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Executive summary

Media literacy enables people to have the skills, knowledge and understanding they need to make full use of the opportunities presented both by traditional and by new communications services. Media literacy also helps people to manage content and communications, and protect themselves and their families from the potential risks associated with using these services.

This report is designed to give an accessible overview of media literacy among UK adults aged 16 and over. The purpose of this report is to support people working in this area to develop and promote media literacy among these groups.

This report is the third full report since our survey began in 2005. It is therefore able to show trends over time for many of the questions asked. Due to different survey periods and focus, change over time is highlighted against either 2007 or 2005.

Take-up and media preferences

UK adults have high levels of household take-up of digital television (89%) and the internet (71%), and nine in ten (91%) use mobile phones. Since 2007, household take-up of digital television and the internet and the use of mobile phones have increased. Three in four adults said they used the internet at home or elsewhere in 2009 (73%), compared to two-thirds (63%) in 2007 and three-fifths (59%) in 2005. There has also been an increase in digital radio listeners and gaming since 2007.

Although there has been an above-average increase in household take-up of the internet since 2007 among those in DE socio-economic groups (48%), take-up in this group and among those aged 55-64 (60%) and those aged 65 and over (33%) is still low compared to all UK adults (71%).

The growth in household take-up of the internet since the 2007 survey has meant that the profile of internet users has changed, with an increase in the number in older age groups – although those aged 65 and over still only account for less than one in ten of all internet users (8%).

Three in ten adults (31%) say they use any type of alternative device (whether a mobile phone / smartphone, games console / player or portable media player) to go online. Use of alternative devices to go online is higher among the under-45s than among those aged 45 and over. Few adults (2%) only use an alternative device to go online and do not use a PC or laptop at home, although those in DE socio-economic groups are more likely to do so compared to all UK adults (5% vs. 2%).

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1 The report comprises two waves of data; one wave of data from spring 2009 and one wave from autumn 2009. The data across both these waves have been combined to give an overall picture for the year, with this report following on from the interim report which was published in October 2009.

2 It should be noted that these take-up measures are from two waves of fieldwork conducted in 2009. For Q1 2010 uptake figures please refer to Ofcom Digital Participation Consortium Tech Tracker data at [http://www.ofcom.org.uk/research/stats/](http://www.ofcom.org.uk/research/stats/)

3 Gaming refers to playing games on any of the following devices, hand-held games console, games console connected to a television, on a computer / laptop, on a mobile phone / smartphone, on a portable media player, on a Personal Digital Assistant (PDA), or on an MP3 player.
Since 2007, there has been no change in the claimed weekly volume of use of the internet in any location among users generally (12.2 vs. 12.1 hours). In 2009, the internet is used in any location for longer per week by younger adults (aged 16-24), males and those in ABC1 socio-economic groups.

Three in ten adults do not have the internet at home (29%) and seven in ten of these (70%) say they do not intend to get it within the next year or so. Most give reasons relating to a lack of interest (72%), as in previous years of this research. However this reason is less likely to be mentioned now than in 2007. Reasons relating to cost (31%) are more likely to be mentioned than in 2007. Not having a PC / laptop is also given as a reason by 23% of those not intending to get the internet at home.

When asked which media activity they would miss the most, while half of all UK adults (50%) say they would miss watching television the most, compared to 2007 more adults now say they would miss using the internet(15% vs. 12%). Younger adults, aged 16-24 (36%) and those in AB socio-economic groups (42%), are less likely to say that they would most miss watching television compared to the UK as a whole.

Communication preferences have changed since 2005 – for example, adults are now more likely to prefer to check their bank balance online (30% vs. 22%) and less likely to prefer to check their bank balance by making a home / landline phone call (12% vs. 18%). Booking a holiday online / by email is now as popular a preference as booking a holiday in person (36%).

**Interest and confidence across media**

Among adults who have digital television at home, those who use a mobile phone and those who have access to the internet at home via a PC / laptop, a minority say they are interested in, but not confident using, certain functions available through these devices. Among internet users, the areas in which people are most likely to lack confidence are: installing filtering software (25%) and installing security features (23%). Across each of the functions, older users, females and those in DE socio-economic groups are more likely to lack confidence.

Among non-users of the internet, three in ten (30%) are interested in any of the interactive functions that we asked about; with interest more likely among younger adults and those in ABC1 socio-economic groups. Proxy use of the internet, through a non-user asking someone else to use the internet for them, occurs among two in ten non-users and is more likely among younger adults, females and those in ABC1 socio-economic groups. Four in ten non-users of the internet can see the benefits of the internet; agreeing that it makes life easier or helps save time.

Using the internet appears to have some correlation with perceptions of employability; users are more likely than non-users to feel that they have the right skills to get a new job. This is not related simply to age or socio-economic group, as the difference in perception seen at an overall level is also evident among internet users and non-users within both younger and older adults, males and females and those in ABC1 and C2DE socio-economic groups.

Since 2007, internet users are more likely to say they are very confident across a number of aspects of using the internet, and six in ten describe themselves as very confident internet users. It remains the case that users are less confident in judging whether a website is truthful than they are in searching online or creating content online.
Using the internet

As in previous years, communication is the most commonly-mentioned activity carried out on a regular basis (at least once a week) by internet users (78%). Compared to 2007, however, fewer internet users are finding information online for their work / studies (36% vs. 48%). There has been a considerable increase in regular use of the internet for social networking (35% vs. 19%) and for entertainment (34% vs. 22%).

Twice as many internet users now have a social networking site profile than in 2007 (44% vs. 22%) with more than three in four of those aged 16-24 (77%) stating that they have a social networking profile. The growth in social networking site profiles since 2007, however, is greatest among 25-34s, females and those in DE socio-economic groups. Compared to 2007, those with a social networking site profile are more likely to use these sites every day (41% vs. 30%), to have a profile which can be seen only by their friends or family (80% vs. 48%), and to use the sites to communicate with their friends and family (78% vs. 69%).

One in three UK adults who use the internet (32%) say they watch online or download TV programmes or films. Almost all of these are doing so through UK TV broadcasters’ websites (29%) (such as BBC iPlayer), with a much smaller proportion watching online or downloading TV programmes or movies from other websites (11%).

Just under half of all internet users say that using the internet has increased their contact with friends (49%) or family (47%) who live further away, and around one quarter say their contact with friends (24%) who live nearby has increased.

Just over eight in ten (81%) internet users say they have saved money by using the internet for certain tasks that we asked about; most commonly buying something online rather than in the shops (65%), comparing prices online (63%) or booking travel online (51%). Half of internet users say they have made significant savings by comparing prices online or buying something online rather than in the shops (48%).

Understanding, security and concerns

UK adults’ knowledge of the main sources of funding for BBC and commercial TV programmes, radio stations and websites has not changed since 2007; with a majority aware of the main source of funding for TV programmes and for radio stations and a minority aware for either BBC website or commercial search engine funding. Compared to all UK adults, there are consistently lower levels of awareness of the licence fee as the main source of funding for the BBC among adults aged 16-24, females, and those in DE socio-economic groups.

Compared to 2007, UK adults are more likely to believe that content is regulated across each of radio (67% vs. 58%), the internet (37% vs. 26%), mobile phones (23% vs. 20%) and gaming (36% vs. 29%). No change is evident for TV, however (80% vs. 79%).

More UK adults believe that file sharing through downloading shared copies of copyright music and films should be illegal (47%) than believe it should be legal (29%), and 24% are unsure. Young people aged 16-24 are more likely to say that such activity should be legal (45%).

Internet users are less willing to provide personal information online than was the case in 2007. For example, the proportion of internet users who say they would be happy to provide their email address when they are online has declined since 2007 (44% vs. 49%). Around half (51%) of internet users say they make some kind of judgement based on “professional”
signs such as padlocks before entering personal information on websites, with little change from 2007.

Around half of those who use search engines (54%) make some kind of critical evaluation of the results from these websites, but around one quarter of younger users (23%) and those in C2DE socio-economic groups (25%) trust that the websites returned by search engines will have accurate and unbiased information, compared to one in five (20%) of all search engine users.

Around half of all adults consider information found on television (52%) and radio (50%) to be reliable and accurate, compared to three in ten internet users who consider information found on the internet to be reliable and accurate (31%). A majority of users say that they tend to trust the news output from TV (54%), radio (66%) and news websites (58%), with TV news less likely to be trusted than the news output from radio or news websites.

The proportion of adult users of each media mentioning any concerns for each of television, radio, the internet, mobile phones and gaming has decreased since 2007. For TV, internet and mobile phones, this takes overall concerns among users to lower levels than those found in 2005. Three in five internet users have concerns about what is on the internet (61% vs. 73% in 2007 and 70% in 2005). Four in ten viewers have concerns about what is on television (39%). Concern about what is on the internet mostly relates to offensive or illegal content. Concerns about mobile phones (26%), gaming (25%) and radio (11%) are at a lower level. Internet users are more likely than non-users to have concerns about what is on the internet (61% vs. 40%), but gaming users and non-users do not differ in this respect (25% vs. 26%).

**Learning**

Just over two in ten adults say they have experience of formal learning about digital technology, which is lower than in 2007 (21% vs. 27%). Experience of formal learning mostly relates to using the internet, and is less likely among those aged 65 and over compared to adults as a whole (16% vs. 21%). There has also been a decline since 2007 in the proportion of adults who would be interested in learning more about digital technology (25% vs. 31%). Interest in learning more mostly relates to using the internet.

As in 2007, when asked about their preferred way of learning about digital technology, just under half of adults nominate learning from friends or family (48%) or reading the manual / instructions (45%). Despite an increase in the number of those who prefer to go to a class to learn about digital technology (9% vs. 6%), few adults prefer this more formal method of learning. Older adults are more likely to prefer to learn from friends and family, while younger adults are more likely to prefer to learn through trial and error.
Section 2

Introduction

2.1 Background

Media literacy enables people to have the skills, knowledge and understanding they need to make full use of the opportunities presented both by traditional and by new communications services. Media literacy also helps people to manage content and communications, and protect themselves and their families from the potential risks associated with using these services.

Ofcom’s definition of media literacy is:

“the ability to use, understand and create media and communications”.

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003. Under Section 14 (6a) of the Act we have a duty to make arrangements for the carrying out of research into the matters mentioned in Section 11 (1).

Ofcom’s work to promote media literacy is intended:

- to give people the opportunity and motivation to develop competence and confidence to participate in communications technology and digital society; and
- to inform and empower people to manage their own media activity (both consumption and creation)

This report provides trends over time, where possible, using data from the Media Literacy Audit – Report on adult media literacy, published in 2006\(^4\) and again in 2008\(^5\), using fieldwork conducted in 2005 and 2007. In 2009, we adopted a six-monthly fieldwork schedule, to enable more frequent reporting and the identification of emerging trends. An interim report based on one wave of 2009 data (with interviewing conducted in April and May 2009) was published in October 2009\(^6\). This report is based on two waves of 2009 data (with the second wave of interviewing conducted in September to October 2009). This report is designed to give an accessible overview of media literacy among adults aged 16 and over, and where possible, within the overall sample of adults, demographic analysis is conducted by age, by gender and by household socio-economic group.

The key objectives of this research are:

- to provide a rich picture of the different elements of media literacy across the key platforms of television, radio, the internet and mobile phones; and
- to identify emerging issues and skills gaps that help to target both Ofcom’s and stakeholders’ resources for the promotion of media literacy.

Many of the findings from this research will also be used to inform, and act as benchmarks for, the work of the Digital Participation Consortium.

\(^4\) http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/medialit_audit/
\(^5\) http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/
\(^6\) http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/uk_adults_ml/
2.2 How we monitor media literacy

In order to monitor media literacy using research we use the following measures to represent some of the key areas of media literacy (see box below).

- Take-up, use and breadth of use of media
- Knowledge of how elements of each media platform are funded
- Knowledge of regulation
- Trust in internet sites
- The extent and levels of concerns about each platform

2.3 Research methodology and analysis

This report draws on research from the two waves of the Media Literacy Tracker 2009 with adults aged 16 and over. Comparisons are made between this research and the Media Literacy Audit surveys, conducted in 2005 and in 2007.

Media Literacy Audit Tracker with adults: 2009

A quantitative survey that involved a total of 1,824 in-home interviews with adults aged 16 and over; with 812 interviews conducted from April to May 2009 and 1,012 interviews conducted from September to October 2009.

Media Literacy Audit survey: 2007

A quantitative survey that involved 2,905 in-home interviews with adults aged 16 and over from October to December 2007. The report was published in 2008.

Media Literacy Audit survey: 2005

A quantitative survey that involved 3,244 in-home interviews with adults aged 16 and over from June to August 2005. The report was published in 2006.

Significance testing at the 95% confidence level was carried out and any findings detailed in this report have been found to be significant to a 95% confidence level. This means that where findings are commented on, there is only a 5% or less probability that the difference between the samples is by chance. Statistically significant findings between 2007 and 2009 are indicated in the figures in the report by circles or arrows.

Take-up figures

The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August of each year. 

7 http://www.ofcom.org.uk/research/cm/
Section 3

Take-up and media preferences

This section looks at a range of issues related to UK adults’ access to, and personal use of, media devices in their households and elsewhere. It looks at the changing profile of internet users as take-up of the internet has increased over time, as well as the reasons given by those who do not have the internet at home. It details the different devices used to go online and to listen to radio at home. It explores the extent to which different media are used, reasons for using different media, which media are used regularly and which media devices adults would miss the most. Finally, it looks at how people’s preferences for making contact in different circumstances have changed since 2005.

Key findings

- Since 2007, household take-up of digital television (89% vs. 82%) and the internet (71% vs. 62%) and personal use of a mobile phone (91% vs. 85%) have increased. Household take-up of the internet and personal use of a mobile phone remain lower for those in DE socio-economic groups (48% internet, 85% mobile phone) and those aged 65 and over (33% internet, 65% mobile phone).10

- Within the overall profile of internet users, a higher share of users in 2009 are older (8% aged 65 and over vs. 6% in 2007).

