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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. For example, the IT Learning Programme use the data to help them plan courses.

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.

### Highlights

- Laptop ownership is steady and laptops are seen as the most needed device (92% of students bought laptops in 2012 and 2013, 90% of students describe them as “essential” or “very important” to own).
- Tablet ownership is increasing (15% in 2012, 21% in 2013).
- The percentage of Windows computers continues to fall and is at its lowest ever level (53%). Mac OS use continues to increase.
- The percentage of students with no anti-virus protection continues to rise.
- The majority of students have a smartphone (81%) and the percentage is increasing. iOS and Android share the market roughly equally between them.
- Accessing email by phone continues to increase in popularity, from 3% in 2010 to 54% in 2013.
- The percentage of respondents who regularly read tweets is 30%, the same as in 2012. The use of Twitter by research postgraduates is decreasing.
- Facebook is still the most popular social network (78%) but has seen a recent decline (from 93% in 2012).
- Knowledge of the University’s YouTube channel is increasing.
- Wifi everywhere is the most desired IT facility (79% describe it as “very important”).

2. **Introduction**

The data for the Freshers’ Survey is gathered at the annual Freshers’ Fair organised by Oxford University Student Union in the Examination Schools. IT Services run a stand which this year included 12 laptops running web browsers. Students are encourage to complete the online survey as they go past the IT Services stall and all who do so are entered in a prize draw to win £100 as an incentive.

The 2013 Freshers’ Survey was the largest yet with over 1000 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 answered fewer than half the questions. There were a small number of questions which were skipped by many people, even though they then went on to answer all subsequent questions. These questions will be investigated before next year’s survey to see if they can be reworded or otherwise changed to encourage a higher response rate. A valid University barcode was required only to enable us to contact the prize winner.

Following a number of revisions over the years, few questions survive unchanged from the very early days, however there were no completely new questions this year so all questions have been analysed in comparison to at least one previous year.

In particular, we now have 3 years’ worth of data which can be classified by division (divisional question introduced in 2010) and two years’ worth of data which can be analysed by three levels of study – undergraduates (UG), taught postgraduates (TPG) and research postgraduate (RPG) students.

We greatly appreciate the help and advice from staff working on the DIGE project in clarifying, updating, ordering and presenting the questions in the most effective manner.
3. **Demographic Profile of Students**

Over half (58%) of the respondents were undergraduates, of the remainder 27% were taught postgraduates and 14% research postgraduates. Only 1% were visiting students. Visiting students are included when looking at the overall results, as in previous years, but have not been analysed as a separate group.

There was a roughly even split between the Humanities, MPLS and Social Science divisions (30%, 33% and 27% respectively). However, Medical Science students only made up 10% of the respondents. These figures are the same as last year.
4. **Type of Computer**

This question asks what kind of computer students brought to Oxford. Respondents may tick as many boxes as they wish. Laptops continue to be the most popular with 92% of students bringing one. Notebooks continue the slight decline first seen last year while desktop computers remain at 4%. Tablets on the other hand have continued their rise, from 5% in 2011, 15% in 2012 to 21% in 2013. iPads are the more popular tablet (16%) but the rate of increase for iPads and other tablets is the same.

![Figure 1 Percentage of respondents bringing each type of computer over time](image)

It is clear that many students bring more than one device, over 400 people (34%) ticked more than one box. In future years it may be interesting to ask how many of each kind of device a student is bringing.

Analysis by level of study shows the same trends for all types of computer except the proportion of research postgraduates bringing tablets. When all tablets are considered together, there has been no increase in the number of tablets brought by research postgraduates (17%), however when this is broken down into iPad vs other tablets, it becomes clear that iPads have slightly fallen out of favour with research postgraduates (14% to 11%) and other tablets have increased in popularity (2% to 6%) over the last 2 years. The proportion of research postgraduates bringing Kindles or other ebook readers has also declined against the overall trend. See Figure 2, markers for research postgraduates are triangles.

