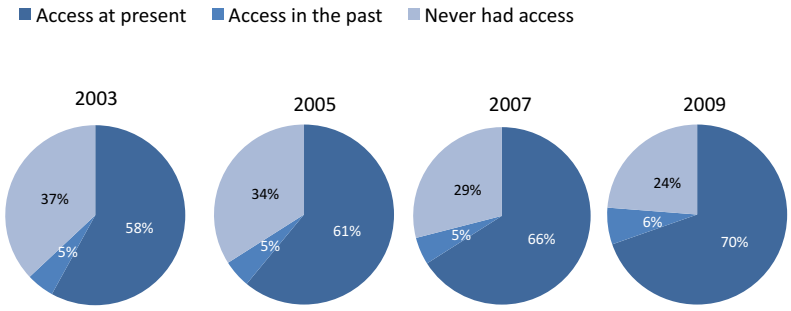
A. Diffusion

"Does this household have access to the Internet?"

Household Internet access in Britain showed an increase from 58% in 2003 to 70% in 2009.

The trend since 2003 has been a slow increase in households with Internet access. In 2009, a quarter (24%) of households in Britain had never had access to the Internet. A small proportion of households remain that have had access to the Internet in the past but who do not currently have access (6%). This proportion of households that used to be online is at about the same level as in previous years.

Household Access (QH1)

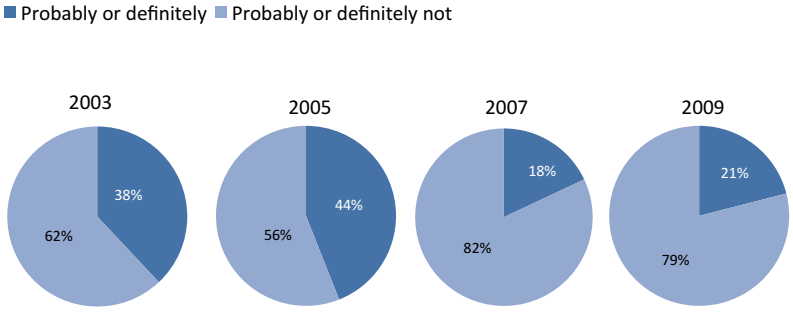


OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013

"Is this household planning to get access to the Internet at home in the next year?"

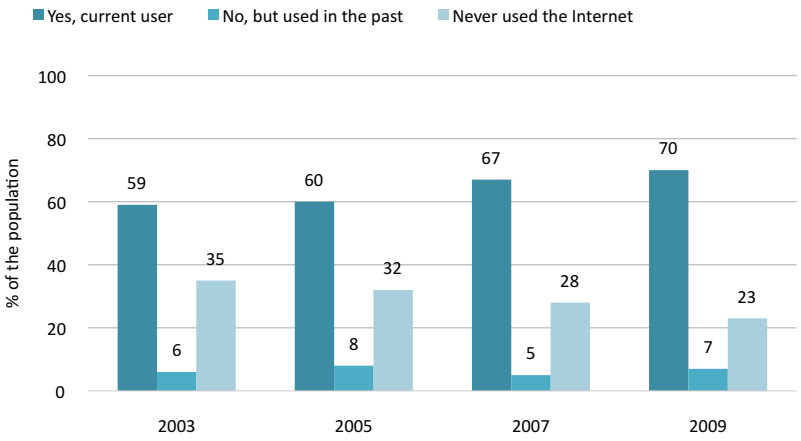
The rate of growth in the market for household Internet connections has been slowing down. Only one fifth (21%) of the households without access to the Internet planned to get access during the next year. On this basis, household access is likely to remain more or less at the same level in 2010 as it was in early 2009.

Future Access in the Household (QH2)



Individuals without Internet access at home.
OxIS 2003: N=848; OxIS 2005: N=850; OxIS 2007: N=781; OxIS 2009: N=609

Internet Use by Individuals (QH14)

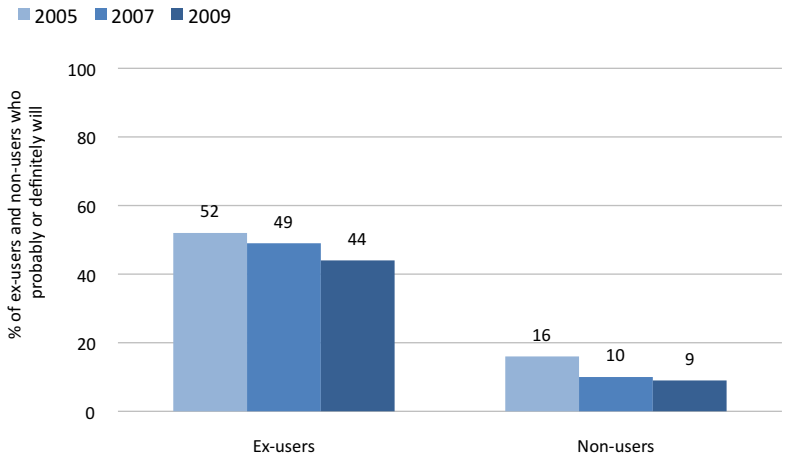


OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013

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

Internet use and home access remained nearly equivalent: In 2009, 70% of British people said they used the Internet and only 5% of Internet users did not have household access. The percentage of Britons who had never used the Internet decreased from 35% in 2003 to 23% in 2009. The number of people who had access in the past but who do not currently have access remained stable at 7% of the population.

Likelihood that Ex-Users and Non-Users Will Get Internet Access (QE16 and QN8 by QH14)



Ex-users and Non-users. OxIS 2005: N= 876; OxIS 2007: N=773; OxIS 2009: N=612.

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

Ex-users (who have used the Internet before) and non-users (who have never used the Internet) were less likely in 2009 than in previous years to say that they would probably or definitely get Internet access in the next year or so. In 2005, 52% of ex-users and 16% of non-users said that they would probably or definitely get access to the Internet, while in 2009 only 44% of ex-users and 9% non-users said so.

As in previous years, ex-users said more frequently than non-users that they would probably or definitely get access to the Internet.

"Access to technologies and digital media in the household is one of the most important drivers for engagement with the Internet in Britain. A media rich household, where people are immersed from an early age in a technology rich environment, provides easy access and the opportunity to play and experiment with digital technologies. Through this type of informal learning in a private setting, many acquire skills that are transferable to other contexts."

Ellen Helsper

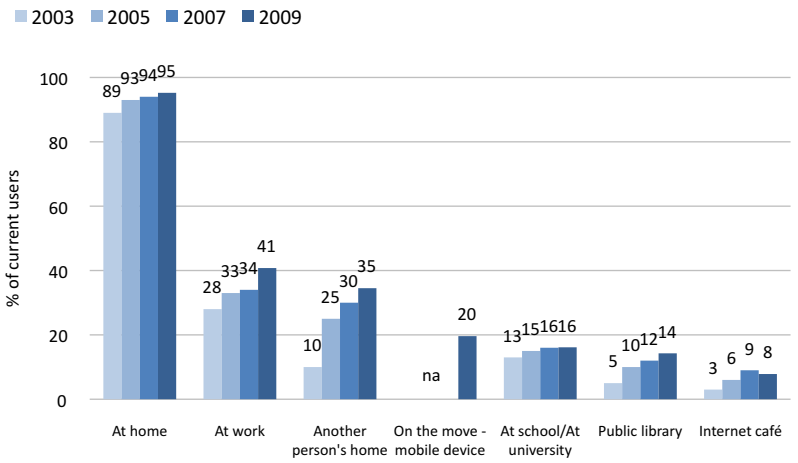
B. Digital Households, Gadgets and Mobility

Locations of Use (QC1)

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

Almost all users (95%) accessed the Internet at home. Work (41%), another person's home (35%) and school (16%) were also frequently named as access locations for the Internet. As use of the Internet has differentiated, Internet cafés and public libraries have become more important as access points. 8% of Internet users accessed the Internet at an Internet café (3% in 2003) and 14% at a public library (5% in 2003).

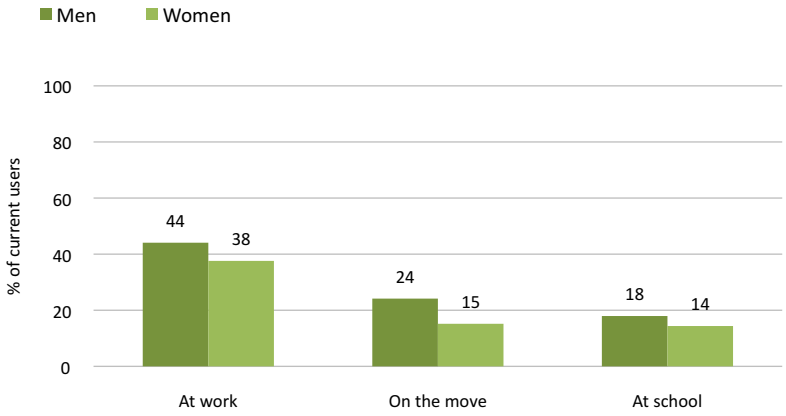
In 2009, almost one fifth (20%) of Internet users accessed the Internet on the move through a mobile phone or wireless dongle. All access locations were more frequently used in 2009 than in 2007, with the exception of school access and Internet cafés, where use remained stable.



Current users. OxIS 2003: N=1,201; OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401

Locations of Use by Gender (QC1 by QD2)

There were few significant differences between men and women with respect to where they accessed the Internet. They were equally likely to access the Internet at home (95%) and at another person's home (35%). However, men were more likely to access the Internet at work (44% v. 38%), on the move (24% v. 15%) and somewhat more likely at school (18% v. 14%).

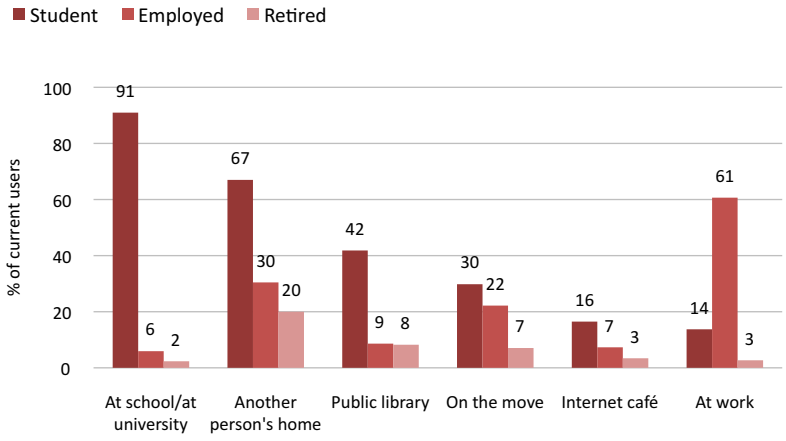


Current users. OxIS 2009: N=1,401

Locations of Use by Lifestage (QC1 by QD15)

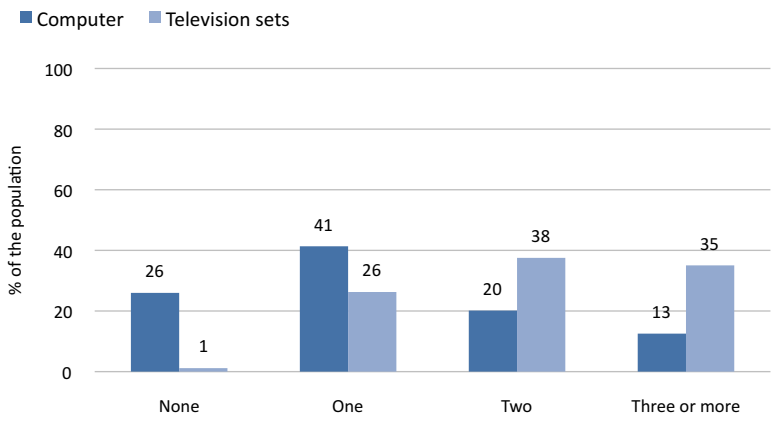
Students, employed and retired Internet users were equally likely to access the Internet at home.

Nearly all students accessed the Internet at school (91%) and most employed people accessed the Internet at work (61%). Diffusion across the workplace has almost doubled since 2003 (34%). Students were also more likely to access the Internet at another person's home (67%), in a public library (42%), on the move (30%) and at an Internet café (16%). Retired users concentrated their use at either their own home (96%) or other people's homes (20%).



Current users. OxIS 2009: N=1,401

Computer and Television Access in the Household (QH9 and QH10)



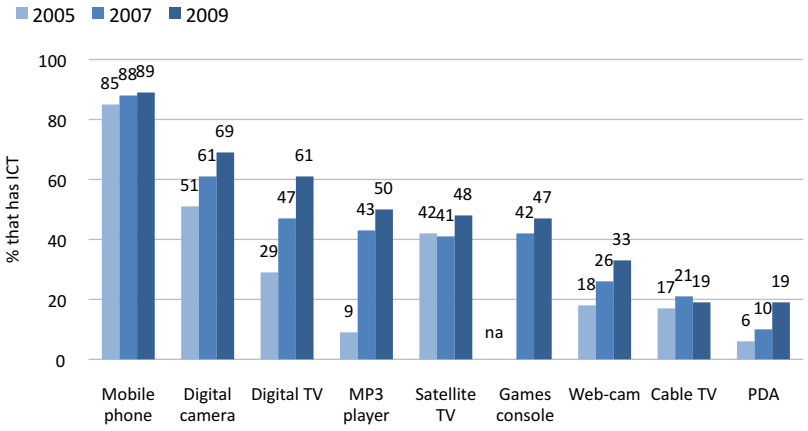
OxIS 2009: N=2,013.

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

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

Televisions remained more common than computers in households across Britain; only 1% of households did not have a television set and one quarter (26%) did not have a computer. The majority of those who did have a computer had only one computer (41% of the population) while the most common number of television sets in households with television sets was two (38% of the population). However, an increasing number of Internet households have more than one computer, enabling more individual use.

ICTs in the Household (QH8 and QH12)



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

"Could you tell me if your household has…"

"Do you yourself have a mobile phone?"

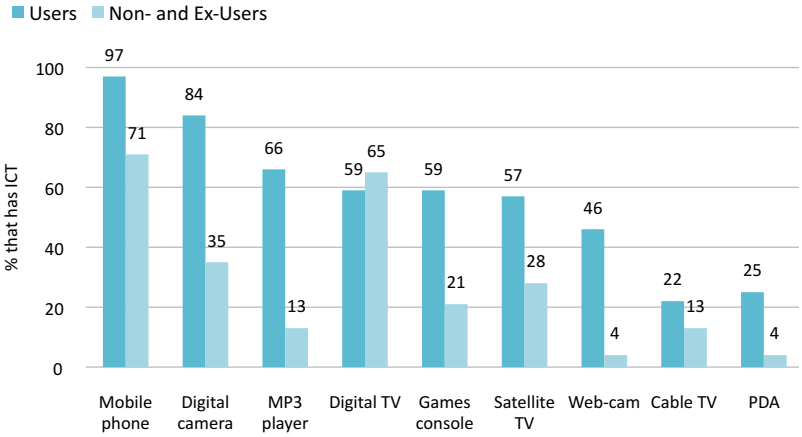
Britons are bringing more digital devices and gadgets into the household, ranging from phones to games consoles. The number of ICTs people have in the home has increased. In 2009, mobile phones had been acquired by almost 9 in 10 British people (89%). 69% had a digital camera in their household, 50% had an MP3 player, 47% had a games console and 33% had a web-cam.

The UK government's digital switchover campaign seems to have had an effect. By 2009, almost all people had a digital television. 61% had digital television, 48% had satellite television and 19% had cable television.

"These findings reveal some of the particular ways that the Internet is embedded in the communication ecology of Britain. Most striking is the rise of mobile Internet to supplement the common practices of texting and using the mobile phone for sending pictures as well as making calls."

Bernie Hogan

ICTs in the Household by Internet Users and Non-Users (QH8 and QH12 by QH14)

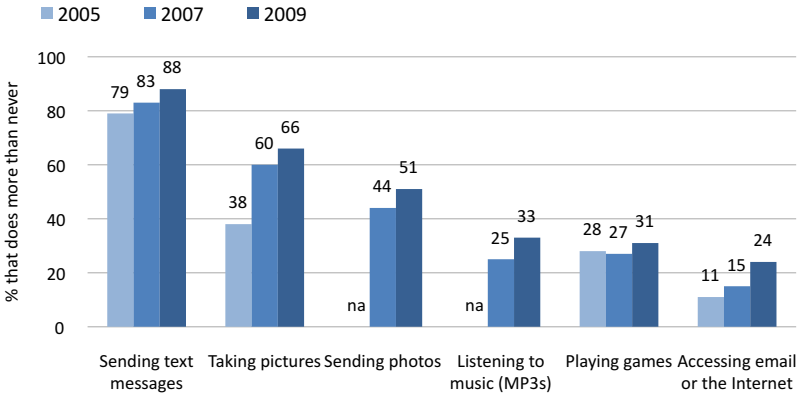


OxIS 2009: N=2,013

In line with the pattern of previous years, Internet users tended to live in more media rich households than non-users. Internet users were more likely to have a digital camera (84% v. 35%), an MP3 player (66% v. 13%), a games console (59% v. 21%) and a PDA (25% v. 4%). Non-users on the other hand were more likely to have a digital television (65% v. 59%). Digital television was the only ICT which increased significantly amongst non-users of the Internet since 2007 (42%), while Internet users significantly increased their uptake of many other ICTs (see OxIS 2007).

Internet users were almost certain to have a mobile phone. Almost all (97%) Internet users had a mobile, while less than three quarters (71%) of Internet non-users had one.

Use of Features on Mobile Phones `



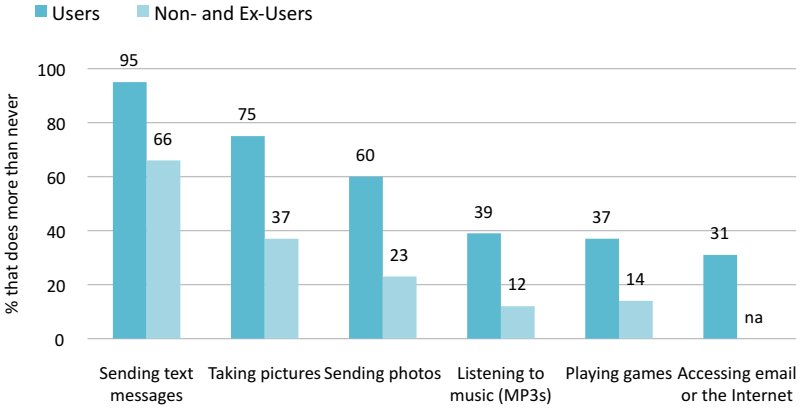
Mobile phone users. OxIS 2005: N=1,857; OxIS 2007: N=2,070; OxIS 2009: N=1,789

"How frequently do you use your mobile phone for…"

The use of the mobile phone to access Internet related applications increased significantly since 2007: 24% accessed email or the Internet through their mobile phone in 2009, up from 15% in 2007. Sending photos by mobile phone also increased, from 44% in 2007 to 51% in 2009. Using the mobile phone for listening to music was also more popular in 2009 than it was in 2007 (33% v. 25%).

Other than making a phone call, texting was the most common use of the mobile phone with 88% of mobile phone users saying they sent text messages.

Use of Features on Mobile Phones: Internet Users and Non-Users (QH13 by QH14)



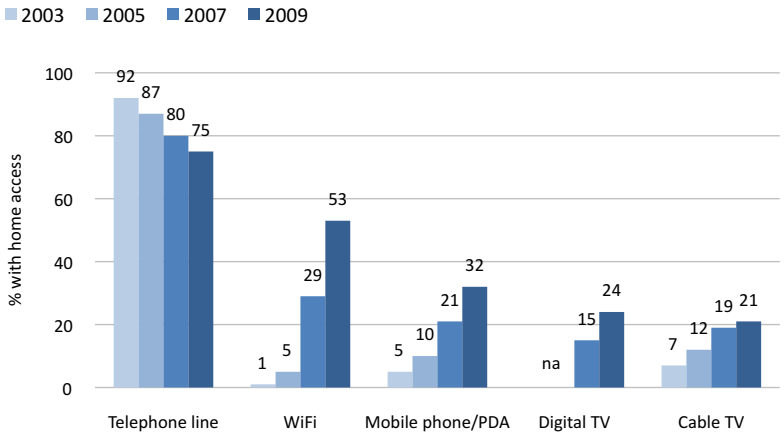
Mobile phone users. OxIS 2009: N=1,789

Internet users made broader use of their mobile phones than non- and ex-users. They were especially more likely to send (60% v. 23%) and take photos (75% v. 37%), to play games (37% v. 14%), send messages (95% v. 66%) and to listen to music (39% v. 12%). In general terms, users increased their use of mobile phone features since 2007, while the use of features by non- and ex-users remained about the same, increasing the gap between both groups (see OxIS 2007).

Almost one third (31%) of Internet users used their mobile phone to access email or the Internet.

C. Changing Infrastructure

Different Types of Access to the Internet in the Household (QH4)



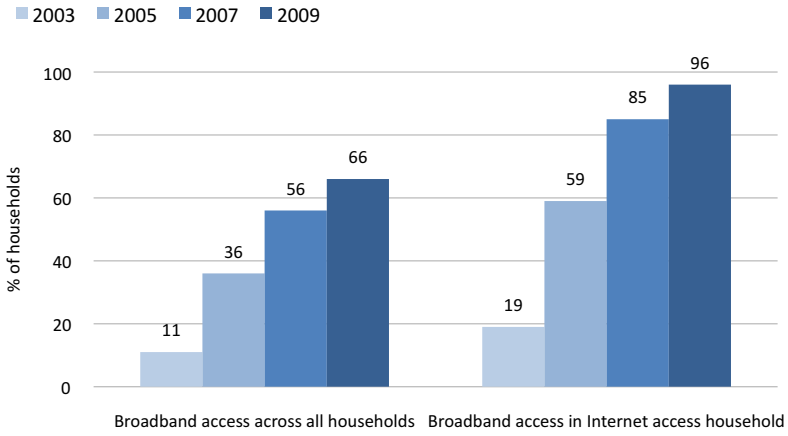
Households with home access. OxIS 2003: N=1,172; OxIS 2005: N=1,330; OxIS 2007: N=1,557; OxIS 2009: N=1,397

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

The percentage of households with telephone connections to the Internet decreased. In 2003, 92% of households with Internet access indicated that they had access over their telephone line, while in 2009, 75% connected to the Internet in this way. This decline is due largely to the rise of wireless connectivity, which is often anchored in telephone or cable connections.

Connections to the Internet using a handheld device continued to increase rapidly, from 5% in 2003 to 32% in 2009. The largest change in infrastructures for access was in Wireless (WiFi) connections to the Internet. 53% of Britons with home access connected through WiFi in 2009, almost twice as many as in 2007 (29%) and ten times as many as in 2005 (5%).

Broadband Access in the Household (QH5)



All households. OxIS 2003: N=2,029, OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013
Households with home access. OxIS 2003: N=1,172; OxIS 2005: N=1,330; OxIS 2007: N=1,557; OxIS 2009: N=1,397

"Do you have a broadband Internet connection at home?"

Households in Britain had moved to a broadband connection, with 66% of all households in Britain accessing the Internet through broadband in 2009. In 2007 only 56%, and in 2005 only 36%, did so.

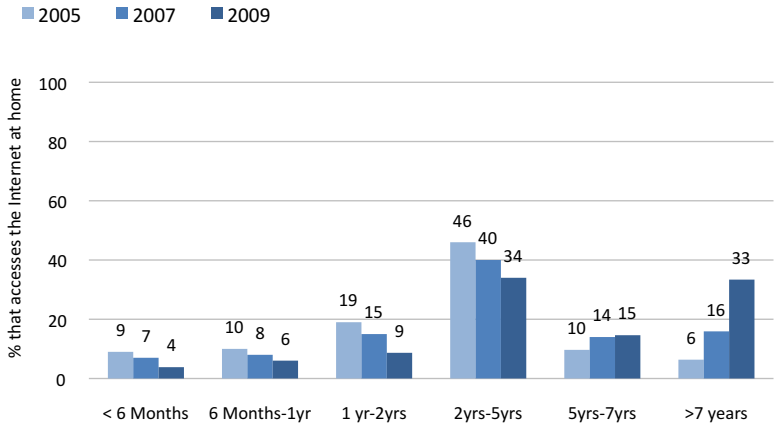
Among Internet households, 96% accessed the Internet through broadband in 2009, while in 2007 this was 85% and in 2005 only 59%. This is another major change in the infrastructures for access.

D. Experience

"How long has your household had an Internet connection?"

The number of people who have had access to the Internet for more than 7 years increased rapidly since 2005 (6%) and 2007 (16%) to 2009 (33%). Internet households in Britain have considerable experience, almost half (48%) have had access for more than five years.

Years of Access to the Internet at Home (QH3)

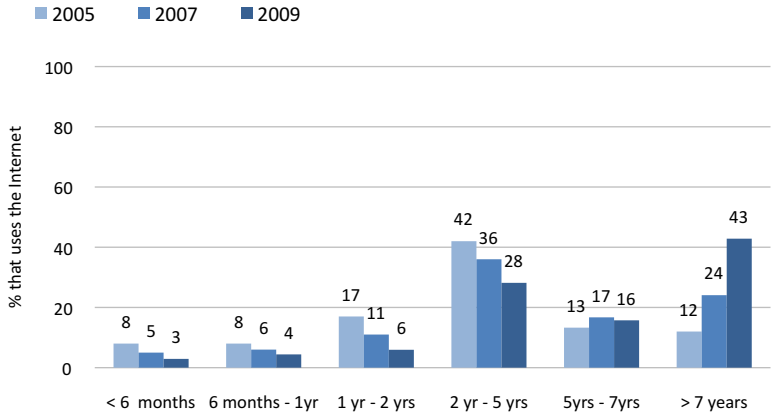


Households with home access. OxIS 2005: N=1,172; OxIS 2007: N=1,557; OxIS 2009: N=1,397

"About how long have you been using the Internet?"

People used the Internet for a longer period of time in 2009 than in previous years. In 2005, less than a fifth (12%) and in 2007 a quarter (24%) had used the Internet for more than 7 years, while in 2009 this was 43%. There were fewer people with less than 1 year experience in 2009 (7%) than there were in 2005 (16%).

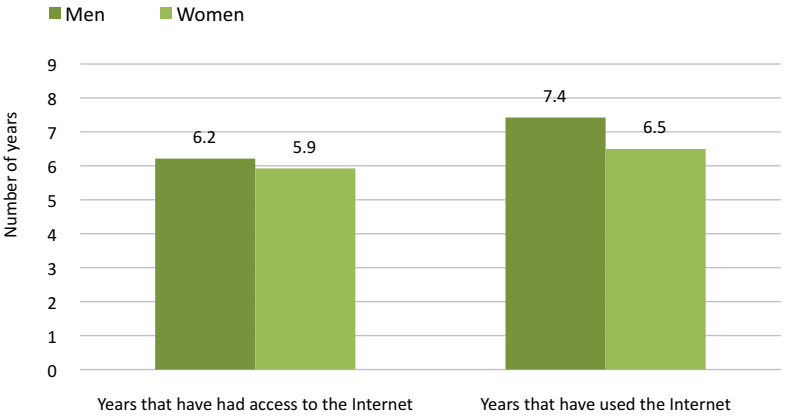
Years of Use of the Internet (QC2)



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

Male users had accessed the Internet at home for somewhat longer (av=6.2 years) and also used it longer (av=7.4 years) than female users who on average had had access to the Internet at home for 5.9 years and used it for 6.5 years.

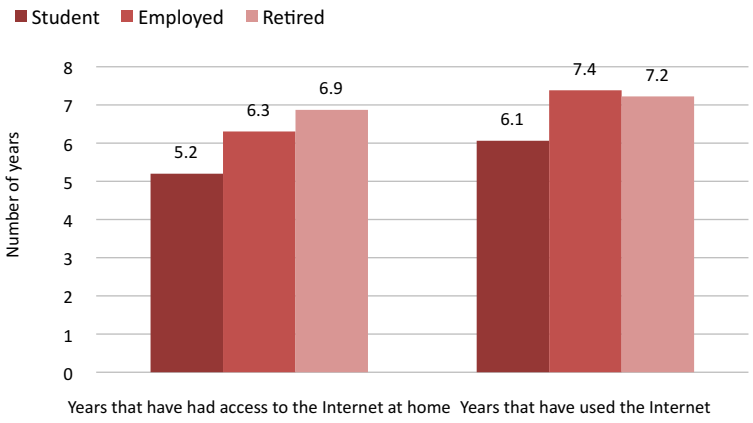
Access to and Use of the Internet by Gender (QH3 and QC2 by QD2)



Households with home access. OxIS 2009: N=1,397

Current users. OxIS 2009: N=1,401

Access to and Use of the Internet by Lifestage (QH3 and QC2 by QD15)



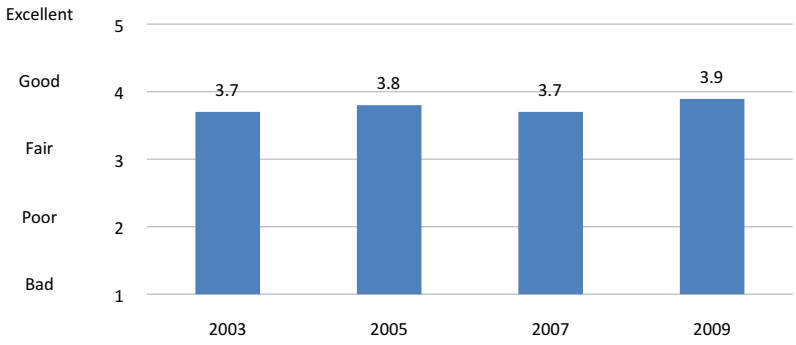
Households with home access. OxIS 2009: N=1,397 Current users. OxIS 2009: N=1,401

Student users had access to the Internet (av=5.2 years) and used it (av=6.1 years) for less time than those at other stages of life.

Employed and retired Internet users used the Internet for about the same time (av=7.4 and 7.2 years) but retired users had access longer (av=6.9 years) than employed users (av=6.3 years).

E. Skill and Expertise

Self-rated Ability to Use the Internet (QC5)



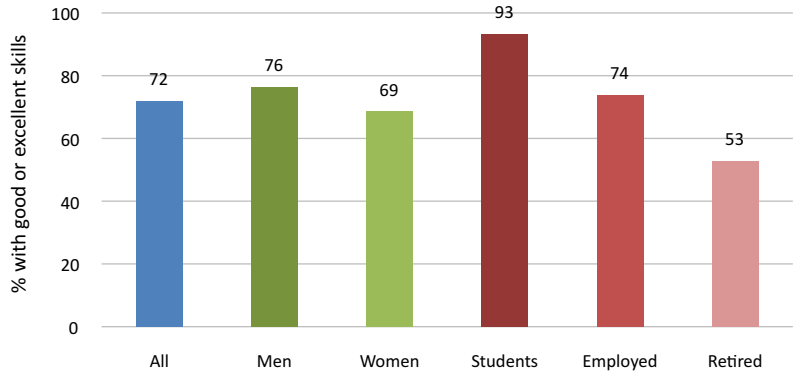
Current users. OxIS 2003: N=1,201; OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401

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

People's ratings of their own Internet skills (av=3.9 in 2009) did not change significantly since 2003 (av=3.7).

Internet users were very confident about their Internet skills, in 2009 over half rated their skills as good (51%) or excellent (21%) (data not shown).

Self-rated Ability to Use the Internet by Gender and Lifestage (QC5 by QD2 and QD15)



Current users. OxIS 2009: N=1,401

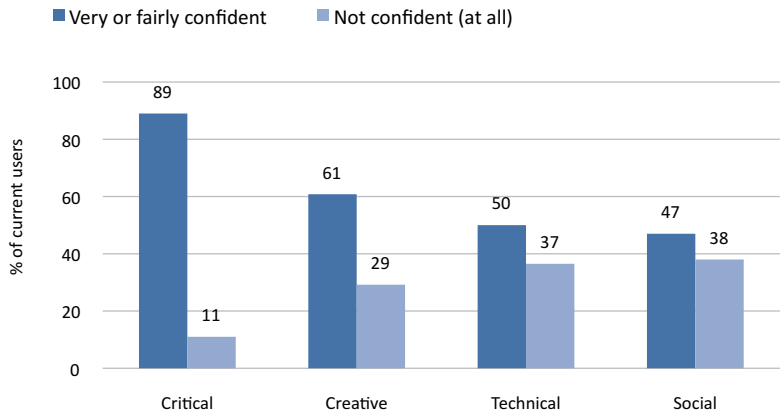
Men were more confident about their Internet skills than women. 76% of men thought they had good or excellent Internet skills, compared to 69% of women. While both were more confident in 2009 than in 2007, the gender differences remained similar at around 7 percentage points.

Students were the most confident with 93% saying they had good or excellent skills, compared with 74% of employed and 53% retired Internet users.