- Just under three in ten UK adults (28%) go online via a mobile phone, one in ten (10%) do so via a games console, and 6% via a portable media player. Younger people aged 16-24 and aged 25-34 are more likely than UK adults as a whole to go online via their mobile (50% and 42%) or their games console/player (20% and 16%).

- Very few UK adults (2%) use only an alternative device (mobile phone, games console or portable media player but not via a PC / laptop) to visit websites, but this is more likely (at 5%) among adults in DE socio-economic groups.

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8 The terms ‘access to’ and ‘take-up’ are used within this report to indicate where a particular device is present in the household. These terms do not mean that the device is necessarily used by the adult. The term ‘use’ indicates where a device is present in the household that the adult actually makes use of.

9 In this report ‘internet users’ are defined as those who say that they use the internet at home or anywhere else.

10 The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures can be found in the annual CMR (Communications Market Report) published in August each year [http://www.ofcom.org.uk/research/cm/](http://www.ofcom.org.uk/research/cm/). For Q1 2010 headline uptake figures across platforms please refer to Ofcom Tech Tracker data; for detailed demographic uptake figures relating to the internet please refer to Ofcom Digital Participation Consortium Tech Tracker data, both at [http://www.ofcom.org.uk/research/stats/](http://www.ofcom.org.uk/research/stats/)
Key findings (continued)

- Since 2007, there has been no change in the estimated weekly volume of use of the internet in any location among users generally (12.2 vs. 12.1 hours). In 2009, the internet is used for longer per week by younger adults (aged 16-24), males and those in ABC1 socio-economic groups.

- 29% of adults do not have the internet at home. Among this group 70% say they do not intend to get the internet at home in next year or so. Five per cent of all adults have access to the internet at home but say that they do not use it.

- While most of those who do not intend to get internet access at home give reasons relating to a lack of interest, this is less likely than in 2007 (72% vs. 82%). Compared to 2007, there is an increase in reasons relating to cost (31% vs. 21%). Non-ownership of a PC / laptop is also stated as a factor (23%). Adults aged 65 and over and those in ABC1 socio-economic groups are more likely to give reasons relating to a lack of interest (88% and 82% respectively), while adults aged under 65 and those in C2DE socio-economic groups are more likely to give reasons relating to cost (40% and 34% respectively).

- While half of all UK adults (50%) say they would miss watching television the most, compared to 2007, more adults now say they would miss using the internet (15% vs. 12%). Younger adults, aged 16-24 (36%), and those in AB socio-economic groups (42%), are less likely to say that they would most miss watching television.

- Communication preferences have changed since 2005, with a shift towards online methods for some activities. Adults are now more likely to prefer to check their bank balance online (30% vs. 22%), and booking a holiday online / by email is now as popular a preference as booking a holiday in person (36%).

3.2 High take-up of media in the home, although take-up remains lower for people in DE socio-economic groups and older adults

Take-up of the key platforms of mobile phone, digital television, the internet and digital video recorders (DVRs) has increased since 2007. Access to digital radio at home through the internet or digital television or listening to a DAB radio has also increased since 2007.
Seven in ten adults live in a household with access to the internet; an increase since 2007 (71% vs. 62%). This increase is evident in each age group of adults and in all of the socio-economic groups. There has been an above-average increase in take-up since 2007 among adults aged 16-24 (84% vs. 71%), aged 25-34 (84% vs. 71%) and adults in DE socio-economic groups (48% vs. 35%).

It is still the case that take-up of the internet is lower among adults aged 55-64 (60% vs. 71% of all adults) and adults aged 65 and over (33% vs. 71% of all adults). Take-up of the internet at home also remains lower among those in DE socio-economic groups (48% vs. 71% of all adults).

Around nine in ten adults live in a household with a digital television service; an increase since 2007 (89% vs. 82%). Since 2007, take-up of digital television has increased among all adults aged 35 and over, with the greatest increase among adults aged 65 and over (76% vs. 65% in 2007). However, take-up of digital television services remains lower among adults aged 65 and over (76% vs. 89% of all adults). Take-up of digital television has also increased since 2007 among adults in C2 (92% vs. 85% in 2007) and DE (86% vs. 72%) socio-economic groups.

Around nine in ten adults use a mobile phone; an increase since 2007 (91% vs. 85%). This increase is evident among those aged 16-24 (100% vs. 97% in 2007), those aged 55-64 (92% vs. 82% in 2007) and those aged 65 and over (60% vs. 51% in 2007). It is still the case, however, that take-up of a mobile phone is lower among adults aged 65 and over (60% vs. 91% of all adults). Use of a mobile phone has also increased since 2007 among adults in the C1, C2 and DE socio-economic groups, but remains lower among adults in DE socio-economic groups (85% vs. 91% of all adults).

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11 For Q1 2010 headline uptake figures across platforms please refer to Ofcom Tech Tracker; for detailed demographic uptake figures for the internet please refer to Ofcom Digital Participation Consortium Tech Tracker data, both at http://www.ofcom.org.uk/research/stats/

12 There is a degree of overlap among those aged 65 and over and those in DE socio-economic groups as one in three of all UK adults aged 65+ (33%) are in DE socio-economic groups.
UK Adults’ Media Literacy

Figure 2: Take-up of platforms, by age and socio-economic group: 2005, 2007 and 2009

Around one in three adults live in a household with a digital video recorder; an increase since 2007 (35% vs. 23%). This increase is evident in each age group of adults and in all of the socio-economic groups. There has been an above-average increase in take-up since 2007 among adults aged 25-34 (46% vs. 27%) and adults in the C2 socio-economic group (39% vs. 21%). In 2009, take-up of a digital video recorder is lower among adults aged 65 and over (20% vs. 35% of all adults) and those in DE socio-economic groups (24% vs. 35% of all adults).

One in three adults listens to digital radio through a DAB radio, digital television or the internet; an increase since 2007 (35% vs. 23%). This increase is evident among those aged 25-34 (45% vs. 38% in 2007), 55-64 (34% vs. 24%) and 65 and over (24% vs. 17%), as well as each socio-economic group except C1. Listening to digital radio is less common among adults aged 65 and over (24% vs. 35% of all adults) and those in DE socio-economic groups (26% vs. 35% of all adults).

13 For Q1 2010 headline uptake figures across platforms please refer to Ofcom Tech Tracker; for detailed demographic uptake figures for the internet please refer to Ofcom Digital Participation Consortium Tech Tracker data, both at http://www.ofcom.org.uk/research/stats/.
Figure 3: Take-up of digital video recorder and listening to digital radio: 2005, 2007 and 2009

Figure 4 shows the profile of the internet users surveyed in 2005, 2007 and 2009, in terms of the proportion of internet users in each of the six age groups and the proportion of internet users in each of the four socio-economic groups. The age and socio-economic group profile of all adults in the UK population in 2009 is also shown for comparison.

There has been an increase over time in the proportion of internet users aged 65 and over and those in the DE socio-economic groups. While 6% of all internet users were aged 65 or over in 2007, in 2009 this rose to 8% of all internet users. Since 2005 there has been an increase in the proportion of internet users from DE socio-economic groups, from 14% in 2005 to 20% in 2009. Internet users in DE socio-economic groups are more likely to be aged 16-34 compared to internet users as a whole (48% vs. 40%).

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14 These all-adult profiles are based on the survey data, and are within the margins of error for 2001 Census profile data.
3.3 Increase in internet users, both at home and elsewhere

The figures reported so far are based on take-up of the internet at home, in other words the proportion of adults in households that have access to the internet. However, not all adults who live in households with the internet actually use it. Within the UK adult population, 67% of adults are in households that have internet access through a computer or laptop and say that they personally use the internet at home. An additional 5% of adults are in households that have internet access through a computer or laptop but say that they do not personally use the internet at home.

Over seven in ten adults use the internet at home or elsewhere in 2009 (73%), compared to over six in ten (63%) in 2007 and in 2005 (59%). Four in ten of all UK adults (38%) use the internet both at home and elsewhere, compared to three in ten (29%) in 2007. There has also been an increase in the proportion of UK adults who use the internet only at home (29% vs. 26%), but no change in the proportion who use the internet only in other locations (5% vs. 7%).
3.4 Adults aged over 65 and those in DE socio-economic groups remain more likely to be non-users of the internet

As shown in Figure 6, three in ten UK adults (27%) do not use the internet at home or elsewhere in 2009, and this is more common among older adults; accounting for four in ten aged 55-64 (41%) and seven in ten aged 65 and over (69%). Non-users of the internet form a higher proportion of adults in DE socio-economic groups (46%) than in other socio-economic groups. With the exception of adults aged over 65 and adults in DE socio-economic groups, a majority of adults in all other age and socio-economic groups use the internet at home.

While four in ten of all UK adults (38%) use the internet both at home and elsewhere in 2009, this is more common among younger adults aged 16-24 (62%), 25-34 (50%), and 35-44 (47%), as well as those in the socio-economic groups AB (56%) and C1 (49%). While three in ten of all UK adults (29%) only use the internet at home, this is more common among those aged 35-44 (34%) and those aged 55-64 (37%).

The only group more likely than UK adults as a whole to use the internet in other locations but not at home are those in the DE socio-economic group (11% vs. 5% of all UK adults).
**Figure 6: Where the internet is used by UK adults in 2009: by age, gender and socio-economic group**

Figure 7 highlights the contrast between users and non-users of the internet (in any location) in terms of their demographic profile. Close to two in three non-users of the internet are aged 55 and over (64%) – with more than two in five aged 65 and over (44%).

**Figure 7: Demographic profile of all UK adults, users and non-users of the internet 2009**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>All UK adults aged 16 and over</th>
<th>Users of the internet</th>
<th>Non-users of the internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 16-24</td>
<td>15%</td>
<td>19%</td>
<td>6%</td>
</tr>
<tr>
<td>Aged 25-34</td>
<td>18%</td>
<td>21%</td>
<td>8%</td>
</tr>
<tr>
<td>Aged 35-44</td>
<td>20%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>Aged 45-54</td>
<td>15%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Aged 55-64</td>
<td>15%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Aged 65 and over</td>
<td>18%</td>
<td>8%</td>
<td>44%</td>
</tr>
<tr>
<td>Socio-economic group AB</td>
<td>25%</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Socio-economic group C1</td>
<td>29%</td>
<td>33%</td>
<td>19%</td>
</tr>
<tr>
<td>Socio-economic group C2</td>
<td>18%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Socio-economic group DE</td>
<td>27%</td>
<td>20%</td>
<td>46%</td>
</tr>
<tr>
<td>Male</td>
<td>48%</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>52%</td>
<td>53%</td>
<td>50%</td>
</tr>
</tbody>
</table>
3.5 Younger adults also use alternative devices to get online

In addition to asking adults about their use of the internet through a computer or laptop at home, the 2009 survey established the extent to which adults use alternative devices to go online: a mobile phone (including smartphones); games console or handheld games player, or portable media player.

While seven in ten UK adults (67%) go online at home through a PC or laptop, three in ten (28%) visit websites via a mobile phone, one in ten (10%) visit websites via a games console/player, and one in twenty (6%) visit websites via a portable media player. The youngest adults, aged 16-24 and aged 25-34, are more likely than UK adults as a whole to visit websites using a mobile phone (50% for 16-24 and 42% for 25-34 vs. 28% of all adults) or a games console / player (20% for 16-24s and 16% for 25-34s vs. 10% of all adults).

Figure 8: Devices used to visit internet websites in 2009: by age

While Figure 8 shows each type of device used to visit websites, Figure 9 divides UK adults into four distinct groups: those who only use a PC / laptop at home and do not use an alternative device, those who use both a PC / laptop at home and also use an alternative device, those who only use an alternative device and do not use a PC / laptop at home, and those who do not use either type of device to visit websites.

Just over half of the youngest adults, aged 16-24, use both a PC / laptop at home and an alternative device to visit websites (53% vs. 29% of all adults), and this is also more likely among 25-34s (42%) and 35-44s (36%) compared to all adults. Adults in AB socio-economic groups are also more likely to use both a PC / laptop at home and an alternative device to visit websites (39% vs. 29% of all adults).

Almost all of those using alternative devices to go online also use a PC or laptop, with just 2% of UK adults only using an alternative device. While very few adults only use an alternative device to visit websites, this is more likely among females than males (3% vs. 1%), and among adults in DE socio-economic groups compared to all adults (5% vs. 2% of all adults).
3.6 Younger adults and males have a higher volume of internet use

Adults using the internet at home or elsewhere were asked to estimate how many hours in a typical week they used the internet at each of the places they accessed it. Figure 10 compares the estimated average weekly volume of use of the internet by users in 2005, 2007 and 2009, and also shows the findings from 2009 across each age group, by gender and for each socio-economic group. Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.16

The estimated weekly volume of use of the internet among users in 2009 has not changed since 2007 (12.2 vs. 12.1 hours). The youngest internet users, aged 16-24, have a higher weekly volume of use compared to all internet users (16.6 vs. 12.2 hours), and this is due mostly to a higher volume of use at home (12.1 vs. 8.4 hours). The oldest internet users, aged 55-64 and 65+, have a lower weekly volume of use compared to all internet users (9.0 for 55-64 and 5.8 for 65+ vs. 12.2 hours).

Males have a higher estimated weekly volume of use than females (13.7 vs. 9.1 hours), due to a higher volume of use in the workplace / place of education (4.0 vs. 2.2 hours).

Across the socio-economic groups, the estimated weekly volume of use does not differ for use at home. The higher volume of use in the workplace / place of education for users in the C1 socio-economic group (4.6 vs. 3.1 hours) means that these users have a higher overall

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15 The three types of device grouped together and shown in Figure 9 as ‘alternative device’ are a mobile phone (including smartphones), a games console or handheld games player, and a portable media player.