![Figure 2 Percentage of students bringing each type of tablet and Kindle (or similar) by student level over time](image)
Data for divisions goes back an additional year, to 2011, so we have 3 years of historical data to compare. Although the rates are different, the pattern is the same. Figure 3 shows this, with laptop data excluded and it can be seen that tablets are the most popular. Desktops used to be favoured most by MPLS students but in 2013 the percentage of students who brought them is the same as in the other divisions. Figure 4 shows just the percentage of students bringing laptops – the percentage of MPLS students bringing laptops has increased the most (84% in 2011 to 96% in 2013), possibly as students are choosing laptops over desktops.
5. Operating System

The question asked “What computer operating system(s) do you mostly use?” and as with many of the survey questions, allowed respondents to tick more than one box. The majority of computers brought by respondents ran Windows OS (53%) but this figure was the lowest yet for Windows OS, Figure 5 shows the breakdown. Android was included as an option for the second year running and has increased from 5% to 12%. The “Other” category saw the appearance of Chrome OS for the first time – only 0.3% but worth watching. Figure 6 shows how the OS preferences have changed over time. 29% of computers brought ran iOS, the same as in 2012.

![Figure 5 Percentage of computers brought with each operating system, 2013](image)

![Figure 6 Percentage of computers brought running each OS over time](image)
This data was also analysed in terms of the percentage of respondents who have access to a device running each type of operating system and shows a slightly different picture, although the trends are broadly similar. The percentage of respondents who brought a Windows device was 67% and 36% for Mac.

Figure 7 Percentage of respondents who have access to devices running each OS over time

Data analysed by level of study showed very little differentiation except that research postgraduates are still the most likely to have brought a Unix or Linux based computer (19% in 2013 compared to 5% for undergraduates and taught postgraduates).

Divisionally, there are only a few variations on the overall trends. The percentage of Medical Science respondents bringing Windows devices has increased against the downward or steady trend for other divisions and overall (Figure 8, purple lines, triangle markers). Also, there has been a drop in the percentage of Medical Science students bringing Macs (41% in 2012 to 29% in 2013, Figure 8, blue line, triangle markers), presumably as Windows OS becomes more popular.

Figure 8 Percentage of respondents who have access to devices running each OS by division over time
6. Assistive Technology
The question “Do you use any assistive devices (hardware or software) with which to access any of the digital technologies that you use (i.e. because of issues with vision, dyslexia, RSI, etc.)?” was introduced in 2012. As last year, the results were consistent across student groups and divisions with a 3% to 6% “yes” response. This is the same as in 2012 and as last year, no investigation into the type of assistive technologies used was done.

7. Anti-Virus Software
The anti-virus software distribution is very fragmented with no clear market leader this year and AVG, McAfee, Microsoft/Windows Security, Norton and Sophos all having a 11-15% market share (Figure 9). The University provides Sophos to all members but as these respondents are new to the University, they will not have been able to take advantage of that yet.

The most obvious, and most concerning, result is that “No protection” continues to rise, to 12% in 2013 and a further 8% “don't know”. The increase holds across all levels of study and all divisions. Traditionally, some people have felt Macs do not need AV software but this year there has been roughly equal numbers of Windows and Mac users with no protection.
8. Mobile Phones
For the second year, the question on mobile phone ownership offered three choices – smartphone, other phone and no phone. Smartphones remain dominant and have clearly increased their market share. As last year, a small proportion of respondents – 3% in total – reported having phones of both types. The percentage of people reporting they had no phone was stable at 2%.

The two graphs in Figure 12 both show how smartphone ownership has changed over time, the area graph showing market share and the line graph the trend.

Figure 13 shows the results by level of study and all levels closely follow the overall results. The results by division are almost identical.
9. Mobile Operating System

In 2011, the Mobile Phone operating system arena was relatively fragmented with Palm, Samsung, Sony Ericsson, Symbian and Windows all represented, even if each market share was less than 10%. By 2013, even Blackberry was almost edged out as iOS and Android dominate, having 42% and 45% of the market respectively.

![Pie chart showing operating system market shares in 2013](image)

The growth of iOS and Android phones has been equally steady (Figure 15) until they have taken nearly all the market (Figure 16). This pattern was seen in both the data analysed by level of study and that split by division, although in MPLS and Medical Sciences Android phones reached 50% to iOS's 38%. It will be interesting to see how the iOS/Android growth and market share develop next year.

![Trend line graph showing operating system usage over time](image)

![Area chart showing operating system usage over time](image)
10. Communications

This question looked at what tools and facilities respondents used regularly to communicate online.

From Figure 17, it can be seen that email appears to be falling out of favour as a communication tool but telephony systems such as Skype are on the increase. Use of Messengers, once popular, are still in steady decline. Twitter is steady compared to last year and mailing lists continue to provide a useful means of communication for over 20% of respondents.

The graph is only slightly different when analysed by level of study, Figure 18. Use of telephony amongst research postgraduates has declined (green line, triangle marker). It also shows that use of mailing lists is less common for undergraduates (blue line, diamond marker). However email is still the most popular communication mechanism, followed by telephony then messengers and mailing lists.