"How confident do you feel about…?"

Internet users were confident about their critical skills such as evaluating the credibility of a source (89% felt fairly or very confident), as well as about their creative skills (61% confident). However, Internet users were less confident about their technical (50% confident) and their social skills (47% confident), such as participating in discussions and making friends online.

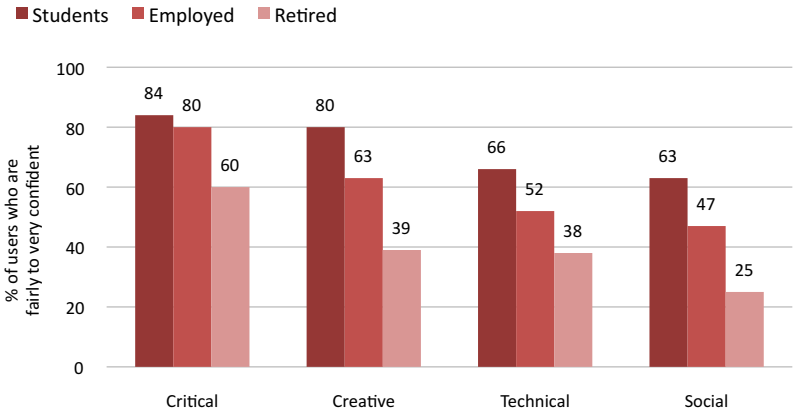
Specific Internet Skills (QC24)



Current users. OxIS 2009: N=1,401

Specific Internet Skills by Lifestage (QC24 by QD15)

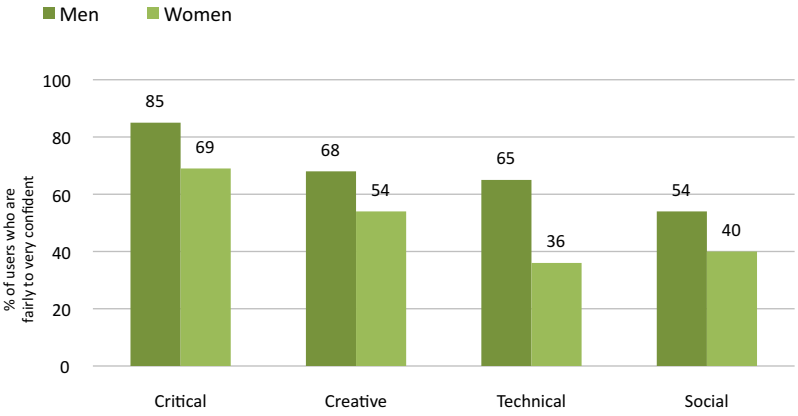
Students rated their own skills higher than did other users. 84% of students felt fairly or very confident about their critical skills, 80% about their creative skills, 66% about their technical skills and 63% about their social skills. Retired users were least confident about their own skills. Only 25% were confident about their social skills and 38% about their technical skills.



Current users. OxIS 2009: N=1,401

Specific Internet Skills by Gender (QC24 by QD2)

Men felt more confident about their skills in every area. 65% of men and only 36% of women felt fairly or very confident about their technical skills and 85% of men and only 69% of women felt confident about their critical skills.



Current users. OxIS 2009: N=1,401

"Physical access to the Internet is only one of the aspects of the digital divide. While it may be possible to diminish the inequalities in access to digital infrastructures, digital skills and motivations are likely to continue to differ – determining the extent to which people engage with the Internet."

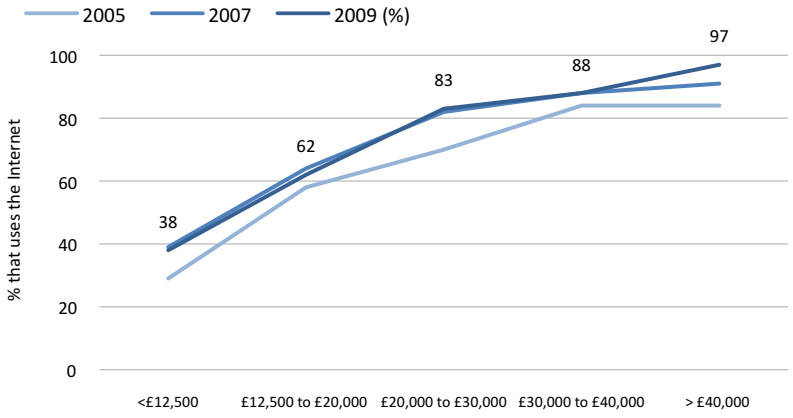
Ellen Helsper

II. Digital Divides: Exclusion and Choice

One type of divide is structured by the social, economic, geographical or physical situation of individuals, such as not being able to afford a computer for one's household. This we call 'exclusion'. A second type is more subject to personal choices of individuals. These choices are shaped by an individual's cultural or social characteristics, such as their gender, but more amendable to choice. This we call digital 'choice'. Divides between Internet users and non-users are created by both exclusion and choice.

A. Exclusion: Income, Education, Socioeconomic Status and Disability

Use by Income (QH14 by SC3)



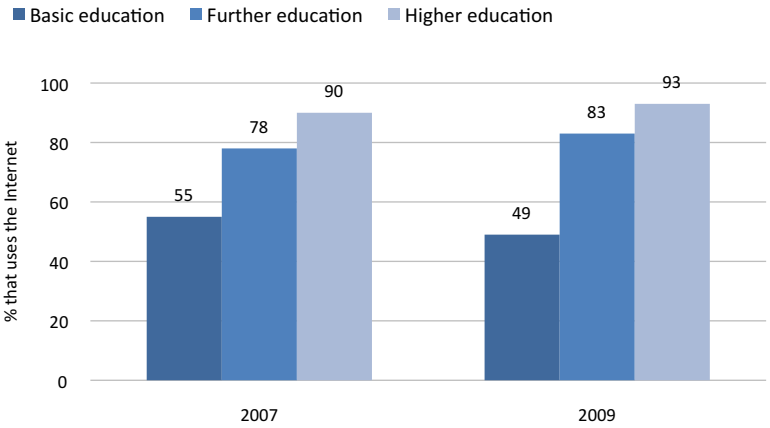
OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013
Note: The income scale changed in 2009.

"Here is a table showing the range of incomes that people have. Which of the letters on this table best represents the total income of your household before tax?"

The difference between income groups remained stratified, but stable from 2003 to 2009. People in the highest income category were more than twice as likely to use the Internet in 2009 (97%) than those in the lowest income category (38%).

Internet use remained in general the same in all income groups between 2007 and 2009. The only considerable increase was among households in the highest income group. From 91% in 2007, Internet use increased to 97%.

Use by Education (QH14 by QD14)



OxIS 2007: N=2,350; OxIS 2009: N=2,013 (Basic: N=901; Further: N=510; Higher: N=360)
Note: Students were excluded.

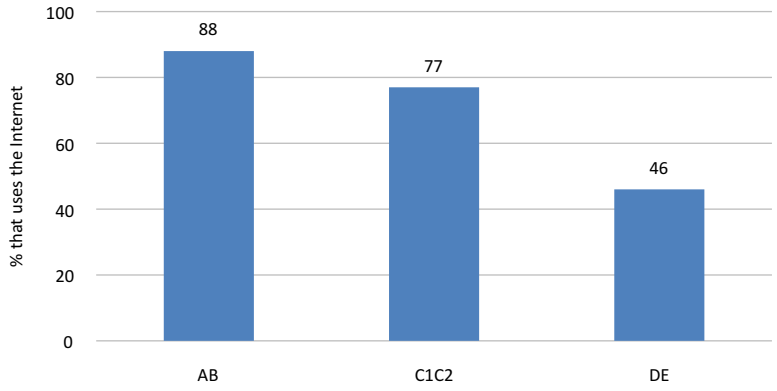
"What is the last type of educational institution (e.g. school, college or university) that you have attended or which type of educational institution are you attending now?"

As in 2007, important differences in Internet use could be observed for people with different levels of education. Among people with basic education (up to secondary school), only 49% used the Internet, while most (93%) of those with a higher (university) education used the Internet. The gap between those with basic and higher education increased between 2007 and 2009, from a 35 to a 44 percentage point difference.

Social Grade was registered by the interviewer

People of higher social grades (AB) were almost twice as likely to use the Internet (88%) as people from the lowest social grades (DE) (46%).

Use by Social Grade of Household (QH14 by QD24)

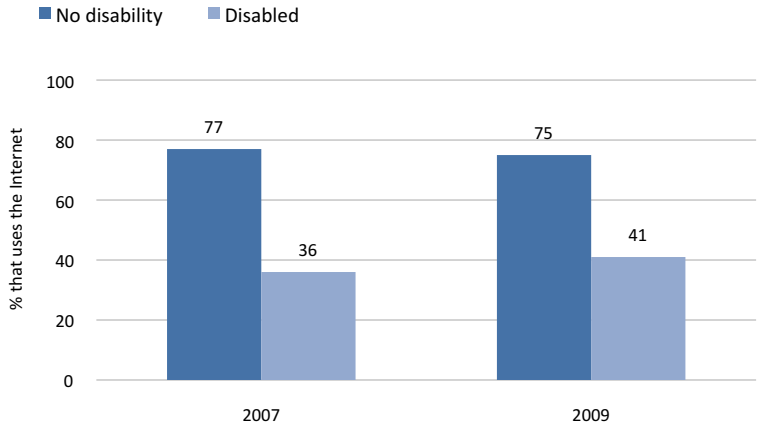


OxIS 2009: N=2,013

"Do you have a health problem or disability which prevents you from doing everyday tasks at home, work or school or which limits the kind or amount of work you can do?"

Disability, such as a health-related problem, remained a key source of digital exclusion. The use of the Internet by people with a health problem or disability increased, but only marginally, between 2007 and 2009. In 2009, 41% of those with a disability used the Internet, while in 2007 only 36% did so. People with a health problem or disability still used the Internet considerably less in 2009 than people without a health problem or disability (75%).

Disability and Internet Use (QH14 by QD29)



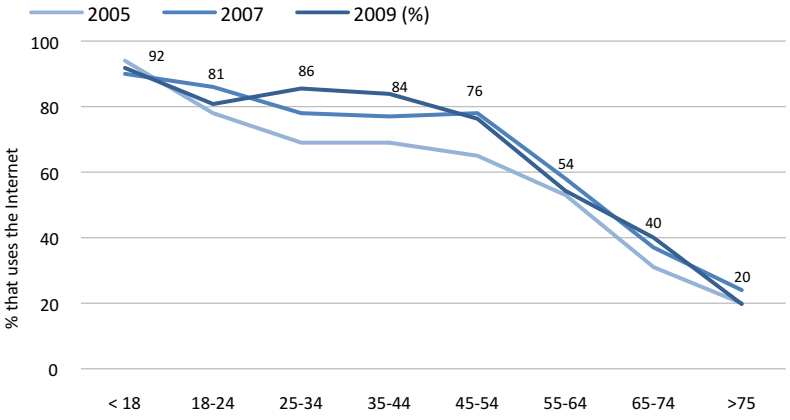
OxIS 2007: N=2,350; OxIS 2009: N=2,013 (Disabled: N=295; No disability: N=1,698)

B. Choice: Age, Life Stage and Gender

"In what year were you born?"

As in previous years, Internet use was strongly related to age: younger people used the Internet more than older people. The number of Internet users increased considerably between 2005 and 2009 for those between 25 and 54. However, it did not change significantly for the other age groups.

Use by Age (QH14 by QD1)



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

Use by Lifestage (QH14 by QD15)

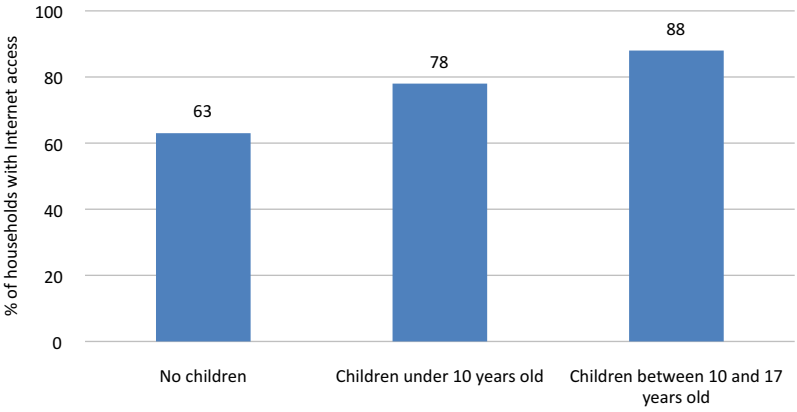
OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350
OxIS 2009: N=2,013 (Students: N=176; Employed=984; Retired=458; Unemployed=161)

"Which of these descriptions best describes your current situation?"

Lifestage remained one of the main factors associated with Internet use. In 2009, 100% of students, compared to only 86% of employed, 34% of retired and 48% of unemployed people used the Internet. However, the number of employed people who used the Internet increased considerably, moving from 67% in 2003 to 86% in 2009. On the other hand, the number of retired people using the Internet increased from 22% in 2003 to 30% in 2005 but remained more or less stable thereafter (34% in 2009). The proportion of unemployed people using the Internet has not changed much.

The gap between students and employed people decreased between 2003 and 2009: while the gap was 31 percentage points in 2003, in 2009 it was 14 percentage points, owing to greater take-up of the Internet among the employed across Britain.

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

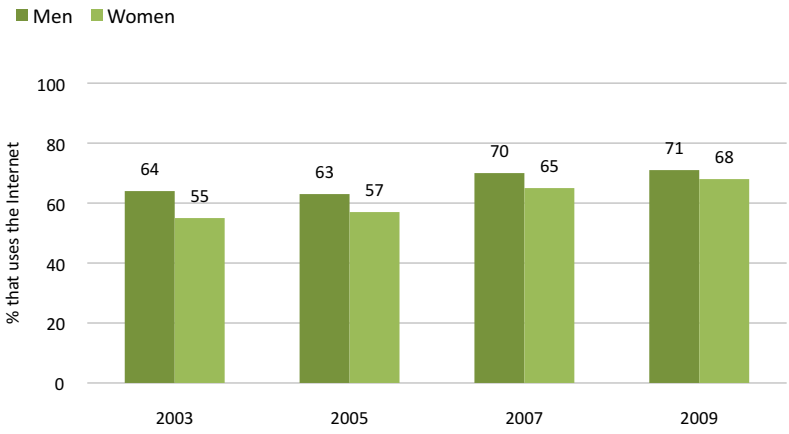


OxIS 2009: N=2,013

"Do any children (people under 18) live in your household? And how old are they?"

Households with children were more likely to have access to the Internet, especially if the children were teenagers. 88% of households with children between 10 to 17 had access to the Internet, compared to 78% of households with under 10s and 63% of households with no children.

Use by Gender (QH14 by QD2)



OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350
OxIS 2009: N=2,013 (Men: N=966; Women: N=1,047)

Gender as observed by the interviewer

Even though a gender divide in use is still present, the difference in Internet use between men and women has been decreasing since 2003. In 2009 the difference in Internet use between men and women was only 3 percentage points: 71% of men and 68% of women used the Internet.

III. Use

The Internet is not the same thing to all people. An early observation was that the computer is a general-purpose tool and the Internet has made this more apparent to the public-at-large. Some use the Internet for work, others for entertainment. You can access rare manuscripts or watch popular movies over the Internet, or create a text or video to distribute to the world. You can use the Internet to be alone or to make friends. Since 2003, OxIS has increasingly focused on how people use the Internet and Web. This is important because the longer-range social implications of the Internet will be shaped and mediated by how people use it – as a passive entertainment medium or an active means for creating original content. The following sections describe these patterns of use on the basis of categories derived from our analysis of responses in earlier years. For example, all of the activities in the first section on information seeking are likely to be grouped together because a person who uses the Internet for one of these is likely to use it for the other activities as well. People are using the Internet for an increasingly wide range of activities, underscoring the potential for the Internet and Web to have implications in many areas of everyday life and work.

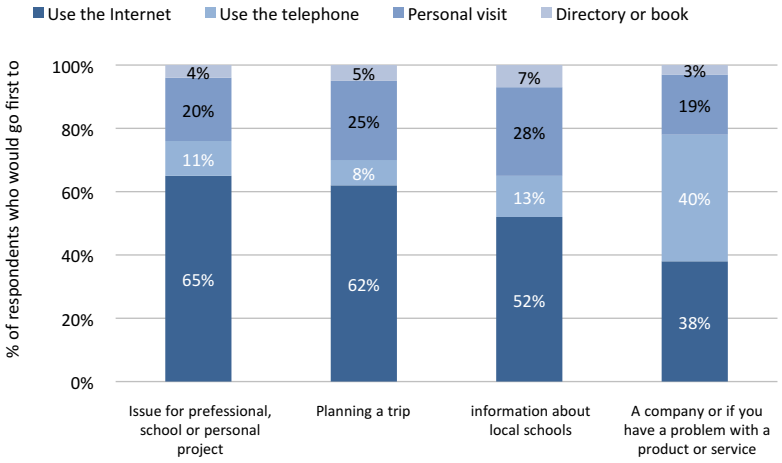
A. Information Seeking

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

The Internet has become the first port of call when people look for information. In 2009, people used the Internet first especially when they were looking for information on issues for a professional, school or personal project (65%), were planning a trip (62%), and getting information about local schools (52%) or about a company (38%).

The Internet became more important in 2009 for looking for information about local schools. In 2007, 40% of British people used the Internet first for this while in 2009 this was 52%.

Looking for Information on Different Media (QA1)

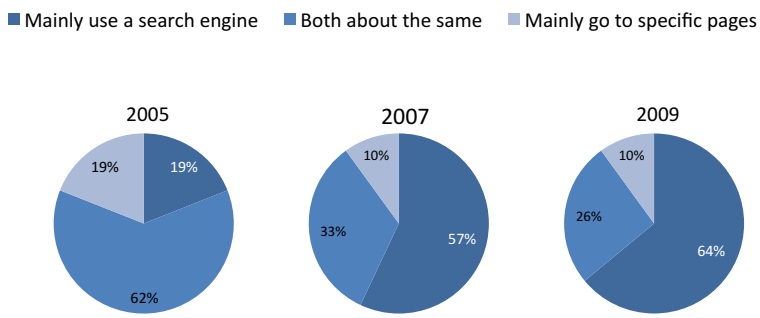


OxIS 2009: N=2,013

"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?"

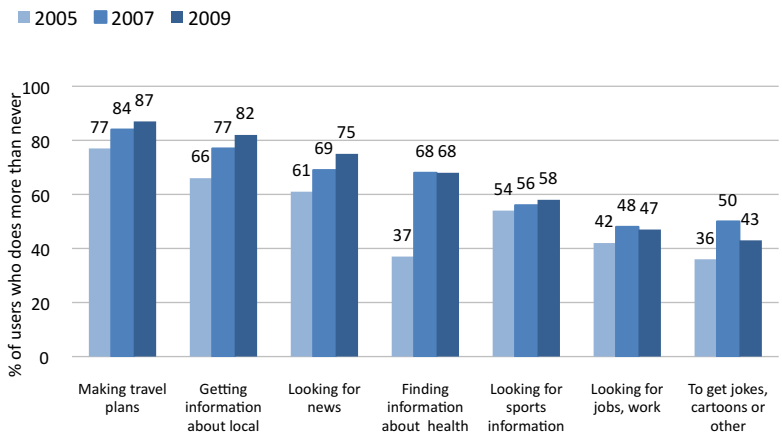
In 2009, Internet users were more likely to focus on the use of search engines than in previous years. Over half (64%) said they mainly used search engines in 2009 compared to 19% in 2005 and 57% in 2007.

Ways to Look for Information Online (QC25)



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

Information Seeking Online (QC22)



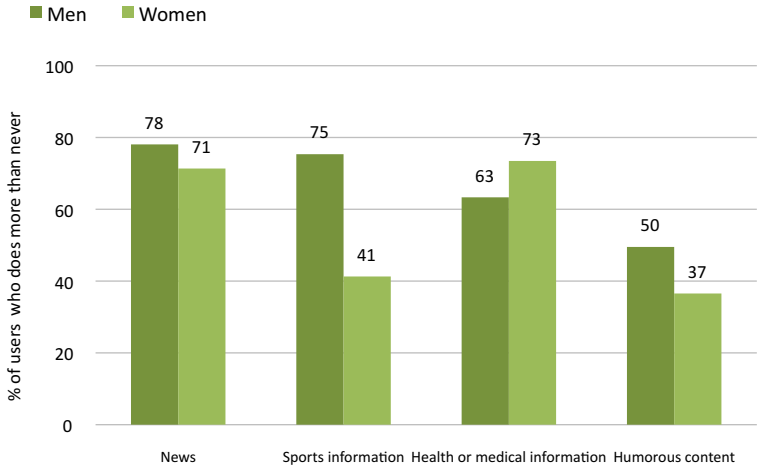
Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401

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

People were generally more likely to look for all types of information online in 2009 than in 2007, with the exception of looking humorous content which decreased (43% v. 50%). The largest increase since 2007 was in looking for news (75% v. 69%).

The most popular type of information seeking was that related to travel plans (87%) and local events information (82%). Health information was just as important to users in 2009 as in 2007 (68%), when there was a major increase in looking for health information as compared with earlier years (37% in 2005).

Information Seeking Online by Gender (QC22 by QD2)

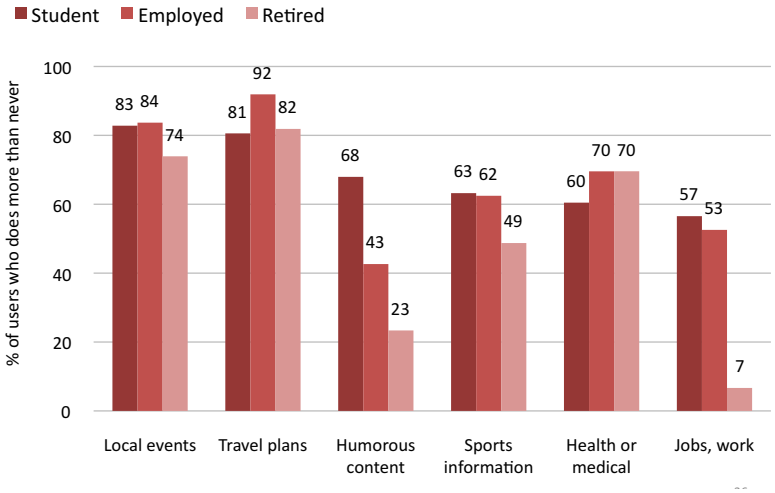


Current users. OxIS 2009: N=1,401

Men looked more frequently for information relating to news (78% v. 71%), sports (75% v. 41%) and humorous content (50% v. 37%) than did women in 2009.

Women looked for health information (73%) more frequently than did men (63%). This reflects the patterns found in 2007 when health was the only information seeking activity undertaken more often by women (see OxIS 2007).

Information Seeking Online by Lifestage (QC22 by QD15)



Current users. OxIS 2009: N=1,401

Students used the Internet more frequently than the other groups to look for humorous content online (68%) and for jobs or work (57%). They were just as likely as the employed to look online for local events (83%) and sports information (63%). Employed users used the Internet to make travel plans (92%) more often than the other groups (81% students, 82% retired users), but all frequently used the Internet for this purpose.

Retired users looked the least frequently for all types of information, with the exception of looking for health information which they were just as likely to do as employed people (70% v. 60% of students). The increased use of health information by retired Internet users was the largest within group difference since 2007, suggesting that the availability of health information on the Internet had become more widely recognised by elders.

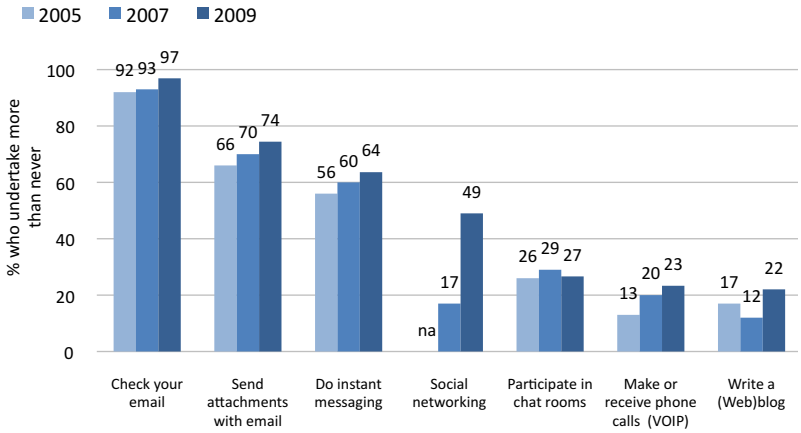
B. Communication and Social Networking

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

Users gradually increased their participation in all activities relating to communication: 97% of Internet users sent emails (92% in 2005) and 64% used instant messaging (56% in 2005), chatting did not increase substantially in popularity; about one third (27%) of users used chat rooms (26% in 2005).

Newer ways of communicating online have increased considerably. In 2005, 13% made VoIP phone calls while in 2009 23% did this. Social networking was the most popular of the new applications; half of the Internet users (49%) reported having updated or created a social networking profile, up from 17% in 2007.

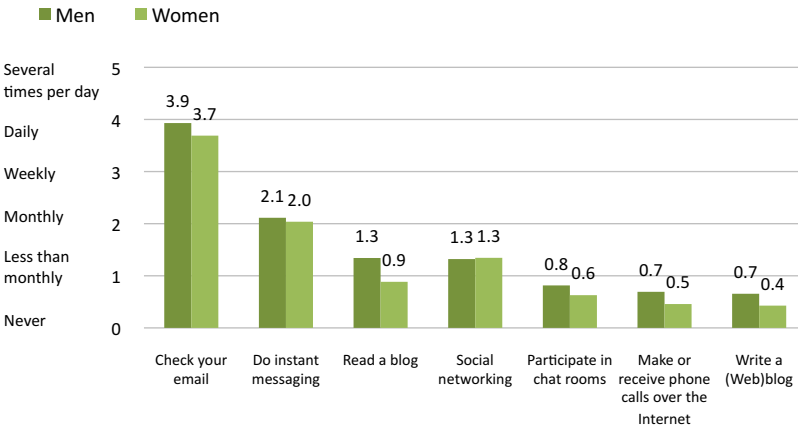
Communication Online (QC10)



Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401
Note. Social networking question changed in 2009.

Communication Online by Gender (QC10 by QD2)

Men undertook almost all online communication activities more frequently than women, but the differences were not large. The differences were largest for reading and writing blogs; men undertook this more often on average (av=1.3 and 0.7) compared with women (av=0.9 and 0.4).

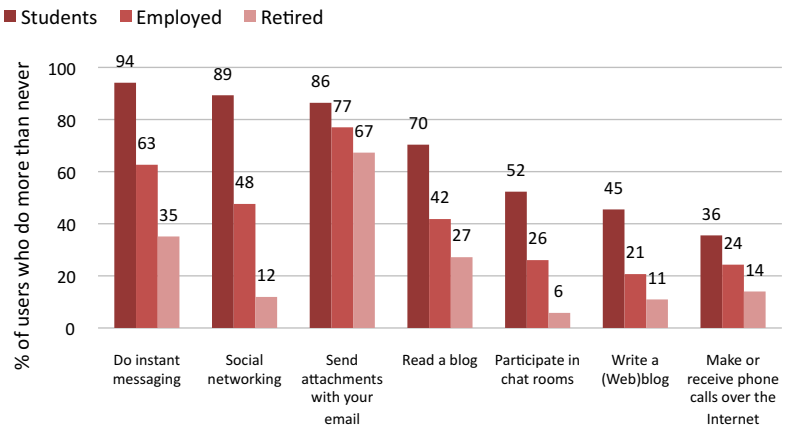


Current users. OxIS 2009: N=1,401

"The Internet is rapidly becoming a core part of how citizens maintain contact with each other, both at a distance and locally. Email is still the dominant way to maintain contact via the web, although its prominence is waning in favour of niche technologies based on friend lists. This includes the use of social software (e.g. Facebook) and instant messaging services (e.g. MSN, Yahoo IM). For many users, email use is taking a backseat to other media. Many people check their email out of necessity, but relish in the use of instant messaging and social network software. Part of this is shown in the steep increase in the number of individuals who use social networking sites. Even more striking is the jump among students, especially among those who use this software daily."

Bernie Hogan

Communication Online by Lifestage (QC10 by QD15)



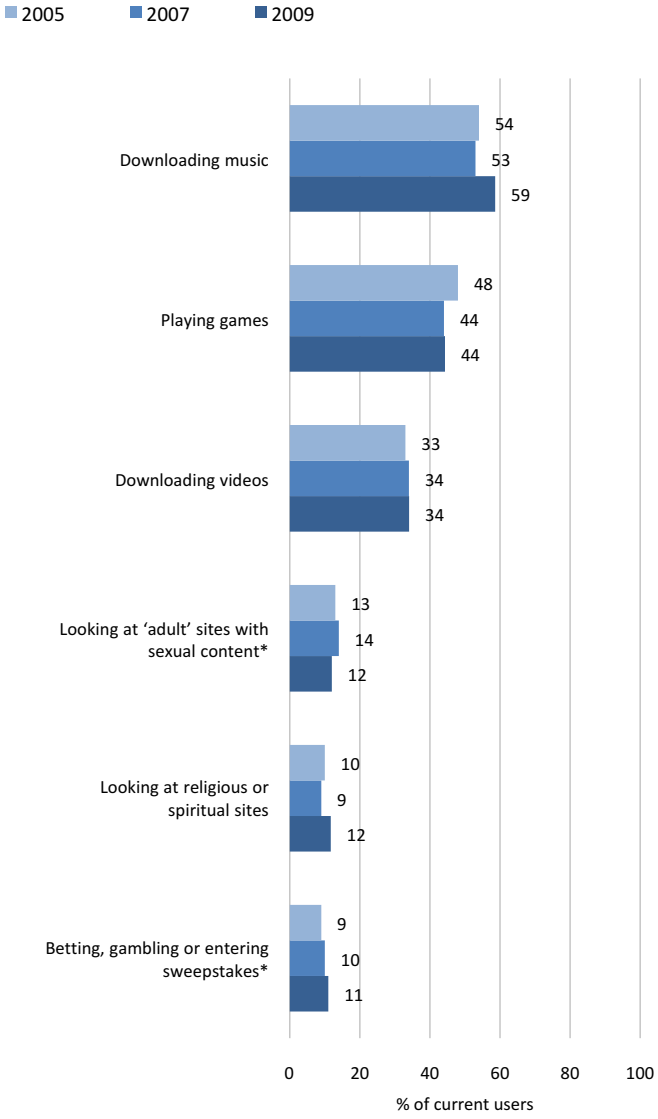
Current users. OxIS 2009: N=1,401

Some forms of online communication continued to be more popular among students than among employed or retired Internet users. As in 2007, the largest difference existed for participating in instant messaging (94% of students), chat rooms (52%), writing blogs (45%) and social networking (89%).

Although all groups participated on average less than monthly in chat rooms and blogs, retired users were a lot less likely to read (27%) or write a blog (11%) than students were. Employed users were less likely than students to participate in instant messaging (63%), chatting (26%), reading blogs (42%) and social networking (48%).

C. Entertainment

Entertainment and Leisure Online (QC31 and QSC7)



Current users. OxIS 2009: N=1,401
*Question were part of self-completion section in 2009

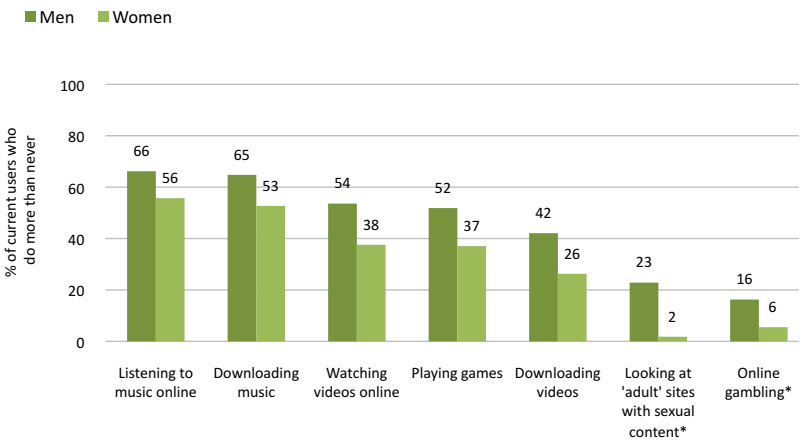
"How frequently do you use the Internet for the following purposes?"

There were only minimal changes since 2005 in leisure and entertainment activities on the Internet. The largest difference was in downloading music: 54% did this in 2005 compared to 59% in 2009. Playing games (44%) and downloading videos (34%) were the most popular activities after downloading music but participation in these did not change much since 2007.