16 That said, the self-reported figures in this survey are not dissimilar to the industry standard measurement. For the month of October 2009, Nielsen figures for internet use at home among the UK population (i.e. adults and children) show a total of 29 hours – compared to the 8.4 hours at-home use per week or approximately 33 hours per month self-reported by adults in this survey.
volume of use compared to all users (14.1 vs. 12.2 hours). Adults in C2 and DE socio-economic groups have a lower overall volume of use compared to all users (10.1 for C2 and 9.6 for DE vs. 12.2 hours), due to lower volumes of use in the workplace / place of education (1.6 for C2 and 0.8 for DE vs. 3.1 hours).

Figure 10: Volume of internet use per week: 2005, 2007 and 2009, by age socio-economic group and gender

3.7 Lack of interest remains the most-mentioned reason for not intending to get the internet at home

Twenty-nine per cent of all adults do not have the internet at home. Seven in ten of all adults who do not currently have the internet say they do not intend to get the internet at home in the next 12 months (70%). Those who do not intend to get the internet at home were asked to say why, without any prompting, and were allowed to nominate as many different reasons as applied to them. Figure 11 shows a summary of the reasons given by those who do not intend to get the internet at home in the next 12 months.

Most give reasons relating to a lack of interest, as in previous years, although this is less likely than in 2007 (72% vs. 82%). There is an increase in the number who do not intend to get internet access due to reasons relating to cost compared to 2007 (31% vs. 21%). In 2009 some 23% of people without the internet gave reasons relating to ownership / availability; typically that they do not have a computer (21%), with some saying that they do not have a landline telephone (2%).

The incidence of nominating ‘cost’ as a reason for not getting internet access at home may exclude a proportion of respondents who did not feel comfortable nominating this particular reason. Those stating ‘a lack of interest’ as a possible reason could be masking those that are not interested in getting the internet at home for various underlying reasons such as due to a lack of experience or a lack of confidence regarding the internet.
In 2009, a total of 410 interviews were conducted with UK adults who say that they do not intend to get the internet at home in the next 12 months. Comparisons across the different demographic groups can be made between those aged under 65 and those aged 65 and over, between males and females, and between those in ABC1 and C2DE socio-economic groups.

Adults aged 65 and over are more likely than those aged under 65 to give reasons relating to a lack of interest (88% vs. 60%), while those aged under 65 are more likely to give reasons relating to cost (40% vs. 15%).

Adults in ABC1 socio-economic groups are more likely than those in C2DE socio-economic groups to give reasons relating to a lack of interest (82% vs. 69%), while those in C2DE socio-economic groups are more likely to give reasons relating to cost (34% vs. 21%).

Reasons relating to cost are more likely to be given by females than males (37% vs. 25%).

Those who do not intend to get the internet at home may give a number of different reasons for this. For example, the same individual may say that they do not intend to get the internet at home both because they’re not interested in the internet and because it is too expensive. Figure 12 shows a hierarchy of reasons for not intending to get the internet at home. Any reasons for not intending to get the internet at home that relate to cost have been prioritised and come first in the hierarchy of reasons (these are shown as financial exclusion in Figure 12). Those who do not give reasons related to cost but also do not give reasons related to a lack of interest come second in the hierarchy of reasons (these are shown as other types of exclusion in Figure 12 and include those who say they do not have a computer). The last group in the hierarchy is those who only give reasons related to a lack of need or a lack of interest (these are shown as ‘self’-exclusion in Figure 12).

Across all UK adults, the ‘self’-exclusion group (10% of all adults) is larger than the financial exclusion group (6%) and other types of exclusion (4%). The ‘self’-exclusion group accounts for 10% of all adults...
for four in ten adults aged 65 and over (40%) and two in ten adults in DE socio-economic groups (18%). The financial exclusion group accounts for one in ten adults aged 65 and over (9%) or in DE socio-economic groups (14%).

Figure 12: Internet take-up, intentions and reasons for not intending to get in 2009: by age and socio-economic group

3.8 Most adults only use their mobile phone for calls or texts in a typical week

Adults who use a mobile phone (91% of all adults) were prompted with a range of activities and were asked to say which they ever do using their phone, and how often they do each. The range of activities are listed below:

- Make or receive calls
- Send or receive text messages
- Take photos
- Send or receive photo messages
- Listen to music

19 It is not possible to show data relating solely to non-users of the internet for age and socio-economic group due to base sizes.

20 These activities do not represent an exhaustive list of all the potential activities that can be undertaken with a mobile phone, but were chosen as representing the majority of activities for most people.
• Take videos
• Play games that are loaded on the phone
• Visit websites using your phone
• Use your phone to visit social networking sites
• Send or receive video clips
• Use your phone to visit sites to look at videos or clips posted by other people
• Play games over the internet using your phone
• Use your phone to put photos or videos on sites for others to see
• Send or receive Twitter updates using your phone
• Watch TV programmes

Figure 13 shows the activities undertaken using a mobile phone at least once a week by five per cent or more of all mobile phone users. Nine in ten mobile phone users make or receive calls using their mobile phone at least weekly and eight in ten send or receive text messages. Fewer than half of all mobile phone users undertake any of the other activities that we asked about at least weekly; with four in ten using the phone to take photos and two in ten using the phone to send or receive photo messages or to listen to music.

Younger mobile phone users, aged 16-24 and 25-34, are more likely than mobile phone users as a whole to undertake each of the activities at least once a week, while older users aged 55-64 and 65+ are less likely.
Three of the activities are more likely to be undertaken at least once a week by females compared to males: send or receive text messages (87% vs. 80%), take photos using the phone (40% vs. 33%) and send or receive photo messages (40% vs. 33%).

### 3.9 Increase in digital radio listeners

All adults were shown a list of ways of listening to radio at home and were asked to say which they ever use. Eight in ten UK adults say they listen to radio at home, which is an increase on the 2007 measure (78% vs. 73%).

Since 2007 there has been an increase in the proportion of UK adults who say they listen to any type of digital radio (35% vs. 30%). This increase is due to a higher proportion of adults who listen to radio at home using a DAB digital radio set (18% vs. 13%), as the proportions who listen through their digital TV service or over the internet have not changed since 2007.
Across the demographic groups, adults aged 25-34 are more likely than adults as a whole to listen to digital radio (45% vs. 35% of all adults), and this is also the case for adults in AB socio-economic groups (42% vs. 35%).

3.10 Increase in gaming

All adults were shown a list of devices that can be used for gaming and were asked to say which they ever use to play games at home or elsewhere. Just under four in ten UK adults use any of the devices for gaming, which is an increase on the 2007 measure (36% vs. 31%). Since 2007, the greatest increase is in gaming using a ‘fixed’ games console connected to a TV (27% vs. 20%), with a smaller increase in gaming using a hand-held games player (16% vs. 13%). There has been an overall decrease in gaming using a PC / laptop since 2007 (14% vs. 17%).
Across the different demographic groups, adults aged 16-24 and 25-34 are more likely than adults as a whole to use any of the devices for gaming (64% for 16-24s and 58% for 25-34s vs. 36% of all adults).

At an overall level, the incidence of gaming does not differ by gender or socio-economic group. However, gaming using a console connected to a TV is more likely among males than females (31% vs. 22%) and more likely among adults in C1 socio-economic groups than adults as a whole (31% vs. 27%).

Adults who use any of the devices for gaming at home or elsewhere were asked to say how many hours per week they play games. The overall average in 2009 is 4.3 hours per week, which does not differ significantly from the 2007 measure (4.7 hours per week). In 2009, males play for more hours per week compared to females (5.2 vs. 3.4 hours per week).
3.11 People use media platforms for a variety of reasons

Adults living in a household with a television, those who listen to the radio at home, those who use the internet at home or elsewhere and those who use a mobile phone were shown a list of possible reasons for using each of these media, and were asked to say which, if any, applied to them. Reasons given by users for each of these four media from the 2009 survey are shown in Figure 17, with responses 'stacked' in order to show the breadth of reasons given and the differences across the four media.

The most popular reasons for watching television and for listening to radio are to relax and to keep up to date with news. The most popular reasons for using the internet are to find out or learn things, and for contact with other people. Unsurprisingly, the single most popular reason for using a mobile phone remains for contact with other people.
For each of television, radio, the internet and mobile phones, younger adults are more likely than adults as a whole to say they use media for fun and to pass the time. Males are more likely than females to say they use each of the four key media to keep up to date with sports, and males are also more likely than females to use the internet to keep up to date with news. Females are more likely than males to watch television and use a mobile phone to relax.

Figure 18 shows the reasons for using the internet across the demographic groups in 2009, with responses also 'stacked' in order to show the breadth of reasons. Younger adults, aged 16-34, differ from the adult population as a whole in 2009 in their reasons for using the internet: they are more likely to say they use the internet for contact with other people (66% vs. 60%), for fun (65% vs. 50%), to relax (49% vs. 41%), to pass the time (48% vs. 36%) or to keep up to date with news (45% vs. 39%), and less likely to say they use the internet to find out or learn things (71% vs. 76%).

Adults aged 45-54 are more likely than adults as a whole to say they use the internet to find out or learn things (85% vs. 76%). Adults aged 55 and over, are less likely than adults as a whole to say they use the internet for fun (27% vs. 50%), to relax (25% vs. 41%), to pass the time (22% vs. 36%) or to keep up to date with sports (16% vs. 21%).

The only differences measured between males and females in 2009 are that males are more likely than females to say they use the internet to keep up to date with news (47% vs. 32%) or with sports (36% vs. 9%) and to pass the time (39% vs. 33%).

There are relatively few differences between the reasons for using the internet across the socio-economic groups in 2009, but adults in AB socio-economic groups are more likely than adults as a whole to say they use the internet to keep up to date with news (50% vs. 39%) and less likely to say they use the internet for fun (42% vs. 50%). Adults in DE socio-economic groups are less likely than adults as a whole to say they use the internet to find out or learn things (64% vs. 76%) or to keep up to date with news (25% vs. 39%).
**UK Adults’ Media Literacy**

Figure 18: Reasons for using the internet in 2009: by age, gender and socio-economic group

3.12 Increase for the internet as a regular media activity

Adults were shown a list of possible media activities and were asked to say which, if any, they regularly do. While watching television remains the dominant media activity, there has been a small decrease since 2007 in the proportion of adults stating they regularly watch television (95% vs. 97%), returning to the level found in 2005. Listening to radio has increased since 2007 (73% vs. 69%), but remains below the level found in 2005. The remaining increases since 2007 relate to newer media: with increases for using the internet (64% vs. 56%), using an MP3 player (29% vs. 25%) and playing console / computer games (24% vs. 21%).
Adults aged 65 and over are more likely than adults as a whole to regularly read newspapers / magazines. Adults aged 16-34 are more likely than adults as a whole to use a mobile phone, use the internet, watch videos / DVDs, listen to an MP3 player, use a games console / player and to use a portable media player. As such, younger adults have a much broader range of regular media activities.

### 3.13 Increase in using the internet as the most-missed media activity

To understand how much importance people attach to various media, we asked them to say which single media activity they would miss the most if it was taken away. Among adults as a whole, television is typically given as the medium they would miss the most (one in two say this). Compared to 2007, adults are more likely to say they would miss using the internet (15% vs. 12%), less likely to say they would miss using a mobile phone (11% vs. 13%) and less likely to say they would miss listening to music on a hi-fi / CD or tape player (2% vs. 5%).

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**Figure 19: Regular media activities: 2005, 2007 and 2009**

A1 – Which of the following do you regularly do? (Prompted responses, multi-coded)  
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009.
While adults in all demographic groups (age, gender, socio-economic group) are most likely to say that television is the medium they would miss the most, there are some key differences within the overall population of adults in 2009. Adults aged 16-24 are less likely than adults as a whole to say they would miss television (36% vs. 50%), and more likely to say they would most miss using a mobile phone (32% vs. 11%). Adults aged 55-64 and 65+ are less likely than adults as a whole to say they would miss using a mobile phone (4% and 1% vs. 11% of all adults). Adults aged 65 and over are more likely than adults as a whole to say they would miss listening to radio (18% vs. 9%) or reading newspapers / magazines (11% vs. 4%), and less likely to say they would miss using the internet (3% vs. 15%).

There are also some differences in the most-missed media activities of adults in specific socio-economic groups, compared to the adult population as a whole in 2009. Adults in AB socio-economic groups are less likely to say they would miss watching television (42% vs. 50%) and more likely to say they would miss using the internet (22% vs. 15%) or listening to radio (14% vs. 9%). Adults in DE socio-economic groups are more likely than adults as a whole to say they would miss watching television (55% vs. 50%) and less likely to say they would miss using the internet (9% vs. 15%).

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**Note:**

21 The categories 'watch television' or 'listen to the radio' do not specify the particular platform being used for these activities. Future waves of the research will clarify which platform or device is being referred to by respondents.
Figure 21: Most-missed media activity in 2009: by age and socio-economic group

Adults who regularly use the internet via a computer / laptop are now more likely to say that the internet is the medium they would miss using the most. This accounts for one quarter (25%) of regular internet users in 2009, compared to two in ten (21%) of regular internet users in 2007 and in 2005 (16%).

3.14 Since 2005, fewer adults prefer to use the home / landline phone to make contact

To understand people’s preferences for methods of communicating, we showed them a list of six methods and asked them to say which one they would choose to use to make contact in each of four different circumstances. The preferred communications options for the different circumstances, in 2005 and in 2009, are shown in Figure 22. It should be noted that the responses shown are for all UK adults, and not solely those with the available technology, in order to be able to capture an overall picture of preferred communications across all adults.

Despite nine in ten UK adults having their own mobile phone, the home / landline phone is more likely to be chosen to make a call than a mobile phone in each circumstance. However, each of the four circumstances that we asked about has seen a shift away from home / landline phone calls and towards other options.

As in 2005, three in ten UK adults prefer to send a text to get in touch with a friend to arrange to meet (29% vs. 27% in 2005), and this is now matched by choosing to make a mobile phone call for this reason (31% vs. 19%). Arranging to meet a friend by using the

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22 The communication option ‘Meet in person’ was not available as a choice for ‘Getting in touch with a friend to arrange to meet.’
home / landline phone remains the most popular preference, but has declined since 2005 (38% vs. 50%). However, when looking at overall use of a mobile phone (making calls and sending texts combined), any use of a mobile phone to get in touch with a friend to arrange to meet is more popular than using the home / landline phone (59% vs. 38%).

