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1. Summary
OUCS and now IT Services have run a survey at Freshers’ Fair since 2004. The aim is to capture the prior experiences, and more recently, wishes, of freshers to inform IT Services’ strategy, focus and resources. The survey also provides a wealth of data for divisions and others to use as they see fit, for example, to explore the support requirements for students or assess what proportion would own the appropriate technology to access facilities divisions or colleges might provide.

Highlight
Over 1000 usable responses
Laptop ownership is at its highest ever at 93%
Tablets are the second most popular type of computer, up to 26% from 21% last year and 6% in 2011
The percentage of people bringing Windows computers is down (by 1%) to 60%, Macs are up to 41%
Chrome books are very popular especially with undergraduates with 16% of respondents bringing them
Students with no anti-virus software is down to 10% from 12%
91% have smartphones and most run iOS (51%) which has overtaken Android (42%)
More people have more than one non-University email account, e.g. Google
Reading email on a phone has overtaken web for the first time, 69% vs 66%
Taught postgrads are the greatest blog readers (48%)
Facebook is still the most popular social media channel (95% of respondents use it).
Snapchat, in the survey for the first time, is second at 35%
College websites are very important when deciding whether to apply to Oxford, second is The Student Room
Facebook is the favourite way to get to know about the University or to hear from current students
Wifi everywhere still seen as the most desirable facility. Taking notes on a laptop/tablet in lectures has experienced the greatest increase in popularity
Laptop is still the most essential device, smartphone still second but has also shown the greatest increase in importance

2. Introduction
The data for the Freshers’ Survey is gathered at the annual Freshers’ Fair organised by the Oxford University Student Union in the Examination Schools. IT Services run a stand which this year included 10 laptops running web browsers.

Students are encouraged to complete the online survey as they go past the IT Services stand and all who do so are entered into a prize draw to win £100 as an incentive. The 2014 Freshers’ Survey was completed by over 1000 people with almost 1100 usable responses collected during the 3 days of Freshers’ Fair. To ensure consistent analysis, responses were rejected if the respondent had failed to provide their level of study or division, or if they had skipped more than five questions. A valid University barcode was required only to enable us to contact the prize winner and not needed to complete the survey.
As in previous years, some questions were changed for this year and new ones were added. However, it has been possible to analyse almost all questions in comparison to at least two previous years with breakdowns by division and student type also being analysed over time.

3. Demographic Profile of Students
The majority of respondents were undergraduates (58%) with 40% postgraduates and the remainder visiting students. Of the postgraduates, 26% were taught postgraduates (TPG) and 14% research postgraduates (RPG). This is exactly the same breakdown as in 2013.

The divisional split was also very similar to previous years with 30% of respondents being from the Humanities division, 33% from Maths, Physical and Life Sciences (MPLS) and 29% from Social Sciences. Again, the number of respondents from Medical Sciences was the lowest at 8% Most of these students are based at the hospital sites and not in the city centre and so find it less convenient to attend Freshers’ Fair.

Figure 1 Percentage of respondents by level of study (l) and by division (r)

4. Type of Computer
This question asks “What type of computer did you bring to Oxford?” and allows respondents to choose more than one option.

Many students brought more than one device and only eight students (less than 1%) did not bring any computer.

The most popular device was a laptop with 93% of respondents bringing one (up from 92% in 2013). This is the highest ever result. The popularity of notebooks continued to fall, now down to 5% while desktop ownership is steady but low at 4% for the third year running. Kindles or equivalent also saw a slight decrease in popularity.

Tablets are now the second most popular device, being brought by 26% of respondents. The change in tablet ownership is also the greatest change over all devices over time. See Figure 2, the yellow line (diamond markers) represents tablet ownership over time. All respondents who brought a tablet also brought at least one other device – laptop, desktop or notebook.