Neither the number of people who looked at 'adult' sites (12%) nor those who participated in online gambling (11%) increased considerably from 2005 and 2007 even though the question was a self-completion item in 2009 to diminish the pressure against reporting socially undesirable behaviour.

The gap between men and women in their use of entertainment and leisure activities with an average of 10 to 15 percentage points continued in 2009. The largest differences were found for looking at adult sites (23% men v. 2% women), watching (54% men v. 38% women) and downloading (42% men v. 26% women) videos and playing games (52% men v. 37% women).

Entertainment and Leisure Online by Gender (QC31 and QSC7 by QD2)

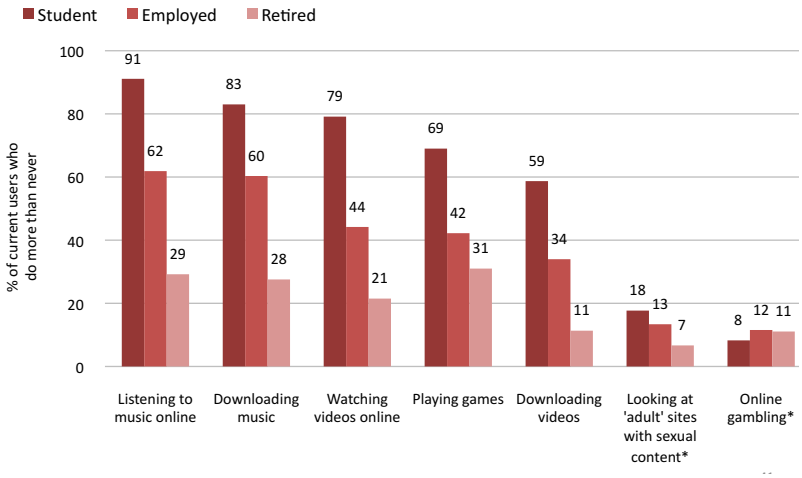


Current users. OxIS 2009: N=1,401
* In self-completion questionnaire

Students were the most frequent participants in online entertainment and leisure activities. They were more likely to listen to music (91%), watch videos (79%) and play games (69%) and were the most likely to look at 'adult' sites (18%).

Employed (12%) and retired users (11%) were more likely to be online gamblers than were students (8%).

Entertainment and Leisure Online by Lifestage (QC31 and QSC7 by QD15)

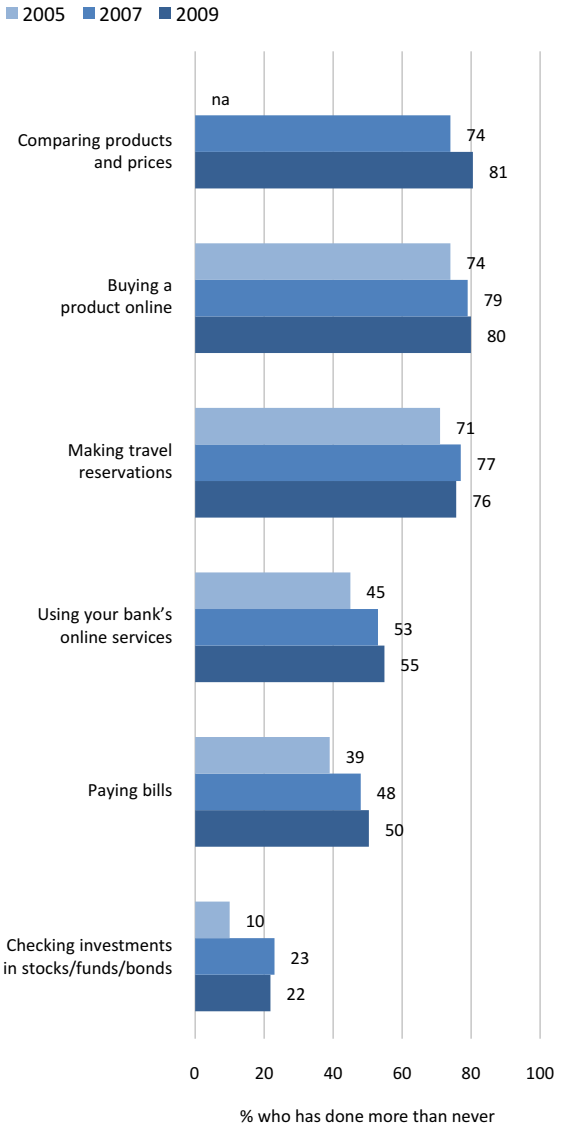


Current users. OxIS 2009: N=1,401
* In self-completion questionnaire

D. Services

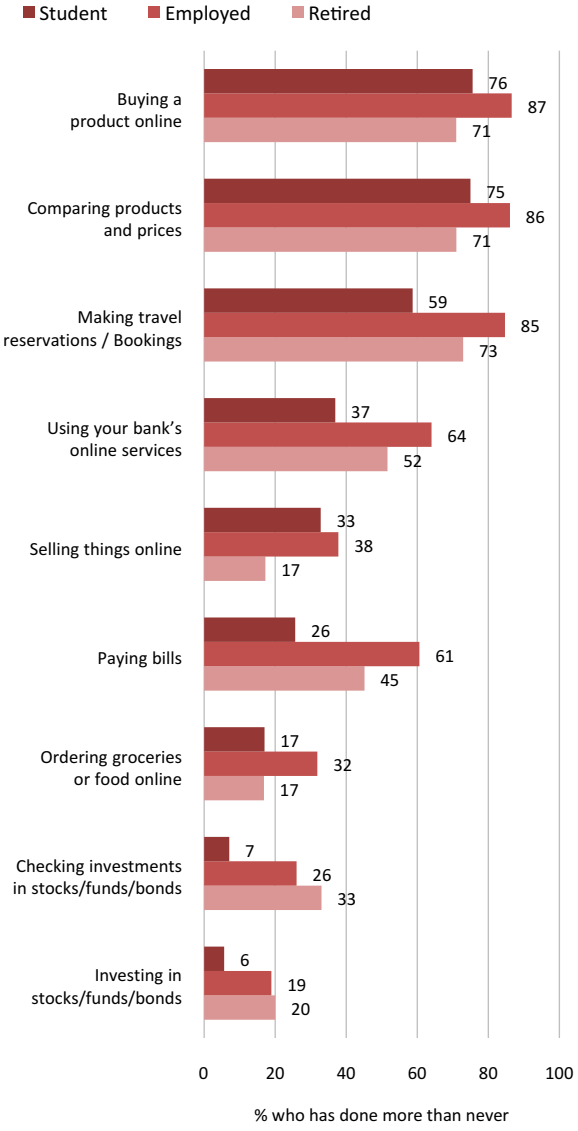
Finance and Commerce

Buying and Using Services Online (QC34)



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

Buying and Using Services Online by Lifestage (QC34 by QD15)



Current users. OxIS 2009: N=1,401

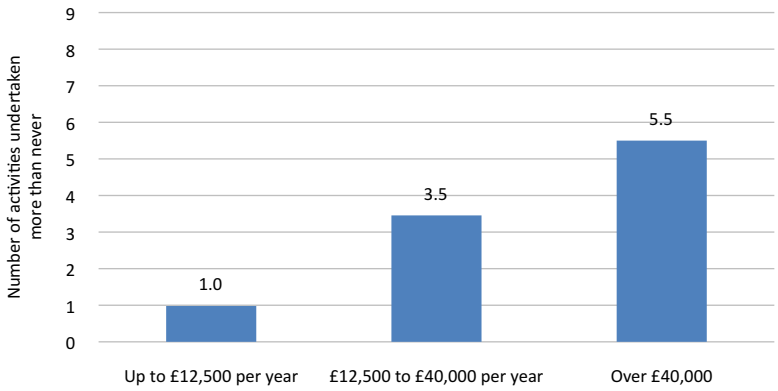
"Within the last year, how frequently have you used the Internet for the following purposes?"

Participation in personal finance and e-commerce activities increased gradually amongst Internet users. This increase was strongest for price and product comparisons (81% v. 74% in 2007), paying bills (50% v. 39% in 2005), and online banking (55% v. 45% in 2005). Some activities stabilised since 2007, 22% checked investments (23% in 2007) and 76% made travel reservations (77% in 2007).

As in previous years, those with the largest buying power, the employed users, were the most active participants in e-commerce. They were especially more likely than students and retired people to make travel reservations (85%), to buy (87%), compare (86%) and sell (38%) products, and to order groceries (32%). Retired people were more likely than the other users to check investments (33%). Students were more likely than retired people to sell things online (33%) and to compare products and prices (75%).

Users with higher incomes participated in a wider range of finance and e-commerce activities than did lower income users. Those with a household income of over £40,000 a year undertook an average of 5.5 activities, compared to an average of 1.0 activity for users with household incomes of less than £12,500 a year.

Buying and Using Services Online by Income (QC34 by SC3)



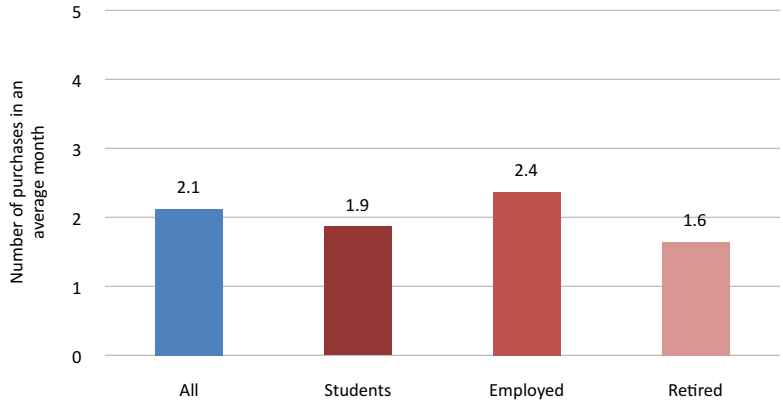
Current users over 18 years old. OxIS 2009: N=1,289
Note. For list of activities see p. 24.

"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."

On average British users bought something online twice a month (av=2.1).

There was no difference between male and female Internet users, but employed (av=2.4 times / month) users were more frequent buyers than student (av=1.9 times / month) and retired (av=1.6 times / month) users.

Purchasing Products or Services over the Internet (QC35 by QD2)



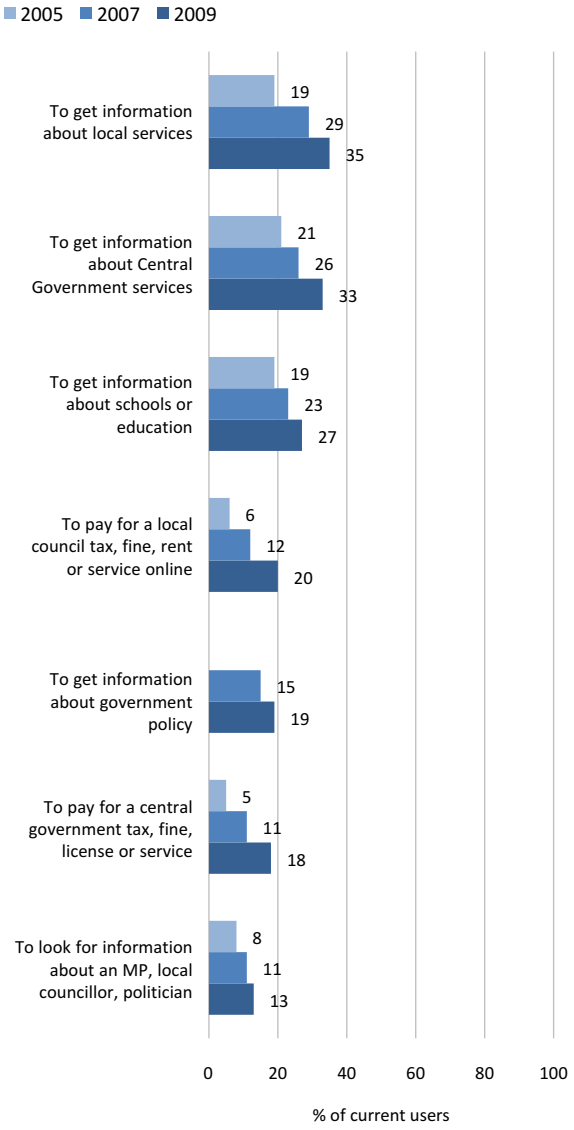
Current users. OxIS 2009: N=1,401

"In the area of e-commerce, questions have emerged over the changing role of intermediaries, such as the salesperson. One of the aspects contributing to this is the proliferation of direct producer-to-consumer services and sales facilitated through the Internet, in addition to the possibilities of almost instant customer service feedback without the need for an agent. These aspects of the Internet have led some to argue that the traditional intermediary will disappear. OxIS 2009 shows that product and price comparison sites remain one of the most popular aspects of e-commerce, which indicates a continuing role for independent intermediaries."

Ellen Helsper

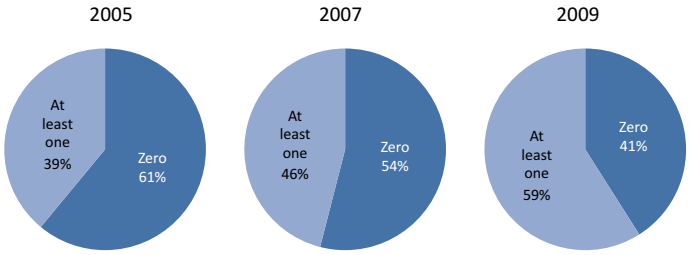
Government Services

Use of Online Government Services (QC37)



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

Use of Online Government Services (QC37)



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

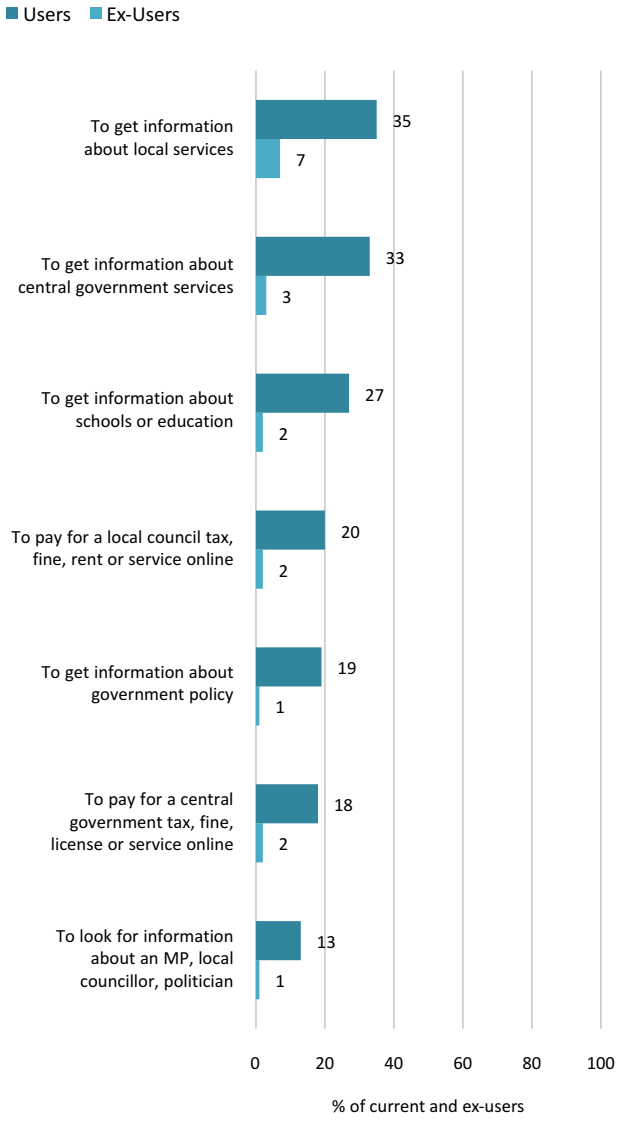
"Talking now about government information and services, have you done any of the following in the past year? Did you use the Internet for this?"

Use of government services online was undertaken by a relatively large proportion of the population and increased considerably since 2005. In 2009, 59% of users undertook at least one such activity online, compared to 46% in 2007 and 39% in 2005. This increase was considerable across all different interactions we measured with government services. Users looked for information about local council services (35%) and central government services (33%) more often than they looked for information on schools and education (27%). Most other activities were undertaken online by between one tenth and one fifth of users (13%–20%) online.

"The higher figures for political engagement do not suggest any Internet fuelled revival for traditional politics. The percentage of Internet users interacting with e-government has been increasing since 2003—but remains lower than for e-commerce or general information seeking. Also, the UK remains low in comparison with other European countries with respect to e-Government, such as in interacting with 'public authorities online'. The percentage of respondents contacting or joining a political party or donating money to a civic organisation or group changed very little between 2007 and 2009. In general, UK figures contrast with the US, particularly with soaring online participation in Barak Obama's highly innovative use of the Internet in his campaign. Information seeking remains the most common e-government activity, similar to the way as e-commerce developed (although slower). However, the frequency of online transactions such as paying for government services, taxes, fines and licenses, has started to increase."

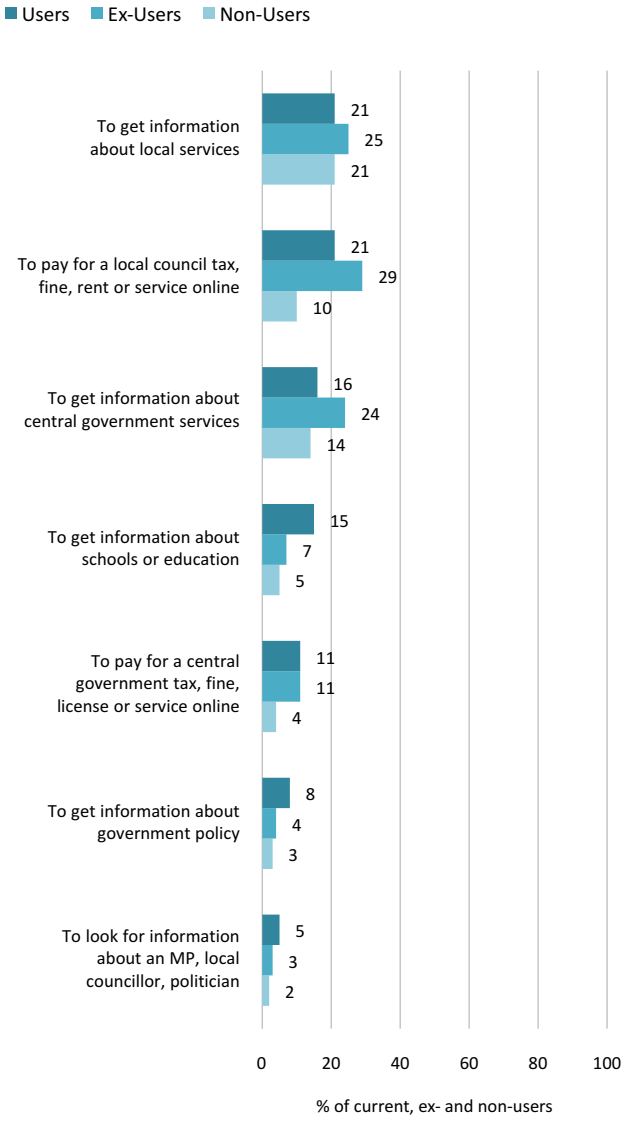
Helen Margetts

Use of Online Government Services by Users and Ex-Users (QC37 and QE19 by QH14)



Current and Ex-users. OxIS 2009: N=1,542

Use of Offline Government Services by Users and Non-Users (QC37, QE19 and QN11 by QH14)



OxIS 2009: N=2,013

"Talking now about government information and services, have you done any of the following in the past year? Did you use the Internet to do this?"

Users were more likely to have used the Government's online services than ex-users were when they used the Internet. 27% got information about schools online compared to 2% of ex-users, and 35% got information about council services compared to 7% of ex-users.

Offline this pattern was largely reversed. The percentage of ex-users that interacted with the Government offline was generally higher than the percentage of users and non-users that undertook these activities offline.

Ex-users were especially more likely to pay for a local council tax or service (29%) and to get information about central government services (24%) offline. Users were more likely than the other groups to get information on government policy (8%) or an MP offline (5%).

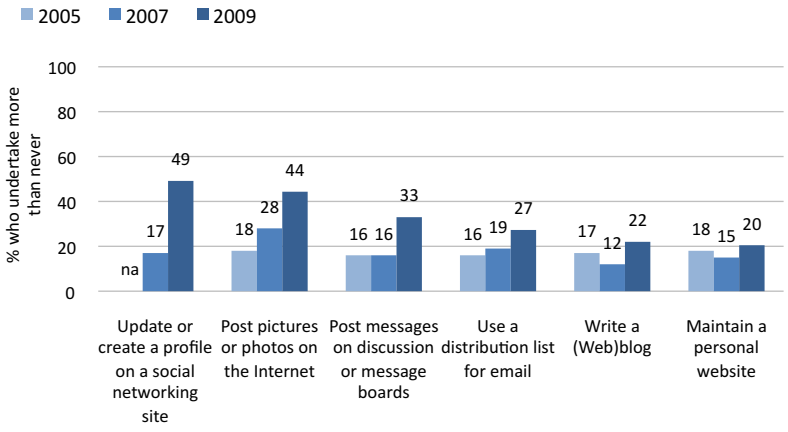
E. Creation and Production

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

The production and creation of content online increased dramatically since 2005 and 2007, largely due to the development of Web 2.0 (social networking) opportunities which have made it easier for users to generate content.

For example, while in 2005 only 18% posted photos online, in 2009 almost half (44%) did this, making it the most popular creative activity online after social networking (49%). Other creative and productive activities also increased significantly since 2007. In 2009, 33% posted messages on discussion boards, 27% used distribution lists and around one fifth of Internet users maintained a blog (22%) or website (20%).

Creativity and Production Online (QC10 and QC31)

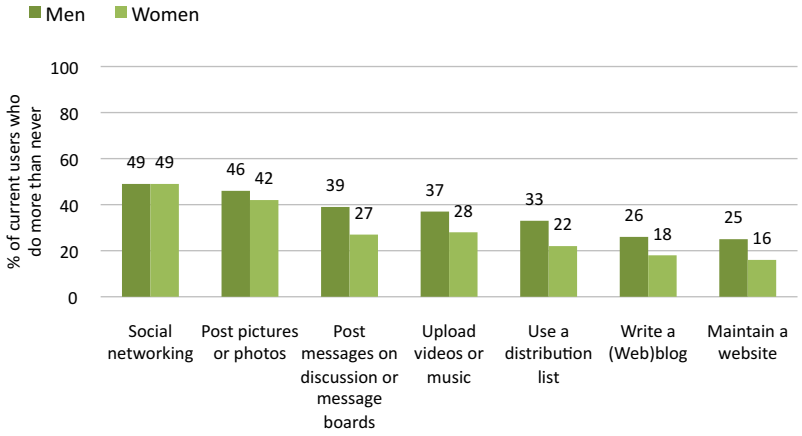


Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401

Men were in general more likely to create online content than women; they were more likely to post messages (39%), write blogs (26%) and to maintain a website (25%). Nevertheless, women were just as likely to update their social networking profile as men (49%).

Amongst women the most popular activity was to post photos (42%) although this was still less popular than amongst men. Women were least likely to maintain a website (16%) or write a blog (18%).

Creativity and Production Online by Gender (QC10 and QC31 by QD2)

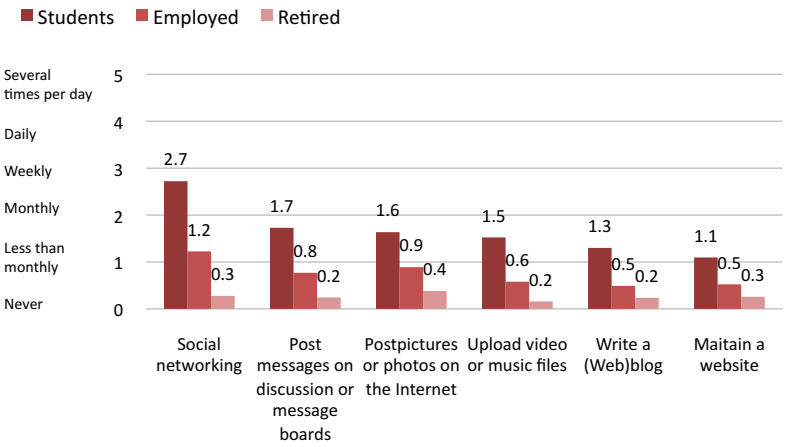


Current users. OxIS 2009: N=1,401

"One of the promises of Web 2.0 is that new user-friendly websites will spawn a flowering of creativity and expansion of content creation among users of the Internet. Unlike contributions to the original web, which often required considerable technical expertise, Web 2.0 applications like Flickr, YouTube, MySpace, Facebook and blogs, allow users with ordinary computer skills to easily share ideas, photographs, videos, and other content. While there has been anecdotal reporting about the extent to which Web 2.0 tools are expanding participation in the creation of content, OxIS shows that this has become a widespread activity. Young people undertake these activities more than their elders, and men do more than women. However, with respect to uses having most to do with maintaining social relationships, social networking and posting photos, women are as likely or nearly as likely to engage in these activities as men. With the increase of more socially oriented sites, more women might become engaged with creating online content."

Eric Meyer

Creativity and Production Online by Lifestage (QC10 and QC31 by QD15)



Current users. OxIS 2009: N=1,401

Students were the most frequent producers of online content. On average they maintained websites (av=1.1) and wrote blogs (av=1.3) several times per month. Most students worked on their social networking sites on a weekly basis (av=2.7).

Employed users were half as likely as students to undertake most creative activities. Like students, their most popular activities were social networking (av=1.2), posting pictures (av=0.9) and posting messages (av=0.8).

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) and had or maintained a social networking site (av=0.3).

IV. Social Shaping and Implications of Internet Use

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 and publications have shown how the Internet does indeed reconfigure the way we do things. Some people read the news online during their working day, rather than only in the morning newspaper. Many people send email rather than post a letter through the mail. New technologies like the Internet define new ways to do things. However, OxIS research finds that the use of the Internet also reconfigures the outcomes of those activities. People who read the news online frequently read stories they would not have seen in their local paper and vice versa. So it can change what we know, not just how we obtain information. Likewise, people who send an email or message someone over a social networking site, rather than write a letter might communicate with a different set of people than they would otherwise keep in touch with. For example, online social networking sites have become known for people rediscovering old and distant friends. In such ways, the Internet can reconfigure whom we know, as well as how we communicate.

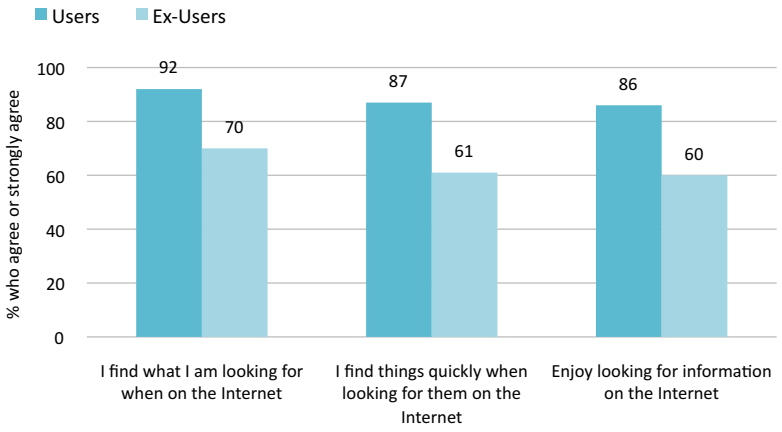
The 2009 OxIS seems to describe a point in time at which the Internet in Britain has passed a tipping point. In many ways, it has begun to make major inroads in a number of areas, such as with respect to television viewing. Nevertheless, its primary role appears to be in complementing and supplementing other sources of information and media of communication, rather than substituting for them.

Experience with the Internet is leading to greater trust in this technology as a source of information and as a medium of communication and services. It is changing and becoming part of the media habits of British people as it becomes more central to being informed, and entertained. The Internet is not taking up considerably more time of users than in recent years, but is being used in more ways and often in ways that save time that would be spent in other activities, such as watching television. Also, possibly more important, it is both reinforcing the networks of family and existing social networks, but also introducing users to new people. Internet users, particularly those using a wide array of communication facilities, are less likely to feel lonely. In addition, they are likely to see the Internet enabling them to be more productive at work, and to have more opportunities online to enhance their personal, financial and economic well-being.

The Internet does not have a set of pre-determined outcomes. It does not make people more sociable or lead people into civic engagement. However, it does provide a resource for people to pursue their interests in seeking information, communicating with others, and being entertained in ways that could well advantage them over those who choose not to use the Internet – a set of individuals that are the focus of the following part of this report.

A. Trust

Attitudes: Searching for Information on the Internet by Current and Ex-Users (QC26 and QE11 by QH14)

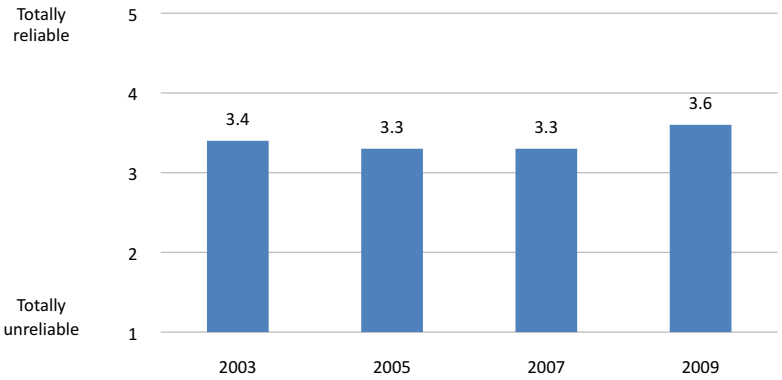


Current and Ex-users. OxIS 2009: N=1,542
Note. Phrasing differed for current users and ex-users.

"Can you please tell me how much you agree or disagree with the following statements about looking for information online?"

Users tended to have better experiences when searching on the Internet than ex-users. 61% of ex-users said that they were able to find things quickly (v. 87% of users), 60% enjoyed looking for information (v. 86% of users) and 70% found what they were looking for (v. 92% of users).

Reliability of Information on the Internet (QA4)

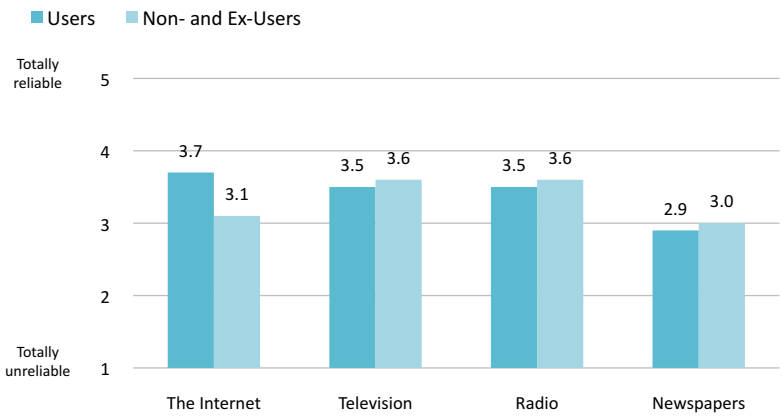


OxIS 2003: N=2,029; OxIS 2005: N=2,185; OxIS 2007: N=2,350; OxIS 2009: N=2,013
Note. The scale changed from a 10 point scale in 2007 to a 5 point scale in 2009.

"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 Internet remained relatively stable between 2003 and 2009 (av=3.4 v. av=3.6).

Reliability of Information by Internet Users and Non-Users (QA4 by QH14)

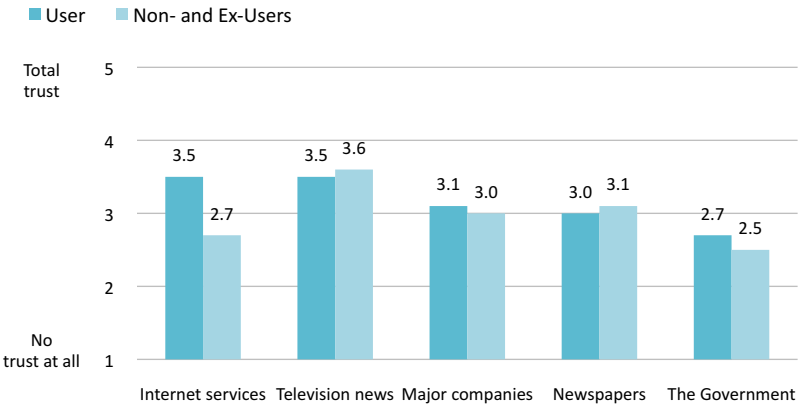


OxIS 2009: N=2,013
Note. The scale changed from a 10 point scale in 2007 to a 5 point scale in 2009.

Trust in the Internet has remained higher among Internet users (av=3.7) than among non- or ex-users (av=3.1). This was relatively similar to earlier years (see OxIS 2007).