Preferences for getting in touch with a friend to arrange to meet vary considerably across the different demographic groups. Younger adults, aged 16-34, are more likely than all adults to prefer to send a text (59% of 16-24s and 42% of 25-34s vs. 29% of all adults), while older adults are more likely to prefer to make a call using the home / landline phone (61% of 55-64s and 83% aged 65+ vs. 38% of all adults). Males are more likely than females to prefer to make a mobile phone call (37% vs. 25%) while females are more likely than males to prefer to send a text (34% vs. 29%). There are relatively few differences across the socio-economic groups, but adults in the C2 socio-economic group are more likely than all adults to prefer to make a call using the home / landline phone (46% vs. 38%).

Since 2005, UK adults are more likely to prefer to check their bank balance online (30% vs. 22%) and less likely to prefer to check their bank balance by making a home / landline phone call (12% vs. 18%). The main preference remains to check a bank balance in person (49% in 2005 and in 2009). There are some key differences in the preferred way to check a bank balance within the overall adult population. The youngest adults are more likely than all adults to prefer to check online (43% of 16-24s and 44% of 25-34s vs. 30% of all adults), while older adults are more likely to prefer to check in person (59% of 55-64s and 66% of those aged 65 and over vs. 49% of all adults). Preferences do not differ between males and females, but adults in AB and C1 socio-economic groups are more likely than all adults to prefer to check online (38% for AB and 40% for C1 vs. 30% for all adults), while those in DE socio-economic groups are more likely to prefer to check in person (63% vs. 49%).

As with preferences for checking a bank balance, there has been a shift since 2005 in preferences for booking a holiday: away from making a home / landline phone call (19% vs. 29%) and towards booking by email / online (36% vs. 23%). Booking a holiday online / by email is now as popular a preference as booking a holiday in person, which has stayed at a similar level to that found in 2005 (36% vs. 35%). Again, younger and ABC1 adults are more likely to prefer to book online and older and DE adults are more likely to prefer to book in person.

As was also the case in 2005, UK adults are relatively unlikely to prefer to make contact with their local council online, although the preference for online contact has increased since 2005 (12% vs. 4%). Adults are still most likely to prefer to contact the local council by making a home / landline phone call, despite a decrease since 2005 (58% vs. 64%).

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23 Preferences for methods of communication are dependent on access to the relevant communication devices which is influenced by differences in demography.
24 Checking a bank balance “in person” could mean checking in a branch or at an ATM.
Figure 22: Preferred communication method for making contact

NZ2A-D. Please use this list to say which one way you would prefer to make contact for a few different reasons that I’ll read out. (Prompted responses, single coded) *2005 wording was 'Contacting the local council'.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2009
Section 4

Interest and confidence

This section reports on the extent to which adults who have certain types of technology at home are interested in and confident using the technology for different functions. It looks at the extent to which non-users are interested in various types of internet activity and their incidence of proxy use. It examines attitudes towards the internet among users and non-users and the extent to which having the internet impacts on perceptions of employability among adults. Finally, it looks at confidence across a number of aspects of using the internet among users.

Key findings

- Across each of the functions we asked about, a minority of those with the technology said they were interested in but not confident using the function.

- Among internet users, the two areas with the greatest gap in confidence relate to installing filtering software (25% are interested but not confident) and installing security features (23% are interested but not confident). For both these areas females are more likely than males to say they are interested but not confident in undertaking them (30% vs. 15% for installing filtering software and 32% vs. 18% for installing security features).

- Older users, those in DE socio-economic groups and females are more likely to lack confidence to use the functions available on the technology they have at home.

- Among non-users, interest in functions associated with the internet, PCs or laptops is higher for younger adults and those in ABC1 socio-economic groups.

- One in five non-users (19%) have asked someone else to use the internet on their behalf in the last year.

- Across all demographic groups, internet users are more likely than non-users to feel that they have the right skills to get a new job.

- Confidence using the internet has increased since 2007, and most adults (60%) describe themselves as very confident internet users. Confidence is, however, lower among older users and females.

4.1 Three in ten digital television owners are not confident using an interactive function

Those with a digital television service at home (89% of all UK adults) were shown descriptions of four functions available through digital television:

- set up a menu of your favourite channels
- select different viewing angles or different matches for sports events
• block access to certain channels or programmes by setting a PIN code

• using the interactive button (the red button) on your remote control

For each function they were asked to say if this was something they were interested in, and those who were interested in a particular function were then asked to say whether they could do this with confidence. Figure 23 splits all digital television owners into one of three groups for each of the four functions (from right to left); those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence. This gap in confidence shown on the left of Figure 23 is of particular interest in assessing media literacy, and is shown in rank order for the four functions.

The confidence gap for the four digital television functions in Figure 23 ranges from one in ten to two in ten digital television owners interested but not able to do the task with confidence. There is some variation in the proportion of digital television owners who are interested in each function, with the highest level of interest (at 62%) in using the interactive button on the remote control. Among those who are interested, a higher proportion compared to the other two functions are not confident in selecting different viewing angles or different matches for sports events (15% within 47% interested) and blocking access to certain channels or programmes by setting a PIN code (14% within 43% interested).

![Figure 23: Confidence and interest in digital television functions](image)

Across the four digital television functions, three in ten (27%) digital television owners say they are not confident. This overall measure does not differ across the different demographic groups within the population of digital television owners.

Across all digital television owners, six in ten (57%) say they are not interested in blocking access to certain channels or programmes by setting a PIN code. This response is more

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25 The total figures for interest reflect the sum of those that are interested and can’t do with confidence and those that are interested and can do with confidence.

26 The measure of 62% is a sum of the two ‘Interested’ responses (with 12% and 51% adding to 62% due to rounding).
likely among older adults aged 55-64 (72% vs. 57%) and aged 65 and over (77% vs. 57%), but does not differ by gender or socio-economic group. Those who do not have any children aged under 16 at home are more likely to say they are not interested in this function compared to those with any children at home (68% vs. 39%). No particular age group, gender or socio-economic group is more likely to say they are interested but not confident in blocking access to channels or programmes.

4.2 Around half of DAB radio listeners are not confident using an interactive function

Those who said they listen to a DAB radio set at home (18% of all UK adults), were shown descriptions of four functions available through some types of DAB radios:

- see details of which music is being played while you listen
- pause and rewind live radio
- listen to digital radio stations not available through the airwaves (i.e. not on a traditional radio set)
- record a programme while it is being broadcast

The confidence gap is at similar levels for each of the four DAB radio functions in Figure 24; with between two in ten and three in ten DAB radio listeners interested but not able to do the task with confidence. There is some variation in the proportion of listeners who are interested in each function, with the highest level of interest in being able to see details of what music is being played while listening (63%). Among those who are interested, the highest proportion is not confident in being able to pause and rewind the radio, which is a function that is only available on some models of DAB radio.

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27 Because some of these functions are specific to certain models of DAB radio, this may suppress interest and experience / confidence levels.
Across the four DAB radio functions, just under half (48%) of all listeners say they are not confident.  

### 4.3 Three in ten owners are not confident using a mobile phone function

Those with their own mobile phone (91% of all UK adults) were shown descriptions of five functions available through some types of mobile phone handsets:

- send a text message to more than one person at a time
- visit websites from your phone
- take photos and send them to people using the phone
- send a text message
- lock your phone so it doesn’t dial numbers by mistake

A majority of mobile phone owners were interested in four of the five functions, the exception being visiting websites using the phone (35%).

The confidence gap is at similar levels for each of the five mobile phone functions in Figure 25; with around one in ten mobile phone owners interested but not able to do the task with confidence. While interest in using the mobile phone to visit websites is lower than any of the other mobile phone functions, a higher proportion who are interested in this type of use are not confident.

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28 It is not possible to look at this in more detail across the different demographic groups due to base sizes.
29 Because some of these functions are specific to certain models of mobile phone, this may suppress interest and experience / confidence levels.
Across the five mobile phone functions, three in ten (29%) of all owners say they are not confident. This overall measure is higher among mobile phone owners aged 55-64 compared to all owners (39% vs. 29%), among adults in DE socio-economic groups (35% vs. 29%), and among females compared to males (34% vs. 23%).

4.4 Four in ten internet users are not confident using an internet function

Those who use the internet at home or elsewhere (73% of all UK adults) were shown descriptions of 13 functions associated with the internet, PCs or laptops:

- install software on a computer which can control or block access to certain websites
- install security features like a firewall, anti-spyware or antivirus software
- transfer photos from a digital camera or mobile phone to a computer
- buy things over the internet
- find out about local services such as cinemas and restaurants
- complete government processes online (e.g. register for tax credits, renew driving licence, car tax or passport, complete tax return)
- do banking over the internet
- use email to contact friends and relatives
- listen to radio over a computer
- contact your local MP, Assembly Member, MSP or local councillor online
• find out information from your local government or local council such as health services, recycling, local libraries

• sign an online petition

• join in debates online or give your opinions on social or political issues

Nine of the functions were of interest to a majority of internet users, with the highest levels of interest in using email to contact friends and relatives (92%).

Three particular functions have confidence gaps at a higher level compared to others: installing software to control or block access to certain websites (25%), installing security features (23%), and transferring photos from another device to a computer (16%).

Figure 26: Confidence and interest in internet functions

Across the 13 functions, four in ten (42%) of all internet users say they are not confident in at least one of the functions. This overall measure is higher among internet users aged 55-64 compared to all users (54% vs. 42%), among adults in DE socio-economic groups (49% vs. 42%), and among females compared to males (50% vs. 33%).

Across all internet users, three in ten (28%) say they are not interested in installing software to control or block access to certain websites. This response is more likely among older adults aged 55-64 (36% vs. 28%) and aged 65 and over (53% vs. 28%), and is more likely among females compared to males (31% vs. 24%), but does not differ by socio-economic group. Those who do not have any children aged under 16 at home are more likely to say they are not interested in this function compared to those with any children at home (31% vs. 23%). Females are also more likely than males to say they are interested but not confident in installing filtering software (30% vs. 15%) and this is more likely among those in DE socio-
economic groups compared to all internet users (30% vs. 23%), but does not vary to any significant extent across the age groups.

Across all internet users, two in ten (18%) say they are not interested in installing security features (such as a firewall, anti-spyware or antivirus software). This response is more likely among older adults aged 55 and over (23% vs. 18%) and those in DE socio-economic groups (23% vs. 18%), and is more likely among females compared to males (21% vs. 14%). Females are also more likely than males to say they are interested but not confident in installing security features (32% vs. 18%), but this does not vary to any significant extent across the age or socio-economic groups.

4.5 Three in ten non-users are interested in an internet function

The same descriptions of 13 functions associated with the internet, PCs or laptops were shown to those adults who do not use the internet (27% of all UK adults). Figure 27 shows the extent to which each of the functions is of interest to non-users, in rank order.

While the majority of non-users say they are not interested in any of the functions, two functions are of interest to two in ten non-users: transferring photos from another device to a computer (19%) and using email to contact friends and relatives (18%).

Across the 13 functions, three in ten (30%) of all non-users say they are interested. This overall measure is higher among non-users aged under 55 compared to those aged 55 and over (41% vs. 24%) and among non-users in ABC1 socio-economic groups compared to those in C2DE socio-economic groups (36% vs. 27%).
4.6 Two in ten non-users have asked someone else to use the internet on their behalf

We asked non-users of the internet whether they had asked someone else to send an email, get information from the internet or make a purchase from the internet on their behalf in the past year. Two in ten (19%) non-users have made a proxy use of the internet in this way. As shown in Figure 28, proxy use of the internet is more likely among non-users aged under 65, females and those in ABC1 socio-economic groups.

Figure 28: Proxy use of the internet in the past year among non-users

4.7 Four in ten internet non-users can see the benefits of the internet

In order to gauge attitudes to the internet, a series of four statements were read out to all adults who were asked to use a scale to say whether they agreed or disagreed with each statement. Not surprisingly, internet users show more positive attitudes towards the internet than non-users. Users are more likely than non-users to agree that the internet makes life easier (87% vs. 34%) and helps save time (85% vs. 37%), and are less likely than non-users to agree that the internet is difficult to use (15% vs. 38%). However, users and non-users agree to the same extent that people who buy things online put their privacy at risk (60% vs. 58%). Four in ten (43%) non-users agree with one or both of the two statements ‘The internet makes life easier’ or ‘The internet helps save time’.

For each statement, non-users are more likely to say they don’t know than to disagree with the statement; with around three in ten non-users saying that they don’t know whether the internet makes life easier, helps save time or is difficult to use. Non-users in C2DE socio-economic groups are more likely than non-users in ABC1 socio-economic groups to say they don’t know in response to these statements.

Few non-users disagree that the internet makes life easier (10%) or disagree that the internet helps save time (15%), but four in ten non-users agree that the internet is difficult to use (38%). No particular demographic group among the population of non-users stands out as being more likely to agree with this statement.
In order to explore the extent to which using the internet impacts on perceptions of employability, all adults were read out the statement ‘If I went to look for a new job tomorrow, I feel I have the right kind of skills to get it’ and were asked to use a scale to say whether they agreed or disagreed with this statement. Responses from internet users and non-users were then examined and are shown in Figure 30; at an all adult level as well as by age, gender and socio-economic group. In each case, internet users are more likely than non-users to agree that they have the right skills and non-users are more likely to disagree. Across all adults, seven in ten internet users agree that they have the right skills compared to three in ten non-users (70% vs. 30%).

The groups of non-users least likely to agree that they have the right skills to get a new job are those aged 55 and over (22% of non-users agree vs. 42% of users), females (27% of non-users vs. 61% of users) and those in C2DE socio-economic groups (24% of non-users vs. 56% of users). In each of these groups of non-users, close to half disagree with the statement. People in this group are more likely to be older (aged 55 and over) and in socio-economic group DE.
4.9 While confidence has increased, internet users remain less confident in judging whether a website is truthful

Internet users were asked to use a scale to say how confident they are across a number of aspects of using the internet, and at an overall level as an internet user.

