



Cabinet Office

# Digital Landscape Research

November 2012

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# 01 About the research

This independent research was conducted by 2CV (<http://www.2cv.co.uk/>) to provide a comprehensive view of UK adults' use of the internet and of government information and transactional services online.

There are a number of existing sources of data on people's use and non-use of the internet (including the Office for National Statistics (ONS) Internet Access Quarterly Update (<http://www.ons.gov.uk/ons/rel/rdit2/internet-access-quarterly-update/2012-q2/stb-internet-access-2012-q2.html>), Oxford Internet Survey (<http://microsites.oii.ox.ac.uk/oxis/>), Ofcom UK Adults' Media Literacy Report (<http://stakeholders.ofcom.org.uk/market-data-research/media-literacy/archive/medlitpub/medlitpubrss/adultmedialitreport/>), BBC Media Literacy: Understanding Digital Capabilities ([http://downloads.bbc.co.uk/learning/learningoverview/bbcmedialiteracy\\_26072012.pdf](http://downloads.bbc.co.uk/learning/learningoverview/bbcmedialiteracy_26072012.pdf))). These sources were reviewed at the start of this project, and the decision was made to focus this research on people's use of government services and information online, about which there is less existing data.

# 02 Methodology

2CV carried out a quantitative study on how UK adults use the internet, and how they access government information and transactional services online. The researchers conducted interviews with 1,298 adults, ensuring that it was nationally representative and weighting it according to ONS Internet Use data.

Of the interviewees, 990 were recruited online, and these people took part in online interviews. The remaining 308 interviewees are people who are offline, and they took part in face-to-face interviews.

2CV also carried out a qualitative study with people who don't use government information and transactional services online. These consisted of 18 2-hour ethnography sessions with pre- and post-session tasks.

These sessions included people of a range of ages, people who are employed and unemployed, people with disabilities, people from lower socio-economic groups, and people living in both rural and urban areas. This informed 2CV's groupings of non-users of government digital services.

## A note on weighting

2CV weighted the data from these interviews to reflect the population as a whole. In the case of this research, it meant the data from the 76% of our interviewees who are online was 'upweighted' to reflect the fact that, according to ONS data, 82% of the actual population is online. This is why, in the research that follows, you will see references to the 1,064 online users and 234 users who are offline who have taken part in this survey.

# 03 UK digital landscape

This section presents important findings from the research. All of the data is available as part of the full data set. Each finding is accompanied by the relevant question from the studies. Unless otherwise noted, the question was asked of 1,298 adults and weighted to ONS Internet Use data.

## Internet use

Figure 1: How often do you access the internet? (Q11)

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%	Internet use
82%	Online (access the internet regularly or occasionally)
18%	Offline (never or rarely use the internet)

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Note: The research also shows that 77% of UK adults use the internet at least once a day

## Use of central government services and information online

Figure 2: Have you accessed central government information or transactional services online within the past year? (Q11)

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Percentage of UK adult population	Completed digital transactions
46%	Online and have used a government transaction online
8%	Online and have accessed government information online

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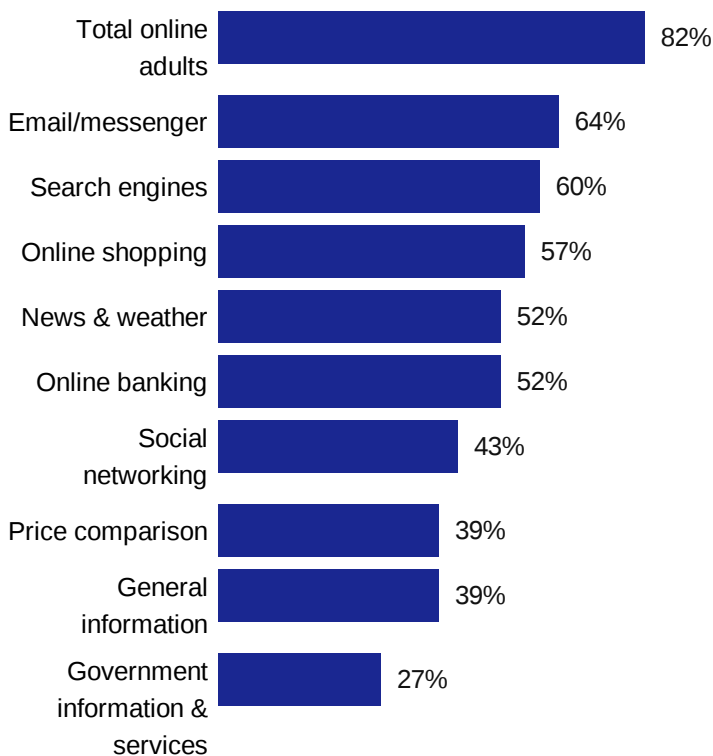
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28%	Online and have not used government information or transactions online
6%	Offline and willing to get online
12%	Offline and unwilling to get online