With the exception of the Internet, users and non-users showed similar levels of trust in media in 2009. 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 of all media by both users and non- and ex-users (av=2.9 and av=3.0).

Average Trust in Organisations by Internet Users and Non-Users (QA5 and QA6 by QH14)



OxIS 2009: N=2,013

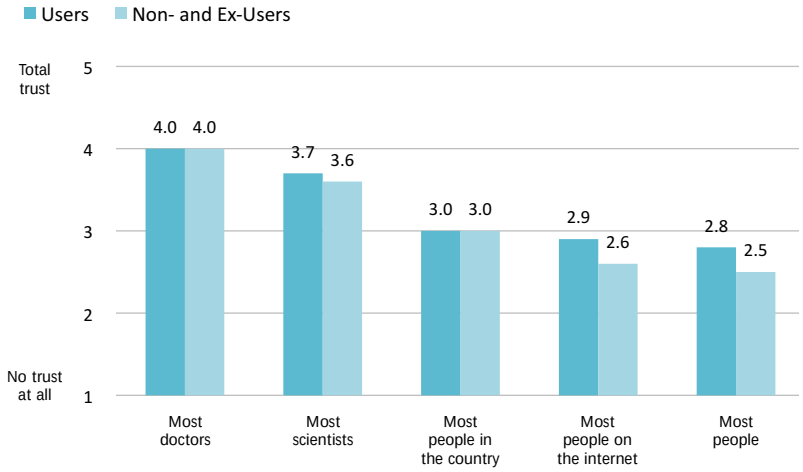
"Now I'd like to ask you about some organisations. Please tell me how much trust you have in the people running each."

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

The Government remained the least trusted institution in Britain for users and non-users (av=2.7 and av=2.5) and television news was the most trusted (av=3.5 for users and av=3.6 for non-users).

Trust in Internet service providers was considerably higher among users than among non-users (av=3.5 v. av=2.7).

Average Trust in People by Internet Users and Non-Users (QA7 and QA8 by QH14)



OxIS 2009: N=2,013

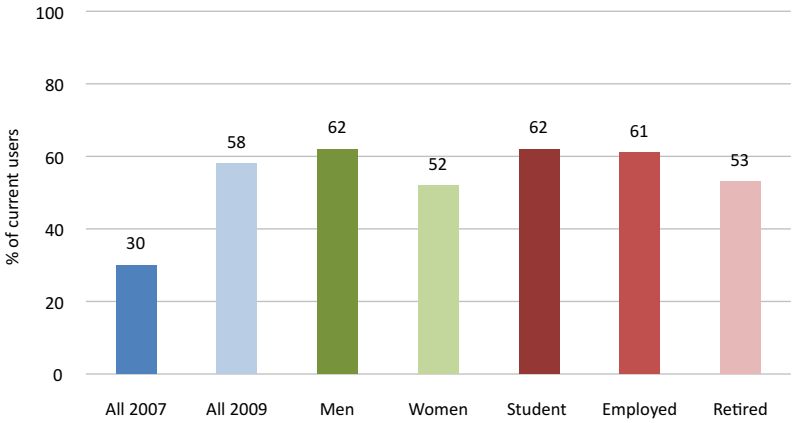
"Now I'd like to ask you about different groups of people. Please tell me how much trust you have in the following groups of people whether or not you have ever been in contact with them."

Doctors remained the most trusted of the individuals that people are in contact with (av=4.0), followed by scientists (av=3.7 for users, av=3.6 for ex- and non-users).

Internet users trusted people they can 'communicate with on the Internet' more (av=2.9) than non- and ex-users (av=2.6). They also trusted most people (av=2.8) more than non-users did (av=2.5).

B. Media Habits: The Internet, Television and Newspapers

Reading of Online Newspapers by Gender and Lifestage (QC27 by QD2 and QD15)



Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401
Note. Question changed in 2009. Percentages by gender and lifestage for 2009.

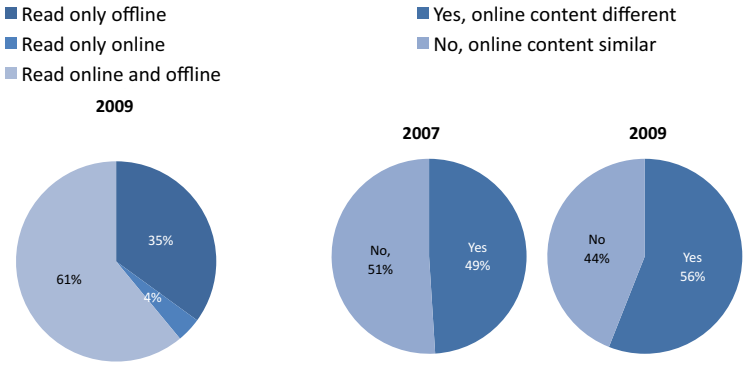
"How frequently do you read any newspaper or news service on the Internet?"

There was a large increase in online newspaper reading since 2007. Over half (58%) of Internet users said they read a newspaper or news online, in comparison to 30% in 2007.

More men (62%) than women (52%) read online newspapers.

Students (62%) were as likely as employed users to read a newspaper online. Retired (53%) Internet users were less likely to read online newspapers.

Unique Reading of Online Newspapers (QC27 and QC28)



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

Current users who read online newspapers. OxIS 2007: N=467; OxIS 2009: N=793

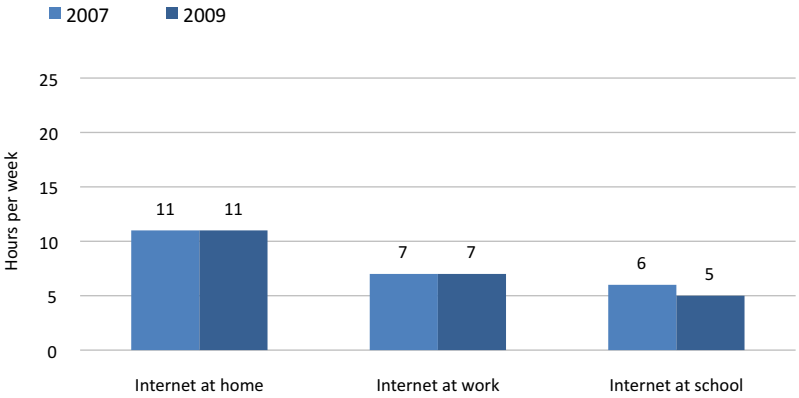
"How frequently do you read any newspaper in print?"

"Are any of these online newspapers different from what you read in print?"

The Internet is a complement to other sources of news. In 2009, only 4% of Internet users who read a newspaper only read it online, and over half of newspaper readers (61%) read a newspaper both online and offline.

About half (56%) of those who read online newspapers or news services read content online that they did not read in print. This was slightly higher than in 2007 (49%). The Internet therefore also provides alternative sources of news and information.

Use of the Internet (QS1)

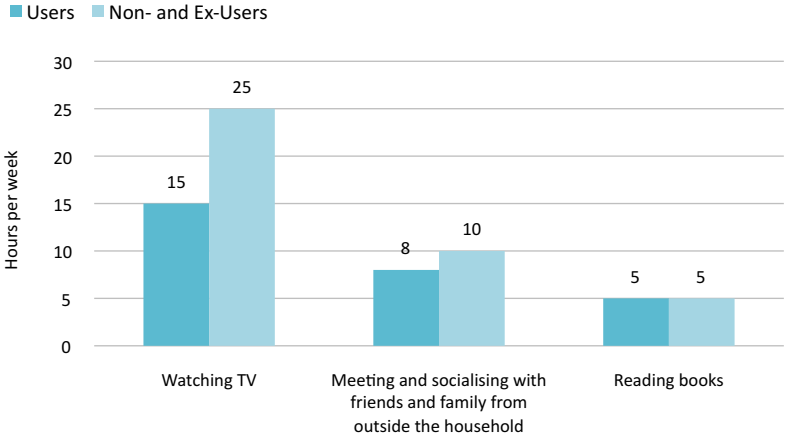


Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401
Note. Internet at school only for student users. Internet at work only for employed users.

"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 about the same as in 2007 (11 hours a week). Employed users spent 7 hours a week online at work (7 in 2007), while at school, students spent 5 hours a week online (6 in 2007).

Use of Media by Internet Users and Non-Users (QS1 by QH14)



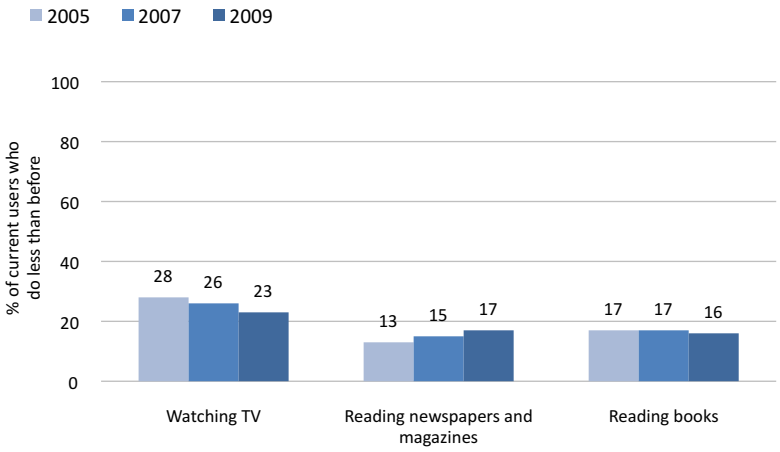
OxIS 2009: N=2,013

Non-users reported spending more time watching TV and socialising with friends and family than did Internet users. This difference was especially evident for TV viewing: non-users spent on average 25 hours a week watching TV, while users spent only 15 hours a week in 2009.

"The Internet is relied upon heavily as a source of information, such as for online news. However, few Internet users use the Internet as a replacement of traditional sources, such as the newspaper. Online and offline sources continue to be used in parallel – as complements."

Rebecca Eynon

Perceived Influence of Internet Use on Media Use (QC32)



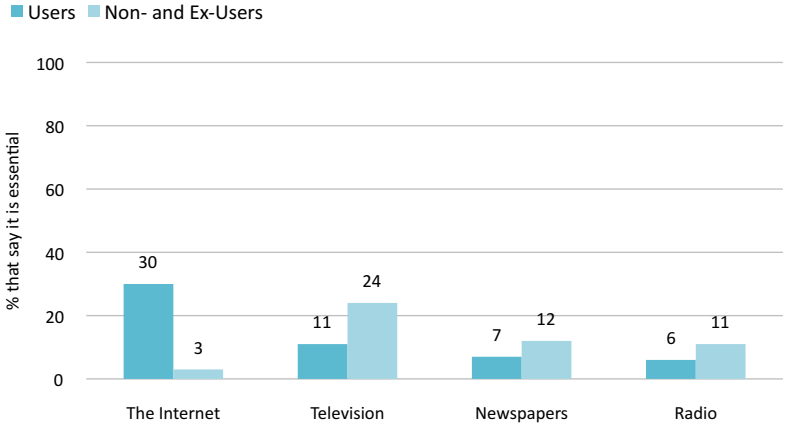
Current users. OxIS 2009: N=1,401

"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 effect was indicated for television watching: 23% thought that the Internet decreased the time they watched television (28% in 2005 and 26% in 2007), around one in six users believed that the Internet decreased the time spent reading newspapers (17%) and books (16%).

C. Centrality of the Internet

Average Importance of Media for Information by Internet Users and Non-Users (QA2 by QH14)

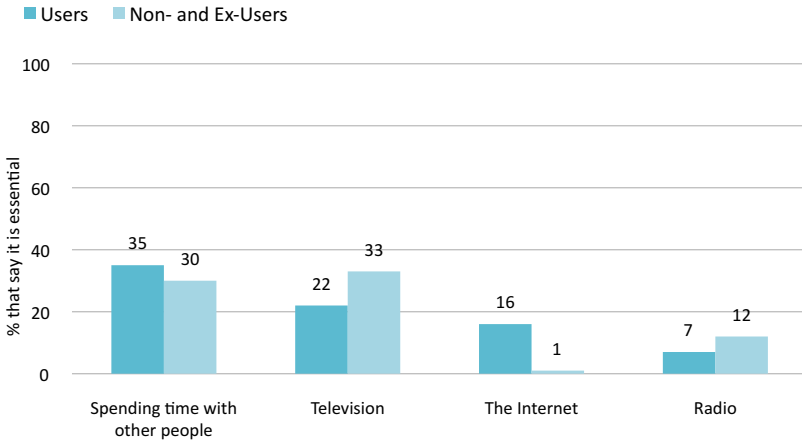


OxIS 2009: N=2,013

"For information in general, how important is each of the following to you as a source?"

Users considered the Internet the most important source for information. 30% said that it is essential, compared to television (11%), newspapers (7%) and radio (6%). Only 3% of non- and ex-users thought the Internet was essential for information.

Average Importance of Media for Entertainment by Internet Users and Non-Users (QA3 by QH14)



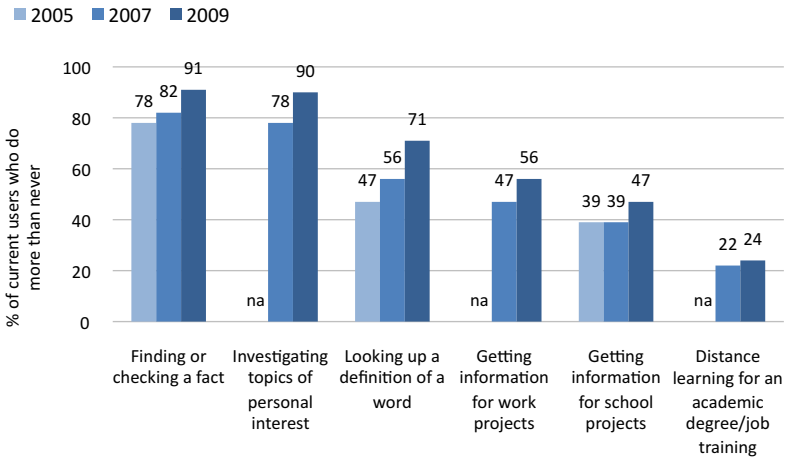
OxIS 2009: N=2,013

"For entertainment in general, how important is each of the following to you as a source?"

In 2009, the Internet remained less important for entertainment than spending time with other people and watching television. Users assigned most importance to spending time with other people (35% said it is essential); more than to watching television (22%) and to using the Internet (16%). This difference was more pronounced in the case of non-users: 30% said that spending time with other people was essential, 33% said this for television and 1% for the Internet.

D. Learning

Learning Online (QC30)



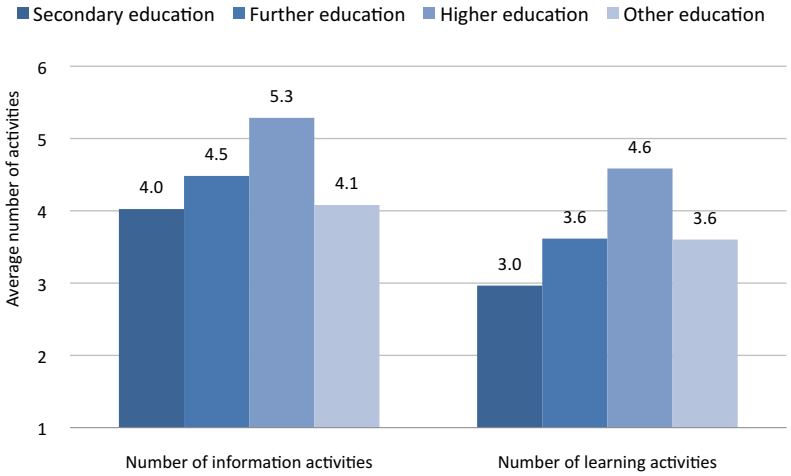
Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401

"How frequently, if ever, do you use the Internet or Web for the following purposes?"

The use of the Internet for informal learning increased significantly. In 2009, 91% checked a fact online (82% in 2007), 90% investigated topics of personal interest (78% in 2007) and 71% looked for the definition of a word (56% in 2007).

Formal learning increased slightly. 47% of Internet users used the Internet to get information for school related projects (39% in 2007 and 2005), 56% for work related projects (47% in 2007), but distance learning did not increase as much since 2007 (24% v. 22%).

Learning Online by Education (QC30 by QD14)



Adult (>18yrs) current users. OxIS 2009: N=1,250

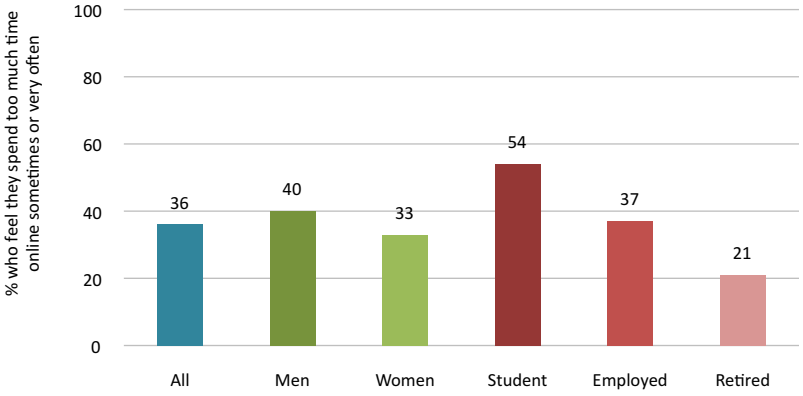
Adult Internet users with higher levels of education undertook a wider variety of information (av=5.3) and learning (av=4.6) activities online, compared to users with further (av=4.5 and 3.6, respectively) and, especially, users with basic education (av=4.0 and 3.0, respectively).

"An increasing proportion of Internet users are employing the Internet in ways that could support informal learning, such as in checking facts and exploring topics of personal interest. Activities that could facilitate formal learning opportunities, such as getting information for school related projects, have also increased to some extent. However, these kinds of formal learning activities tend to be less popular than informal ones."

Rebecca Eynon

E. Time Use

Evaluation of Time Online by Gender and Lifestage (QI2 by QD2 and QD15)



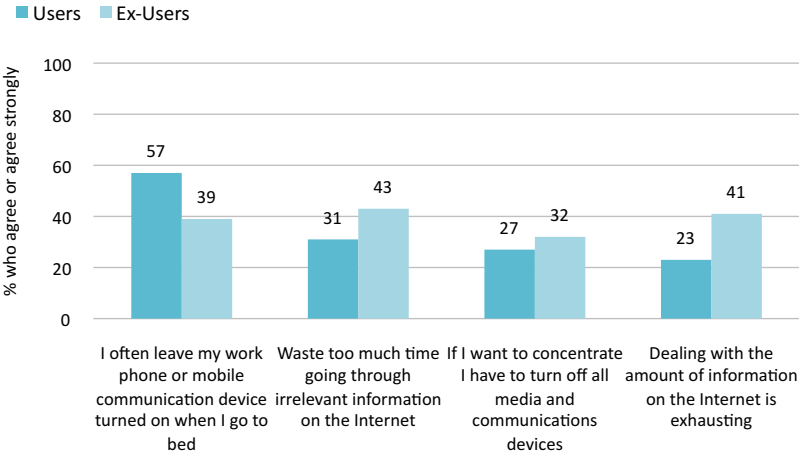
Current users. OxIS 2009: N=1,401

"Do you ever feel that you spend too much time on the Internet?"

More than a third of Internet users (36%) thought that they spent too much time on the Internet. Men (40%) were more likely to think their Internet use was problematic than women (33%).

More than half of students (54%) thought they spent too much time online, compared to just over one third of employed (37%) and one fifth of retired people (21%).

Information Overload (QI1 and QI3 by QH14)

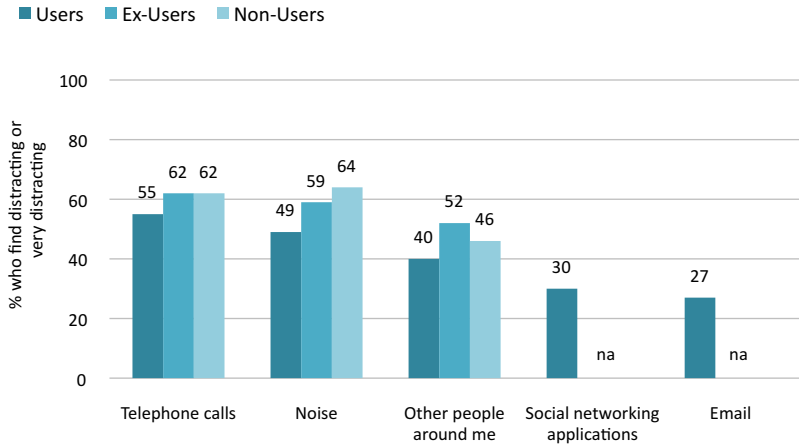


Current users and Ex-users. OxIS 2009: N=1,542
Note. Phrasing differed for ex-users and current users.

"Can you please tell me to what extent do you agree or disagree with each statement?"

Ex-users (41%) were twice as likely as users (23%) to say that dealing with the amount of information on the Internet was exhausting, and they were more likely to say that they wasted too much time going through irrelevant information (43% ex-users v. 31% users). Users were more likely to leave their work phone or mobile communication device turned on when they went to bed (57% v. 39%).

Information Overload (QI4 by QH14)

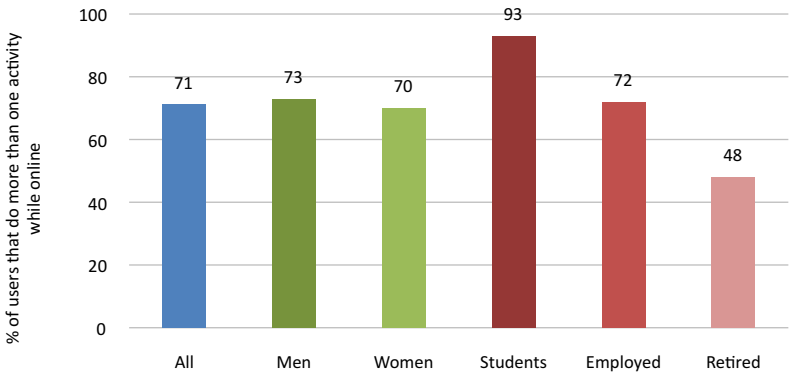


OxIS 2009: N=2,013

"When you are trying to concentrate on a task, how distracting do you feel are the following…?"

Among Internet users, email (27%) and social networking applications (30%) were considered less distracting than telephone calls (55%), noise (49%), and other people (40%). For ex-users and non-users, telephone calls (62%) and noise (59% and 64%, respectively) were more distracting than for users. Ex-users were more likely to think that other people were a distraction (52%) compared to users (40%) and non-users (46%).

Multitasking by Gender and Lifestage (QC6 by QD2 and QD15)



Current users. OxIS 2009: N=1,401

"Do you do more than one activity while you are online such as listening to music, watching TV or using the telephone?"

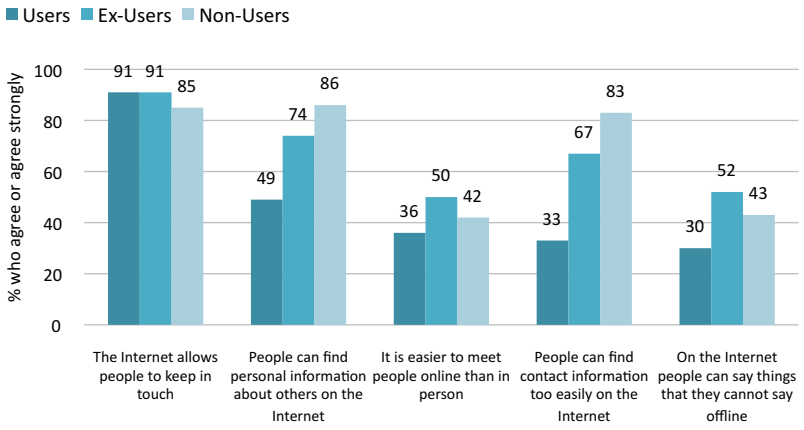
In 2009, more users were likely to multitask online (71%) than in 2007 (63%).

Women (70%) were almost as likely to multitask as men (73%). There was a considerable increase from 2007 for women especially (see OxIS 2007).

The largest differences existed between people at different stages in their life. Students were the most likely to multitask (93%), followed by employed (72%) and retired people (48%). The largest increase since 2007 (12 percentage points) was found for students.

F. Reconfiguring Social Networks

Attitudes about the Internet's Influence on Social Networks (QC21, QE17 and QN9 and QH14)



OxIS 2009: N=2,013
Note. Phrasing differed for current users, ex-users and non-users.

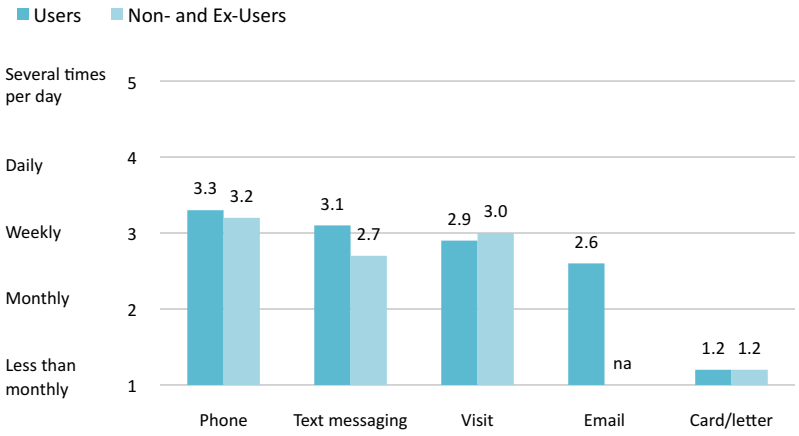
"Please tell me how much you agree or disagree with the following statements?"

Users and ex-users agreed more with the statement that the Internet allows people to keep in touch (91%) than non-users did (85%).

Non-users were most likely to be wary of the negative aspects of online communication: 86% agreed or strongly agreed that people can find personal information too easily online and 83% that contact information is too readily available. Only half of users (49%) held these concerns about personal information, and only one-third held these concerns over contact details (33%).

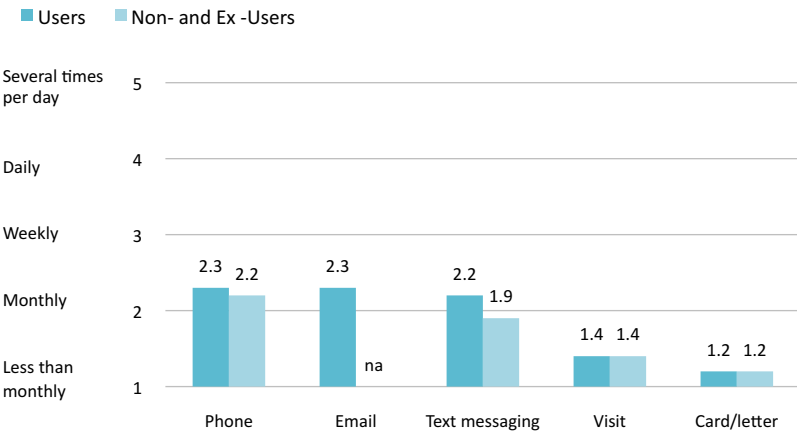
Users were less likely (36%) than ex-users (50%) and non-users (42%) to agree that it is easier to meet people online than in person.

Communicating with Family and Friends Who Live Nearby by Internet Users and Non-Users (QB3 by QH14)



OxIS 2009: N=2,013

Communicating with Family and Friends Who Live Faraway by Internet Users and Non-Users (QB4 by QH14)



OxIS 2009: N=2,013

"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…?"

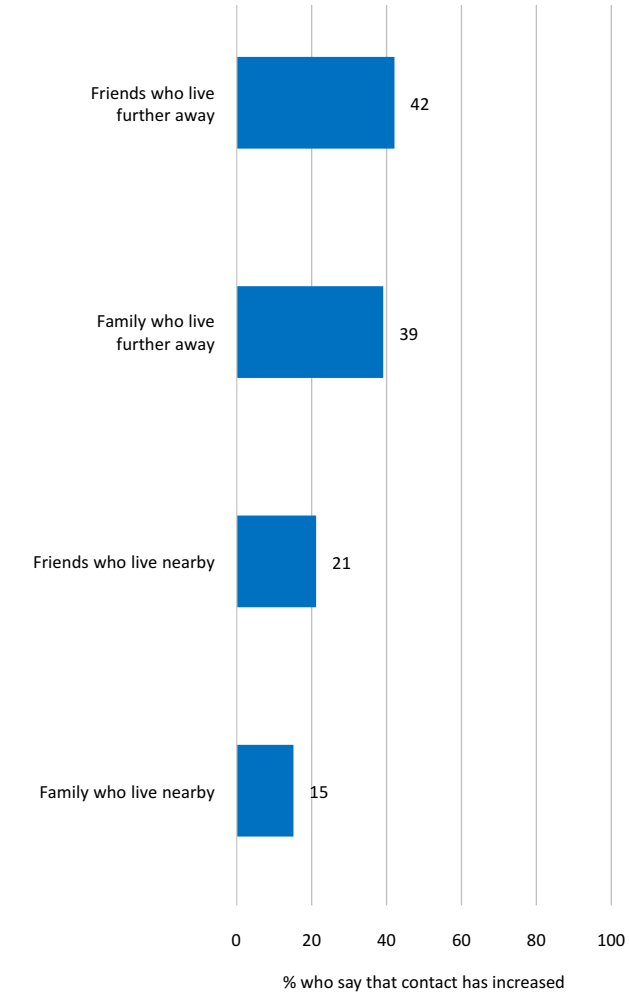
The Internet did not seem to replace other forms of interactions with family and friends such as those through visits, phone conversations and written communication.

On average, Internet users contacted family and friends via email on a monthly or weekly basis. This was fairly similar for friends and family who lived far away (av=2.3) and those who lived close by (av=2.6).

"Most means of maintaining contact are age-graded, but the OxIS surveys show that people of all ages use some combination of all online media. Nevertheless, certain media are especially popular with people at different life stages. For example, email is especially popular with middle-aged and employed individuals, whereas networking is especially popular with students. These figures are somewhat different from the 2005 and 2007 samples for two reasons. The first is a difference in response categories that now enables us to analyze frequency of use for various media, rather than mere use / non-use. Second, there has been a real shift among young people towards social software, which was only beginning in 2007. By contrast, many other differences are disappearing. For example, there are fewer substantial gender differences in the use of the Internet for communication."

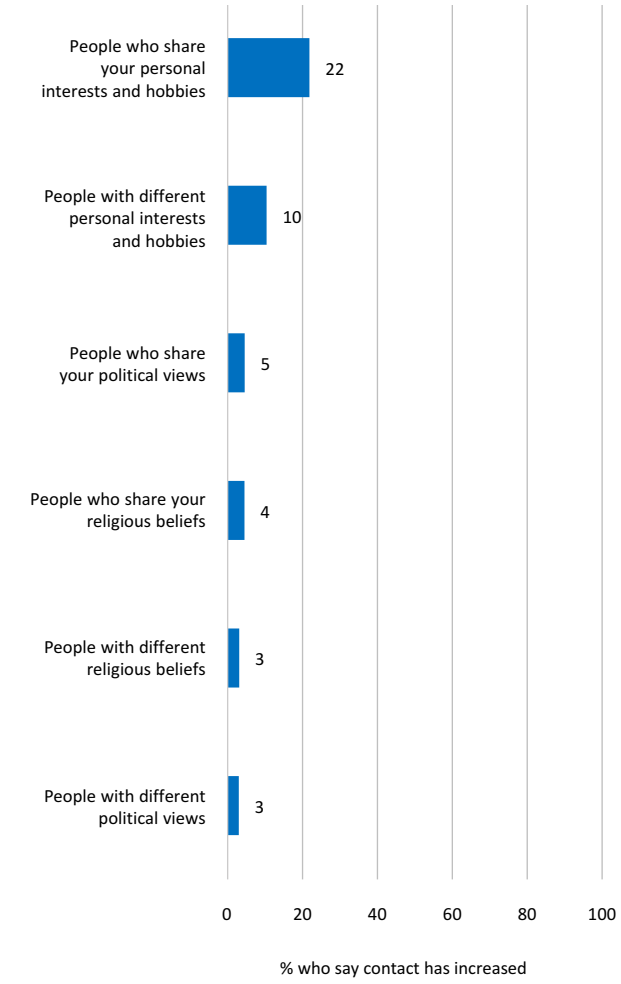
Bernie Hogan

Influence of the Internet on Offline Relationships (QC19)



Current users. OxIS 2009: N=1,401

Influence of the Internet on Offline Social Networks (QC20)



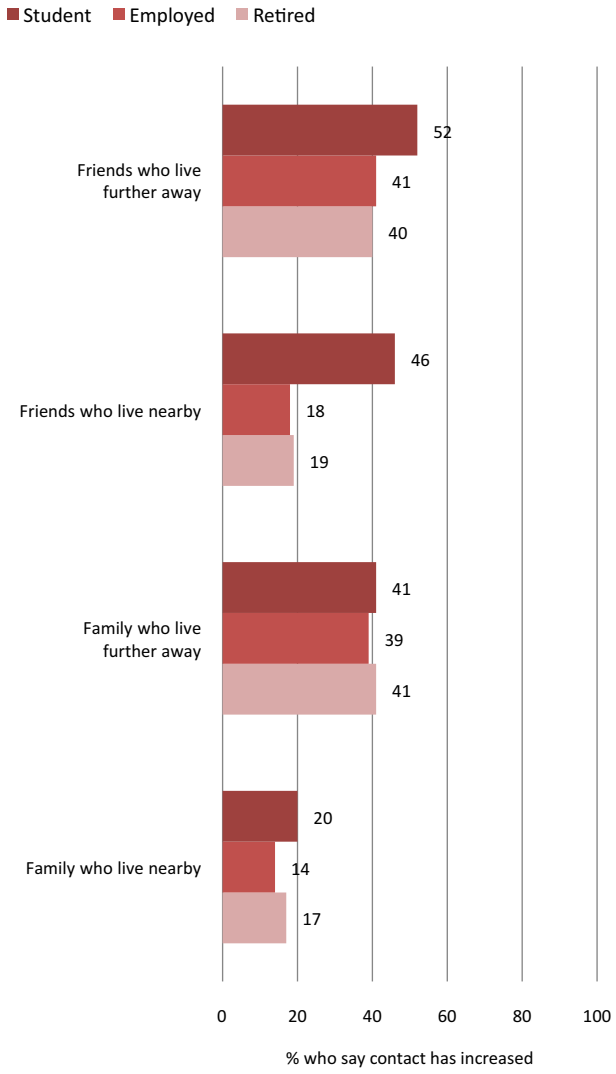
Current users. OxIS 2009: N=1,401

"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 indicated that the Internet influenced their relationship with friends and family. In 2009, a considerable proportion said that access to the Internet had increased the contact they had with friends (42%) and family (39%) who lived further away and about one fifth that it had increased contact with friends (21%) and family (15%) who live nearby. This was very similar to the findings from OxIS 2007.