Confidence has increased since 2007 among internet users in terms of finding what they want on the internet (71% vs. 58% in 2007), using the internet to do creative things (47% vs. 37%) and judging whether a website is truthful (38% vs. 20%). Across each of these aspects of using the internet, more internet users say they are confident than say they are not confident. However, a significant minority of internet users say they are not confident using the internet to do creative things (24%) or judging whether a website is truthful (14%).

Focusing on confidence in judging whether a website is truthful, younger users aged 16-24 and 25-34 are more likely than all internet users to say they are confident (both 78% vs. 70% for all) while older users aged 55-64 and 65 and over are more likely to say they are not confident (26% for 55-64 and 30% for 65+ vs. 14% for all). Females are more likely than males to say they are not confident in judging whether a website is truthful (19% vs. 9%) and users in DE socio-economic groups are more likely than all users to say they are not confident (20% vs. 14%).

When asked to use the scale to say how confident they are as an internet user, six in ten (60%) of all users describe themselves as very confident and fewer than one in ten (6%) describe themselves as not confident. Responses to this question from the different demographic groups within the population of internet users are detailed in the next section.

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30 The measure of 14% is a sum of the two ‘Not confident’ responses (with 10% and 5% adding to 14% due to rounding)
4.10 Older users, females and those acquiring the internet most recently are less confident internet users

As with the other measures for aspects of internet use, younger users, aged 16-24 and 25-34 are more likely than all internet users to say they are confident overall as an internet user (95% for 16-24 and 93% for 25-34 vs. 87% for all) while older users aged 55-64 and 65 and over are more likely to say they are not confident (10% for 55-64 and 14% for 65+ vs. 6% for all). Females are more likely than males to say they are not confident as an internet user (8% vs. 4%). The only difference across the socio-economic groups is that users in the C1 group are more likely than all users to say they are confident (91% vs. 87%).
Figure 32: Confidence as an internet user in 2009: by age, gender and socio-economic group

IN10D – Overall then, how confident are you as an internet user? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+, 615 male, 667 female, 341 AB, 417 C1, 232 C2, 290 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+. Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009.
Section 5

Using the internet

This section reports on a variety of ways in which people can use the internet. It looks at the breadth of regular online activities and the hours spent using the internet each week and how these differ across demographic groups. It then focuses on the types of websites used by those looking for health information and the extent to which the internet is being used to watch television programmes and films. It covers the impact of having the internet on contact with others and the extent to which internet users feel they have saved money through buying online or comparing prices online. Finally, it examines how the internet is being used for social networking.

Key findings

- Compared to 2007, the internet is more likely to be used regularly\(^{31}\) for social networking (35% vs. 19%) and for entertainment (34% vs. 22%). These activities are most likely to be undertaken by internet users aged 16-34.

- Based on claimed use, the internet is used for a broader range of tasks by younger adults, males, and those in ABC1 socio-economic groups.

- Twice as many internet users have a social networking site profile compared to 2007, accounting for four in ten of all users (44% vs. 22%), and this increase since 2007 is most evident among females and adults in DE socio-economic groups.

- One in three internet users (29%) say they watch or download programmes from UK TV broadcasters’ websites.

- Just under half of all internet users say that they have increased their contact with friends (49%) and family (47%) who live further away as a result of using the internet.

- Nearly half of internet users (48%) say they have made significant savings by comparing prices online or buying something online rather than in the shops.

\(^{31}\) ‘Regularly’ refers to an activity carried out at least once a week.
5.1 Communication remains the most common activity on the internet, with some changes in what the internet is used for regularly

Adults who use the internet at home or elsewhere were prompted with a range of internet activities and were asked to say which they ever do, and how often they do each. These uses were grouped into nine types of use, in order to assess breadth of use of the internet. The categories are:

- Communication – relates to activities such as sending or receiving email or using Instant Messaging services.
- Transactions – relates to buying or selling things online, banking and paying bills online, downloading software or gambling online.
- Work / studies information – relates to finding information online for work or for studies.
- Social networking – relates to using social networking sites (such as Facebook, MySpace, Piczo, Bebo, hi5 or Twitter).
- Entertainment – relates to uses such as listening to radio stations online, playing games online, watching online or downloading video clips, TV programmes or films, downloading or listening online to music, or looking at adult-only websites.
- News - relates to looking at news websites.
- Leisure information – relates to finding information for booking holidays or finding information for leisure time such as cinema and live music.
- Public / civic – relates to finding information online about public services provided by local or national government, or completing government processes online such as registering for tax credits, renewing a driving licence, car tax or passport, completing a tax return, or looking at political, campaign or issues websites.
- Health – relates to finding information about health-related issues (new in 2009; not covered in previous surveys).

As in 2007, communication is the most commonly mentioned activity carried out at least once a week by internet users (78% in 2009 vs. 76% in 2007). Fewer internet users in 2009 say they use the internet for work / studies information (36% vs. 48%). While fewer internet users say that they use the internet at least once a week for transactions compared to 2007 (37% vs. 41%), this change could be a result of changes to how internet users were asked about this type of activity.

Two types of activity see an increase in weekly use compared to 2007: social networking (35% vs. 19%) and entertainment (34% vs. 22%). It is possible that these increases are in part a result of the change in the profile of internet users.

Across the eight categories of internet use covered in both surveys (i.e. excluding health), overall breadth of use of the internet is at a similar level in 2009 as in 2007. Among internet users in 2009, younger internet users use the internet for a broader range of tasks than older

32 These activities in no way represent an exhaustive list of all the potential activities that can be undertaken online, but were chosen as representing the majority of activities for most people.
users, males make broader use than females, and those in AB and C1 socio-economic groups use the internet for a broader range of tasks than those in C2 and DE socio-economic groups.

The youngest internet users, aged 16-24, are more likely than adults as a whole to use the internet at least weekly for work/studies information (47% vs. 36%), social networking (69% vs. 35%) and for entertainment (58% vs. 34%). By contrast, the oldest groups of internet users, aged 65 and over, are less likely than adults as a whole to use the internet at least weekly for each of these three types of activity.

There are relatively few differences in the types of use made by males and females, but males are more likely than females to use the internet at least weekly for work/studies information (40% vs. 33%), for news (26% vs. 18%) and for leisure information (19% vs. 13%), while females are more likely than males to use the internet at least weekly for social networking (40% vs. 29%).

Internet users in AB socio-economic groups are more likely than adults as a whole to use the internet at least weekly for communication (88% vs. 78%), for work/studies information (46% vs. 36%) and for news (29% vs. 22%), but less likely to use the internet at least weekly for entertainment (27% vs. 34%). Internet users in the C2 and DE socio-economic groups make narrower use of the internet, and are less likely than adults as a whole to use the internet at least weekly for communication (64% and 67% vs. 78%) and work/studies information (20% and 27% vs. 36%). Internet users in DE socio-economic groups are also less likely than adults as a whole to use the internet at least weekly for transactions (25% vs. 37%) and for news (13% vs. 22%).

Figure 33: Types of internet activities carried out at least once a week: 2007 and 2009, by age, gender and socio-economic group

IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, multi-coded)


*NB The activities within the ‘Transactions’ category were amended between 2007 and 2009. Two activities from 2007 (Buying and selling on auction sites – EBay, QXL, etc. and ‘Buying things online’) were combined into one 2009 activity in 2009 ‘Buying and selling things online’.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009
Figure 34 shows the percentage of all internet users and those in each age group who use the internet at least once a week for each of the 22 individual activities in 2009 that have been grouped into the nine types shown in Figure 33.

### Figure 34: Individual internet activities carried out at least once a week in 2009: by age

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending / receiving emails</td>
<td>75%</td>
<td>75%</td>
<td>81%</td>
<td>76%</td>
<td>73%</td>
<td>68%</td>
<td>63%</td>
</tr>
<tr>
<td>Finding information for your work / job / studies</td>
<td>36%</td>
<td>47%</td>
<td>36%</td>
<td>37%</td>
<td>39%</td>
<td>28%</td>
<td>14%</td>
</tr>
<tr>
<td>Looking at social networking sites</td>
<td>35%</td>
<td>69%</td>
<td>54%</td>
<td>28%</td>
<td>17%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Using online chat rooms or Instant Messaging</td>
<td>27%</td>
<td>49%</td>
<td>40%</td>
<td>24%</td>
<td>16%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Banking and paying bills online</td>
<td>26%</td>
<td>24%</td>
<td>33%</td>
<td>25%</td>
<td>24%</td>
<td>26%</td>
<td>24%</td>
</tr>
<tr>
<td>Looking at news websites</td>
<td>22%</td>
<td>21%</td>
<td>25%</td>
<td>23%</td>
<td>26%</td>
<td>20%</td>
<td>15%</td>
</tr>
<tr>
<td>Listen to or download music online</td>
<td>18%</td>
<td>43%</td>
<td>21%</td>
<td>12%</td>
<td>10%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Buying and selling things online</td>
<td>17%</td>
<td>17%</td>
<td>25%</td>
<td>19%</td>
<td>16%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Watch online or download short video clips</td>
<td>16%</td>
<td>33%</td>
<td>18%</td>
<td>10%</td>
<td>14%</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Finding information for your leisure time including cinema and live music</td>
<td>14%</td>
<td>20%</td>
<td>17%</td>
<td>11%</td>
<td>17%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Playing games online</td>
<td>13%</td>
<td>23%</td>
<td>15%</td>
<td>12%</td>
<td>5%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Downloading software</td>
<td>11%</td>
<td>18%</td>
<td>12%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Watch online or download TV programmes</td>
<td>10%</td>
<td>20%</td>
<td>10%</td>
<td>6%</td>
<td>10%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Listening to radio stations online</td>
<td>10%</td>
<td>12%</td>
<td>13%</td>
<td>9%</td>
<td>7%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Maintaining a website / blog</td>
<td>9%</td>
<td>18%</td>
<td>10%</td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>Finding information about public services provided by local or national government</td>
<td>8%</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
<td>12%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Finding information for booking holidays</td>
<td>8%</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
<td>10%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Finding information about health related issues</td>
<td>7%</td>
<td>7%</td>
<td>4%</td>
<td>7%</td>
<td>9%</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>Complete government processes online</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Looking at political / campaign / issues websites</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>6%</td>
<td>1%</td>
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<tr>
<td>Online gambling</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Looking at adult-only websites</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>*</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each (Prompted responses, multi-coded)?

Base: All adults aged 16+ who use the internet at home (1,282 aged 16+, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

*=Less than 0.5%

Figure 35 shows the percentage of all internet users, males and females, and those in each socio-economic group, who use the internet at least once a week for each of the 22 individual activities in 2009 that have been grouped into the nine types shown in Figure 33.
UK Adults’ Media Literacy

Figure 35: Individual internet activities carried out at least once a week in 2009: by gender and socio-economic group

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>Male</th>
<th>Female</th>
<th>AB</th>
<th>C1</th>
<th>C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending / receiving emails</td>
<td>75%</td>
<td>75%</td>
<td>74%</td>
<td>87%</td>
<td>79%</td>
<td>62%</td>
<td>60%</td>
</tr>
<tr>
<td>Finding information for your work / job / studies</td>
<td>36%</td>
<td>40%</td>
<td>33%</td>
<td>46%</td>
<td>42%</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td>Looking at social networking sites</td>
<td>35%</td>
<td>29%</td>
<td>40%</td>
<td>30%</td>
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<td>Using online chat rooms or Instant Messaging</td>
<td>27%</td>
<td>26%</td>
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<tr>
<td>Banking and paying bills online</td>
<td>26%</td>
<td>28%</td>
<td>25%</td>
<td>30%</td>
<td>31%</td>
<td>25%</td>
<td>14%</td>
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<tr>
<td>Looking at news websites</td>
<td>22%</td>
<td>26%</td>
<td>18%</td>
<td>29%</td>
<td>23%</td>
<td>17%</td>
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<tr>
<td>Listen to or download music online</td>
<td>18%</td>
<td>20%</td>
<td>17%</td>
<td>16%</td>
<td>21%</td>
<td>18%</td>
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<tr>
<td>Buying and selling things online</td>
<td>17%</td>
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<td>16%</td>
<td>21%</td>
<td>15%</td>
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<tr>
<td>Watch online or download short video clips</td>
<td>16%</td>
<td>19%</td>
<td>14%</td>
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<tr>
<td>Finding information for your leisure time including cinema and live music</td>
<td>14%</td>
<td>17%</td>
<td>12%</td>
<td>17%</td>
<td>16%</td>
<td>9%</td>
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<tr>
<td>Playing games online</td>
<td>13%</td>
<td>14%</td>
<td>13%</td>
<td>7%</td>
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<tr>
<td>Downloading software</td>
<td>11%</td>
<td>14%</td>
<td>7%</td>
<td>10%</td>
<td>13%</td>
<td>8%</td>
<td>10%</td>
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<tr>
<td>Watch online or download TV programmes</td>
<td>10%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
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<tr>
<td>Listening to radio stations online</td>
<td>10%</td>
<td>12%</td>
<td>8%</td>
<td>11%</td>
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<td>4%</td>
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<td>Maintaining a website / blog</td>
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<td>10%</td>
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<td>Finding information about public services provided by local or national government</td>
<td>8%</td>
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<td>12%</td>
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<td>5%</td>
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<td>Finding information for booking holidays</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>11%</td>
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<td>Finding information about health related issues</td>
<td>7%</td>
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<td>Complete government processes online</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
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<tr>
<td>Looking at political / campaign / issues websites</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
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<tr>
<td>Online gambling</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
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<tr>
<td>Looking at adult-only websites</td>
<td>1%</td>
<td>2%</td>
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IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each (Prompted responses, multi-coded)?
Base: All adults aged 16+ who use the internet at home (1,282 aged 16+, 615 male, 667 female, 341 AB, 417 C1, 232 C2, 290 DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009
*=Less than 0.5%

5.2 Increase in creative activities driven by social networking

In order to understand the extent to which the internet is being used for content creation, we asked internet users about their interest and experience of a variety of online activities. The activities that we asked about included uploading content onto a website, creating web pages, social networking profiles or blogs, and contributing to existing sites or blogs.