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## Use of online services

Figure 3: Which of the following services do you regularly use online? (Q11)

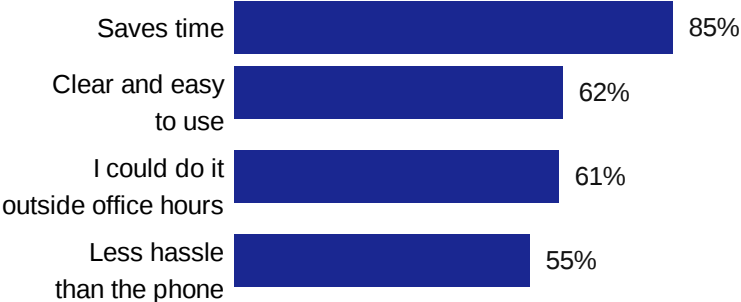


Note: 'Government information & services' is any central or local government website or digital service

## Reasons for using government services

Figure 4: What are your reasons for using government services online? (Q7)

Note: This question was asked only of the 554 people in the study who had used government services online



# 04 Who is online and who is offline?

Unless otherwise noted, questions were asked of 1,298 adults, weighted to ONS Internet Use data. Of these adults, 1,064 are online and 234 offline.

## Internet use by demographic

Figure 5: Percentages of people who are online and offline in each demographic

Note: For definitions of the socio-economic groups (SEGs) listed below visit the National Readership Survey website (<http://www.nrs.co.uk/lifestyle.html>)

User group	% online	% offline
Male	84%	16%
Female	80%	20%
16-24	97%	3%
25-34	97%	3%
35-44	92%	8%
45-54	80%	20%
55-64	70%	30%
65 & over	59%	41%
SEG A	94%	6%

SEG B	95%	5%
SEG C1	90%	10%
SEG C2	84%	16%
SEG D	79%	21%
SEG E	34%	66%
SEG ABC	92%	8%
SEG C2DE	72%	28%
Disability	72%	28%
No disability	85%	15%
Urban	85%	15%
Suburban	78%	22%
Rural	84%	16%

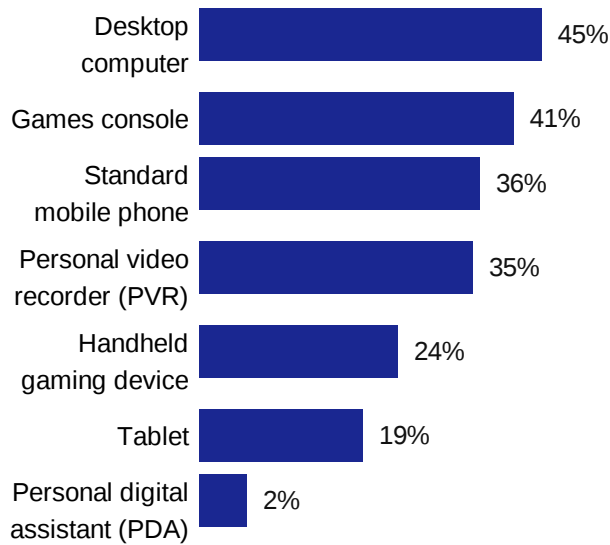
## Devices people own

Figure 6: Which of the following devices do you own? (L3 and N2)