Table Growth of respondents by level of study and division

<table>
<thead>
<tr>
<th>Level of Study</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG</td>
<td>58%</td>
</tr>
<tr>
<td>TPG</td>
<td>26%</td>
</tr>
<tr>
<td>RPG</td>
<td>14%</td>
</tr>
<tr>
<td>Visiting</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Division</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humanities</td>
<td>30%</td>
</tr>
<tr>
<td>MPLS</td>
<td>33%</td>
</tr>
<tr>
<td>SocSci</td>
<td>29%</td>
</tr>
<tr>
<td>MedSci</td>
<td>8%</td>
</tr>
<tr>
<td>Medical Sciences</td>
<td>8%</td>
</tr>
</tbody>
</table>
Figure 2 Percentage of respondents who brought each type of device over time

Tablet ownership was also broken down by type of tablet – iPad or other tablet (see Figure 3). iPads are clearly the most popular but the rate of increase in ownership is the same.

Figure 3 Percentage of respondents bringing different types of tablet over time

When analysed by type of student (undergraduate, taught postgraduate or research postgraduate), ownership of devices was very similar for all devices except tablets where responses showed that more postgraduates than undergraduates brought tablets. Ownership is roughly equal for taught and research postgraduates and the increase in ownership is seen across all levels of study (Figure 4).
The data was also broken down by division. There was a decrease in the percentage of Medical Science students bringing laptops, down from 95% to 90%. In 2013, there was a notable increase in the number of laptops brought by Medical Science students; this down turn brings them more in line with the other divisions. Otherwise the divisional breakdown saw the same trends as overall figures.

Figure 6 shows the breakdown by division for tablets and kindles. In contrast to other results, the number of Humanities students with iPads has decreased (red line, diamond markers). Also note that the rate of increase of other tablet ownership and the levels of ownership is highest amongst Medical Science students (purple line, triangle markers).
5. Operating System

This question asked “What computer operating system(s) do you mostly use?” and allowed respondents to choose as many of the options as they wished. 60% of the respondents have Windows computers, the lowest result yet. The number of respondents using Mac OS increased to 41%, its highest value to date, with Chrome and Android also seeing increases (to 15% and 18% respectively). The rise of Chrome is the most dramatic. It wasn’t explicitly included in the survey last year but was noted as “Other” by three people, around 0.3%.

When analysed by level of study (Figure 8), some differences appear. Amongst research postgraduates, Windows ownership has increased (purple line, triangle markers) and Mac usage decreased (blue line, triangle markers). Taught postgraduates show the lowest Windows ownership (57%, purple line, square
markers) and highest Mac ownership (49%, blue line, square markers). Research postgraduates are the most likely to own a Unix/Linux computer, as in previous years (green line, triangle markers) whereas undergraduates are most likely to own a Chromebook (black line, diamond markers).

Figure 8 Percentage of respondents with each OS by level of study over time
The analysis of operating system by division over time is shown in Figure 9. Looking in terms of operating system, in all cases, a higher percentage of students brought Windows computers (purple lines) than any other. Second for all divisions was Macs (turquoise lines). Third most popular is Android (red lines) although this year, there is noticeable overlap between the results for Android (red lines), Chrome (black lines) and Linux/Unix (green lines). It will be interesting to see how these trends develop over the next few years.

Humanities divisions (diamond markers) and Social Sciences division (circle markers) students bring:
- above average percentage of Macs (turquoise lines)
- below average percentage of Windows computers (purple lines)
- below average percentage of Android computers (red lines)
- below average percentage of Linux/Unix computers (green lines)

MPLS students (square markers) bring:
- below average percentage of Macs (turquoise lines).
- above average percentage of Windows computers (purple lines)
- above average percentage of Android computers (red lines)
- above average percentage of Linux/Unix computers (green lines)

These are all on-going trends.

The percentage of computers with each OS brought by Medical Science students (triangle markers) in 2014 are very close to the average in all cases.
Results for Chrome are broadly similar across the divisions and do not have the same amount of historical data to compare against. This year’s results show they are most popular with Humanities students (black line, diamond markers).

6. Assistive Technology
The percentage of respondents who use some kind of assistive technology (screen readers, etc.) has fallen slightly from 4% in 2013 to 3% in 2014.