All divisions follow the same pattern, there is less than 10% difference between each division on all methods of communication except for telephony, which has a 12% difference between MPLS and Medical Science (56% and 68% respectively).

Figure 17 Percentage of respondents regularly using various communication channels over time

Figure 18 Percentage of respondents regularly using various means of communication by level of study over time.
11. Email Service
Respondents were asked which email service they used, being given the options of AOL, Google Mail, Hotmail, Yahoo or other. Google Mail continues to dominate with 52% of respondents having an account (Figure 19).

[Note, this was a question which 17% of “usable” respondents did not answer although they then went on to answer later questions. The result of this is that it looks like email use has dropped for all groups. This can also be seen in Figure 17 and Figure 18, above.]

The order of preference, with Google Mail highest followed by Hotmail, Yahoo and AOL, has been consistent since 2010. In 2009, Google Mail and Hotmail were equal on 39%. The gap between Google Mail and Hotmail has slowly widened from 0% to 29% over the years.

When analysed by level of study and by division there were some minor variations but the overall picture is the same across all.

12. Email Clients
Respondents were asked whether they read their email on the web, their phone, using Outlook, Mac Mail, Windows Mail, Thunderbird or another client. Phone access is very popular and is increasing rapidly (Figure 21, green line). It has now reached the same level as reading mail on the web (which has been declining). Percentages for 2013 are 54% of respondents read email on their phone and 56% read email on the web. Outlook is also continuing to increase in popularity, up to 28%.
A similar picture was seen when analysing the responses by level of study. In Figure 22, reading email on a phone (green lines) is approaching reading email on the web (turquoise lines) but not quite overtaking for any group.

Outlook use is decreasing for research postgraduates (red line, triangle markers) as is Mac Mail (blue line, triangle markers) whereas they are increasing for other groups. Windows Mail and Thunderbird are consistently used by fewer than 10% of the respondents and both show a slight decline in popularity.

When analysed by division (Figure 23), Medical Sciences (triangle markers) show a decrease in use of Outlook (red line) and Mac Mail (blue line) compared to an increase in other divisions. Slightly over half the Medical Science respondents were research postgraduates so it may be that we are seeing the same result in two different places.
13. Blogs
The next question asked respondents if they read or wrote a blog at least once a week. There was also a “neither” option. Just 10% of respondents write blogs and this has been steadily decreasing. The number of people reading blogs is also decreasing, as is the percentage of people who do neither. This could be because previously people often both read and wrote blogs and now do one or the other.

14. Twitter
Respondents were asked if they read or wrote tweets at least once a week. The percentage of people reading and tweeting is increasing slowly, see Figure 25. Only 30% of people read Twitter messages on a regular basis. This is higher than the percentage who tweet regularly themselves (20%). The gap between reading others tweets and writing your own is fairly constant around 11%. The percentage of people who neither read nor tweet themselves has decreased to 50%.

The results were the same when analysed by levels of study and by division – the percentage of people reading or writing blogs is decreasing.

The greatest increase in reading and writing tweets is seen with undergraduates (Figure 26, diamond markers, 32% read tweets in 2013) whereas the use of Twitter by research postgraduates is decreasing (triangle markers, 19% read tweets in 2013).
The picture across the divisions is very similar. There is a slight rise for all divisions except for Medical Sciences who have slight decrease in the percentage of people reading tweets.

15. Social Networks
The next question asked which social networks respondents regularly used, giving the options of Facebook, Twitter, Google+, LinkedIn or other. Figure 27 shows the results and trends over time.

Facebook still the most popular (78%) but has seen a recent decline (from 93% in 2012). Twitter and LinkedIn are steadily increasing while Google+ hasn’t changed in the last 2 years. The same pattern is reflected when analysed by levels of study except that use of LinkedIn amongst research postgraduates is declining. Taught postgraduates are the most likely to use LinkedIn (36%, up from 27%) whereas very few (<10%) of undergraduates use LinkedIn. This is the same as in previous years.

16. Qualifications
There is a decrease in the number of respondents having a computer or IT related GCSE: 19% in 2013, down from 23% last year. All other qualifications (NVQ, ECDL, A level, degree, company accreditation) were less than 5%
17. VLE
This is a straightforward yes/no question about whether they had used an "online learning environment or study site" in previous studies, giving examples of common platforms such as Moodle and Blackboard. In 2013, 51% of respondents had used a VLE in previous studies, down from 61% in 2012.