Note: The table below shows responses from 1,064 people who are online and 234 who are offline



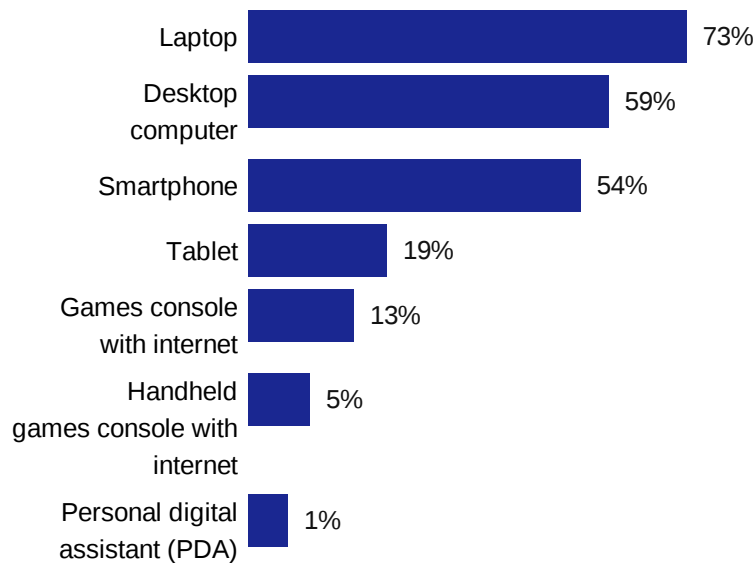




## Devices people use to access the internet

Figure 7: Which of these do you use to access the internet?

Note: This data is selected from more detailed information found in Sections N2 and L3 of the full research.

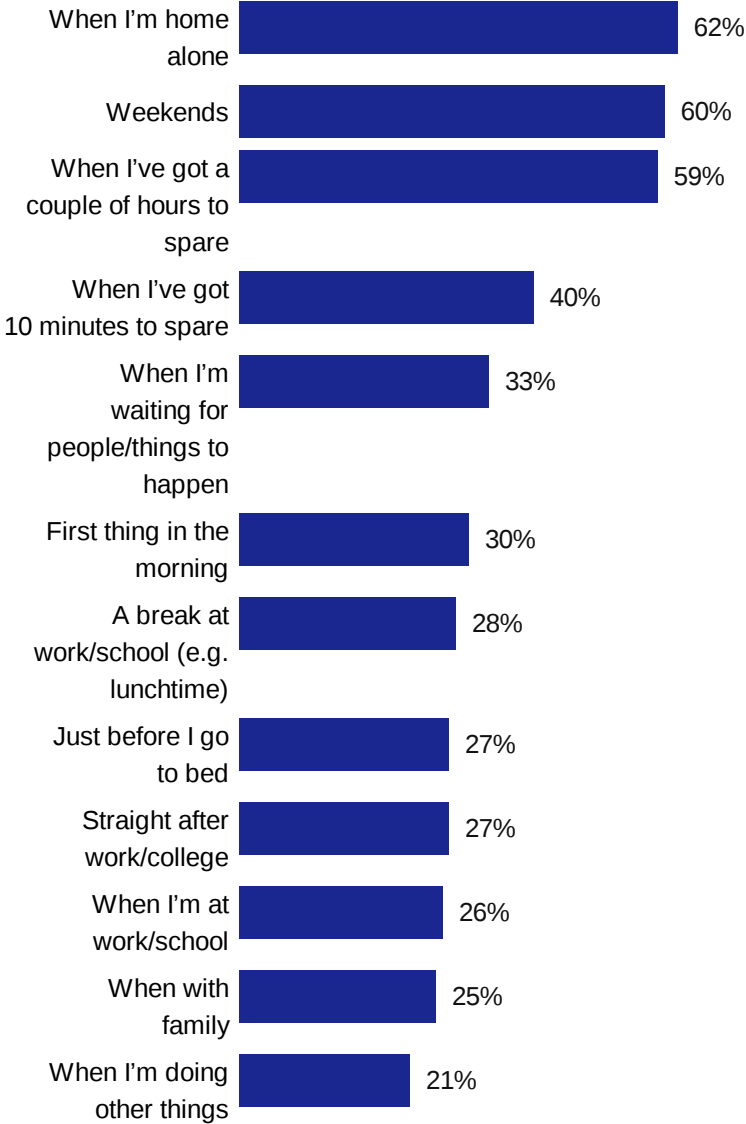


## When people access the internet

Figure 8: Please tell us the different times that you typically access online services