7. Anti-Virus Software
The anti-virus software market is fairly fragmented, as it has been for some years. Figure 10 shows the breakdown of anti-virus software used by the respondents for 2014 while Figure 11 shows how it has changed over time. MacAfee and Avast are on the increase, Sophos use has decreased slightly and Windows Security has maintained its levels. One very pleasing decrease is in the percentage of respondents who have no protection, down from 12% to 10%.

Figure 10 Percentage of respondents with each type of anti-virus software
When analysed by type of study, the graph for undergraduates shows the same picture as Figure 11. There is less variation amongst taught postgraduates; each anti-virus package has between 8% and 14% of the responses. For research postgraduates different anti-virus software has fallen in and out of favour over the last 3 years. Sophos is the most popular with 22%. All the others are between 8% and 14%. No protection has fallen greatest for research postgraduates, although it was the highest last year, from 18% to 11%.

The distribution of anti-virus software between divisions is very similar to the overall picture and shows the same increases and decreases.

8. Mobile Phones

Smartphone ownership continues to rise. When asked what type of mobile phone they had brought with them, 91% of respondents said they had brought a smartphone.

Figure 13 shows the data analysed by level of study. The rise of smartphones is the same for all groups as for overall data. The analysis by division shows the same result with all lines following each other very closely.
9. Mobile Operating System

Last year, Android and iOS dominated the mobile phone operating system market with only a few percent between them. The two are again dominant; however iOS has now taken the lead 51% to 42%. See Figure 14.
The picture is a little more diverse when considered by level of study (Figure 15). While iOS (red lines) is still the preferred mobile OS for undergraduates (diamond marker) and taught postgraduates (square marker), research postgraduates (triangle markers) are more likely to have an Android phone (turquoise line, triangle marker). These three points all lie in the area circled above.
In the analysis by division (Figure 16), iOS scores highest in the Humanities, Social Sciences and Medical Sciences divisions (red lines, diamond, circle and triangle markers respectively). Android is the highest scoring for MPLS students (turquoise line, square markers). See circled area above.

10. Communications

Respondents were asked “Which of the following do you use for communicating with people online?” and given the options of email, Internet Relay Chat (IRC), Internet telephony (Skype, Facetime, etc.), mailing lists, messengers (AIM, MSN, WhatsApp, etc.), newsgroups, online discussion forum, personal web page, social media (Facebook, etc.) or Other and could choose as many options as they wished.

The option of “personal web page” was included for the first time this year and is in response to a particular IT Services project looking at the provision of personal, club and society web pages by the department.

![Percentage of respondents using each type of communication method over time](image)

Email is still the most popular communication method for all respondents. The dip in 2013 seems likely to have been due to the structure of the survey and positioning of this question, however, even ignoring this data point, email has slightly decreased in popularity. Social networking sites and messengers are clearly both used by many respondents and the percentage of respondents using them regularly as a means of communication is increasing.

Use of Twitter is steady and is analysed in more detail in section 14.

When analysed by level of study, the results for all types of communication are very similar to the overall results and trends with the exception of mailing lists. Undergraduates are far less likely to use these compared to both taught and research postgraduates. This is an ongoing trend, and has been seen for the last few years.
When analysed by division, MPLS students are most likely to use discussion lists. Again this is an ongoing trend.

11. Email Service

![Graph showing email service usage over time]

Over 80% of the respondents have access to a Google mail (gmail) account and this has continued to increase. However the percentage of respondents with Hotmail and Yahoo accounts has only decreased slightly. This seems to be due to more people having more than one account; over 360 have two accounts with these providers and 64 respondents have accounts with all three. There are no differences between the groups when analysed by level of study or by division.

12. Methods for Reading Email

The options offered for reading email/email clients were Mac Mail, Outlook or Outlook Express, Thunderbird, Web, Windows Mail, On my phone and On my tablet. The results are shown in Figure 19.

![Graph showing methods for reading email]

Figure 19 Percentage of respondents who read email using each method
On my phone has seen a steady rise for the last few years and has now overtaken on the web as the most popular method of accessing email. Outlook and Mac Mail both continue to increase in popularity. On my tablet was only offered as a choice this year and 17% of respondents said they regularly read email on their tablet (26% of respondents brought tablets). Thunderbird and Windows Mail have been used by less than 10% of respondents since 2010.