18. Mobile Oxford
The percentage of respondents who had heard of or used Mobile Oxford has remained constant since last year in all cases: overall (Figure 28), by level of study and division.

19. Podcasting
The percentage of respondents who had heard of iTunes U or podcasting.ox has decreased slightly. See Figure 29. However, awareness of Oxford’s You Tube channel is increasing, although slowly (red line).

There is very little change to this pattern when awareness of the channels was analysed by level of study. However there is some variation when analysed by division (Figure 30).
20. Further Podcasting

30% of respondents had watched or listened to a podcast (Figure 31). These were asked subsequent questions about what they had watched or listened to.

The majority of podcasts watched were those relating to the respondents own interests (red line). University Introductions remain the second most popular with no change from last year. Very few respondents said they view things recommended by their teachers (green line), which may be because they are not interested in the recommendations or because their teachers rarely recommend items (see Figure 32).
21. Sources of Information
Respondents were asked where they had found information before coming to the University. This was a new question in 2012. The most popular site was Facebook, and its popularity is increasing (Figure 33). The Student Gateway had been equally popular but the percentage of respondents who consulted it has decreased since 2012. Nothing is known about how these are sites are promoted. The percentage of respondents who look at College websites is also decreasing.

When analysed by level of study (Figure 34), Facebook is the most popular source of information for all groups, and this is increasing for all groups (blue lines). College websites had been higher than Facebook for taught postgraduates (red line, square markers) and research postgraduates (red line, triangle markers) but in 2013 was overtaken by Facebook. For undergraduates, Facebook has always been the most popular information source and this lead is increasing (blue lines, diamond markers). Taught postgraduates are the only group who are using The Student Room more in 2013 than in 2012 (purple line, square markers).
22. Relative Importance of Facilities
The next set of questions asked respondents to think ahead to their life as a student and rate a variety of facilities from very important to have available to not at all important (see Figure 35).

Figure 35 Percentage of respondents who think it is very or fairly important to have certain facilities available

Wifi access everywhere in the University was seen as most important by the greatest percentage of respondents with 79% saying it is very important and 12% fairly important. Having online handouts after a lecture was the next most popular facility (38% very important, 34% fairly important) and was seen as more important to have than online lecture notes before the lecture. The ability to watch TV and films on the web in their college room is also seen as important (41% very important, 31% fairly important).

Lower levels of importance were given to getting online feedback on written assignments, listening or watching recordings of lectures and taking notes on a laptop during lectures and classes.

These results are very similar to last year with less than 5% difference for all items.

Figure 36 Percentage of respondents who think it is very important to have certain facilities by level of study
Table 1 Percentage of respondents who think it is very important to have certain facilities by level of study

<table>
<thead>
<tr>
<th>Facility</th>
<th>UG</th>
<th>TPG</th>
<th>RPG</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wi-Fi everywhere</td>
<td>75%</td>
<td>86%</td>
<td>81%</td>
<td>79%</td>
</tr>
<tr>
<td>Online handouts after lecture</td>
<td>48%</td>
<td>51%</td>
<td>42%</td>
<td>48%</td>
</tr>
<tr>
<td>Online handouts before lecture</td>
<td>29%</td>
<td>49%</td>
<td>29%</td>
<td>34%</td>
</tr>
<tr>
<td>Watch TV on web</td>
<td>42%</td>
<td>38%</td>
<td>40%</td>
<td>41%</td>
</tr>
<tr>
<td>Do most reading online</td>
<td>21%</td>
<td>46%</td>
<td>57%</td>
<td>33%</td>
</tr>
<tr>
<td>Submit written assignments online</td>
<td>28%</td>
<td>44%</td>
<td>38%</td>
<td>34%</td>
</tr>
<tr>
<td>Online assignment feedback</td>
<td>20%</td>
<td>32%</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>Listen to/watch recording of lecture</td>
<td>21%</td>
<td>22%</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>Take notes on laptop during lectures</td>
<td>21%</td>
<td>26%</td>
<td>16%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Figure 36 shows the breakdown by level of study of which facilities respondents feel are very important. The purple bar shows the result overall, the different coloured markers show how the opinions of undergraduates, taught postgraduates and research postgraduates compare. The greatest variation is seen in the opinion of research postgraduates (green triangle markers) and undergraduates (blue square markers) towards reading online. Overall, 33% of respondents said this was very important whereas 57% of research postgraduates and 21% of undergraduates said it was very important. Table 1 shows the same data in a tabular format.