Note: This question was asked of 1,064 people who are online. This data is selected

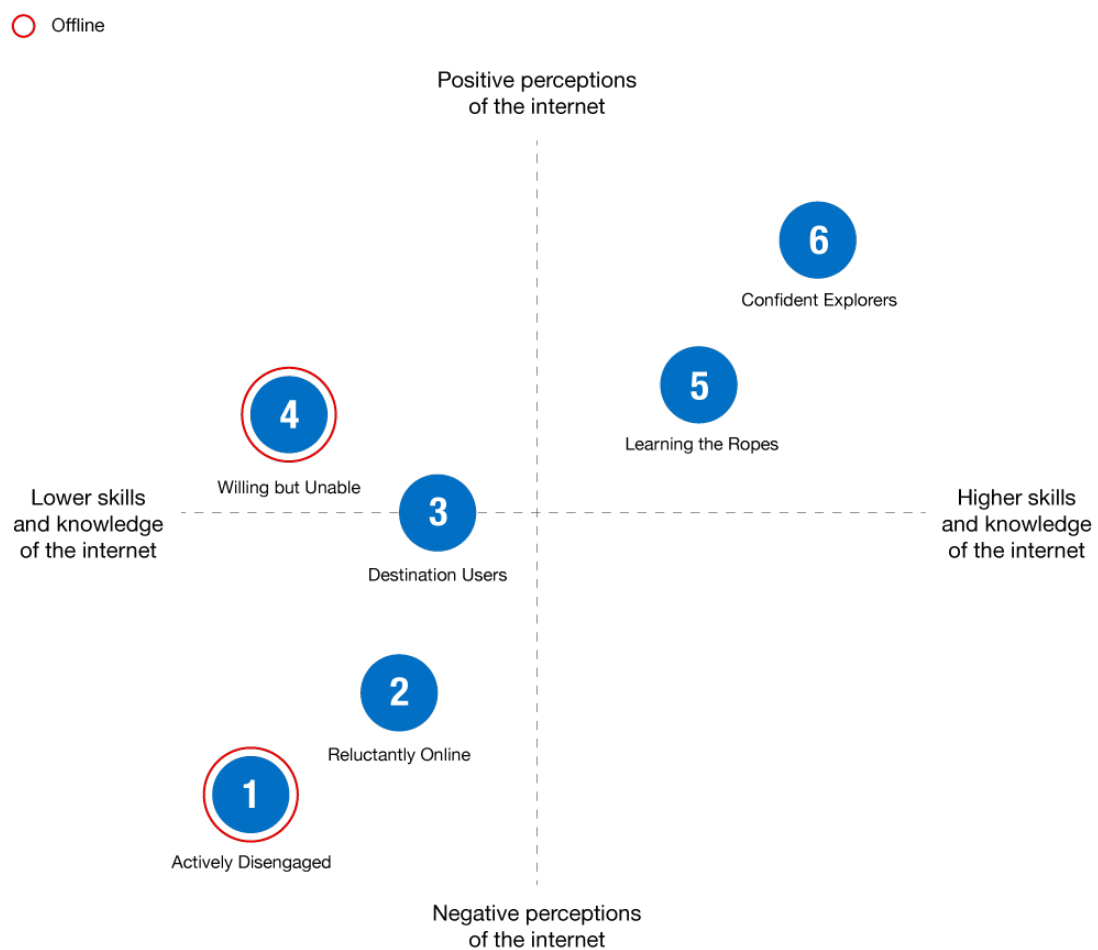
from more detailed information found in Section L4 of the full research.



# 05 Groupings of people who do not use government services or information online

2CV developed groupings of UK adults who do not use government services online based on the findings of the research.