When analysed by level of study, only a very small difference from the overall picture was found. Slightly fewer research postgraduates read email on their phones compared to undergraduates and taught postgraduates (62% versus 70% and 70% respectively).

13. Blogs

The survey asked about reading and writing blogs, and doing neither. Reading blogs remains reasonably popular; some 42% say they read blogs regularly, a figure that has fluctuated only marginally over the last few years. However the percentage of respondents writing blogs has shown a sustained decrease over the same time scale and the percentage neither reading nor writing has increased (Figure 20).

![Figure 20 Percentage of respondents who read or write blogs, or do neither](image)

When analysed by level of study, taught postgraduates are the greatest blog readers (48%, steady over the last 3 years) with undergraduates least likely to read blogs (38% and steady). The percentage of research postgraduates reading blogs has increased this year, from 40% to 45%.

All groups show a decline in the percentage of respondents writing blogs, this is slightly more pronounced for taught postgraduates were it fell from 17% to 9%.

The picture is slightly more complicated when analysed by division (Figure 21). In all cases, the percentage of respondents who neither read nor write blogs is increasing. Social Sciences has seen the greatest number of readers in the past (blue line, circle markers) but have now been overtaken by Humanities students (blue line, diamond markers). Humanities have also overtaken Social Sciences in percentage of students writing blogs (red lines, diamond and circle markers respectively).
14. Twitter

While blogging appears to be decreasing in popularity, use of Twitter, both reading and writing tweets continues to rise (Figure 22). Overall percentages are still fairly low though, only 35% of people read tweets compared to around 40% who read blogs.

The results for both the level of study and divisional analyses are almost identical. For example, see the values for writing tweets in Table 1.
<table>
<thead>
<tr>
<th>Overall</th>
<th>UG write</th>
<th>RPG write</th>
<th>TPG write</th>
</tr>
</thead>
<tbody>
<tr>
<td>21%</td>
<td>22%</td>
<td>19%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Table 1 Percentage of respondents tweeting overall and by level of study in 2014

### 15. Social Networks

Some new options were added to this question this year, namely Instagram, Tumblr and Snapchat. Respondents are asked which of the social networks listed they used regularly.

![Figure 23](image_url) Percentage of respondents using each social media channel over time

Clearly from Figure 23, Facebook (blue line) is the most popular social media channel with 95% of all respondents saying they used it regularly. Newcomer Snapchat (green square) is second on 35% with Twitter (purple line), Instagram (turquoise square) and LinkedIn (yellow line) close behind with 30%, 26% and 22% respectively. Facebook, Twitter and LinkedIn are all increasing in popularity.

When analysed by level of study, the results for Facebook are identical and all at 95%. Results for Google+ are also very similar and very low (5-10%). Both these channels have been removed from Figure 24 to allow for a clearer view of the responses for the other channels.

The most striking result is that 46% of undergraduates use Snapchat (green diamond), far higher than the percentage of taught or research postgraduates (23% and 15% respectively, green square and triangle). Undergraduates are also more likely to use Instagram and Twitter. Conversely, LinkedIn (yellow lines) is far more popular amongst postgraduates than undergraduates (yellow line, diamond markers). The actual percentage of responses is given in the table below.
Figure 24 Percentage of respondents using each social media channel by level of study over time

Figure 25 has also had the results for social media channels where there were no differences between divisions removed from the chart. In this case, Facebook, Twitter and Google+ have not been shown. The most active division on LinkedIn (yellow lines) is Social Sciences; 38% of Social Science students say they regularly use LinkedIn compared to MPLS with 18%, the second highest.

Over 40% of students in Medical Sciences and Humanities are regular users of SnapChat (green triangles and diamonds respectively). Medical Science students also use Instagram more than students from other divisions (turquoise triangles, 33%) while MPSL students are least likely to use Instagram (turquoise square, 19%). Fewer respondents regularly use Tumblr; more respondents from Humanities use it regularly (pink diamond, 17%) than people in the other divisions (6% to 10%).