The impact on connecting people with similar or different beliefs was not as clear. Internet users were more likely to say it increased the contact they had with people who share their personal interests (22%), political (5%) and religious views (4%) than they were to say it increased contact with people with a different hobby (10%), political view (3%) or religion (3%).

Influence of the Internet on Offline Relationships (QC19)

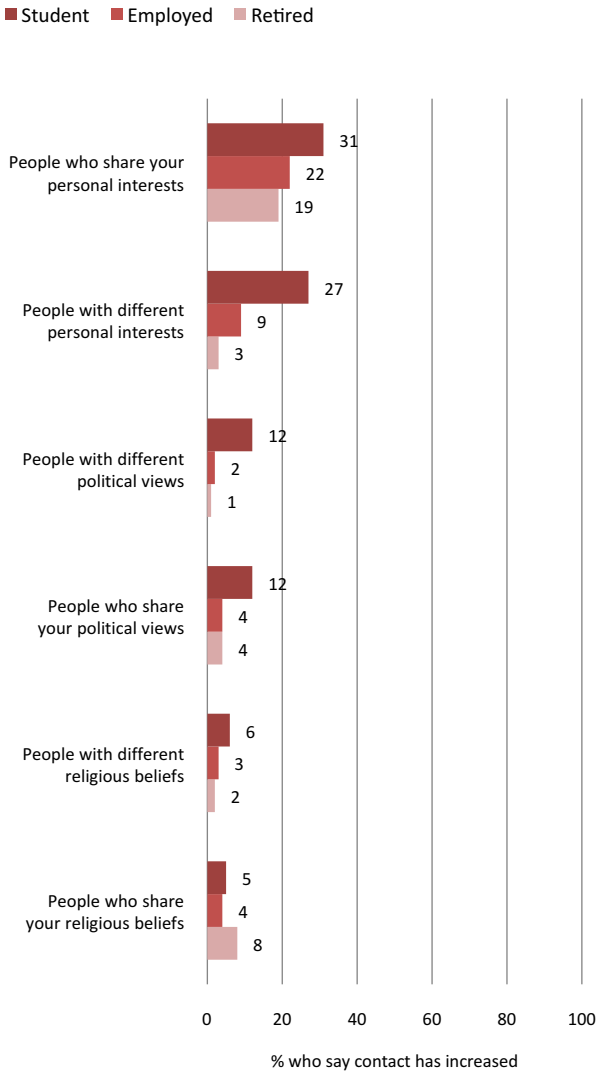


Current users. OxIS 2009: N=1,401

Students were most likely to think that the Internet had increased the amount of contact they had with friends. This difference was especially large for friends who live nearby (46% of students, 18% employed and 19% retired).

Students were also most likely to think that their contact with others had increased, and did not make a distinction between people with different or similar interests. A third of students thought it had increased their contact with people who share their interests (31% with similar interests, 27% with different interests).

Influence of the Internet on Offline Social Networks (QC20)



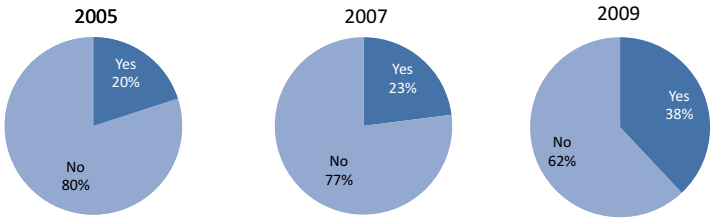
Current users. OxIS 2009: N=1,401

Employed and retired users were more likely to say their contact with people with the same views had increased, they were less likely to say that their contact with people with different views had increased. 9% of employed people saw an increase in contact with those with different interests, compared to 22% who saw an increase in contact with those with similar interests.

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

G. Reconfiguring Friendships: Meeting People

Online Contacts (QC12)

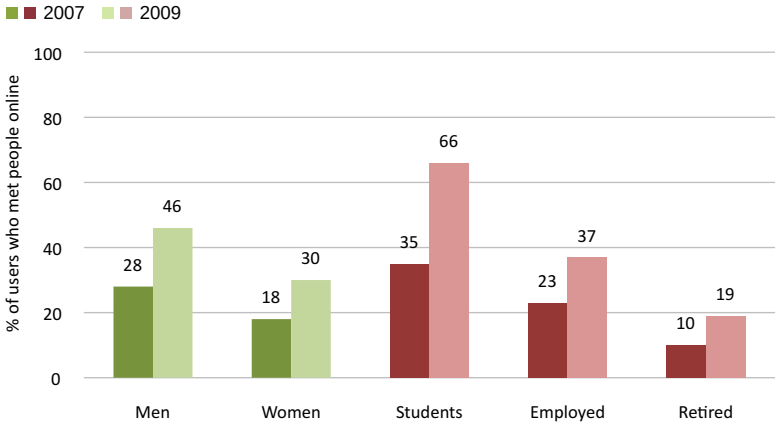


Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401
Note. The question changed in 2009.

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

People were more likely to meet new people online in 2009 than in 2007 and 2005. More than a third (38%) of Internet users had met an online friend they did not know before (23% in 2007, 20% in 2005). This difference might be attributed to an improvement in the questions asked, but the size of the change does suggest a real increase in online friendships.

Online Contacts by Gender and Lifestage (QC12 by QD2 and QD15)



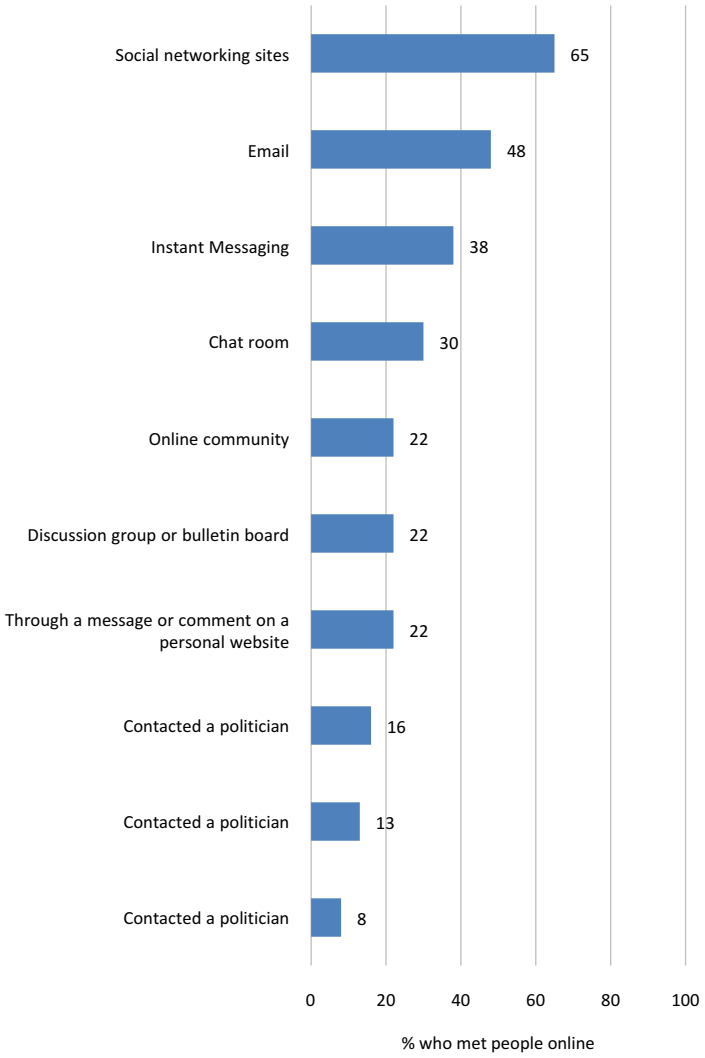
Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401

Men were more likely to meet people online they did not know before (46%) than were women (30%). Both men (28%) and women (18%) were less likely to do this in 2007 than in 2009.

Retired users continued to be the least likely to meet people online (19%), followed by employed users (37%), with students the most likely to do this (66%).

Social networking sites were the most common place for people to meet others (65%), followed by email (48%), instant messaging (38%) and chat rooms (30%). Less than a third of those who met someone online met them through comments on personal websites (22%) or online dating sites (13%).

Places to Meet People Online (QC12)

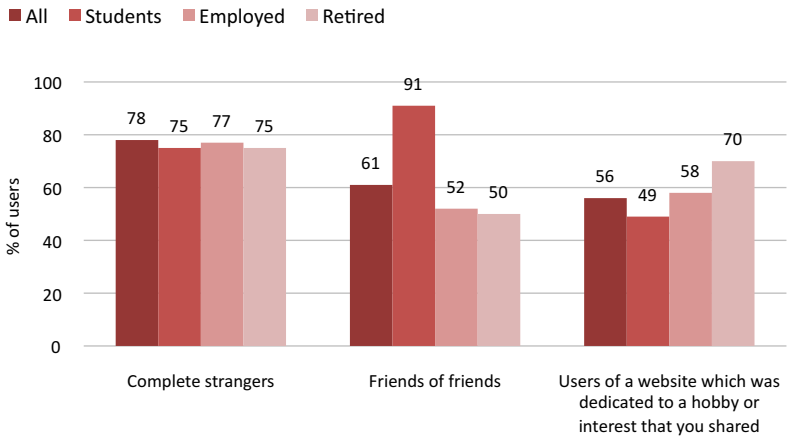


Current users who met people online. OxIS 2009: N=538

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

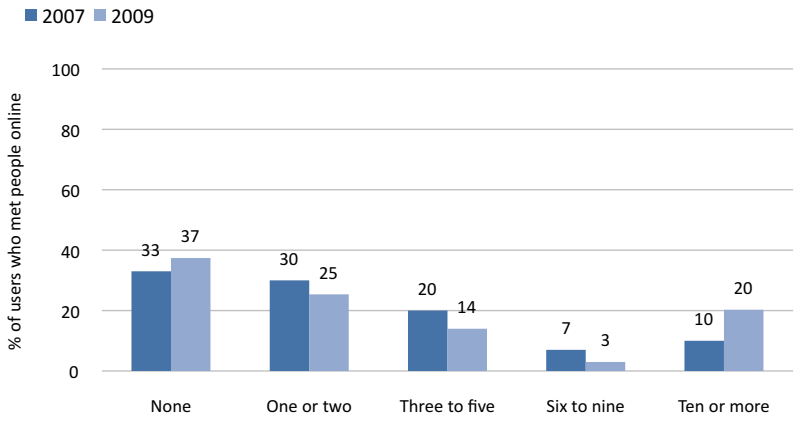
Almost four out of every five (78%) Internet users who have met someone online met a complete stranger. Three out of five people met a friend of a friend (61%), and just over half met people with similar interests (56%). Students were more likely than others to have met friends of friends (91%).

People Met Online by Lifestage (QC16 by QD15)



Current users who met someone online. OxIS 2009: N=538

Online Friends (QC15)

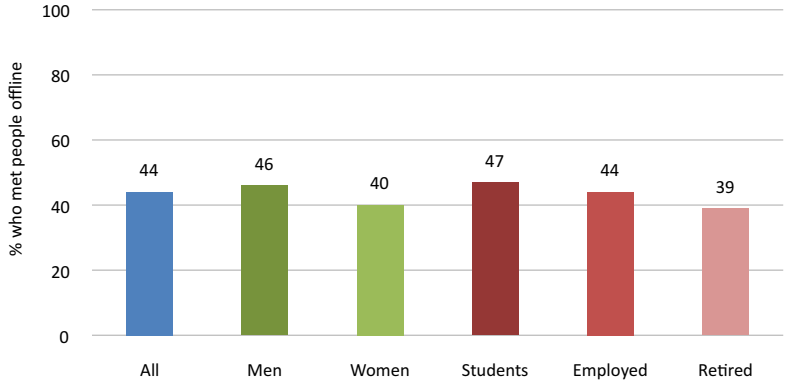


Current users who met someone online. OxIS 2007: N=359; OxIS 2009: N=538

"How many of these people, who you have met on the Internet, would you regard as friends?"

More than a third (37%) of those who had met people online did not consider any of these people to be friends; this was slightly higher than in 2007 (33%). However, the number of people who considered ten or more people they had met online to be friends doubled from 10% in 2007 to 20% in 2009.

Meeting Online Acquaintances Offline by Gender and Lifestage (QC17 by QD2 and QD15)



Current users who met someone online. OxIS 2009: N=538

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

Nearly half (44%) of those who had met someone online had gone on to meet them in person. This is slightly down from 47% in 2007. This means that, in 2009, 17% of Internet users had gone on to meet someone offline who they had met online (12% in 2007).

Men were slightly more likely to meet people offline who they had met on the Internet (46%) than were women (40%). Both men (49%) and women (45%) were somewhat less likely to do this in 2009 than in 2007 (see OxIS 2007).

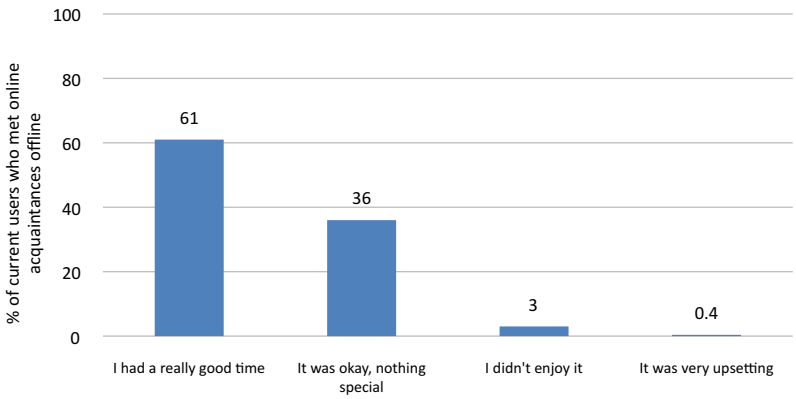
Retired users were in 2009 the least likely to have met online friends in person (39%), followed by employed users (44%), with students the most likely to do this (47%).

This means that about a third of student users (31%; 13% in 2007) had met someone offline that they had first met online, in comparison to one sixth (16%; 10% in 2007) of employed users and 7% of retired users (6% in 2007).

"Individuals are linking to others through the Internet, discovering ways in which it can save time and confusion, meeting new people and finding others with like interests. These are significant steps towards a networked public. However, the age-graded nature of media use means that young, middle-aged and older individuals may have a more difficult time maintaining contact across generational boundaries. In fact, non-users and ex-users are much more likely to say they feel like they are missing out or isolated than users. Not using the Internet may in fact lead to social isolation."

Bernie Hogan

Experience of Meeting Online Acquaintances Offline (QC18)

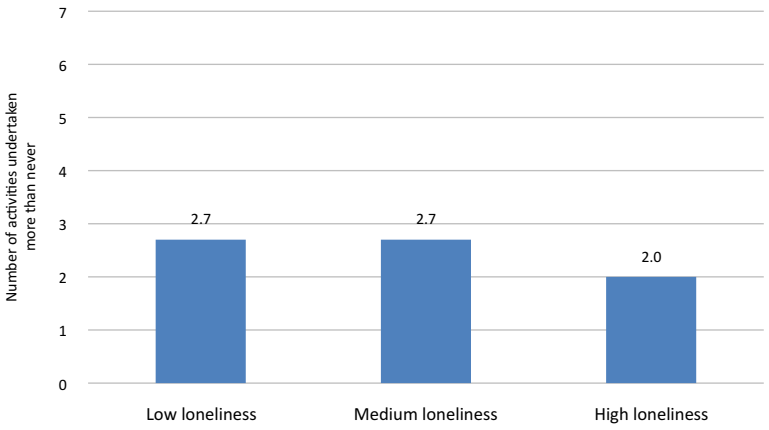


Current users who met online acquaintances offline. OxIS 2009: N=197

"How was the experience of meeting them in person?"

On average, people reported having had 'a really good time' (61%) meeting online friends in person. Only 3% said that their experience of meeting people online had been upsetting or not enjoyable.

Communication Online by Level of Loneliness (QC10 by SC5 and SC6)

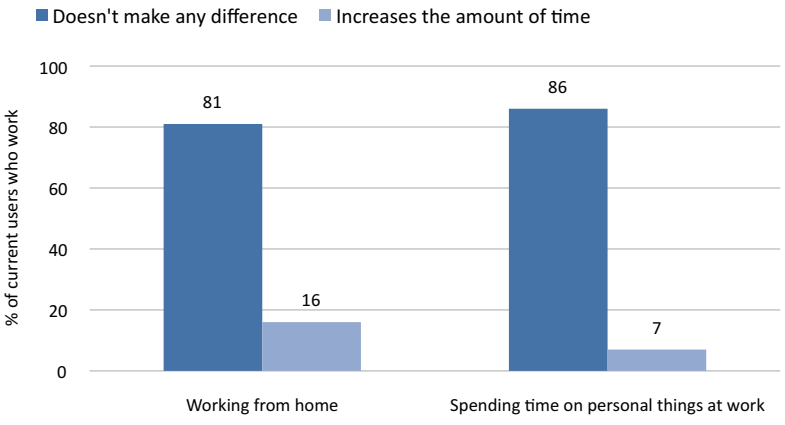


Current users. OxIS 2009: N=1,401
Note. For list of activities see p. 21 and for loneliness items see p. 56.

Users who perceived themselves to be lonely used a narrower range of Internet—based communication platforms than those who considered themselves to be social. High ratings on the loneliness scale related to an average of 2.0 communication activities, compared to 2.7 activities for low ratings of loneliness.

H. Boundaries of Work and Everyday Life

Working from Home (QD20 and QD21)



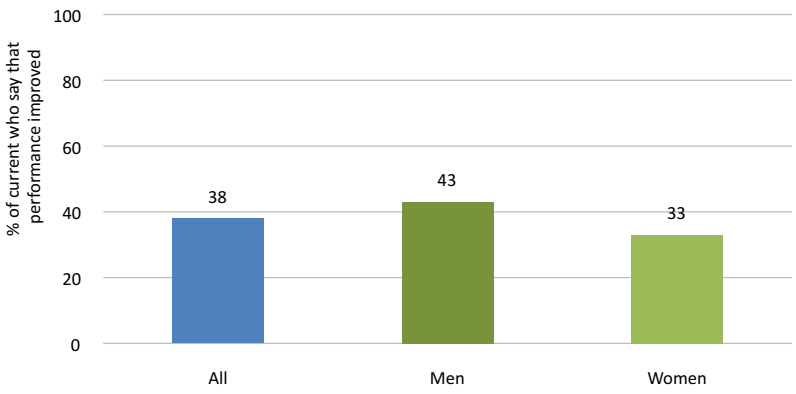
Current users who work. OxIS 2009: N=891

"Do you think that having access to email and the Internet decreases the amount of work you do at home, increases the amount of work or doesn't make any difference?"

"Do you think that having access to email and the Internet decreases the time you spend on personal things at work, increases the amount of time or it doesn't make any difference?"

Most of the Internet users who worked thought that having access to the Internet and email did not make any difference to the amount of work they did from home (81%), while a few thought it increased the amount of work at home (16%). They also thought that having access to the Internet and email did not make any difference in the amount of time spent on personal things at work (86%). Only 7% of users said that the Internet increased the amount of time spent on personal things at work.

Work Performance (QD22)



Current users who work. OxIS 2009: N=891

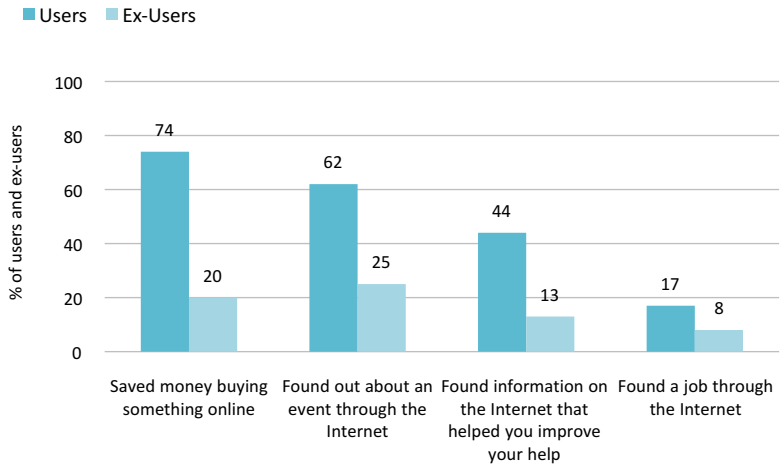
"Because of your Internet access at work, do you feel that your work performance / productivity has improved a lot, improved somewhat, stayed the same, worsened somewhat, or worsened a lot?"

More than a third of those Internet users who worked (38%) thought that their performance / productivity at work improved because of their Internet access.

Men were more likely to say that the Internet improved productivity (43%) at work than were women (33%).

I. Personal, Financial and Economic Opportunities

Effectiveness of Internet Use (QC23 and QE9 by QH14)

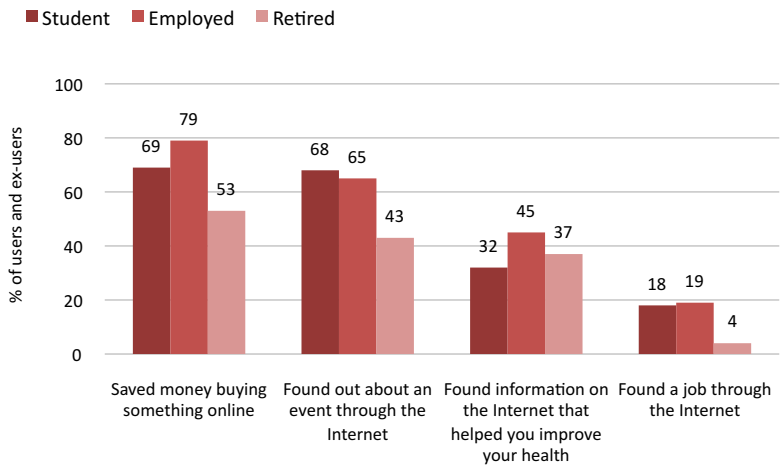


Current and Ex-users. OxIS 2009: N=1,542

"Have / Did you ever?"

The Internet was considered an effective tool for life improvement. 74% of Internet users saved money by buying something online, 62% found out about an event, 44% found information that helped improve their health and 17% found a job. Users took more advantage of the Internet than ex-users did. Only 8% of ex-users ever found a job through the Internet and only 20% saved money by buying online.

Effectiveness of Internet Use by Lifestage (QC23 and QE9 by QD15)

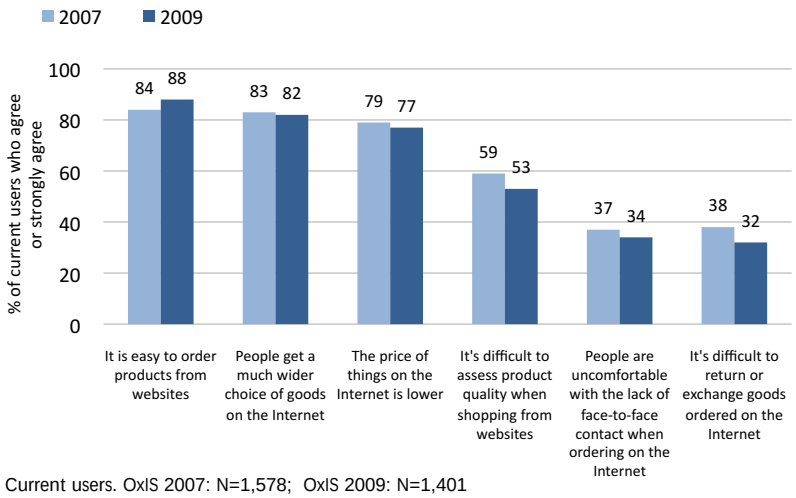


Current and Ex-users. OxIS 2009: N=1,542

Employed users / ex-users were more likely than other users / ex-users to have saved money buying something online (79%) or to have found information on the Internet that helped them improve their health (45%).

Students said more frequently than employed and retired people that they found out about an event through the Internet (68%). Students and employed people were equally likely to have found a job through the Internet (18% and 19%, respectively).

Attitudes Regarding e-Commerce (QC36)



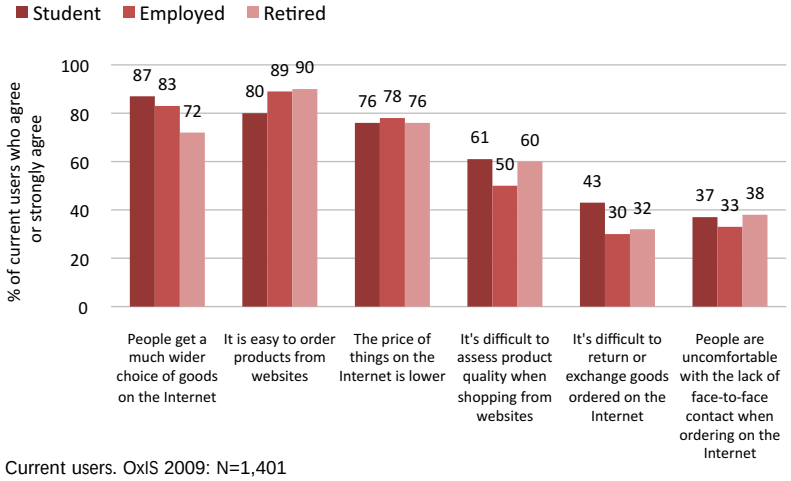
Current users. OxIS 2007: N=1,578; OxIS 2009: N=1,401

"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 remained high. Over three quarters agreed that it was easier to order products (88%), that there was a wider choice of goods online (82%), and that prices were lower (77%).

The experiences users had online were not universally positive but seem to have improved considerably since 2007. Users continued to find difficulty assessing the quality of online products (53% v. 59% in 2009), agreed more in 2007 that it was difficult to return goods (38% v. 32% in 2009) and agreed more in 2007 that they were uncomfortable with the lack of face-to-face contact in online transactions (37% v. 34% in 2009).

Attitudes Regarding e-Commerce by Lifestage (QC36 by QD15)



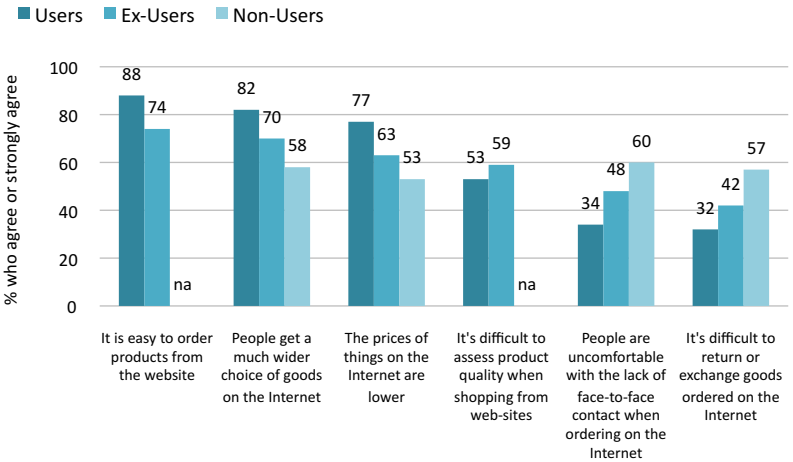
Current users. OxIS 2009: N=1,401

In 2007 students were the most optimistic and retired users the most pessimistic about e-commerce. This changed in 2009.

Students were more positive than other users about the range of choices people get online (87% agreed) but less positive than the others about the ease of buying online products (80% agreed it was easy), about the difficulty of returning goods (43% agreed it was difficult) and the discomfort with the lack of face to face contact (37% agreed).

Employed users were less likely to say that it is difficult to assess product quality (50% said it was difficult).

Attitudes Regarding e-Commerce (QC36, QE18 and QN10 by QH14)

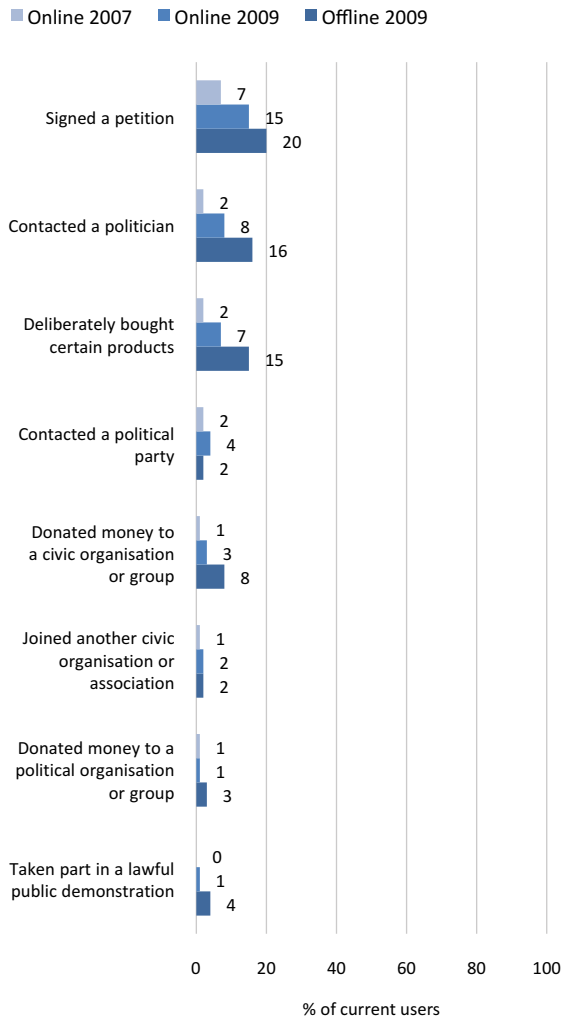


OxIS 2009: N=2,013
Note. Phrasing differed for users, ex-users and non-users.

Users were in general more positive about e-commerce than were ex-users and non-users. They were especially more likely to agree that it was easy to order products from the website (88%), that there was a wider choice of products (82% agreed), that prices were lower (77% agreed), and they were less likely to agree that people were uncomfortable with the lack of face-to-face contact (34% agreed).

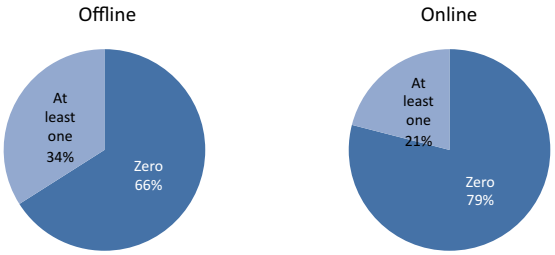
J. Civic Engagement

Online and Offline Civic Participation by Internet Users (QP2)



Current users. OxIS 2007: N=1,578. OxIS 2009: N=1,401
Note. Question changed in 2009.

Number of Civic Activities Undertaken Offline and the Number Undertaken Online (QP2)



Current users. OxIS 2009: N=1,401

"In the last year, have you done any of the following? Did you do this offline, online or have you done it both offline and online?"