For most items, a higher percentage of taught postgraduates (red square markers) rated them as very important when compared to the overall response. The exception is watching TV on the web in their college room. A lower percentage of undergraduates rated all facilities as very important when compared to the overall response, except for watching TV on the web. Figure 37 shows the same graph with the data analysed by division. The corresponding tabular data is shown in Table 2.

Table 2 Percentage of respondents who think it is very important to have certain facilities by division

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Wi-Fi everywhere</td>
<td>79%</td>
<td>74%</td>
<td>81%</td>
<td>84%</td>
<td>79%</td>
</tr>
<tr>
<td>Online handouts after lecture</td>
<td>45%</td>
<td>49%</td>
<td>54%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Online handouts before lecture</td>
<td>33%</td>
<td>28%</td>
<td>33%</td>
<td>45%</td>
<td>34%</td>
</tr>
<tr>
<td>Watch TV on web</td>
<td>42%</td>
<td>41%</td>
<td>44%</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Do most reading online</td>
<td>27%</td>
<td>28%</td>
<td>41%</td>
<td>42%</td>
<td>33%</td>
</tr>
<tr>
<td>Submit written assignments online</td>
<td>40%</td>
<td>21%</td>
<td>30%</td>
<td>45%</td>
<td>34%</td>
</tr>
<tr>
<td>Online assignment feedback</td>
<td>25%</td>
<td>19%</td>
<td>21%</td>
<td>31%</td>
<td>24%</td>
</tr>
<tr>
<td>Listen to/watch a recording of a lecture</td>
<td>17%</td>
<td>17%</td>
<td>21%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Take notes on laptop during lectures</td>
<td>21%</td>
<td>15%</td>
<td>17%</td>
<td>32%</td>
<td>22%</td>
</tr>
</tbody>
</table>
23. Relative Importance of Devices

The question asked was “Thinking ahead to your life as a student, please indicate how important you think it will be to have each of these technologies”. The scores offered were Essential, Very important, Fairly important, Not important at all or No opinion.

Figure 38 shows the overall percentages of respondents who felt each device was essential or very important to have. A laptop is clearly the device with the greatest percentage of students rating it as essential (78%) or very important (12%). Second is a smartphone while a personal desktop computer, e-book reader, note or net book and a tablet all score around 20–25%.

The full text of the options for digital camera, e-book reader and MP3 player were described as Digital camera (or camera on your phone), E-book reader (e.g. Kindle or a tablet with an e-reading app) and MP3 player (or music player on your phone) so did not just refer to a dedicated device.

![Figure 38 Percentage of respondents who feel devices are essential or very important in 2013](image)

There is very little change in any of the percentages since last year. The only devices where there was any change worth noting were iPads or other tablets, as shown in Figure 39, and smartphones, Figure 40. In Figure 39, the percentage of respondents who reported having a tablet computer as essential has increased (bottom red section, 6% to 10%), Very important is about the same (blue), Fairly important as increased (green, 20% to 23%) and there is a similar decrease in the percentage of people who rated them as Not important at all (purple, 50% to 42%)

![Figure 39 Reported importance of iPads or other tablets over time](image)

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2013</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essential</td>
<td>6%</td>
<td>10%</td>
<td>-3%</td>
</tr>
<tr>
<td>Very Important</td>
<td>12%</td>
<td>13%</td>
<td>0%</td>
</tr>
<tr>
<td>Fairly important</td>
<td>20%</td>
<td>23%</td>
<td>-3%</td>
</tr>
<tr>
<td>Not important at all</td>
<td>50%</td>
<td>42%</td>
<td>8%</td>
</tr>
<tr>
<td>No opinion</td>
<td>7%</td>
<td>6%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Table 3 Reported importance of iPads or other tablets over time

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For Smartphones (Figure 40 and Table 4), the percentage of people who rated them as essential or very important (blue and red) increased from 57% in 2012 to 67% in 2013.

The data was also analysed by level of study (Figure 41 and Table 3). A higher than average percentage of research postgraduates (green triangles) rate having their own desktop computer as essential or very important. The device they rated lowest was an MP3 player.

More taught postgraduates (red squares) rated almost all devices as essential or very important compared to the overall figures. The only device where the result for undergraduates (blue diamonds) was higher than the overall figure was for MP3 players. The analysis by division showed only minor differences of less than 5% between the rating for the division and the overall rating.