Two thirds of adults (65%) have experience of any of the nine content creation activities that we asked about. Two additional online activities were included in the 2009 survey: signing an online petition (22% have done this) and contacting a local councillor or MP online (7%
have done this). There tends to be a consistent pattern in responses by age across most of these activities. With the exception of the two additional online activities incorporated into the study in 2009, broadly speaking, those aged 16-34 are more likely to have undertaken the activity, with those aged 45 and over being less likely to have undertaken the activity. Moreover, those aged 45 and over are also more likely than all UK adults to state they are not interested in undertaking the activity.

In terms of differences by gender, men are more likely to have set up their own website (20% vs. 10%) or to have made a short video and uploaded it to a website (14% vs. 9%). Not only are women more likely to have set up a social networking profile (48% vs. 40%), more than half of men (54%) state that they are not interested in setting up a social networking profile.

Adults in DE socio-economic groups are less likely, compared to all adults, to have uploaded photos to a website (40% vs. 49%) or to have signed an online petition (16% vs. 22%). Aside from these two differences there is little variation in experience of having undertaken each activity by socio-economic group.

Comparing the seven activities that we asked about in both 2007 and 2009, there has been an increase in undertaking any of the content creation activities online compared to 2007 (62% in 2009 vs. 51% in 2007).

Since 2007, there has been an increase in three activities: uploading photos to a website (49% vs. 43%), setting up a social networking site profile (44% vs. 22%) and contributing comments to someone else’s blog (27% vs. 19%). The proportion of internet users with a social networking site profile has therefore doubled since 2007.

None of the other content creation activities that we asked about were more likely to be undertaken by internet users in 2009 than in 2007. One activity shows a higher volume of internet users who say they are not interested compared to 2007: setting up a website (71% vs. 67%).

**Figure 36: Experience of, and interest in, content creation: 2007 and 2009**

*IN23A-I – I’m going to read out a number of things people might do online. Please tell me for each one I read out if you’ve done it, or you’d be interested in doing it, or not interested. (prompted responses, single coded)*

5.3 Growth in social networking site profiles since 2007 is most evident among 25-34s, females and DE socio-economic groups

As mentioned above, the proportion of adult internet users with their own social networking site profile has doubled since 2007 (44% vs. 22%). Figure 37 shows the proportion of internet users with a social networking site profile in 2007 and in 2009. All demographic groups have seen a statistically significant increase in the experience of setting up a social networking site profile since 2007, with the exception of adults aged 55-64 and those aged 65 and over.

The growth in social networking site profiles since 2007 is greatest among adults aged 25-34 (65% vs. 27%), females (48% vs. 22%), and those in DE socio-economic groups (46% vs. 20%).

Figure 37: Set up own social networking site profile: 2007 and 2009, by age, gender and socio-economic group

5.4 Nine in ten social networking site users say they have a profile on Facebook

Those adults with a social networking site profile were asked to say on which sites they had a page or profile. As in 2007, Facebook is the most commonly-used social networking site, with an increase in the proportion of social networking site users naming it as a site on which they have a profile (90% vs. 62%)\(^3\). By contrast, the proportions of those who say they have profiles on MySpace (18% vs. 46%) and on Bebo (17% vs. 32%) have declined since 2007.

\(^3\) By way of context, Nielsen NetView figures for October 2009 show that 59% of internet users aged 16+ visited Facebook that month, 9% visited MySpace, and 7% visited Bebo. These NetView figures do not of course mean that visitors were necessarily visiting their own profile, but give an indication of the relative share of each site.
While relatively few use social networking sites other than Facebook, there are some key differences within the overall population of social networking site users. Users aged 16-24 are more likely than users as a whole to use MySpace (29% vs. 18%) or Bebo (30% vs. 17%), males are more likely than females to use MySpace (23% vs. 15%), and adults in DE socio-economic groups are more likely than users as a whole to use Bebo (29% vs. 17%).

At an overall level, fewer social networking site users have a profile on more than one site in 2009 compared to 2007 (28% vs. 39%). In 2009, users aged 16-24 are more likely than all users to have a profile on more than one site (39% vs. 28%), and this is also true for males compared to females (33% vs. 24%).

5.5 Increase in frequency of visiting social networking sites

Among those with a social networking site profile, there has been an increase since 2007 in the percentage saying they visit a social networking site every day (41% vs. 30%). The proportion visiting any social networking sites less often than once a week has halved since 2007 (8% vs. 20%).
Social networking site users aged 16-24 are more likely than social networking site users as a whole to visit any social networking sites every day (54% vs. 41%).

5.6 Most social networking site users say their profile can be seen only by their friends

Those with a social networking site profile were asked whether their profile can be seen by other people, and if so, whether it can be seen only by their friends, or by anyone. Social networking site users are now far more likely to say they have a profile which can be seen only by their friends, compared to 2007 (80% vs. 48%).
While a majority of social networking site users in each of the demographic groups say they have a profile which can only be seen by their friends, users in DE socio-economic groups are more likely than users as a whole to say their profile can be seen by anyone (26% vs. 17%).

### 5.7 Increase in talking to friends and family through social networking sites

Adults with a social networking site profile were shown a list of activities and were asked to say which, if any, they used social networking sites for. Compared to 2007, social networking site users are now more likely to use the sites to talk to friends and family they see a lot (78% vs. 69%), those they rarely see (75% vs. 65%) and to look at campaigns/petitions (10% vs. 6%).

Social networking site users are less likely to use these sites for two types of activity compared to 2007: listening to music or finding out about bands (19% vs. 29%) and talking to people they don’t know (10% vs. 17%).

**Figure 41: Social networking site uses: 2007 and 2009**

The youngest social networking site users, aged 16-24, are more likely than social networking site users as a whole to use the sites to talk to people who are friends of friends (41% vs. 32%) and to listen to music or find out about bands (30% vs. 19%). Three types of use are more likely among males compared to females: talking to people who are friends of friends (37% vs. 28%) or who they don’t know (13% vs. 7%), and to listen to music or find out about bands (25% vs. 14%).

### 5.8 Internet users are now more likely to visit ‘lots of’ new websites

Three in ten (31%) adults who use the internet at home or elsewhere say they only use websites that they have used before in most weeks when they use the internet; a similar figure to 2007 (35%). There has, however, been an increase since 2007 in the share of internet users who say they visit ‘lots’ of new websites most weeks (27% vs. 19% in 2007), at the expense of the share of internet users who say they visit ‘maybe one or two’ websites that are new to them (39% vs. 45% in 2007).
Among internet users in the 2009 survey, older users aged 55-64 and 65+ are less likely than all internet users to say that they visit lots of new websites in most weeks when they use the internet (18% for 55-64s and 12% for 65+ vs. 27% of all internet users).

Users aged 25-34 are more likely than all internet users to say that they visit lots of new websites in most weeks when they use the internet (37% vs. 27%), and this is also the case for males compared to females (30% vs. 25%).

Figure 42: Visits to new websites in most weeks when the internet is used: 2007 and 2009, by age

5.9 Indications of a shift towards NHS websites for health information

When asked about the types of information they ever use the internet to find, just under half of all internet users (47%) said that they ever use the internet ‘to find out more about an illness’; which is higher than the measures from 2007 (42%) and 2005 (41%). Three groups of internet users are more likely to look for health information online: females (54%), those in AB socio-economic groups (53%) and those aged 25-34 (54%).

Those who ever use the internet to find out more about an illness were shown a list of options and were asked to say which types of websites they tend to look at for this information. Compared to 2007, use of NHS Direct / NHS 24 websites has increased (85% vs. 70%) while use of websites from support groups for particular illnesses / conditions has decreased (24% vs. 37%). Relatively few people looking for this type of health information say that they use the other types of websites that we asked about.
5.10 One in three UK adults are watching television programmes or films over the internet

Among adults who use the internet at home or elsewhere in 2009 (73% of all UK adults), three in ten (32%) are watching online, or downloading, TV programmes or films. Most of these users of these are doing so through UK TV broadcasters’ websites (29%) such as BBC iPlayer, with a much smaller proportion doing so from other websites (11%).

Younger adults aged 16-24 and 25-34 are more likely than all adult internet users to download or watch TV programmes or films online (46% and 39% vs. 32%), and stand out as being much more likely to have used websites other than UK TV broadcasters’ websites to download or watch online (21% and 16% vs. 11%). By contrast, downloading or watching TV programmes or films online is less common among internet users aged 55-64 and 65 and over (24% and 16% vs. 32%).
Males are more likely to watch television programmes and films online compared to females (36% vs. 30%), through being more likely than females to have used websites other than UK TV broadcasters’ websites to download or watch online (14% vs. 9%).

Internet users in DE socio-economic groups are less likely than all internet users to watch television programmes and films online (23% vs. 32%).

5.11 Around half of all internet users say that using the internet has increased their contact with friends and family

Just under half of all internet users say that using the internet has increased the contact they have with friends (49%) or family (47%) who live further away. While some internet users say their contact with friends (24%) or family (18%) who live nearby has increased, this applies to a minority of all internet users. Just over two in ten internet users say they have increased contact with people with whom they share personal interests and hobbies (22%) and one in ten with people with different interests and hobbies (11%). Very few internet users say they now have decreased contact with others as a result of using the internet.
Increased contact with others as a result of using the internet is more likely among the youngest internet users, aged 16-24, and among females, but does not vary across the different socio-economic groups.

Those with a social networking site profile are more likely than internet users as a whole to say that their contact with others has increased as a result of using the internet to contact friends who live further away (62% vs. 49% of all internet users), family who live further away (59% vs. 47%), friends who live nearby (34% vs. 24%), and people with whom they share personal interests and hobbies (32% vs. 22%).

5.12 Most internet users say they have saved money through buying or comparing prices online

Adults who use the internet at home or elsewhere were prompted with five internet activities and were asked to say whether they had saved money by doing any of these activities in the last six months. Where savings had been made, the internet users were asked to use a scale to describe how significant the savings were.

Eight in ten internet users felt they had saved money across any of the five activities (81%), with at least half of all internet users saving money through buying something online rather than in the shops (65%), comparing prices online (63%) or booking travel online (51%). Half of internet users say they have made significant savings by comparing prices online or buying something online rather than in the shops (48%).

Across the different demographic groups, making any savings through the internet activities is more likely among users aged 35-44 (88% vs. 81% of all) and those in the C1 socio-economic group (87% vs. 81%). While each of the demographic groups sees a majority of
internet users making any savings, savings are less likely among users aged 55 and over and those in DE socio-economic groups (both 73% vs. 81% of all).

At an overall level, experience of saving money does not differ between males and females. However, females are more likely than males to have made savings through using vouchers from websites or emails (31% vs. 20%).

While internet users in the C1 socio-economic group are more likely to have made savings, no single activity is more likely to have resulted in savings for these users compared to all internet users. However, those in AB socio-economic groups are more likely than all internet users to say they have made savings through booking travel online (60% vs. 51%).

Figure 46 summarises the incidence of savings being made by internet users in the last six months and the significance of the savings made for each of the five activities. Three in ten of all internet users say they have made ‘very significant’ savings through buying something online rather than in the shops (27%) or comparing prices online (25%), two in ten through booking travel online (21%) or using a price comparison website (18%), and one in ten through using vouchers from websites or emails (10%).

Figure 46: Extent to which savings have been made by internet users in the last six months

NIN43A/ NIN43BA-E – Now, thinking about possible savings you might make by going on the internet... In the last six months, would you say you have saved money by doing any of these?? Which of these best describes the savings you have made in the last six months by [ACTION AT NIN34A]? (Prompted responses, single coded)

Base: All who use the internet at home or elsewhere (702 aged 16+)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2009
Section 6

Understanding, security and concerns

This section looks at people’s awareness of the main sources of funding for the BBC and commercial operators, and perceptions of regulation across different communications platforms. The questions relating to funding and regulation provide insight into the area of ‘understanding’ within Ofcom’s definition of media literacy. This section also provides a picture of attitudes towards downloading shared copies of copyright music and films without the permission of the rights holder. It details the types of checks that internet users make when visiting new websites, attitudes towards providing personal details online and the types of judgements made before entering these types of details. This section reports on trust in the news content provided by different media and ratings of the reliability and accuracy of the information to be found in different media. Finally, this section looks at the extent to which adults have concerns about the main communications platforms and the key types of concerns.

Key findings

- Since 2007, there has been little change in awareness of the main sources of funding for BBC and commercial TV programmes, radio stations and websites.

- UK adults are now more likely than in 2007 to believe that content is regulated (in terms of what can be broadcast / shown / written) across each of radio (67% vs. 58%), the internet (37% vs. 26%), mobile phones (23% vs. 20%) and gaming (36% vs. 29%).

- UK adults are more likely to believe that downloading shared copies of copyright music and films without the permission of the rights holder should be illegal (47%) than believe it should be legal (29%), and 24% are unsure. Young people aged 16-24 are more likely to say that such activity should be legal (45%).

- Internet users are less willing to share personal information online now than in 2007, and willingness is lower among those acquiring the internet at home most recently.

- Around half of all adults consider information found on television (52%) and radio (50%) to be reliable and accurate, compared to three in ten internet users who consider information found on the internet to be reliable and accurate (31%). A majority of users say that they tend to trust the news output from TV (54%), radio (66%) and news websites (58%).

- UK adults are more likely to have concerns about content on the internet (55%) than content on the other key media platforms (39% television, 26% mobile phones, 26% gaming, 9% radio).