<table>
<thead>
<tr>
<th>Social Media</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG Instagram</td>
<td>30%</td>
</tr>
<tr>
<td>TPG Instagram</td>
<td>23%</td>
</tr>
<tr>
<td>RPG Instagram</td>
<td>15%</td>
</tr>
<tr>
<td>UG Snapchat</td>
<td>46%</td>
</tr>
<tr>
<td>TPG Snapchat</td>
<td>23%</td>
</tr>
<tr>
<td>RPG Snapchat</td>
<td>15%</td>
</tr>
<tr>
<td>UG Tumblr</td>
<td>14%</td>
</tr>
<tr>
<td>TPG Tumblr</td>
<td>7%</td>
</tr>
<tr>
<td>RPG Tumblr</td>
<td>6%</td>
</tr>
</tbody>
</table>
16. Deciding to come to Oxford University

Several new questions were added to the Freshers’ Survey this year on behalf of the Digital Communications Office. Most of these related to the University web pages under www.ox.ac.uk and have not been analysed here. One question which does have wider interest is “Which of these other websites and online resources did you use to help you decide whether to apply to Oxford?” and this has been analysed with the results shown in Figure 26. College websites were the most frequently used source of information to help a student make a decision.

![Figure 26 Percentage of respondents using each resource](image)

17. Sources of Information

Students were asked “During the weeks before your arrival in Oxford, which of these websites and online resources did you use to obtain information or to get to know other students?” with the options being Facebook, The Student Room, The University website (www.ox.ac.uk), Your college's website, Your department’s website or Other.

![Figure 27 Percentage of respondents using each information source over time](image)

Figure 27 shows the results overall and Facebook retains its position as the most popular source of information with college websites second. The historical data shows that all options have decreased compared to 2013 possibly because this question offered two new sources this year – departmental websites and the University website. Both of these were used by almost 40% of students.
The analysis by level of study (Figure 28) highlights a number of differences from the overall result. Undergraduates (diamond markers) are the most likely to use Facebook (turquoise lines) but least likely to use either college, departmental or University web pages (red, yellow and purple lines respectively). Taught and research postgraduates were the groups which used college and departmental web pages the most (square and triangle markers, red and yellow lines respectively). Table 2 shows the actual percentages involved.

![Figure 28 Percentage of respondents using each information source by level of study over time](image)

<table>
<thead>
<tr>
<th></th>
<th>Facebook</th>
<th>The University website</th>
<th>College website</th>
<th>Dept website</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG</td>
<td>80%</td>
<td>32%</td>
<td>46%</td>
<td>24%</td>
</tr>
<tr>
<td>TPG</td>
<td>67%</td>
<td>47%</td>
<td>59%</td>
<td>54%</td>
</tr>
<tr>
<td>RPG</td>
<td>62%</td>
<td>52%</td>
<td>62%</td>
<td>57%</td>
</tr>
<tr>
<td>Overall</td>
<td>74%</td>
<td>39%</td>
<td>52%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Table 2 Percentage of respondents using each information source by level of study for 2014

18. Mobile Oxford
The question on Mobile Oxford asks if the student has heard of Mobile Oxford or not and if they have used it. Mobile Oxford is promoted in a variety of ways to prospective students such as highlight boxes in the Undergraduate Prospectus and Open Day information.

Respondents could choose either *I haven't heard about it, I've heard about it and used it or I've heard about it but not used it.* These responses have been used to create Figure 29. It is good to see that the percentage of people who have heard of the service (yellow line) is increasing and also that the increase is due to more people hearing about the service and using it (blue line). Use is highest among taught postgraduates where 25% of respondents are users. In the divisional analysis, a greater percentage of Social Scientists say they use the service (24%) than other divisions.
19. Podcasting
Similar to above, respondents were asked whether they had heard of Oxford on iTunes U, Oxford’s YouTube Channel or podcasts.ox.ac.uk. In this case, respondents could select as many of the options as they wished.