One fifth (21%) of Internet users undertook at least one civic action on the Internet, compared to one third (34%) of users who had done this offline.

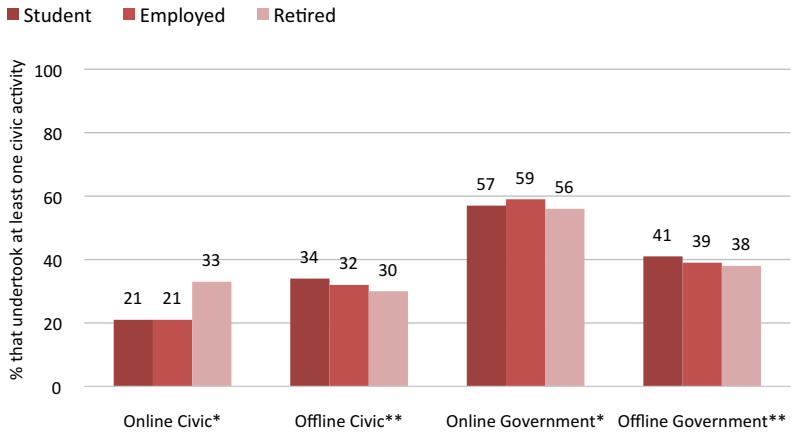
The most frequently undertaken activity online continued to be signing a petition. 15% of Internet users signed an online petition in 2009 (v. 7% in 2007), and 20% of users did this offline (down from 25% in 2007).

Deliberately buying certain products on the Internet increased; 7% did this in 2009 (v. 2% in 2007) and 15% did this offline. The only other online civic activity that has gone up significantly was contacting a politician, from 2% online in 2007 to 8% in 2009.

"In 2009, the figures reflect the rise in online petitioning, with high volume electronic petitions being rapidly disseminated across national and international networks. This reflects offline developments: 2007 was the year of the highly successful petition against the government's road-pricing plans to the No. 10 Downing Street e-petitions website, which attracted 1.8 million signatures and appeared to have been instrumental in policy change."

Helen Margetts

Online Civic Participation (QP2, QC37, QE19 and QN11 by QD15)

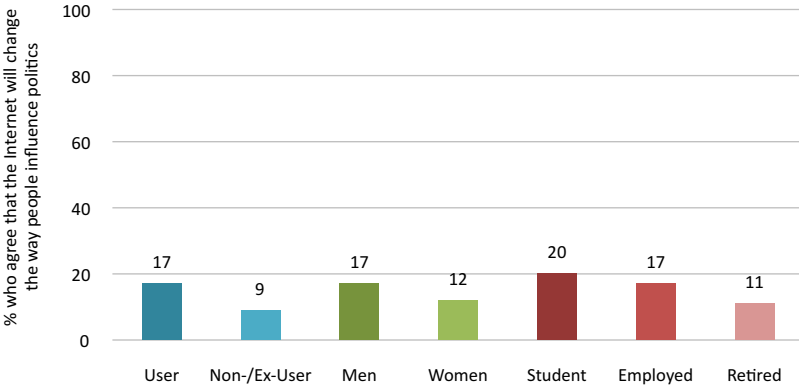


* Current users. OxIS 2009: N=1,401
** Users, Ex-Users and Non-Users. OxIS 2009: N=2,013

While retired people were less likely to be Internet users, once they were online they were more likely than students or employed users to be civically engaged. 33% of retired users undertook at least one online civic activity in 2009, compared to 21% of employed and student users. Retired people were similarly likely to participate in these types of activities offline: 30% undertook at least one activity compared to 32% of employed users and 34% of students.

In 2009, there were no major differences between student, employed and retired users in interaction with the government online. 56% of retired, 59% of employed and 57% of student users have undertaken such an activity online. There were no large differences between the groups in offline political participation; 41% of students, 39% of employed and 38% of retired people interacted with government services offline.

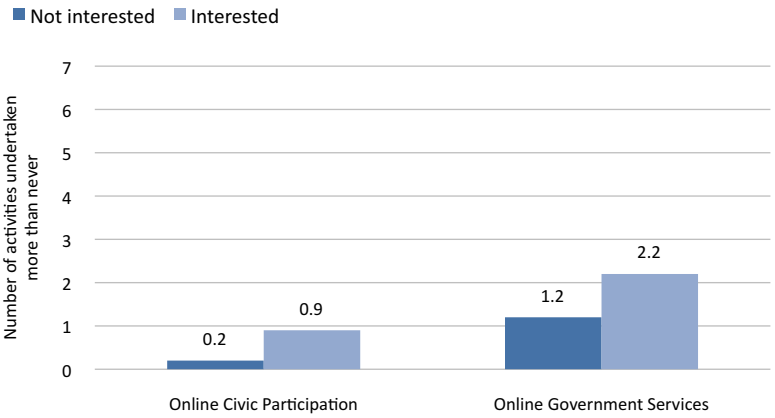
Effect of the Internet on People's Influence on Politics (QP5 by QH14, QD2 and QD15)



OxIS 2009: N=2,013

Users were more positive about the effect of the Internet on politics than non-users. 17% of users and only 9% of non- and ex-users agreed that the Internet will change the way people influence politics. Men (17%), students (20%) and employed people (17%) were also more positive about this compared to women (12%) and retired people (11%).

Participation Online by Interest in Politics (QC37 and QP2 by QP1)



Current and Ex-users. OxIS 2009: N=1,542
Note. For list of activities see p. 47 and p. 26.

Users and ex-users who were interested in politics had undertaken a greater variety of civic (av=0.9) and government related (av=2.2) activities online than users not interested in politics (av=0.2 and av=1.2, respectively).

V. Digital Inclusion Policy: Understanding the Disengaged

Most research on the Internet is focused on those who use this technology. However, if initiatives that are aimed at diminishing digital divides are to be more successful, learning more about the characteristics and attitudes of non-users is important. This part of the report focuses on several different types of non-users:

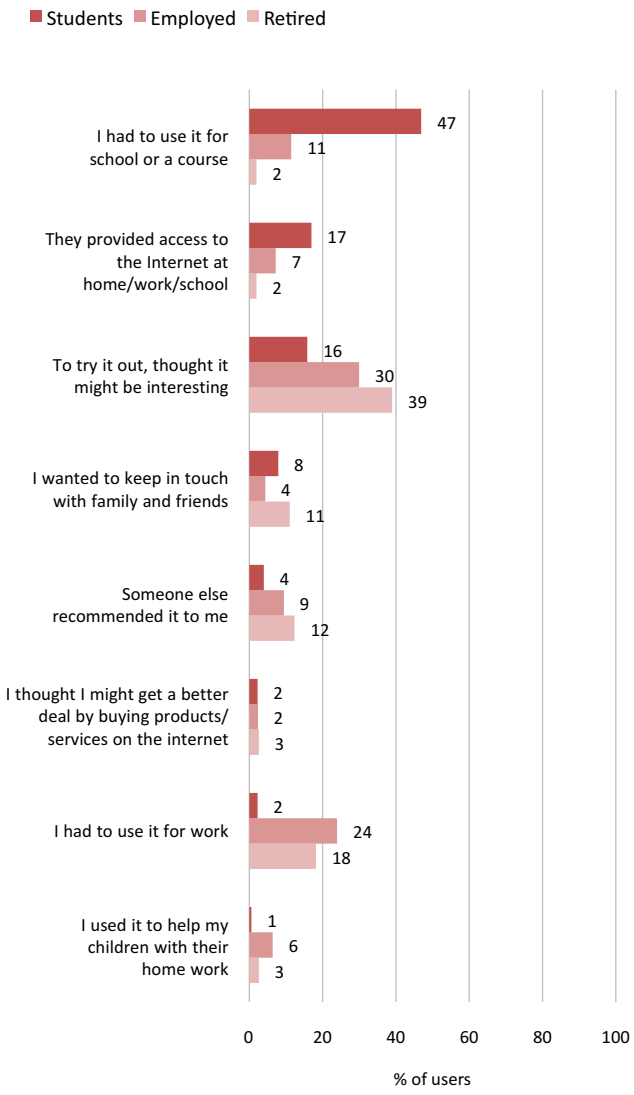
- Non-users: people who have never used the Internet
- Ex-users: people who once used the Internet but were not using it at the time of our survey
- Proxy users: those who use the Internet through another person, such as a family member, but who do not use it themselves in a more direct way

Generally, it is difficult for people to explain why they did or did not do something, such as why they decided to vote or not, or whether they decided to use or not use the Internet. In hindsight, many people tend to rationalise and simplify their choices. In many cases, people do not consciously think through their reasons for doing or not doing something. Nevertheless, the reasons people give for their choices can be instructive. In the graphs that follow, OxIS shows that non-users cite many separate but related reasons for not using the Internet, and the findings undermine any single explanation for non-use. The findings underscore the difficulty of bringing the next major segment of non-users online as there is no apparent single barrier, but many potential problems that will make it extremely difficult to bring the hardcore non-users onto the Internet.

The OxIS data also indicate the role of a variety of socio-cultural factors in shaping digital choices. The same groups that were less likely to use the Internet, such as older people, were those groups more likely to lack the motivation to go online or have a narrower range of reasons to do so. In addition, while ex-users and non-users have a range of people who might help them as proxy-users, some groups, such as the retired, are a lot less likely to refer to 'experts' for help and will rely more on close contacts such as family members.

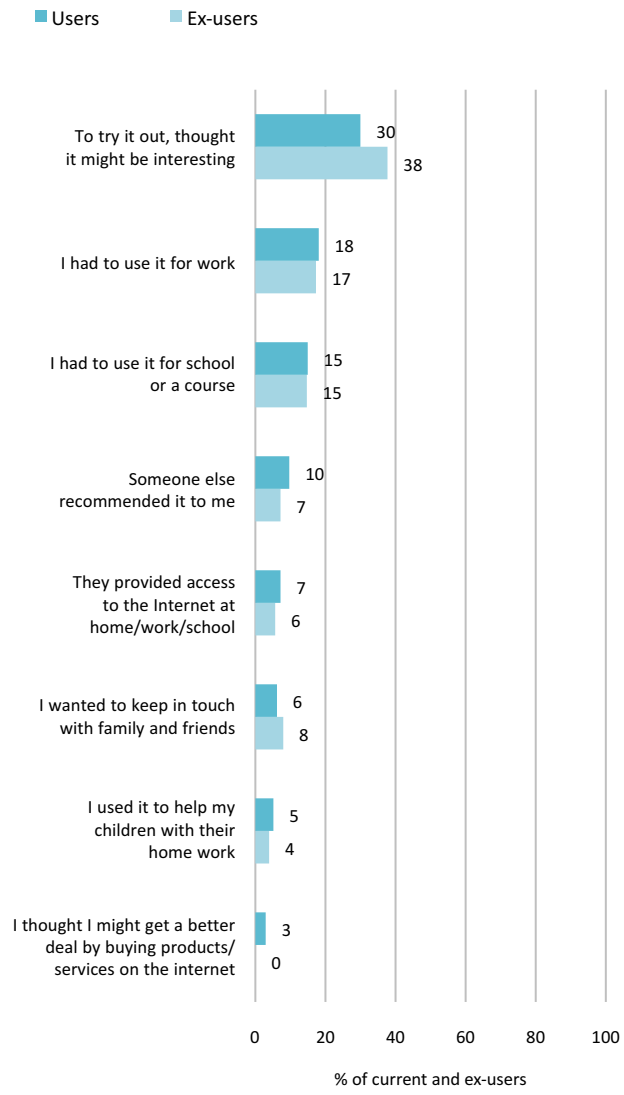
A. Rationales for Use and Non-Use

Reasons Users Started Using the Internet by Lifestage (QC3 by QD15)



Current users. OxIS 2009: N=1,401

Reasons Users and Ex-Users Started Using the Internet (QC3 and QE3b by QH14)



Current and Ex-Users: OxIS 2009: N=1,541

"People give a number of reasons why they started using the Internet. Which of the following reasons was the most important when you decided to start using the Internet?"

"We would like to know if any of the following reasons relate to why you once decided to use the Internet?"

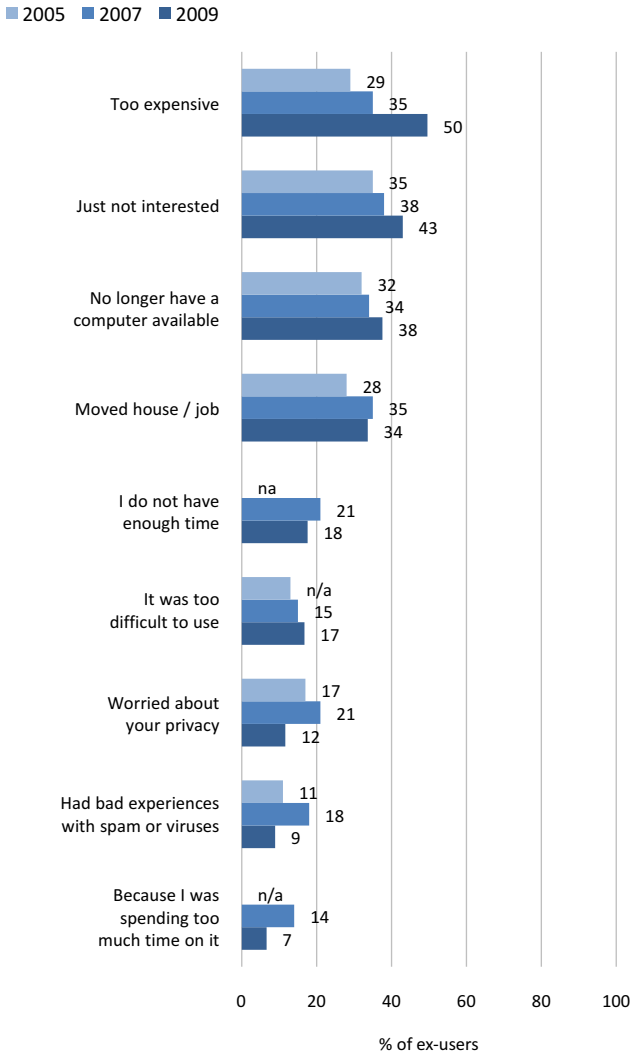
"And which of those reasons was the most important?"

Students and employed users started using the Internet mainly because they had to use it for school or work. Not surprisingly, students were more likely than employed and retired users to have started using the Internet because they had to use it for school (47%) and because access was provided at school (17%), while employed users were more likely than others to say that they started using the Internet because they had to use it for work (24%).

On the other hand, retired users had mostly interest driven motivations to go online. Retired users were more likely than others to say that they started using the Internet to 'try it out' (39%), to keep in touch with family and friends (11%) and because someone recommended it (12%).

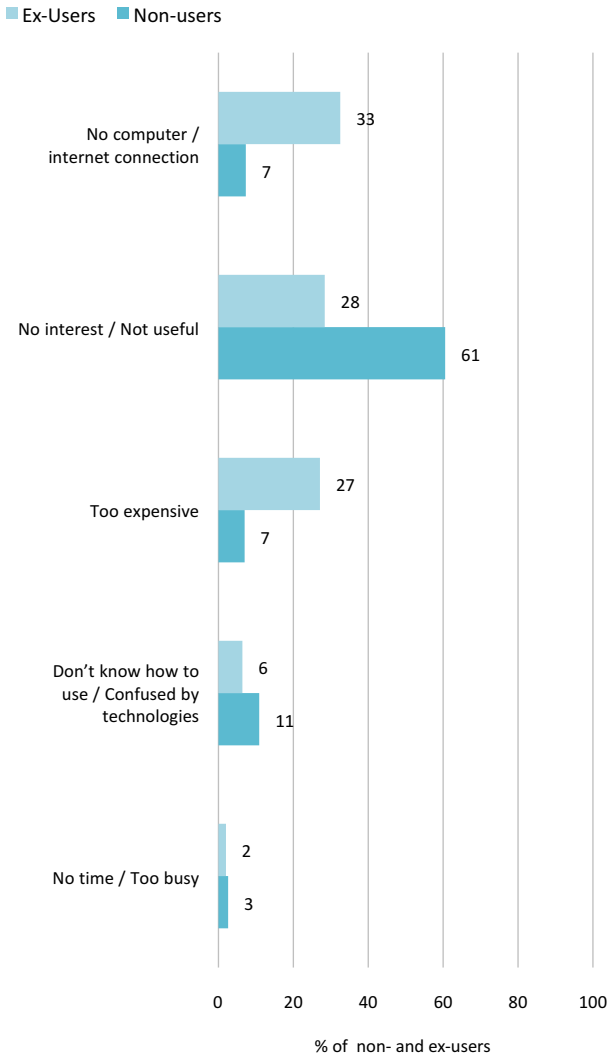
Users and ex-users did not differ significantly in the reasons they gave to start using the Internet. There was only one important difference: ex-users were more likely than users to say they started using the Internet to try it out (38% v. 30%).

Reasons Ex-Users Stopped Using the Internet (QE4)



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

Most Important Reasons Ex-Users and Non-Users Do Not Use the Internet (QE6 and QN2 by QH14)



Ex- and Non-users. OxIS 2009: N=612

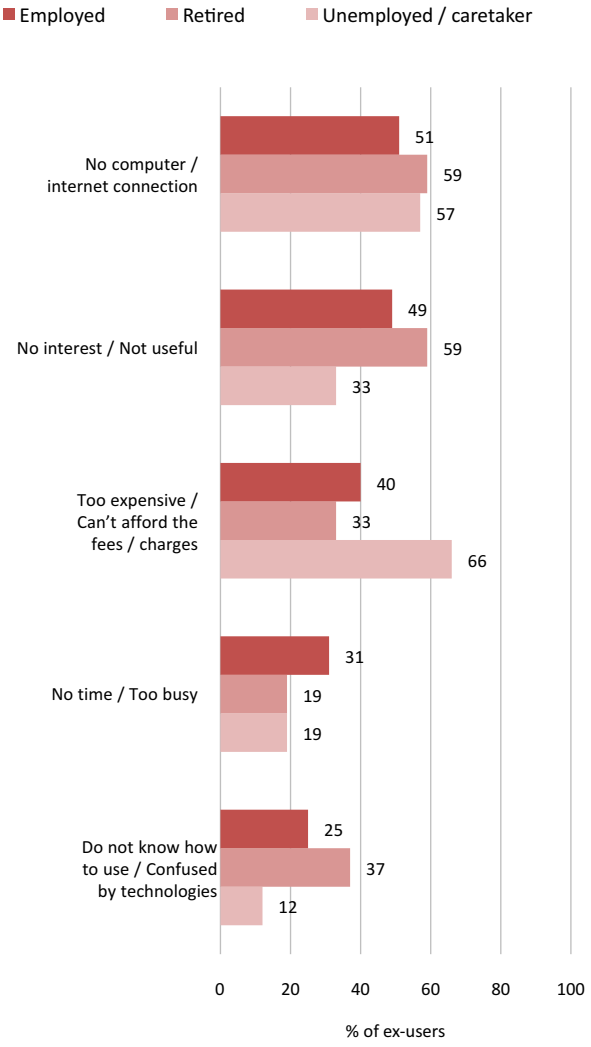
"People have given a number of reasons for stopping use of the Internet. We would like to know if any of these reasons were important to your decision."

"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?"

In 2009, ex-users referred more than in previous years to the costs involved in the use of the Internet (50% v. 29% in 2005), to a lack of interest (43% v. 35% in 2005) and to no longer having a computer available (38% v. 32% in 2005). They were less concerned with issues of privacy (12% v. 17% in 2005), spam or viruses (9% v. 11% in 2005) and a lack of time (18% v. 21% in 2007).

Ex-users mentioned a lack of access (33%), a lack of interest (28%) and the costs involved (27%) as the most important reasons to stop using the Internet. Non-users referred more frequently than ex-users to not being interested (61% v. 20%) and to their lack of skills (11% v. 6%).

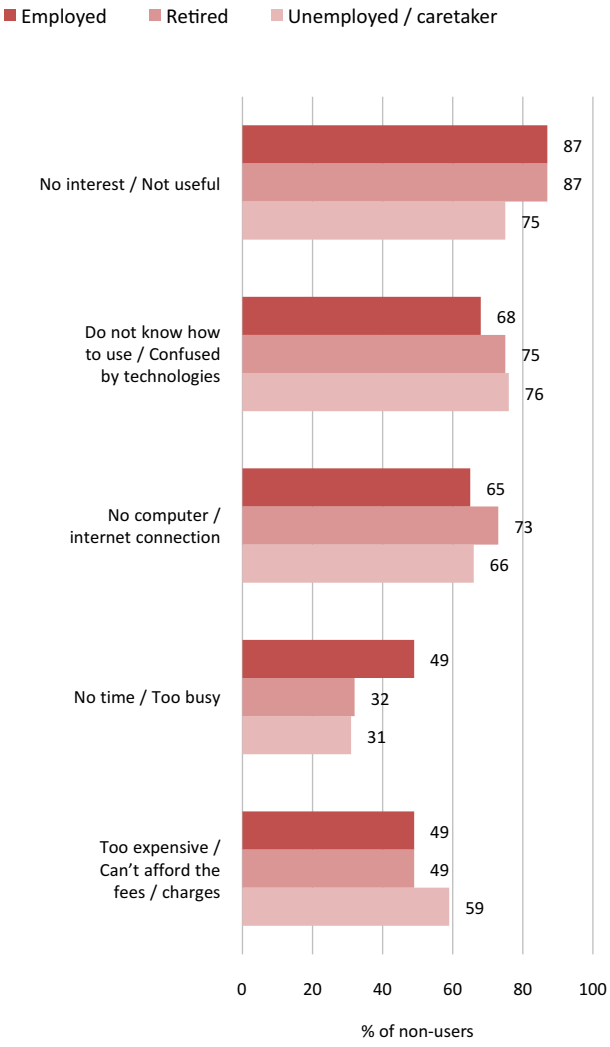
Reasons Ex-Users Stopped Using the Internet by Lifestage (QE4 by QD15)



Ex-Users. OxIS 2009: N=141

Employed ex-users were more likely than retired or unemployed / caretaker ex-users to say that the most important reasons for stopping the use of the Internet was not having enough time. 31% said that they did not have enough time (19% of retired, unemployed / caretaker ex-users). Retired ex-users were more likely than others to state not having access to a computer or the Internet (59%), not being interested (59%) and a lack of skills using the Internet (37%) as main reasons to stop using the Internet. For unemployed and caretaker ex-users, the main reason to stop using the Internet was the cost involved (66%).

Reasons Non-Users Do Not Use the Internet by Lifestage (QN1 by QD15)



Non-users. OxIS 2009: N=471

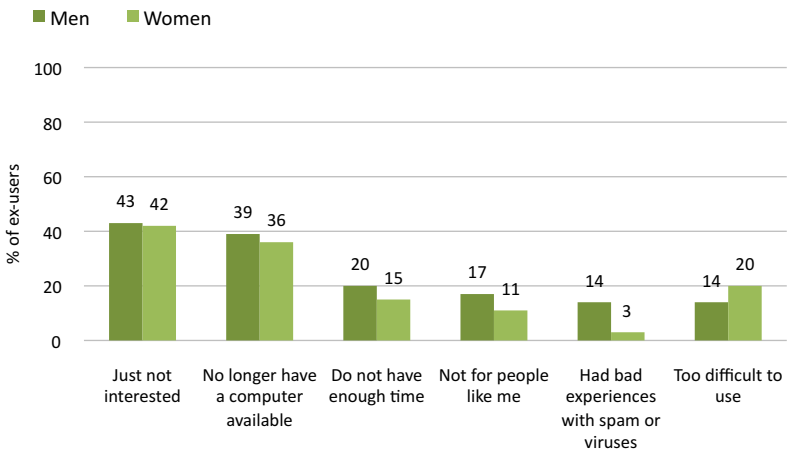
Employed non-users were more likely than retired or unemployed / caretaker non-users to state not having enough time as the main reason for not using the Internet (49%). Retired non-users were more likely than others to say that not having a computer or access to the Internet was the main reason for not using the Internet (73%). Unemployed / caretaker non-users said more frequently than the other non-user groups that the main reason for not using the Internet was costs (59%).

Male ex-users were more likely than female ex-users to say that no longer having access to a computer and bad experiences with spam were the reasons they stopped using the Internet. 39% of men reported no longer having access to a computer and 14% reported bad spam experiences as main reasons compared to 36% and 3% of women. Men also referred more frequently to not having enough time (20% v. 15%) and argued that the Internet was not for people like them (17% v. 11%).

Women, on the other hand, were more likely than men to say that the main reasons for stopping their use of the Internet was related to a lack of skills. 20% of women and 14% of men said it was too difficult to use. This difference between men and women decreased since 2007 from 15 to 6 percentage points.

Notably, in 2009 there was no difference between men and women's lack of interest in the Internet or concerns about cost (27%).

Reasons Ex-Users Stopped Using the Internet by Gender (QE4 by QD2)



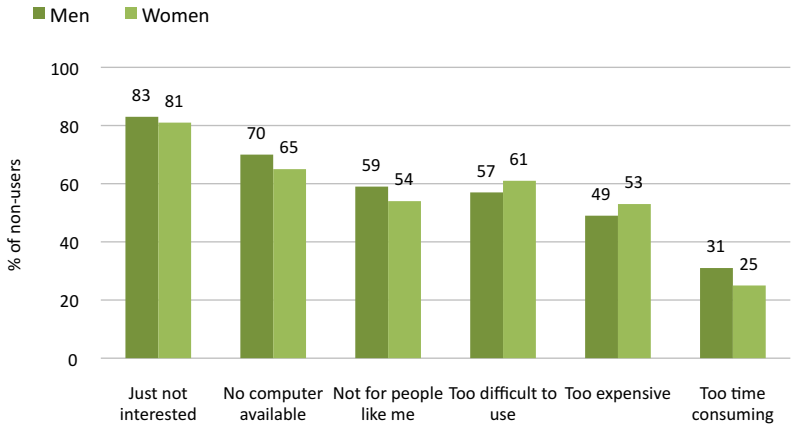
Ex-users. OxIS 2009: N=141

Male non-users were more likely than female non-users to say that the main reasons for not using the Internet was a lack of access to a computer (70% v. 65%), the time consuming nature of the Internet (31% v. 25%) and because the Internet was not for people like them (59% v. 54%).

Female non-users, on the other hand, were more likely than male non-users to say that they did not use the Internet because of a lack of skills (61% v. 57%) and because it was too expensive (53% v. 49%).

There were no major differences between men and women in terms of interest as a reason for non-use.

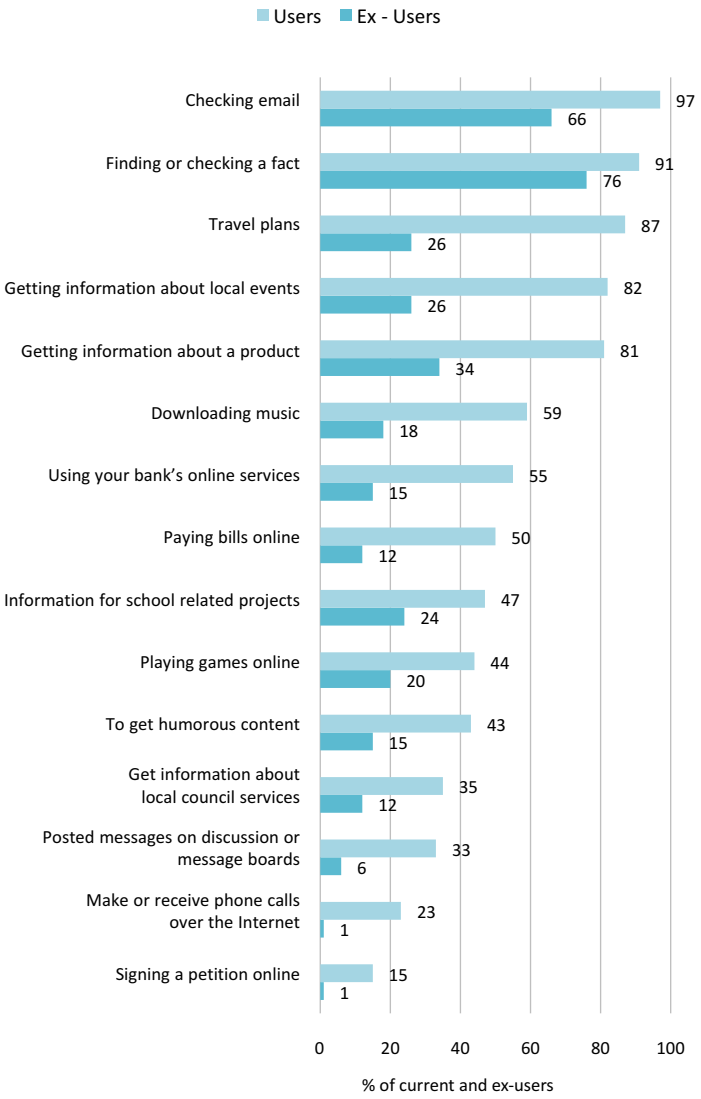
Reasons Non-Users Do Not Use the Internet by Gender (QN1 by QD2)



Non-users. OxIS 2009: N=471

B. Ex-User Engagement

Internet Uses by Current and Ex-Users
(QC10, QC22, QC31, QC34, QC37, QC42 and QE8 by QH14)



Current users and Ex-users. OxIS 2009: N=1,542

"When you used the Internet, did you use it for the following purposes?"

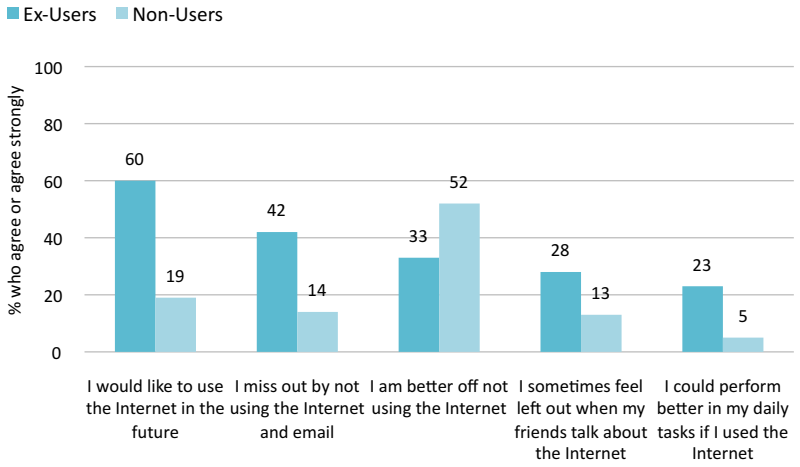
Users used the Internet more for all types of uses than ex-users did when they had access to the Internet. The greatest differences in percentage points could be observed in getting information about local events (82% of users v. 26% of ex-users), making travel plans (87% of users v. 26% of ex-users), getting information about products (81% of users v. 34% of ex-users) and downloading music (59% of users v. 18% of ex-users).

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

Internet ex-users felt more strongly that they miss out by not using the Internet than did non-users: 60% of ex-users said they would like to use the Internet in the future (19% of non-users), 42% said that they missed out by not using the Internet (14% of non-users), 28% felt sometimes left out when their friends talked about the Internet (13% of non-users) and 23% 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 (52% v. 33%).

C. The Advantages and Disadvantages Associated with Non-Use

Attitudes Towards the Internet of Ex-Users and Non-Users (QE10 and QN3 by QH14)



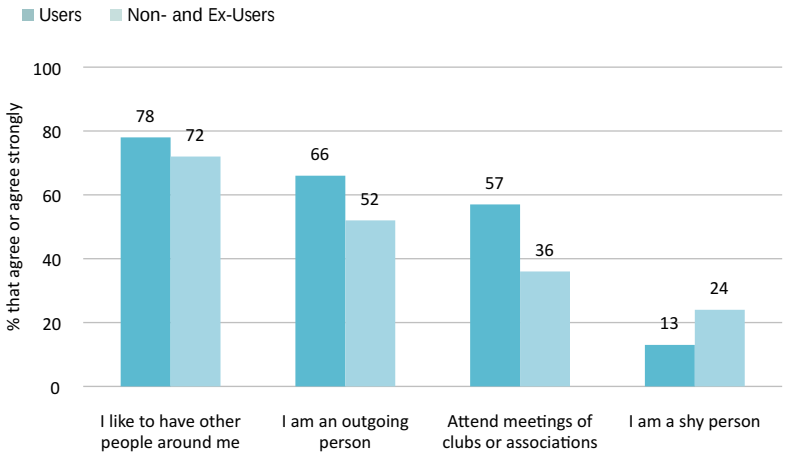
Ex-users and Non-users. OxIS 2009: N=612

"I would now like to ask you a few things about yourself. How much do you agree with the following descriptions?"

"Do you participate to the activities of one or more of the following organisations?"

There were considerable differences between users and non-users in how social they perceived themselves to be. Non-users more often perceived themselves to be shy than did users (24% v. 13%), also as less outgoing (52% v. 66%) and less likely to participate in social organisations (36% v. 57%).