Figure 9: Groupings of people who do not use government transactional services or information online



## Group 1: Actively disengaged

### Demographics

- 88% are aged 45 or older
- 61% are in socio-economic groups D and E

### Lifestyle facts

- Majority are single, with no family at home
- Satisfied with their lives as they currently are

### Negative perceptions of the internet

- Internet seen as irrelevant and antisocial (discouraging human connection)
- Low understanding, mainly seen as an information source and for trivial communication (Facebook, Twitter)

### Low or no computer and internet skills

- Internet passed them by and now the task of learning feels too large, making them unwilling to learn
- Pessimistic or proudly defiant about their use of the internet in the future
- A fondness and preference for traditional and face to face methods of communication – can't understand how these could be replicated digitally
- Believe there will always be an alternative to digital and will seek this out, particularly for government services

### These people say

- "Well I've survived this long without it, so I don't see why I would ever need it in the future"
- "I've never even turned a computer on, they baffle me"
- "Can't imagine doing transactions at all"
- "I prefer to go to a shop and buy it, I want to see it and feel it before I buy it"
- "I have no intention of even trying [government services online]"
- "Why would I ever need to buy anything online, I can get what I need in town"
- "They would never expect me to do government transactions online, they couldn't"

## Group 2: Reluctantly online

### Demographics

- 50% are aged 25 to 44
- 51% are in socio-economic groups C1 and C2

### Lifestyle facts

- Use the family computer (70% have children at home)
- Struggle to learn new computer or internet skills, despite help from children

### Resentful of the internet

- Associate it with being forced to learn something they find hard
- Being online seems inevitable, they wish this wasn't the case
- Reject personal information being online, feel it is intrusive (e.g. Facebook photos)
- Understand the general benefits of being online, but they have yet to experience them personally (e.g. ease, convenience, entertainment, information)

### Only basic skills, rely on family

- Only use a few websites (e.g. Google, email, Facebook)
- Find being taught to use the internet inadequate or unrewarding
- Unconfident online, and are demotivated by the proficiency of others

### Feel disinclined to transact online

- Strongly dislike carrying out transactions online
- Perceive a safety and security risk, which is heightened for government transactions due to sensitivity of data shared
- Prefer 'human' methods (face to face, phone) – benefit from the the personal contact and no computer or internet skills required

### These people say

- "Why should I do it? I have someone who can do it for me. She's a wizard, it would take me all day to do it myself"
- "I found some photos of me on Facebook. How did they get there? I wasn't asked"

- “I see people on the bus tapping and nattering away on their phones and I just think ‘what’s wrong with a book?’”
- “I have a Friends Reunited but I don’t see the point. I keep getting requests from people I don’t want to be friends with!”

## Group 3: Destination users

### Defining characteristics

- No specific age or demographic profile
- Tend to not have regular contact with computers in work (e.g. manual workers, long-term unemployed, retired)
- May or may not have internet access at home

### Love what they know of the internet, fear the rest

- Find the enormity of the internet frightening and overwhelming, which keeps them in their comfort zone
- Enthusiastic about a specific function(s) and are willing to tackle barriers to access these:
  - Communication (e.g. Skype) – cheap, face to face across distance
  - Transaction (e.g. flights, shopping) – cheap, easy to access
  - Information (e.g. ancestry, car insurance) – easy to access

### Can do specific tasks, but lack wider skills

- Not confident, but have overcome barriers to achieve specific tasks
- Uncertain about the internet more generally and scared of being outside of their comfort zone, so they don’t use their skills on other sites
- Initially introduced and helped by family, although may since have become practiced in tasks by themselves
- If they have no access at home, they will seek it out (e.g. through friends, family, library)
- Don’t trust the internet with personal information and want to control the amount of data they share

### These people say

- “If I had the confidence the sky would be the limit!”
- “Used properly it’s a great tool. Buts it’s a dangerous tool too”

## Group 4: Willing but unable

### Demographics

- Slight skew female
- 83% are aged 45 or older
- 58% are in socio-economic groups D and E

### Lifestyle facts

- Primarily empty nesters, late in their working lives, children have left home
- Low skilled, struggle to learn, and may have low levels of literacy