Whilst it is disappointing to see that awareness of both iTunes U and podcasts.ox.ac.uk are decreasing, awareness of the University’s YouTube channel has increased for the third year running and now stands at 30%. Taught postgraduates have the greatest awareness of iTunes U with 40% of respondents saying they had heard of it.

20. Further Podcasting
As well as asking about awareness of podcasting channels, respondents were asked if they had viewed any podcasts, and if they had, were asked what kind of podcasts they had viewed.
Figure 31 shows that the number of people who had viewed podcasts has decreased since 2013, falling from 30% to 19%.

Figure 32 Percentage of podcast watchers who had viewed each category of podcast

Of the people who had watched at least one podcast, the majority (84%) had chosen podcasts relating to their own interests. Either teachers aren’t recommending many podcasts or the respondents are taking no notice as the percentage of respondents viewing what their teachers recommend remains below 10%.

This year saw a sharp decrease in the number of podcasts about the University (from 53% to 33%). This may be because the new University website embeds many videos in its pages so people do not need to seek out a specific podcasting channel.

All levels of study and all divisions show a similar pattern with one exception; the percentage of Medical Science students who have viewed podcasts has stayed steady at 24%.

21. **Relative Importance of Facilities**

These last two questions were the most complicated as they asked respondents to rate various facilities and devices. Firstly, they were asked “Thinking ahead to your life as a student, please indicate how important it will be to...”

Items they were asked to rate, from Very Important to Not Important (or No Opinion) were:
- have Wi-Fi access everywhere
- have Online handouts to review after lecture
- have Online handouts to read before lecture
- watch TV on web in your college room
- do most of your reading online
- submit assignments online
- get feedback for assignments online
- watch a recording of a lecture afterwards
- take notes on your laptop during lectures

Figure 33 Percentage of respondents who rated each activity as Very or Fairly Important over time

A quick analysis of the results is shown in Figure 33. The percentages of respondents ranking an activity as Very or Fairly Important have been added together and shown on a single chart. Almost every activity has become more important to respondents over the years, particularly the ability to read online handouts before a lecture (light green, triangle markers) and taking notes on a laptop during lectures (pink line, round markers).

Wi-fi access everywhere and the ability to read online handouts after a lecture remain the top two activities when analysed in this way.

Stacked bar charts were created for each activity to show in detail how results had changed over time. Figure 34, for example, shows how the rating of Wi-fi everywhere has changed over time. The percentage of respondents who rate it as Very Important has increased by 10% since 2012. Figure 35 shows the same thing for submit written assignments online. Here the percentage rating the activity as Very Important has increased by 11% since 2012.
The other activity which has seen a noticeable change in ratings is *Take notes on your laptop* or tablet during a lecture (Figure 36) where both *Very Important* and *Fairly Important* have increased by 9% since 2012. In this case, the *Not important* option has shown a 15% decrease in the same time span.
22. Relative Importance of Devices

The final question of the survey asked respondents to think about devices; Thinking ahead to your life as a student, please indicate how important you think it will be to have a ... with ranking options ranging from Essential to Not at all Important or No Opinion.

Items they were asked to rate were:
- Laptop
- Smartphone
- MP3 player
- Shared desktop computer
- Digital or phone camera
- Personal desktop computer
- E-book reader
- Notebook/netbook
- iPad/other tablet

As can be seen in Figure 37, ownership of a laptop is seen by the highest percentage of respondents as being Essential or Very Important. Ownership of a smartphone is second and has seen the greatest increase over the last three years. The other devices have seen almost no change in their rankings.

Figure 37 Percentage of respondents who rated each device as Essential or Very Important over time
Since 2012, the percentage of respondents rating smartphone ownership as *Essential* has increased by 21% and the percentage rating it *Not Important* has decreased by 10%. See Figure 38.

Although the line for *Essential* and *Very Important* for *Own an iPad or other tablet* only shows a small increase (turquoise line, Figure 37), the more detailed chart in Figure 39 shows that percentage of respondents ranking tablet ownership as *Not important* at all has decreased by 10% since 2012. Each of the percentages for *Essential*, *Very Important* and *Fairly Important* has increased by 5%.