Self-Confidence and Social Activities by Internet Users and Non-Users (SC6 and QB5 by QH14)

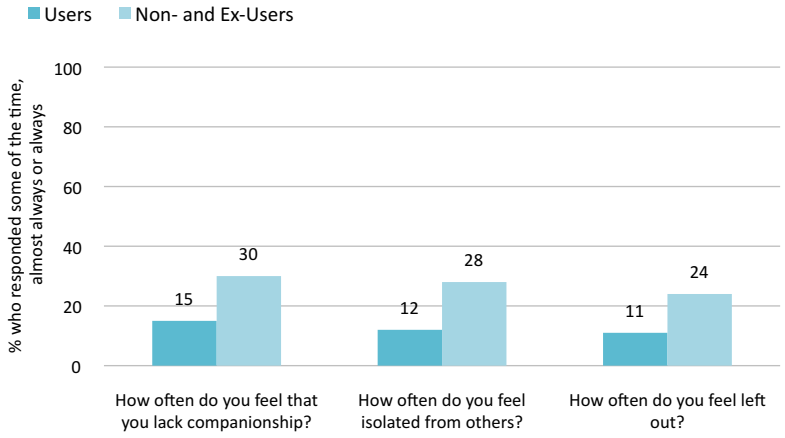


OxIS 2009: N=2,013

"Digital exclusion is strongly related to other types of social disadvantage, those who are socially and economically excluded are also unlikely to access the Internet for these purposes. In fact, analysis of OxIS has shown that people who suffer deep social exclusion are four times more likely to be disengaged from the Internet, compared to the socially advantaged. In addition, different types of disadvantage are often reflected online. For example, Internet users who feel socially isolated offline often disengage from social activities online."

Ellen Helsper

Loneliness (SC5 by QH14)

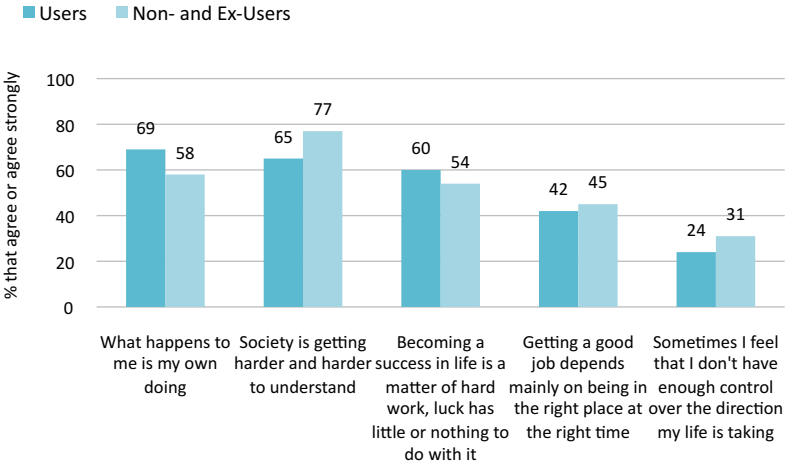


OxIS 2009: N=2,013

"The next question is about how you feel about different aspects of your life. Could you tell me for each one if you feel that way always, almost always, some of the time, rarely or never?"

Non- and ex-users felt lonelier than users. 30% of non-and ex-users felt that they lacked companionship some of the time, almost always or always (15% of users), 28% of non- and ex-users felt isolated from others (12% of users), while 24% of non- and ex-users felt left out (11% of users).

Self-Confidence and Control over the Environment by Internet Users and Non-Users (QB2 and SC6 by QH14)



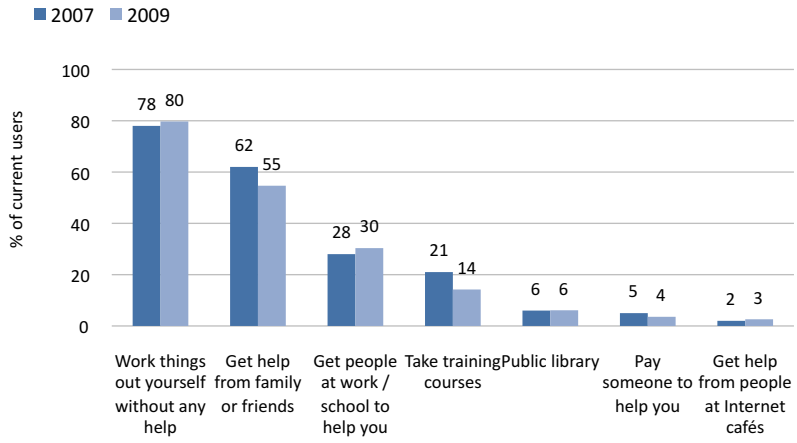
OxIS 2009: N=2,013

"How much you agree or disagree with each of the following descriptions?"

Internet users felt more in control of their lives and the world around them than did non- and ex-users. In 2009, 65% of users and 77% of non-users believed that that 'society is getting harder and harder to understand'. Users agreed more frequently that becoming a success in life was a matter of hard work (65% v. 50%) and that what happens to them was their own doing (69% v. 58%). On the other hand, non-users agreed more often that they did not have control over the direction their life was taking (31% v. 24%).

D. Proxy Use

Asking for Help (QC4)



Current users. OxIS 2009: N=1,401

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

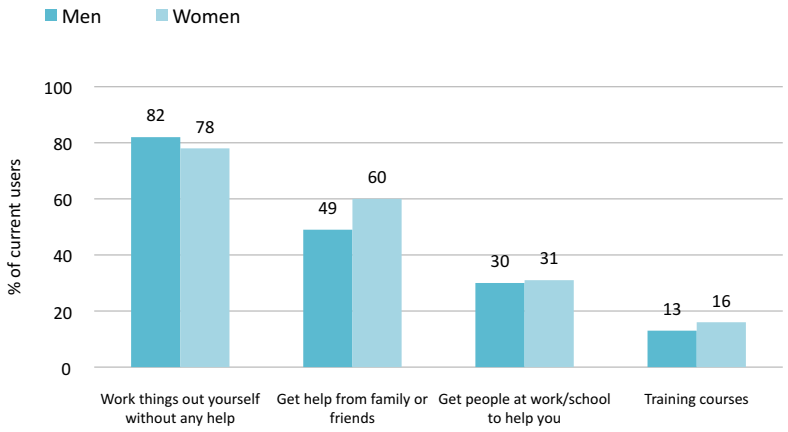
Users tended to work things out for themselves before they asked for help in relation to the Internet (80%). This had not changed since 2007 (78%).

The most frequently used sources of help were family and friends (55%). Asking people at work for help was more popular (30%) than taking a training course (14%). The least common was to ask people in public spaces, such as Internet cafés (3%) or public libraries (6%), for help. There were few changes since 2007, except that family and friends (62% in 2007) and taking courses (21% in 2007) became less popular sources of help in 2009.

"Even when people do not use the Internet themselves they might have access through someone else. This type of proxy-use is quite common and often goes unnoticed in research about digital disengagement."

Ellen Helsper

Asking for Help by Gender (QC4 by QD2)

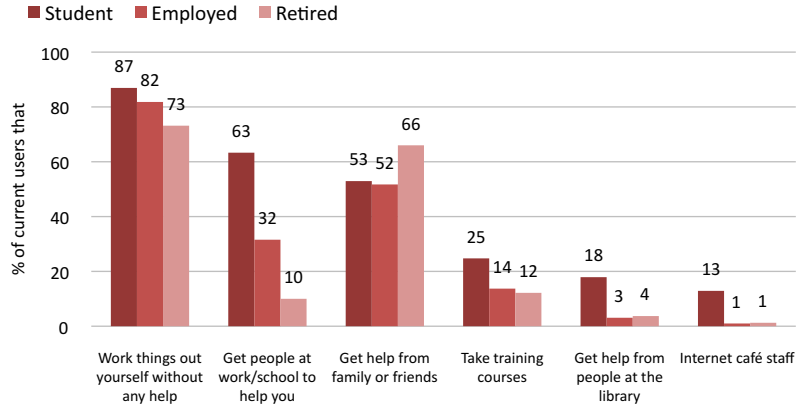


Current users. OxIS 2009: N=1,401

Women were almost as likely as men to sort things out for themselves. 82% of men said they worked a problem out this way compared to 78% of women. This was a considerable increase since 2007 for women (see OxIS 2007).

Women were more likely than men to ask family and friends for help (60% v. 49%) and as likely as men to ask people at work (31% v. 30%).

Asking for Help by Lifestage (QC4 by QD15)



Current users. OxIS 2009: N=1,401

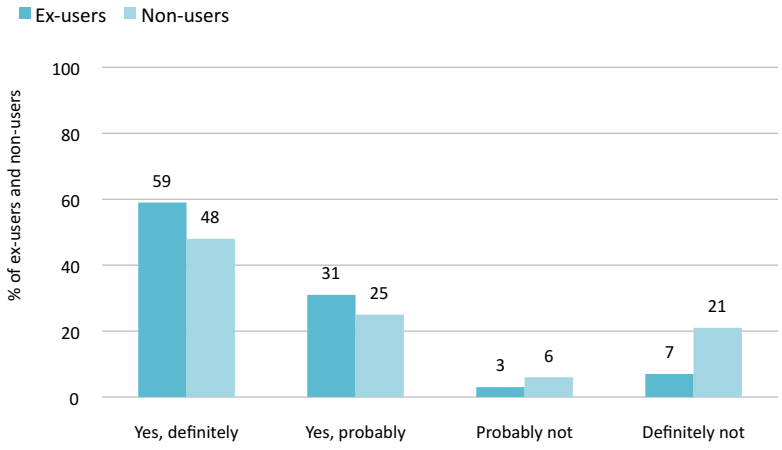
Students were most likely to work things out for themselves (87%), followed by employed users (82%) and retired users (73%). There was an increase since 2007 from 80% for student users, while employed users increased this only 2 percentage points and retired users did not increase their self-reliance.

Retired users continued to be most likely to ask family and friends for help (66%). Retired users were the least likely to take a training course (12%), in comparison to 14% of employed and 25% of student users.

Students were most likely to use all other sources of help. 63% asked people at school, 18% someone at the library and 13% someone at an Internet café.

Employed people were less likely to ask people at work or school (32%) but were just as likely as students to ask family and friends (52%).

Availability of Proxy-Users to Ex-Users and Non-Users (QE12 and QN4)

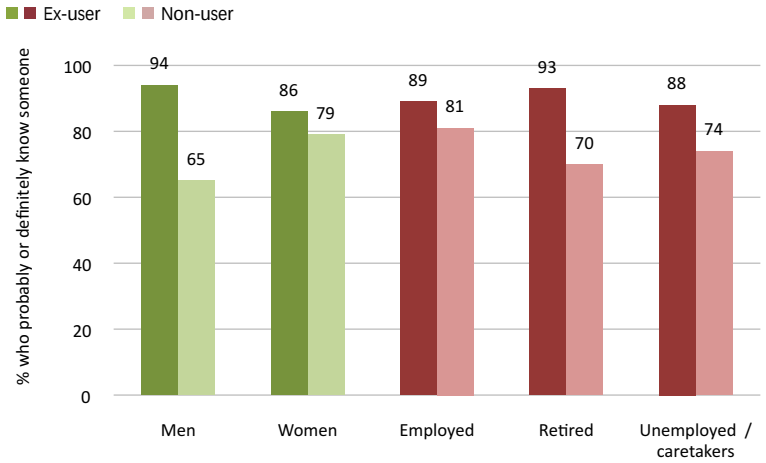


Ex-users and Non-users. OxIS 2009: N=612

"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 to know someone they could ask for help in using the Internet than non-users. 90% of ex-users knew someone who could probably or definitely help them compared to 73% of non-users.

Availability of Proxy-Users by Gender and Lifestage (QE12 and QN4 by QD2 and QD15)

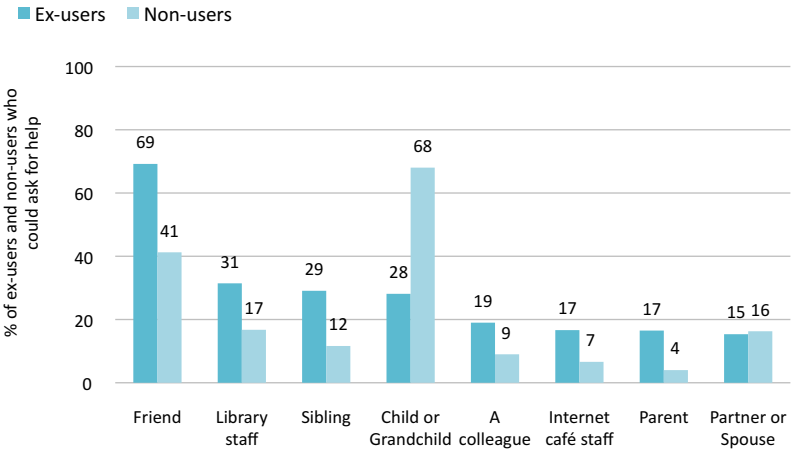


Ex-users and Non-users. OxIS 2009: N=612

Female ex-users (86%) were less likely to know someone who could help them use the Internet than male ex-users (94%), but female non-users (79%) were more likely to know someone than male non-users (65%).

There was little difference between employed, retired, and unemployed ex-users in their network of proxy-users: 88% to 93% had someone they could ask for help. Retired non-users were the least likely to know someone who could help them use the Internet (70%); less likely than employed (81%) and unemployed ex-users (74%).

Type of Proxy Users Available to Ex-Users and Non-Users (QE13 and QN5)

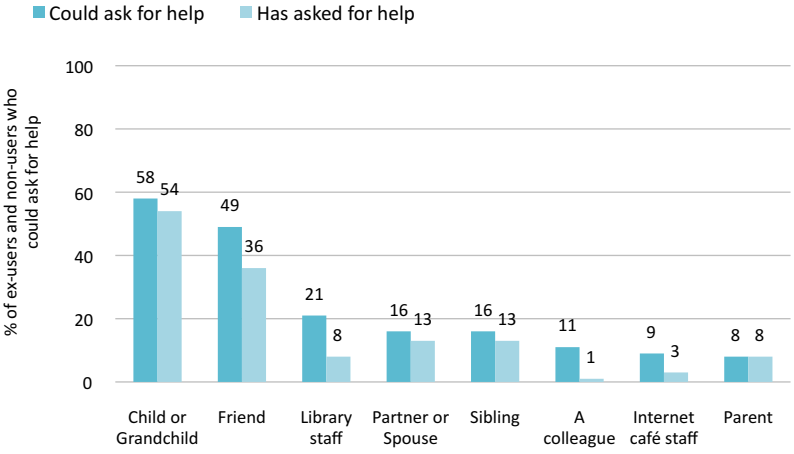


Ex-users and Non-users who know someone who could use the Internet for them.
OxIS 2009: N=425

"And who could you ask for help on Internet related matters?"

The most popular person for ex-users to ask for help from was a friend (69%). This was in contrast to non-users who were most likely to ask a child or grandchild (68%). Ex-users were also more likely to ask library staff (31%), a sibling (29%), a colleague (19%), Internet café staff (17%) or a parent (17%) than non-users, who were unlikely to ask non-family members or friends for help, with the exception of library staff (17%).

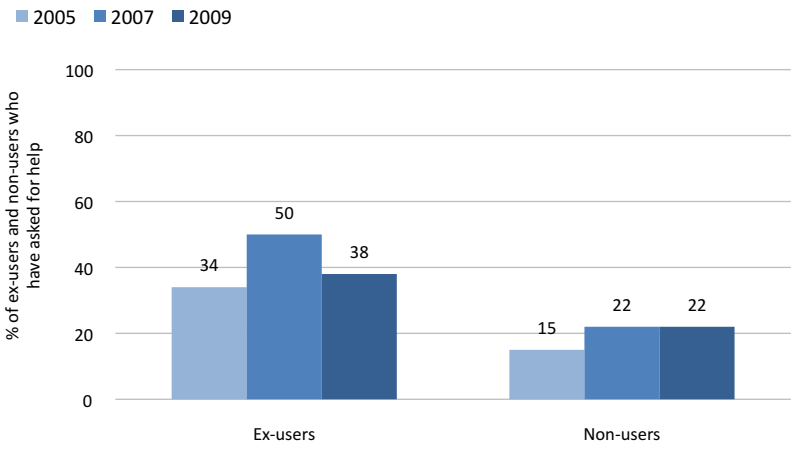
Availability and Use of Proxy Users by Ex-Users and Non-Users (QE13, QN5, QE15 and QN7)



Ex-users and Non-users who know someone who could use the Internet for them.
OxIS 2009: N=425

The difference between the availability and the use of proxy users was largest for friends and library staff (13 percentage points), for a colleague (10 percentage points) and for Internet café staff (6 percentage points). Thus even though ex- and non-users thought these non-family members might be available for support in Internet related matters, they had not actually asked them for help. This difference in availability and use was smaller for family members: for parents there was no difference and for siblings or a partner or spouse it was only 3 percentage points.

Use of Proxy Users by Ex-Users and Non-Users (QE14 and QN6)



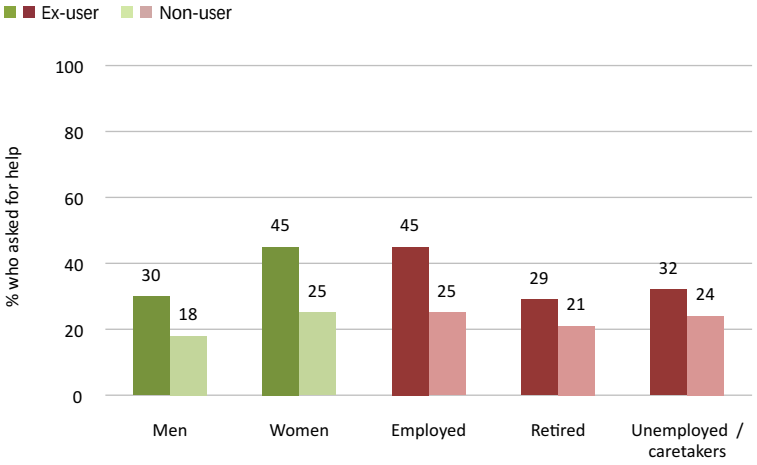
Ex-users and Non-users. OxIS 2005: N= 876; OxIS 2007: N=773; OxIS 2009: N=612

"In the past year have you asked someone to send an email for you, get information from the World Wide Web or make a purchase from the Internet?"

Ex-users were more likely to have asked someone for help in using the Internet in the last year than non-users. In 2009, just over one third (38%) of ex-users asked someone for help compared to 22% of non-users.

Ex-users were less likely to have asked for help in 2009 than in 2007. In 2007 half of ex-users (50%) asked for help. Proxy use by non-users stabilised from 2007.

Use of Proxy-Users by Gender and Lifestage (QE14 and QN6 by QD2 and QD15)



Ex-users and Non-users. OxIS 2009: N=612

Male ex-users were less likely to have asked for help in using the Internet than female ex-users. Nearly half of female ex-users (45%) asked for help compared to 30% of male ex-users. The difference between male (18%) and female (25%) non-users was smaller.

Employed ex-users were more likely to have asked for help (45%), than retired (29%) or unemployed / caretaker (32%) ex-users.

At all life stages, ex-users were more likely to have asked for help than non-users.

"One important aspect of proxy use through others is how accessible these people are in everyday life. OxIS has shown that the digital divides that are present in general access to the Internet tend to be replicated in access to proxies. That is, age, socio-economic status and education are all related to who we have access to help us use the Internet. Younger people with higher socio-economic status and education levels are likely to have a broader network of people and therefore to have, within this broader network, access to people who are more skilled or are ICT professionals."

Ellen Helsper

VI. Regulation and Control

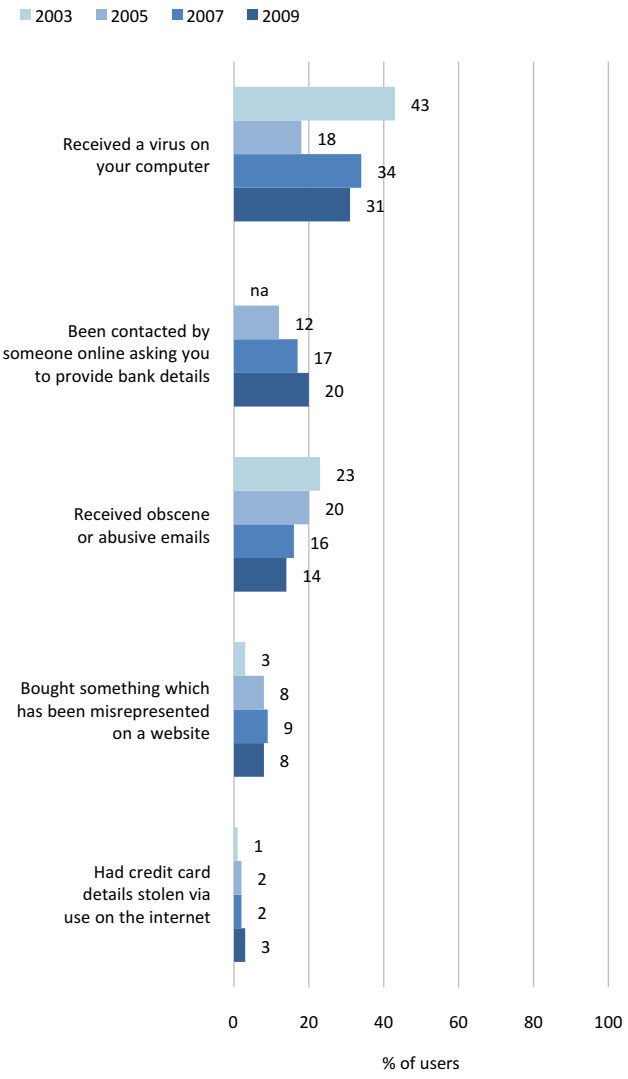
Since the earliest days of the Internet there have been calls for more control and regulation, given concerns over hate speech, spam, viruses, fraud and other malicious uses of the Internet. Breaches of copyright have been another push for more regulatory controls. Of course, the Internet is already highly regulated in the sense that its users are governed by the laws of nations, such as laws against fraudulent practices, and the ways in which many regulatory policies, such as in copyright and telecommunications shape uses of the Internet. However, that has not reduced a range of efforts to introduce greater regulation, including the control of content, particularly as the Internet has begun to play a more central role in a more converged media landscape.

The 2009 survey surfaces two somewhat conflicting themes. On the one hand, the many threats to Internet users, such as spam, seem to be diminishing as concerns to users, and certainly not becoming more pronounced. This appears to be in part due to users taking initiatives to do something about these threats, such as finding ways to filter out spam email. Likewise, in the spirit of more self-regulation, more users seem to be adopting more conventional norms about the use of the Internet, such as viewing it as inappropriate to download copyrighted books.

On the other hand, more people appear to support greater regulation of the Internet, possibly given the journalistic coverage of things that have gone wrong online. However, this is more the case for individuals who do not have experience using the Internet. Those more supportive of regulation of the Internet tend be those less experienced or knowledgeable about its use. However, this rising support for greater control and regulation of the Internet is balanced by a very supportive attitude among British people for technology in general and the Internet in particular. This is particularly the case for those with experience with the Internet. Nevertheless, given these conflicting views, it is likely that regulation and control of the Internet will continue to be an important topic of public debate in the coming years.

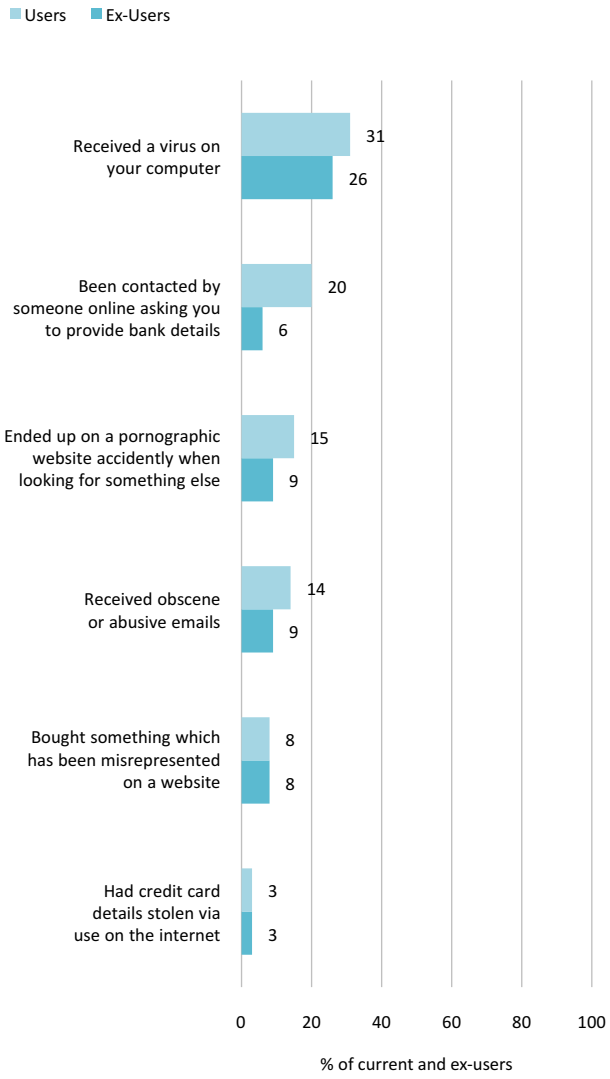
A. Concerns: Negative Experiences and the Actions of Users

Negative Experiences Person Has Had on the Internet (QC9)



Current users. OxIS 2003: N=1,201; OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401

Negative Experiences Person Had When Using the Internet (QC9 and QE7 by QH14)



Current and ex-users. OxIS 2009: N=1,542
Note. Phrasing differed for ex-users and users.

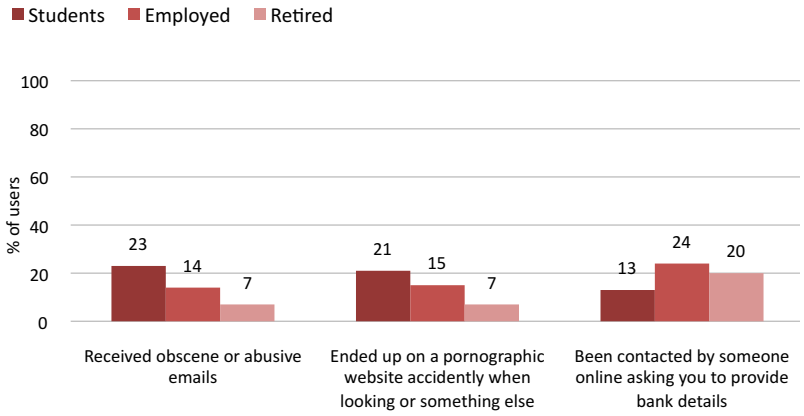
"In the past year have you…?"

"When you used the Internet did you…?"

In general, negative online experiences were less frequent in 2009 than in 2003. One third (31%) of users received a computer virus in 2009 (43% in 2003) which remained the most common negative experience. Further evidence of a decrease in negative experiences is that in 2009, 14% of users have received obscene or abusive emails, while in 2003 this was 23%. The only negative experience that went up was being contacted by someone requesting bank details: 20% of users said this happened in 2009, up considerably since 2005 (12%) (see OxIS 2007).

Fewer ex-users had negative experiences on the Internet than users. 26% of ex-users received computer viruses, while only 6% were contacted by someone asking to provide bank details and only 9% ended up on a pornographic website accidentally when looking for something else (15% of users).

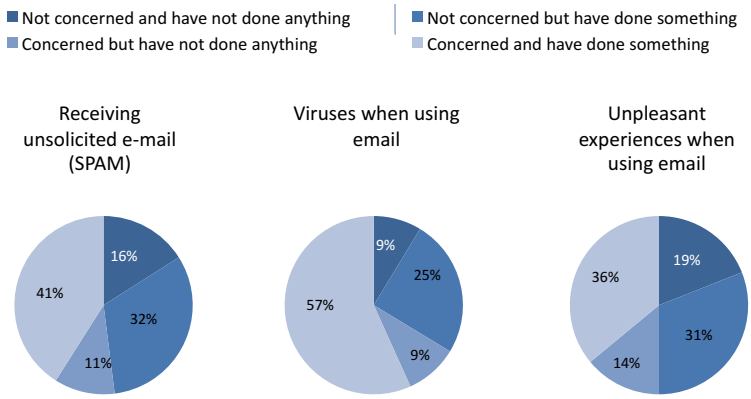
Negative Experiences Person Has Had on the Internet by Lifestage (QC9 by QD15)



Current users. OxIS 2009: N=1,401

Students were more likely than others to have received obscene or abusive emails (23%) and to have ended up on a pornographic website by accident (21%). More employed (24%) and retired users (20%) were contacted by someone online asking to provide bank details than students (13%).

Concern and Action in Relation to Bad Experiences when Using Email (QC7 and QC8)



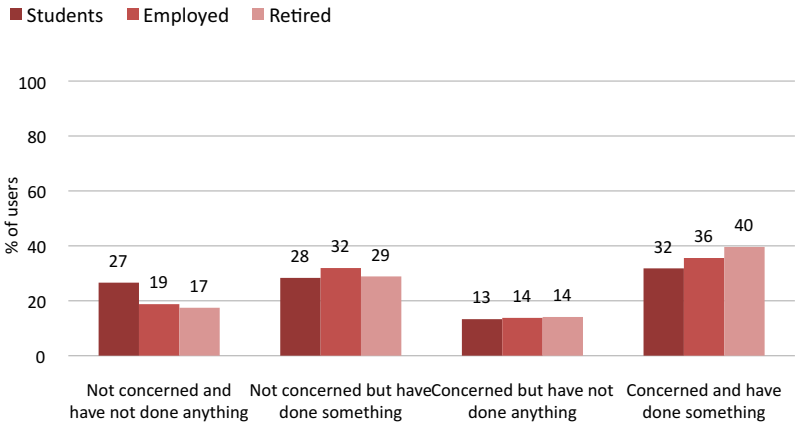
Current users. OxIS 2009: N=1,401

"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. 52% were concerned about spam, 66% were concerned about viruses and 50% were concerned about unpleasant experiences, such as being sent obscene emails.

Users were more likely to have taken action against viruses than against spam and unpleasant experiences: 82% did something to prevent viruses, while 73% did something to prevent spam and 67% to prevent unpleasant experiences, such as being sent obscene emails.

Concern and Action in Relation to Bad Experiences when Using Email by Lifestage (QC7c and QC8c by QD15)



Current users. OxIS 2009: N=1,401

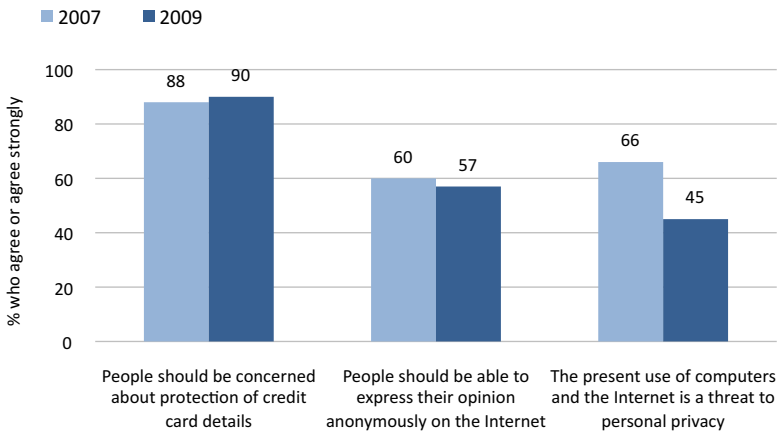
Retired users were somewhat more concerned than students and employed users about unpleasant experiences when using email: 54% said they were concerned, compared to 45% of student and 50% of employed users.

Likewise, retired (69%) and employed (68%) users were somewhat more likely to have taken action against bad experiences through email than students (60%).

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

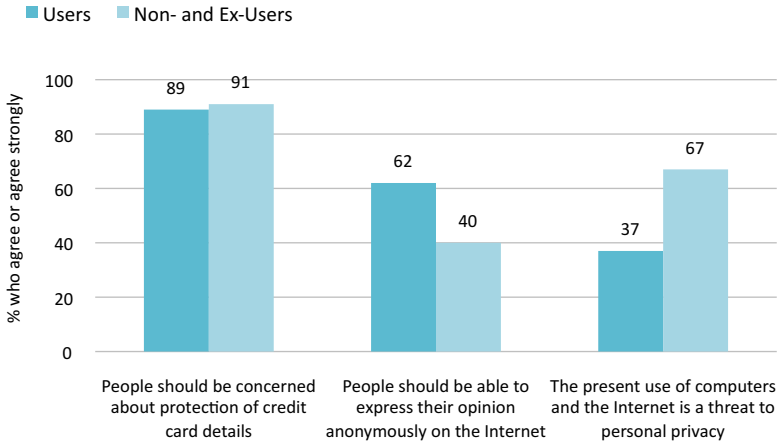
In 2009, people were as concerned about credit card fraud as they were in 2007 (90% agreed people should be concerned). However, they were less concerned about personal privacy (45% v. 66% agreed computers are a threat). In addition, people felt strongly about the right to anonymously express opinions (57% v. 60% agreed).