### Very positive attitude toward the possibilities of the internet

- Ease, convenience, breadth and accessibility of internet is very appealing
- Recognise the internet has passed them by and feel they are missing out, desperate to catch up
- Inspired by seeing others (especially children and peers) make it look easy or fun

### Lack skills, but are willing to learn

- Find the idea of learning overwhelming and scary
- Desire to use the internet encourages them, even though there's lots to learn
- Seek training or courses for assistance but are unsure where to look

### Don't feel they are quite ready for government transactions online

- Transacting is a core motivator for getting online (shopping, banking, holidays)
- But it feels like hard work, and requires skills they feel like they don't have yet
- Positive they will one day adopt government digital transactions, but need to master general computer and internet skills first

### These people say

- "There is more good on the internet than bad"
- "I really want to try now, I think I have waited for too long"
- "I see my friend on it and I want to be like her, she does everything on it"

- “I’m envious in a way of people who can use it”
- “I want to learn but I don’t want to make a fool of myself and embarrass myself”

## Group 5: Learning the ropes

### Demographics

- Slight skew female
- 59% are aged 16 to 44
- 41% are in socio-economic groups C2, D and E

### Lifestyle facts

- Tend to be (or were) stay at home mums or manual workers
- Now want, or have a need to, use computers or the internet
- Compared to other groups, are more likely to have younger families

### Very positive about the benefits of the internet

- Aware that when they are proficient the internet will give them access to:
  - Richer and better communication (e.g. Facebook, Skype, email)
  - Easy, cheap and convenient shopping (e.g. eBay, holidays)
- Only use a few websites, but always finding out about new ones that grab their interest

### Committed to learning new skills

- Mainly independent users, have goals and know where they need help
- Learning is challenging, but they try to go online as regularly as possible
- Accept that there is a lot of trial and error and practice needed
- Prefer to experiment on their own device, because this reduces fear of breaking other people’s devices
- Low confidence in their abilities limits how they use the internet
- Thrown by the unexpected (e.g. pop ups, errors, updates)

### Attitudes to online government services

- Open to the idea of online transactions, because they see the benefits
- Trust the internet, but they are fearful of the consequences of making mistakes



(e.g. broken computer or lost data)

- Like physical transactions because of the face to face interaction

## These people say

- “I trust the internet, but I don’t trust myself on the internet”
- “I don’t think its difficult, its easy if you know how”
- “How do you show your proof [when doing car tax online] of MOT and insurance papers?”

## Group 6: Confident explorers

### Demographics

- Slight skew male
- 48% are aged 16 to 34
- 57% are in socio-economic groups A, B and C1

### Lifestyle facts

- Out of all groups, confident explorers are the least likely to have families

### Highly skilled and confident across a wide range of websites

- Regularly use the internet for functional and leisure activities
- Open to experiencing more from the web and are not put off by new/different sites
- Find it easy to transfer knowledge and skills across sites
- Mostly self-taught, but may have received some formal tutoring (e.g. school, work)
- Anticipate they will use the internet more over time, and see it becoming more central to their lives

### Evangelical about the internet

- See multiple advantages to being online and can’t imagine life without it
- Struggle to see (m)any disadvantages
- Some are concerned about transactions, but feel aware of the dangers and how to manage them

### Not using government sites because of lack of awareness and bad

## user-experiences

- Don't make the connection between government and digital services
- Imagine that government sites might not be as easy as other sites they are familiar with

## These people say

- "I use the internet for everything – communicating, blogging, music, browsing photos, education, research – even to make money with eBay"
- "I'm not as techy as my cousin, he does website development and coding – I'd love to be able to do that"
- "It's convenient to do ANYTHING on the web – look up information, be entertained, go shopping and communicate with people"
- "I learnt how to use the internet in IT class in school – it was amazing, it still is pretty amazing. IT class taught me how to stay safe online and feel confident using it."

# Annex 1 Data

Download the full data (<http://publications.cabinetoffice.gov.uk/assets/data/digital-landscape-research.csv>) from the Digital Landscape research

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