- Internet users are more likely than non-users to have concerns about content on the internet (61% vs. 40%).
6.1 Most adults are aware of the main source of funding for TV programmes and radio stations, but fewer than half know how websites are mainly funded

All adults were asked to say, without prompting, what they believed to be the main source of funding for television programmes, radio stations and websites. For each medium, questions were asked about the main source of funding for BBC content and for content from commercial operators.

Unprompted awareness of the main source of funding is higher for television than for radio, and considerably lower for the internet, as was also the case in 2007. Unprompted awareness of the main source of funding for the BBC remains higher than for the commercial operators, across television, radio and the internet.

Awareness of the licence fee as the main source of funding has not changed since 2007 for BBC television programmes (80% in 2009 and in 2007) or BBC radio stations (62% in 2009 and in 2007), and has increased since 2007 for the BBC website (44% vs. 41%).

Responses regarding the main source of funding for television programmes on ITV, Channel 4 and Five, the other main radio stations, and search engine websites such as Google, are mostly unchanged since 2007.

Figure 47: Awareness of the main source of funding for television programmes, radio stations and websites: 2005, 2007 and 2009

![Chart showing awareness of main funding sources](chart.png)

Correct response | Incorrect response | Don’t know
---|---|---

There are three groups within the overall adult population with consistently lower levels of awareness of the licence fee as the main source of funding for BBC television programmes, radio stations and website: those aged 16-24; females; and those in DE socio-economic groups.
Internet users are more likely than non-users to be aware of the main source of funding for both the BBC website (51% vs. 27%) and for search engine websites (35% vs. 12%). Since 2007, there has been no change in awareness among internet users for either of these measures.

Despite higher awareness among internet users, it remains the case that just under half of all internet users are unaware of the main source of funding for the BBC website, and more than half are unaware of the main source of funding for search engine websites.

6.2 Adults are now more likely to believe that content is regulated across four of the five key platforms

Adults were asked to say whether content is regulated\textsuperscript{34} across each of television, radio, the internet, mobile phone and gaming. Compared to 2007, UK adults are more likely to think that content is regulated across each of these key platforms, with the exception of television.

Figure 48: Belief that content is regulated: 2005, 2007 and 2009

As with the responses regarding the main source of funding, younger adults aged 16-24 and those in DE socio-economic groups are less likely to think that television and radio content is regulated. Belief that television programmes are regulated is lower among 16-24s (69% vs. 80% of all adults) and those in DE socio-economic groups (68% vs. 80%). For both television and radio, adults are more likely to say they are unsure whether content is regulated than to say that content is not regulated.

\textsuperscript{34} The following definition was offered as an explanation of a regulator. “A regulator is often called a "watchdog" – it sets rules or guidelines about content. People can also complain to the regulator if they feel something was inappropriate - perhaps because it was offensive, harmful, inaccurate or unfair.”
The increase since 2007 in the proportion of adults who think internet content is regulated (37% vs. 26%) is evident across most of the demographic groups in 2009. Those aged 35-44 are most likely to hold this view (43% vs. 37%).

6.3 Increase in belief that types of online content are regulated

We asked people whether they thought programmes or clips shown on broadcasters’ own websites, or sites like YouTube, and home-made videos made by the general public, were regulated or not. Adults were shown a list of different types of online content and were asked to say which, if any, are regulated35 in terms of what can be shown on the internet.

Compared to 2007, adults are more likely to think that programmes or clips of programmes shown on broadcasters’ websites (such as the BBC website or the ITV website) are regulated (33% vs. 27%). Adults are also now more likely than in 2007 to think content on sites such as YouTube is regulated (23% vs. 12%). Four in ten of all UK adults (36%) are unsure whether any of the types of online content that we asked about are regulated.

Among those adults who watch TV programmes online or download from UK TV broadcasters’ websites (29% of all internet users, 21% of all UK adults), more than half think that programmes or clips shown on broadcasters’ website are regulated (54% vs. 33% of all adults).

Figure 49: Belief that online content is regulated: 2007 and 2009

6.4 Most platform users feel people should be protected from inappropriate or offensive content and that content must be free to be expressive or creative

Adults using each of the main media: television, radio, the internet and mobile phones, were asked to use a scale to say whether they agreed or disagreed that users of the platform in question should be protected from inappropriate or offensive content. Those using each

35 The following definition was offered as an explanation of a regulator. “A regulator is often called a “watchdog” — it sets rules or guidelines about content. People can also complain to the regulator if they feel something was inappropriate - perhaps because it was offensive, harmful, inaccurate or unfair.”
platform were also asked to say whether they agreed or disagreed that platform content must be free to be expressive and creative. Figure 50 shows the extent of agreement and disagreement to these two questions in 2009 among users of each of these four platforms.

The majority of users feel they should be protected and, as in previous surveys, internet and mobile phone users are the most likely to strongly agree that users should be protected from content for these platforms. Broadly speaking, agreement that users should be protected tends to be higher among older users, females and those in DE socio-economic groups.

A majority of users also believe that content must be free to be expressive or creative. Across all four platforms users are more likely to agree strongly that users must be protected from inappropriate or offensive content than they are to agree that content must be free to be expressive and creative. Broadly speaking, overall agreement that content should be free to be expressive and creative does not vary across the demographic groups.

Figure 50: Platform content – users must be protected from inappropriate or offensive content and content must be free to be expressive and creative - 2009

6.5 Younger adults are most likely to say downloading shared copies of copyright music and films without the permission of the rights holder should be legal

When asked whether downloading shared copies of copyright music and films without the permission of the rights holder should be illegal, more adults believe that it should be illegal (47%) than believe it should be legal (29%), with the remainder (24%) unsure. Adults aged 16-24 are the only group within the adult population in which more people say that downloading music and films in this way should be illegal compared to those who say it should be illegal (45% vs. 39%). Adults aged 55-64 are more likely than all adults to say it should be illegal (57% vs. 47% of all adults), and those aged 65 and over are more likely than all adults to say they don’t know (38% vs. 24%). Females are also more likely than males to say they don’t know (27% vs. 21%).

Those in AB socio-economic groups are more likely than adults as a whole to say that downloading music and films in this way should be illegal (50% vs. 42%), while those in DE socio-economic groups are more likely to say they don’t know (31% vs. 24%).
6.6 Eight in ten users say they make some sort of check when visiting new websites

All adults who use the internet at home or elsewhere were asked to think about new websites they visit and the types of checks they would make. Figure 52 excludes those who stated that they do not visit new websites, and shows the types of checks made in 2009.

While eight in ten (81%) users who ever visit new websites indicated that they make any of the ten types of checks we asked about, the check most commonly made (checking for a padlock or other secure symbol) is undertaken by just four in ten (38%) internet users.
Within the overall population of internet users who ever visit new websites, those aged 65 and over are less likely to make any of the types of checks that we asked about (67% vs. 81%).

6.7 Internet users are less happy to share personal information online compared to 2007

When registering on a website, users may be asked to provide several types of personal details. We asked internet users to consider six types of personal information and tell us how they would feel about entering these details online.

Compared to 2007, internet users are less happy to provide most of the six types of personal information. The information that internet users are most likely to be happy to provide is their email address, but this has declined since 2007 (44% vs. 49% in 2007).

Close to two in ten internet users said they would never provide their home address details; higher than in 2007 (17% vs. 13% in 2007). Similarly, internet users are more likely to say they would not provide their credit card details (20% vs. 17%) or their debit card details (24% vs. 20%) to pay online compared to 2007.

Fewer internet users told us that they would be happy to provide their mobile phone number than in 2007 (28% vs. 34%), with users now more likely to say that they would never do this (24% vs. 19%). Similarly, fewer internet users than in 2007 told us that they would be happy to provide their home phone number (26% vs. 30%), with users now more likely to say that they would never do this (25% vs. 21%).
Within the population of internet users from the 2009 study, internet users aged 65 and over and those in DE socio-economic groups are more likely than all internet users to say they would never provide each of the six types of personal information that we asked about. Females are more likely than males to say they would never provide their home phone number or mobile phone number. Across the six types of personal information, four in ten (38%) internet users say that there is at least one that they would never provide. This overall measure is higher among users aged 65 and over (54%), females (42%) and those in DE socio-economic groups (46%).

It is possible that these changes since 2007 in the extent to which internet users are prepared to provide personal information are a result of the change in the profile of internet users, referred to earlier in this report.

For each of the six types of personal information there is a difference in the responses from those who have more recently got the internet at home, with a higher proportion of these people saying they would never provide this information.

6.8 Most internet users make some kind of judgement about a website before entering personal details online

Having asked internet users to tell us how they would feel about entering personal details online, we then asked them to say whether they would make a judgement about a website before entering these types of details. Internet users were not prompted with any types of checks they might make.

Responses have been grouped into the three broad types of checks made:

- ‘professional’ signs (such as a padlock);
- personal instinct (such as a known company name, a professional appearance); and
- peer signs (such as an online review or a recommendation from a friend)
Figure 54 shows that, as in 2007, internet users are most likely to make judgements about websites based on professional signs, with this type of judgement made by around half (51% vs. 48% in 2007), before entering any personal details. Four in ten make judgements based on personal instinct (43% vs. 45% in 2007), with relatively few (and fewer compared to 2007) making judgements based on peer reviews (20% vs. 24% in 2007).

The number of internet users who say they would not make any kind of judgement of a website before entering personal details, has not changed since 2007 (12% vs. 11%).

Figure 54: Judgements made about a website before entering personal details: 2005, 2007 and 2009

Figure 55 displays these responses in a different way, in order to show how many are making judgements based solely on elements relating to the ‘personal instinct’ category. In order to do this it compares the types of judgements made about a website before entering personal details online, having imposed a hierarchy on the type of judgement made, if any. The hierarchy prioritises judgements made on any professional signs (such as a padlock), followed by peer signs (such as recommendation from friends) and then personal instinct alone (such as a known company name). This way of looking at the data shows that, since 2007, fewer internet users would make judgements using peer signs but not professional signs (8% vs. 13%) and fewer internet users would make judgements based only on personal instinct (13% vs. 17%).

IN37 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009
Figure 55: Hierarchy of judgements made about a website before entering personal details: 2005, 2007 and 2009

IN37 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded) Professional signs (e.g. Padlock, system messages); Peer signs (e.g. Peer review, recommendation from friends); Personal instinct (e.g. Company I’ve heard of, looks professional)


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Figure 56 looks at the types of judgements made by internet users in each age group in 2009, using the same hierarchy of judgements shown in Figure 55. Adults aged 16-24 are more likely to say they wouldn’t make a judgement before entering personal details (18% vs. 12%), while those aged 55-64 are more likely to say they wouldn’t enter these details as they wouldn’t trust any site (14% vs. 7%). Internet users aged 35-44 are more likely to make judgements based on professional signs (61% vs. 51%), while users aged 65 and over are less likely to use professional signs (40% vs. 51%).
6.9 Around half of search engine users make some kind of critical evaluation of search engine results

Internet users were asked to choose from three options to say what they most often do when looking for information on the internet: use a search engine, type in a website address or go to a website stored in their Favourites section. More than half (56%) of all internet users say that, of these three options, they use a search engine most often when looking for information on the internet.

Those internet users who would most often use a search engine were then asked to say which of the following statements is closest to their opinion:

- ‘I think that if they have been listed by the search engine, these websites will have accurate and unbiased information.’
- ‘I think that some of the websites in the list will be accurate or unbiased and some won’t be.’
- ‘I don’t really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of.’

Around half of those internet users who mostly use search engines (54%) make some type of critical evaluation of the websites contained in search engine results; responding that some of the websites returned will be accurate or unbiased while others will not be. This is more likely to be the case among users aged 45 and over than younger users aged under 45 (60% vs. 51%) and among users in ABC1 socio-economic groups compared to users in C2DE socio-economic groups (58% vs. 49%).
Two in ten internet users who mostly use search engines trust that the websites returned by the search engines will have accurate and unbiased information (20%). This is more likely to be the case among users aged under 45 than those aged 45 and over (23% vs. 13%) and among users in C2DE socio-economic groups compared to users in ABC1 socio-economic groups (25% vs. 17%).

Two in ten internet users who mostly use search engines respond that they don’t really think about accuracy or bias, and use the sites they like the look of (18%). This response does not vary to any significant extent across the different demographic groups.

Figure 57: Search engine user attitudes towards the accuracy or bias of the websites returned by a search

At NIN46 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded)

Base: All adults aged 16+ who mostly use search engines to look for information on the internet (407 aged 16+, 252 aged 16-44, 155 aged 45+, 201 male, 206 female, 251 ABC1, 155 C2DE). Significance testing shows any between adults aged under 45 and aged 45 and over, between males and females, between those in ABC1 and C2DE socio-economic groups.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2009

6.10 Information on television and radio content is considered to be more reliable and accurate than that on the internet or in newspapers

All adults were asked to use a five-point scale to say how reliable and accurate they would rate the information found in newspapers, television, radio and the internet. Using this scale a rating of 1 means the information found is totally unreliable and inaccurate and a rating of 5 means the information found is totally reliable and accurate. Responses from all adults for each of the four media are shown in Figure 58, which also shows ratings for the internet as given by internet users and non-users. The four media are shown from left to right in descending order of the rating of reliability and accuracy given by all UK adults.

Grouping the top two (4 or 5 out of 5) and bottom two (1 or 2 out of 5) ratings from the five point scale, just over half of all UK adults rate information found on television (52%) and on radio (50%) as reliable and accurate, and around one in ten rate information found on television (8%) and on radio (8%) as unreliable and inaccurate. Information found on the internet is next in this ranked order; with three in ten adults rating this as reliable and accurate (31%) and around two in ten rating this as unreliable and inaccurate (17%). Information found in newspapers is the least likely to be rated by all adults as reliable and accurate; with this rating given by two in ten of all adults (23%), with a higher proportion of...
adults rating information found in newspapers as unreliable and inaccurate (27%). A significant minority (21%) of UK adults don’t feel able to rate the accuracy or reliability of information found on the internet, whereas a much smaller proportion of adults are unable to rate the information found on television (1%), on the radio (5%) or in newspapers (1%).