Attitudes Towards the Internet and Privacy (QB1)



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

Attitudes Towards the Internet and Privacy by Internet Users and Non-Users (QB1 by QH14)



OxIS 2009: N=2,013

Non- and ex-users were more worried about threats to personal privacy by technology than were Internet users. 67% feared that the present use of computers and the Internet puts privacy at risks compared to only 37% of users. However, almost everyone tended to be concerned about credit card fraud (89% of users and 91% of non- and ex-users).

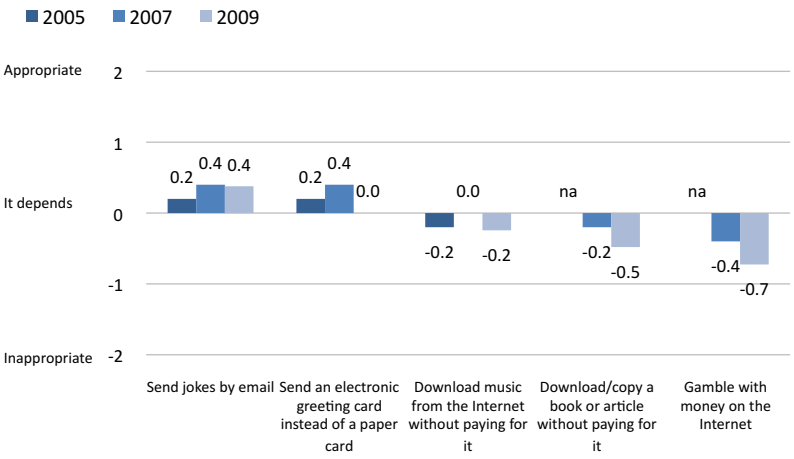
Users were more worried about threats to freedom of speech. Two thirds (62%) of users agreed that people should be able to express their opinion anonymously compared to only 40% of non-users.

"Given many high-profile media stories of personal data breaches by firms or government, it is surprising that in 2009 people were less concerned about privacy than in previous years, although concern about financial fraud remained high. There was a difference in attitudes between users and non-users, with non-users being more likely to believe that going online posed a threat to their personal privacy."

Victoria Nash

B. Evolving Norms: Self-Regulation

Judgement about Appropriateness of Activities (SC4 by QH14)

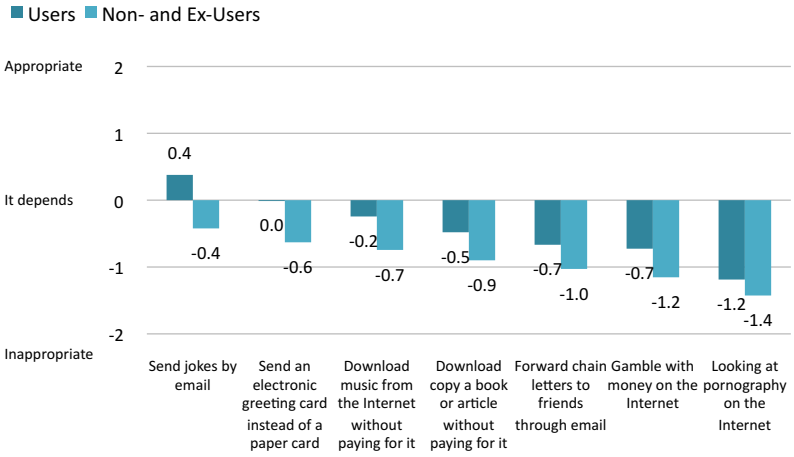


Current users. OxIS 2005: N=1,309; OxIS 2007: N=1,578; OxIS 2009: N=1,401
Note. In 2009 questions were part of a self completion section.

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

Norms of Internet use appear to be developing over time. Internet users considered it less appropriate in 2009 than in 2007 to download books or articles and to gamble online. Downloading music (av=–0.2) or books (av=–0.5) without paying for them, gambling online (av=–0.7),forwarding chain letters (av=–0.7) and looking at pornography online (av=–1.2) were also thought to be inappropriate. On the other hand, sending jokes (av=0.4) was in general perceived as appropriate by Internet users.

Judgement about Appropriateness of Activities by Internet Users and Non-Users (SC4 by QH14)



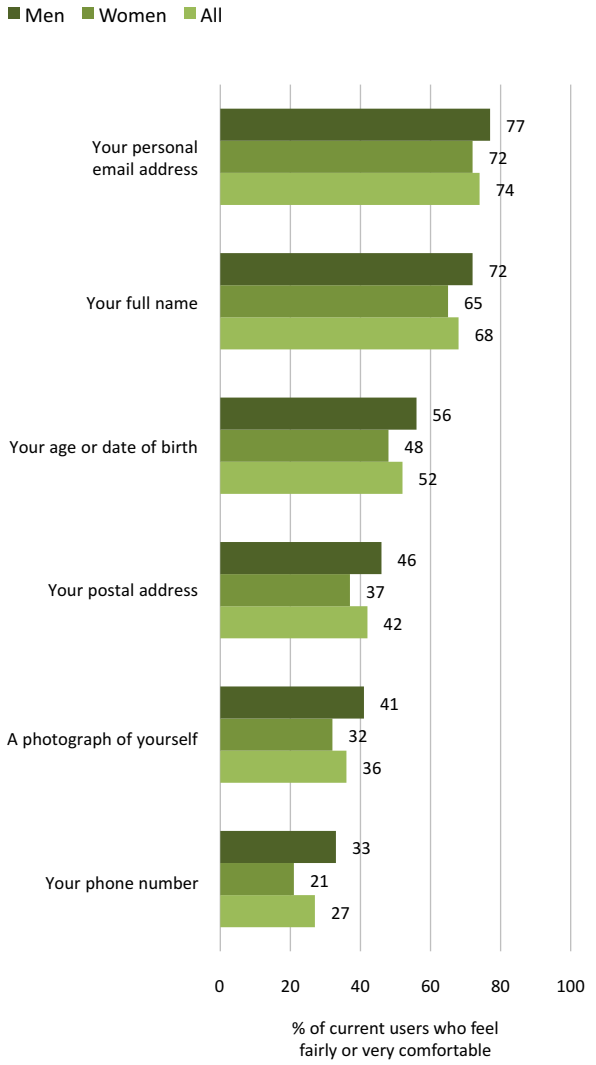
OxIS 2009: N=2,013

Non- and ex-users were more critical about the appropriateness of certain online activities than were users. Users considered it more appropriate to send jokes (av=0.4 v. av=–0.4) or electronic cards (av=0.0 v. av=–0.6) , to download music (av=–0.2 v. av=–0.7) or books (av=–0.5 v. av=–0.9), to forward chain letters (av=–0.7 v. av=–1.0), to gamble online (av=–0.7 v. av=–1.2) and to look at pornography (av=–1.2 v. av=–1.4).

"Anxiety about the Internet's risks may be entirely rational, and can be a force for good, if it leads users to take appropriate action to safe-guard themselves and their families when they go online. It is unfortunately a mark of digital inequality, however, that those who are generally more vulnerable are less likely to know how to take such action. For example, parents with higher levels of education and more digital skills are more likely to actively mediate their children's Internet use."

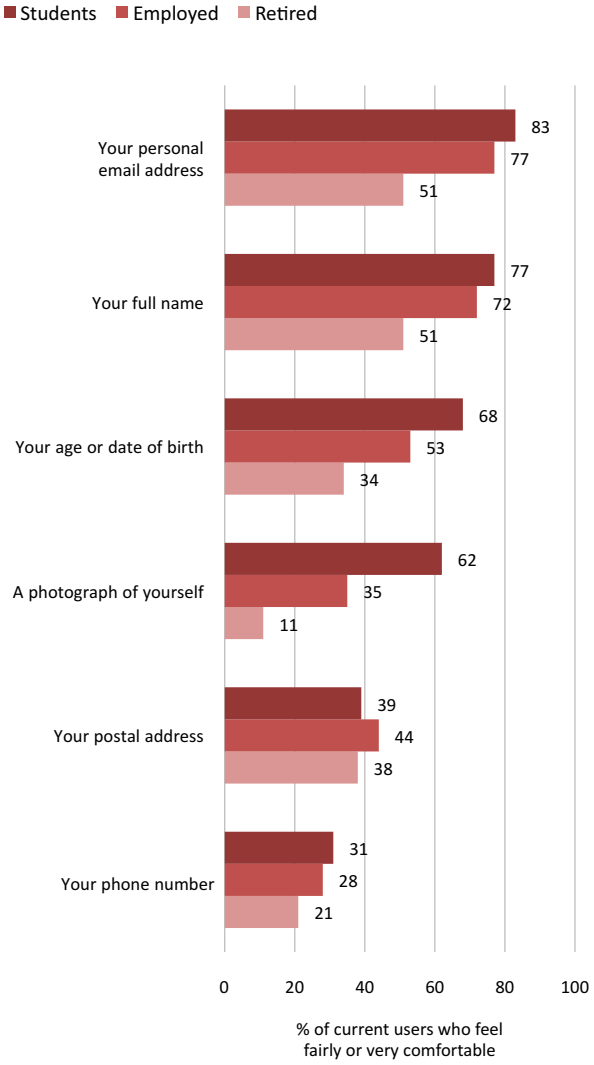
Victoria Nash

Providing Personal Information to Register on a Website by Gender (QC11 by QD2)



Current users. OxIS 2009: N=1,401

Providing Personal Information to Register on a Website by Lifestage (QC11 by QD15)



Current users. OxIS 2009: N=1,401

"How comfortable would you be to provide the following types of information to register on a website?"

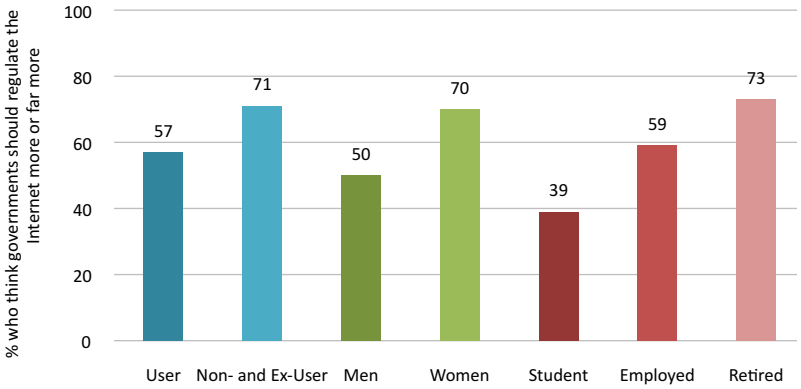
In general, users felt comfortable providing personal information to register on a website, such as their personal email address (74% feel comfortable), full name (68% feel comfortable) or age (52% feel comfortable). However, they felt less comfortable providing their postal address (42% feel comfortable), personal photograph (36% feel comfortable) or phone number (27% feel comfortable).

Men felt more comfortable than women did about providing all types of information. 46% of men and only 37% of women felt comfortable providing their postal address, while 33% of men and only 21% of women felt comfortable providing their phone number.

Students felt more comfortable about providing almost all types of information than other users. For example, 62% of students felt comfortable providing a personal photograph, while only 35% of employed users and 11% of retired users felt the same. However, students felt somewhat less comfortable than employed users about providing their postal address (39% v. 44%).

C. Attitudes Toward Regulation and the Internet

Attitudes Towards Government Regulation of the Internet (QI5 by QH14, QD2 and QD15)



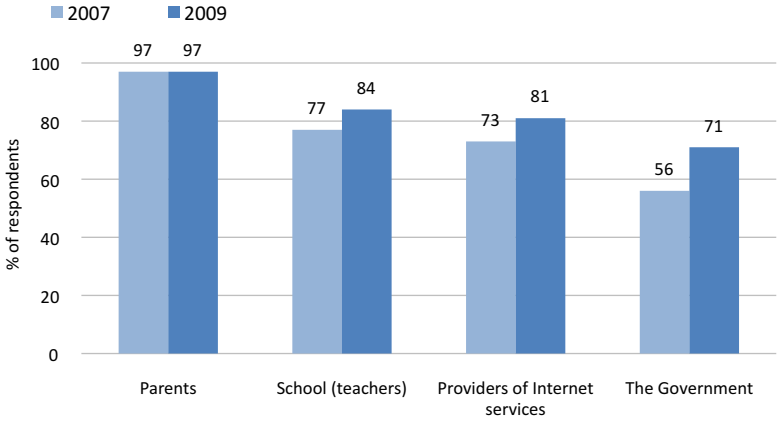
OxIS 2009: N=2,013

"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 government should regulate the Internet far more, more, no more no less, less or far less?"

People thought that governments should regulate the Internet more, but Internet users were less in favour of government regulation than non-users.

71% of non-users thought the Government should regulate the Internet more or far more, compared to 57% of users. Women and retired people also showed strong support for government regulation: 70% of women (compared to 50% of men) and 73% of retired people (compared to 59% of employed and 39% of students) agreed that the Government should regulate the Internet more or far more.

Responsibility for Restricting Children's Content (QI6 by QH14)



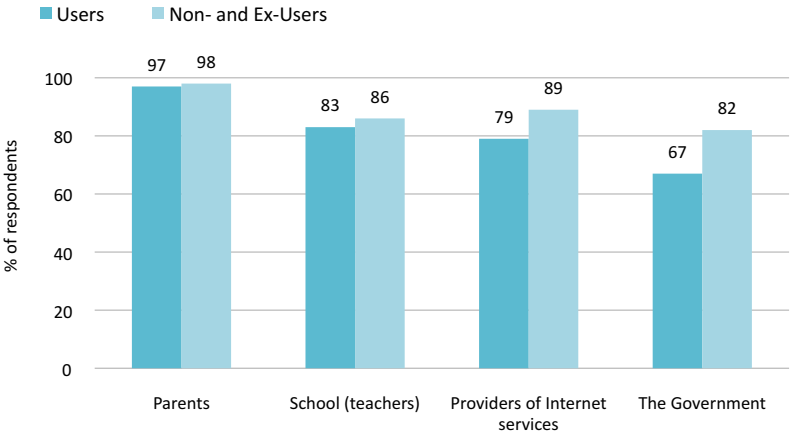
OxIS 2007: N=2,350; OxIS 2009: N=2,013

"Which of the following do you think should be responsible for making these restrictions or do you think that no one should restrict children's content?"

There was a general agreement that parents should be responsible for regulating children's access to Internet content (97%). However, people also assigned responsibility to schools (84%), Internet Service Providers (ISPs) (81%) and the Government (71%). In 2009 people were more likely to say that children's content should be restricted than in 2007.

In 2007, 77% thought that teachers should restrict children's content, 73% thought that ISPs should restrict children's content, while only 56% thought the Government should be responsible for this restriction.

Responsibility for Restricting Children's Content by Users and Non-Users (QI6 by QH14)



OxIS 2009: N=2,013

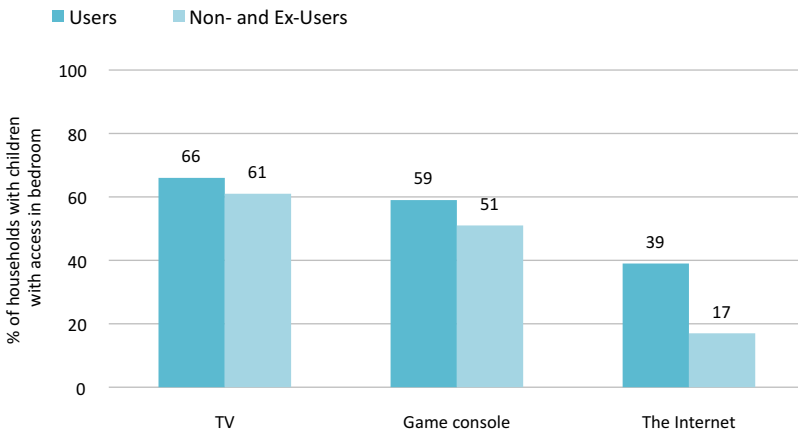
Non-users placed more responsibility on restricting children's content with schools (86%), ISPs (89%) and Government (82%) than users did (83%, 79% and 67%).

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

As more digital media enter the household, there is a trend toward more privatisation. This is supported by the presence of media in children's bedrooms: on average 65% had a television, 58% had a game console and 36% had an Internet connection.

Users of the Internet were more likely to have children with media rich bedrooms than non-users, with the exception of television, which was equally present in users and ex- and non-users' households. In 39% of users' households with children, the children had access to the Internet in the bedroom. This was the case for 17% of children in the households of respondents who were non- and ex-users.

Children's Access to Technologies in the Bedroom (D7 by QH14)

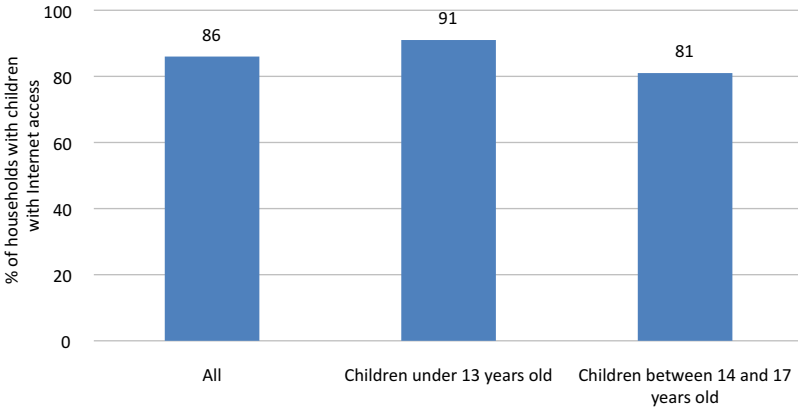


People who have children in household. OxIS 2009: N=728

"Are there rules for this child / these children in your household?"

Only 14% of households with children had no rules regarding children's use of the Internet. Households with children under 13 who had access to the Internet were more likely (91%) than households with children between 14 and 17 (81%) to have set rules.

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



Households with children who have access to the Internet. OxIS 2009: N=480

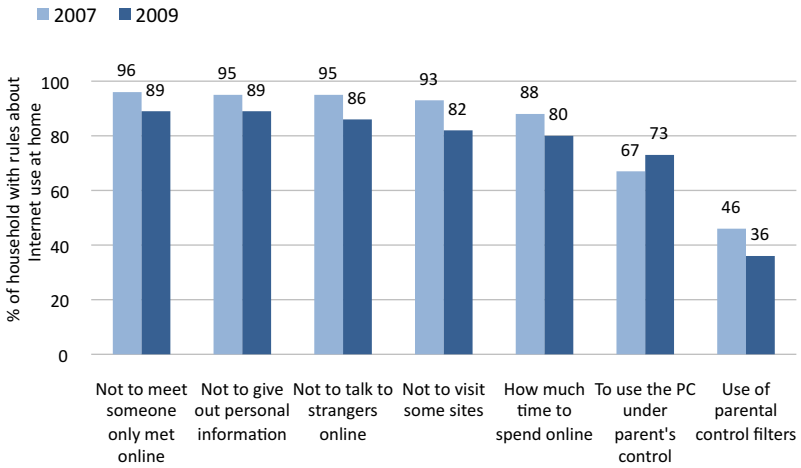
"Have you ever been told by your parents or caretakers…?" / "Have you ever told your child / your children…?"

"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?"

Most households had rules to protect children from grooming and to restrict the use of the Internet, but use of parental control filters remained low. In 2009, fewer households had set rules for their children than in 2007.

89% of households with rules had rules about giving out personal information (95% in 2007), 89% had set rules about not meeting someone they only met online (96% in 2007), 86% had set rules about talking to strangers (95% in 2007) and 80% of households restricted the amount of time children spent online (88% in 2007). Only 36% of parents used parental control filters (46% in 2007).

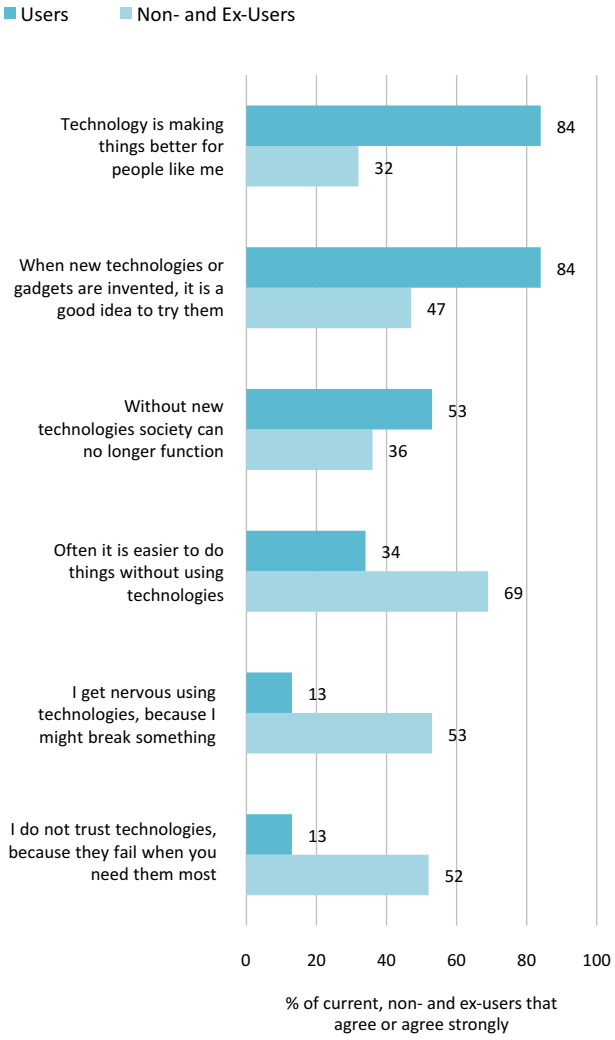
Rules about Internet Use by Children (QD10 and QD11)



Households with rules about Internet use at home. OxIS 2007: N=389; OxIS 2009: N=399
Note. Question changed in 2009.

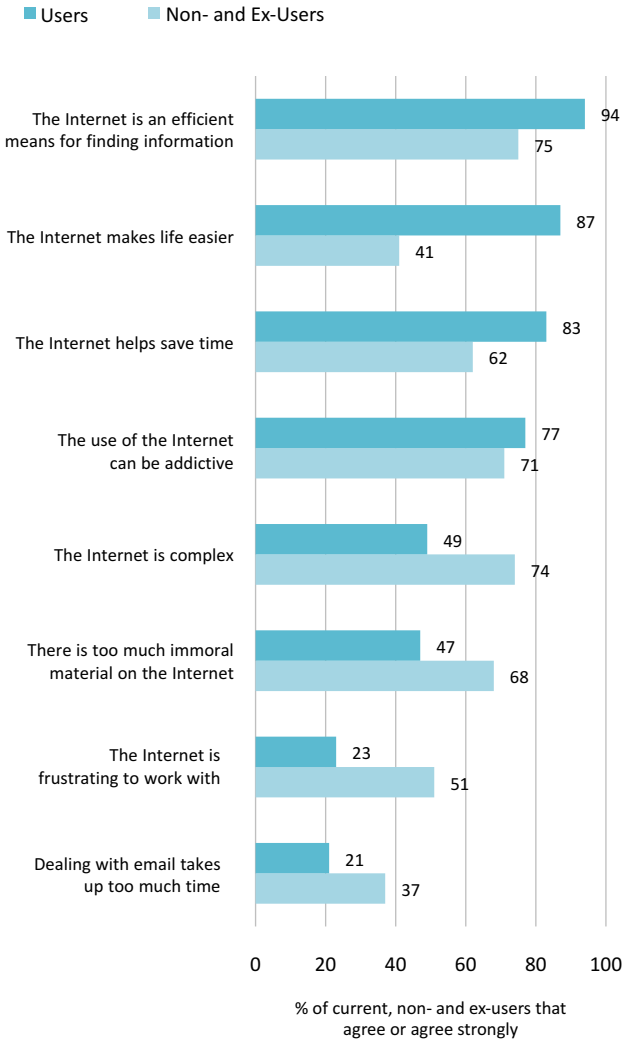
D. Attitudes Towards Technology and the Internet

Attitudes Towards Technology by Internet Users and Non-Users (QI1 and QB1 by QH14)



OxIS 2009: N=2,013
Note. Phrasing differed for users, ex-users and non-users.

Attitudes Towards the Internet by Internet Users and Non-Users (QI3, QC21, QE17 and QN9 by QH14)



OxIS 2009: N=2,013
Note. Phrasing differed for users, ex-users and non-users.

"Please tell me how much you agree or disagree with each of the following statements?"

Most British people expressed positive attitudes towards technology in general.

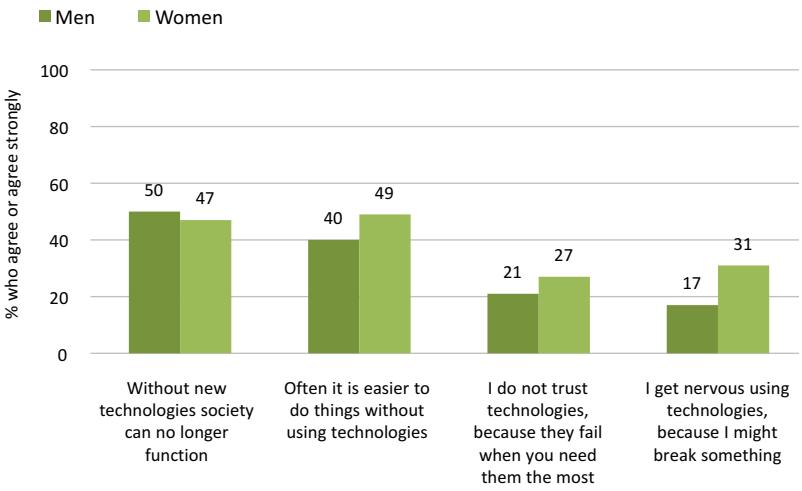
Internet users had more positive attitudes towards technology than non-users. They thought technology was making things better for people like them (84% v. 32%) and that it was a good idea to try new technologies out (84% v. 47%). Non-users distrusted technologies more (52% v. 13%) and were nervous about using technologies (53% v. 13%).

People were positive about the Internet. Not surprisingly, Internet users showed more positive attitudes towards the Internet than non-users. They agreed more with the view that the Internet is an efficient means for finding information (94% v. 75%), that the Internet makes life easier (87% v. 41%) and that it helps save time (83% v. 62%). Non-users found the Internet more complex (74% v. 49% agree), said that there is too much immoral material on the Internet (68% v. 47% agree) and agreed that it is frustrating to work with (51% v. 23%). However, users and non-users agreed almost to the same extent that the Internet can be addictive (77% v. 71%).

"Some people think technologies are making life better, others think it makes things worse, to what extent do you agree or disagree with each statement?"

Men showed more positive attitudes towards technologies. Women agreed more that it is often easier to do things without using technologies (49% v. 40% agree), they distrusted technologies more (27% v. 21% agree) and they were more nervous about using technologies (31% v. 17% agree).

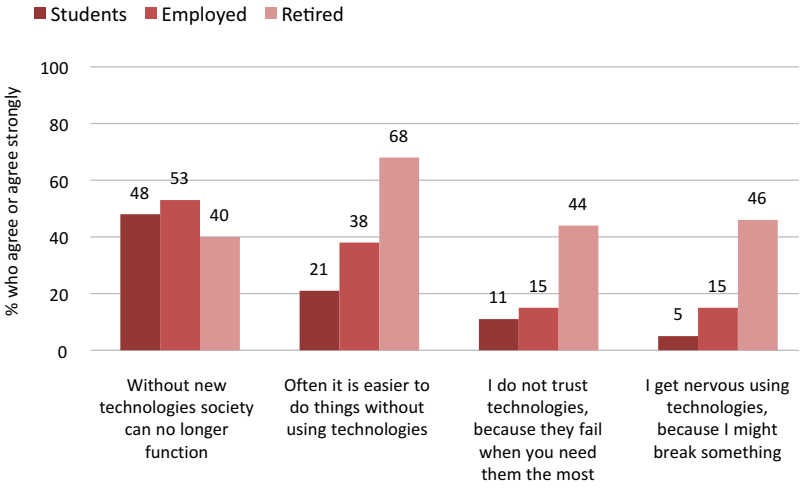
Attitudes Towards Technologies by Gender (QI1 by QD2)



OxIS 2009: N=2,013

Attitudes towards Technologies by Lifestage (QI1 by QD15)

Students evaluated technologies more positively, compared to employed people and especially to retired people. Students distrusted technologies less (11% v. 15% employed and 44% retired) and were less nervous about using technologies (5% v. 15% and 46% agreed). The retired were more likely to think it was easier to do things without technologies (68% v. 21% students and 38% employed).



OxIS 2009: N=2,013

"The availability of immoral material online and the Internet's addictive potential remained sources of anxiety in 2009. Although these concerns have not significantly increased in prevalence since 2007 amongst users, they have increased in concern amongst those who do not use the Internet. This difference in concern reflects the importance of experience with technologies in shaping our views about them."

Victoria Nash

OxIS References

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Methodology

One of the aspects that makes the Oxford Internet Surveys unique is that they are conducted face-to-face. This has resulted in a high response and completion rate over the years and a wider array of topics being covered. Since 2003, all OxIS surveys have been conducted in the field with respondents through door-to-door household interviews. The OII designed the survey instruments and research methodology. The personal interviews were conducted by ICM's trained interviewers. ICM is a survey research consultancy that specialises in behavioural and opinion research and which has accumulated a national team of interviewers with experience in face-to-face interviewing.

Sampling

Sampling was based on a multi-stage design. Firstly a random sample of 175 paired Enumeration Districts (EDs), stratified by region, was selected. Within each selected ED a random sample of 10 addresses was 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 EDs were paired with an adjacent ED that is most similar in terms of its ACORN type.

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

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

Second Stage: Household Selection

Within each selected ED, interviewers were issued with 10 randomly selected addresses from which they were expected to achieve at least a 60% response rate. A further three addresses were issued to be used only if six interviews could not be achieved with the original 10 addresses. An additional 316 addresses were issued for the 2009 survey.

Out of a total of 3,816 addresses issued, 572 lay in areas that interviewers felt unable to work in (eg. due to safety reasons). Overall, 3,244 addresses were visited by ICM staff.

Third Stage: Random Selection of Respondents

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.

Response Rate

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

Reasons for refusal	N	%
Not interested. No wish to participate	485	74.7%
Too busy	62	9.6%
Ill / Not well	34	5.2%
Away for duration of fieldwork	18	2.8%
Language barrier	17	2.6%
Not stated	15	2.3%
Don't know	18	2.8%
Total refusals	649	100%

Questionnaire Design

The questionnaire is made up of some questions which have been developed as part of the World Internet Project (WIP) as well as questions unique to the OxIS and UK context. Many questions have remained the same since 2003 to enable comparisons between years, however, sometimes it was necessary to make small changes to the way in which a question was phrased, to reorganise the ordering of questions and to broaden the scope of who answered the questions. We have not seen major differences between years in the way in which respondents interpreted the questions. Please see previous 'Internet use in Britain' reports (OxIS 2003, 2005, 2007) for more details on how the questions were asked in previous years. The questionnaire and methodology for all our surveys are available at: http://www.oii.ox.ac.uk/microsites/oxis/

This year the questionnaire was piloted because considerable changes were made to the way in which the questionnaires were handled by the interviewers. Instead of one long questionnaire the interviewer had a general section of questions asked to all and separate sections to be asked to users, ex-users or non-users. The filter was made based on the last question in the general questionnaire which enquired about whether or not they used or had ever used the Internet themselves. This should not have influenced the way in which the questions were presented to the participant.

In addition, a number of sensitive questions were presented to the participants in a separate envelope which respondents filled out themselves, anonymously, without the interviewer being able to see the answers of the respondent. This might have influenced the answers in comparison to previous surveys, as this procedure was designed to allow people to feel more comfortable about answering these questions.

Weighting

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

Gender	Unweighted	Weighted
Male	42%	48%
Female	58%	52%
Age	Unweighted	Weighted
14-17	4%	6%
18-24	9%	10%
25-34	14%	18%
35-44	19%	18%
45-54	13%	16%
55-64	15%	12%
65+	26%	19%
Social Economic Grade	Unweighted	Weighted
AB	16%	22%
C1	34%	30%
C2	17%	18%
DE	25%	21%
Refused	7%	10%
Govt office region	Unweighted	Weighted
North East	5%	5%
North West	11%	12%
Yorkshire and Humberside	9%	9%
East Midlands	7%	7%
West Midlands	7%	9%
Eastern	9%	10%
London	12%	13%
South East	15%	14%
South West	9%	9%
Wales	4%	5%
Scotland	9%	9%

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