Among internet users, three in ten (31%) rate information found on the internet as reliable and accurate and two in ten rate information found on the internet as being unreliable and inaccurate (17%). Just under half (46%) of internet users are neutral in their rating.

Figure 58: Rating of the reliability and accuracy of the information found in key media

Among internet users, none of the different demographic groups stand out as being more likely to rate the information found on the internet as reliable and accurate or as unreliable and inaccurate. Internet users aged 55 and over are, however, more likely to feel unable to assign a rating (14% vs. 6% of all internet users).

6.11 A majority of users trust news output from radio, TV and news websites

In order to understand the trust placed in different media, we asked users of certain media to use a scale to indicate the extent to which they trust the news output that they see, hear or read through television / radio / news websites / newspapers. Questions were asked of adults with any televisions in the home, those who listen to radio at home, those who use the internet at home or elsewhere and who were able to respond to the question regarding news websites (91% of internet users) and those who were able to respond to the question regarding newspapers (99% of all adults).

Before looking in detail at the responses for television, radio and the internet, Figure 59 compares the overall responses from users of each of the four media. The questions regarding trust in news were asked about each type of media as a whole, and not specific TV channels, radio stations, news websites or newspapers. As a result, it is not possible to say which specific news sources within each media the users are considering when they respond to these questions.
News from radio is the most likely to be trusted by users; with seven in ten users (66%) agreeing that they tend to trust what they hear. Newspapers are the least likely of the four media to be trusted; with the lowest level of agreement that users tend to trust what they read (34%) and the highest level of disagreement (43%). Similar percentages of users agree that they trust TV news (54%) and news websites (58%). Responses from users do differ, however, in terms of the level of disagreement that the news output is trusted. Disagreement among users is at a higher level for TV news (24%) than for radio (15%) or news websites (16%).

Figure 59: Agreement with statement – When I watch TV news / listen to radio news / visit news websites / read newspapers I tend to trust what I see / hear / read or see

Figure 60 shows responses from adults with any televisions in the household in terms of the extent to which they agree or disagree that they trust what they see when they watch TV news. Across the different demographic groups, those aged 25-34 are more likely than all with a television in the household to agree that they trust TV news (69% vs. 54%) and those aged 55-64 are more likely to disagree (32% vs. 24%). Trust in TV news does not differ by gender or across the socio-economic groups.
Figure 60: Agreement with statement – When I watch TV news I tend to trust what I see

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<thead>
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<td>22%</td>
<td>24%</td>
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<tr>
<td>DE</td>
<td>58%</td>
<td>17%</td>
<td>24%</td>
<td>2%</td>
</tr>
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</table>

T13F – Please use this card to tell me the extent to which you agree or disagree with some things that other people have said about television. (Prompted responses, single coded)

Base: All adults aged 16+ with any TVs in the home (1004 aged 16+, 146 aged 16-24, 147 aged 25-34, 200 aged 35-44, 132 aged 45-54, 168 aged 55-64, 211 aged 65+, 493 male, 511 female, 228 AB, 287 C1, 187 C2, 299 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+.

Source: Ofcom research, fieldwork carried out by Saville Rossiter Base in September to October 2009

Figure 61 shows responses from adults who listen to radio at home in terms of the extent to which they agree or to disagree that they trust what they hear when they listen to radio news. Across the different demographic groups, no group stands out in terms of being more likely to agree or to disagree that they trust radio news. Those aged 25-34 are, however, more likely to have a neutral attitude through neither agreeing nor disagreeing with this statement (27% vs. 19%).
Figure 61: Agreement with statement – When I listen to radio news I tend to trust what I hear

Figure 62 shows responses from adults who use the internet at home or elsewhere in terms of the extent to which they agree or disagree that they trust what they read or see when they visit news websites, having excluded those who didn’t visit news websites. Across the different demographic groups, those in DE socio-economic groups are more likely than all internet users to agree that they trust news websites (68% vs. 58%). Trust in news websites does not differ by age or by gender.

Figure 62: Agreement with statement – When I visit news websites I tend to trust what I read or see
Adults who use the internet at home or elsewhere were also asked to use a scale to indicate the extent to which they agree or disagree with the statement ‘When I visit social networking websites I tend to trust what I read or see’. Those who didn’t visit social networking websites (34% of all internet users) have been excluded from our analysis of the responses to this question. As shown in Figure 63, internet users are broadly as likely to agree that they trust social networking site content as they are to disagree (32% vs. 35%). Users in DE socio-economic groups are more likely to agree that they trust social networking website content (41% vs. 32%). Users aged 35-44 are less likely than all users to disagree (25% vs. 35%).

Figure 63: Agreement with statement – When I visit social networking websites I tend to trust what I read or see

<table>
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<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Don't know</th>
</tr>
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<tbody>
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<td>35-44</td>
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<td>55+</td>
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<td>19%</td>
</tr>
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</tr>
<tr>
<td>AB</td>
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<td>32%</td>
<td>38%</td>
<td>20%</td>
<td>10%</td>
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<tr>
<td>DE</td>
<td>31%</td>
<td>32%</td>
<td>28%</td>
<td>19%</td>
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</table>

6.12 Fewer adults say they have concerns about each of the five key platforms, compared to 2007

We asked people, regardless of whether they used each platform, to say whether they have any concerns about what is on television, radio, the internet, mobile phones and gaming. People could mention any types of concerns they have about the platform in question, or tell us that they don’t have any concerns about the platform, or say that they don’t know. Figure 64 compares the overall mentions of any concerns for each of the key platforms in 2005, 2007 and 2009.

People say they have most concerns about what is on the internet and what is on television, compared with other platforms, as was the case in 2007. However, the proportion of adults mentioning any concerns has decreased since 2007 for each of television, radio, the internet, mobile phones and gaming. For television, radio and the internet, the proportion of adults with any concerns is closer to the levels found in 2005 than the levels found in 2007. However, concerns about mobile phones are on a steady decline since 2005. We did not ask about concerns about gaming in the 2005 survey.
When looking at concerns by users of each platform, the internet is the only platform where users are more likely to have concerns compared to all adults (61% vs. 55%). As was the case among all adults, users of each platform are less concerned than they were in 2007.

**Figure 65: Concerns about platforms among users: 2005, 2007 and 2009**

When asked if they have any concerns about what is on TV/radio/ the internet/ mobile phones/ gaming? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use each platform (variable base). Significance testing shows any change between 2007 and 2009

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

### 6.13 Users are more likely to have concerns about the internet than about other media platforms

When asked if they have any concerns about what is on the internet, six in ten adults who use the internet at home or elsewhere (61%) told us about the concerns they have. These relate mainly to concerns which could be categorised as relating to offensive / illegal content (45%). Other concerns mentioned relate to security / fraud (23%) or to a risk to others or to
society as a whole (18%). The top three specific\textsuperscript{36} concerns about the internet, mentioned by adult internet users, are: sexual content / pornography (28%), content unsuitable for children (24%), and websites showing abuse of children (15%). Adult internet users aged 55-64 (74%) are more likely than all adult internet users as a whole (61%) to have any concerns about the internet. The youngest adult internet users, aged 16-24 (48%) are less likely than all adult internet users as a whole (61%) to have any concerns about the internet.

**Figure 66: Concerns about the internet among users, by age**

<table>
<thead>
<tr>
<th></th>
<th>All adults</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
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<tbody>
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<td>Any concerns</td>
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<td>61%</td>
<td>64%</td>
<td>55%</td>
<td>74%</td>
<td>77%</td>
<td>86%</td>
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<tr>
<td>Offensive/ illegal content</td>
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<td>48%</td>
<td>50%</td>
<td>47%</td>
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<td>50%</td>
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<td>9%</td>
<td>7%</td>
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</tr>
</tbody>
</table>

\textsuperscript{36} These specific (unprompted) concerns are then placed into the categories described.

Internet users are more likely to have any concerns about what is on the internet compared to non-users (61% vs. 40%). Internet users are more likely to have each of the categories of concerns compared to non-users, with the exception of concerns relating to a risk to others or to society as a whole.
When asked if they have any concerns about what is on television, four in ten adults with TVs in the household (39%) told us about the concerns they have. These relate mainly to concerns which could be categorised as relating to offensive content (25%) and poor quality content or repeats (21%). The top three specific concerns about television, mentioned by adults with TVs in the household, are: bad language/swearing (14%), violence (13%) and sex / nudity (9%). Adults aged 55-64 and those aged 65 and over with TVs in the household are more likely to have any concerns about television than adults as a whole (both 52% vs. 39%). Adults aged 16-24 with TVs in the household (19%) are less likely than adults as a whole (39%) to have any concerns about television.

The oldest adults, aged 55 and over, are more likely to have any concerns about what is on television, as are those with no under-16s at home, compared to those with any children aged under 16 in the household (42% vs. 34%).
When asked if they have any concerns about mobile phones, one quarter of all adults (26%) who personally use a mobile phone told us about the concerns they have. No single category of concern dominates, with broadly equal mentions of concerns which could be categorised as relating to risks to others or to society as a whole (11%), health concerns (9%), and concerns relating to affordability (8%). The top three specific concerns about mobile phones mentioned by adults who use a mobile phone are: health concerns about using a handset (7%), the general cost of making calls (6%) and health concerns about mobile signal masts (4%). Adults aged 45-54 (36%) and those aged 55-64 (35%) are more likely to have any concerns about mobile phones than adults as a whole (26%). Adults aged 16-24 (19%) are less likely than adults as a whole (26%) to have any concerns about mobile phones.
When asked if they have any concerns about gaming, one quarter of adults who ever play games electronically (25%) told us about the concerns they have. These relate mainly to concerns which could be categorised as relating to offensive content (18%). The top three specific concerns about gaming mentioned by adults who play games electronically are: violent content (14%), content unsuitable for children (11%) and discouraging creative play for children or encouraging children to stay indoors (both 5%). Adults aged 45 and over (38%) are more likely to have any concerns about gaming than adults as a whole (25%). Adults aged 16-24 (15%) are less likely than adults as a whole (25%) to have any concerns about gaming.

**Figure 70: Concerns about gaming, by age**

Adults who play electronic games do not differ from the overall adult population regarding concerns about gaming; either in terms of having any concerns or having any of the individual categories of concerns.
When asked if they have any concerns about what is on radio, one in ten adults (11%) told us about the concerns they have. No single type of concern dominates, with broadly equal mentions of concerns that could be categorised as relating to offensive content (6%), poor quality content or repeats (4%) and concerns relating to advertising or sponsorship (3%). The top three specific concerns about radio mentioned by adults are: bad language / swearing (3%), bad taste / shock tactics (3%) and too many advertising breaks or poor quality programmes (both 2%). No single age group is either more likely or less likely to have concerns about radio, compared to adults as a whole.

Figure 72: Concerns about radio, by age

G6 – Can you tell me if you have any concerns about gaming? (Spontaneous responses, multi-coded)
Base: Adults aged 16+ who play electronic games (616)/ do not play electronic games (1208). Significance testing shows any differences between users and non-users
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

R6 – Can you tell me if you have any concerns about what is on radio? (Spontaneous responses)
Base: Adults aged 16+ who listen to the radio at home (1388 aged 16+, 174 aged 16-24, 216 aged 25-34, 283 aged 35-44, 205 aged 45-54, 217 aged 55-64, 283 aged 65+). Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009
Section 7

Learning

This section looks at adults’ preferred methods of learning about digital technology, as well as their experience of, and interest in, learning.

Key findings

- Few UK adults have experience of formal learning about digital technology or are interested in learning more. Those aged 65 and over are less likely than UK adults as a whole to be interested (17% vs. 25%)

- Of the five methods that we asked about, the most preferred ways of learning about digital technology are by asking friends or family (48%), by reading the manual/instructions (45%) and through trial and error (42%). Fewer adults say they prefer to learn through asking the supplier or store (13%) or by going to a class (9%)

7.1 One in four adults have experience of formal learning about digital technology

Across all UK adults, a minority say they have experience of ‘formal learning’, through classes or training, about any of the aspects of digital technology that we asked about. Experience of formal learning about digital technology has declined since 2007 (21% vs. 27%). The only type of learning experienced by more than one in ten adults relates to how to use the internet (15%), as was also the case in 2007 (20%). One in ten adults say they have learned about using the internet safely (7%)\footnote{This question was added in 2009}.
In 2009, experience of formal learning about digital technology is less likely among those aged 65 and over compared to adults as a whole (16% vs. 21%). Adults aged 16-24 are more likely than adults as a whole to have experience of learning about how to use the internet (20% vs. 15%), creating a website (14% vs. 5%), editing digital pictures or digital video (8% vs. 5%) and sending photos using a mobile phone (6% vs. 2%).

Experience of learning about digital technology does not differ between males and females or across the socio-economic groups.

Figure 74 shows the overall experience of formal learning about digital technology across the different age and socio-economic groups. The overall decline since 2007 is seen for those aged 16-24 (32% vs. 43%) and 25-34 (20% vs. 35%), as well as those aged 45-54 (17% vs. 26%). The decline in any experience of formal learning about digital technology since 2007 is also seen in each of the socio-economic groups, with the exception of DE adults.
7.2 A minority of adults are interested in learning more about digital technology

Across all UK adults, a minority say they would be interested in learning more about any of the aspects of digital technology that we asked about. Levels of interest in learning more about digital technology at an overall level have declined since 2007 (25% vs. 31%), due to lower levels of interest in learning about how to use the internet (7% vs. 12%), creating a website (6% vs. 8%), how the media are funded (1% vs. 3%) and how programmes are made (2% vs. 5%).
In 2009, interest in learning more about digital technology is less likely among those aged 65 and over compared to adults as a whole (17% vs. 25%). Adults aged 55-64, however, are more likely than adults as a whole to be interested in learning about how to use the internet (14% vs. 7%) and using the internet safely (13% vs. 6%).

While the overall proportion interested in learning about digital technology does not differ by gender, females are more likely than males to be interested in learning about editing digital pictures or digital video (7% vs. 5%).

Interest in learning about digital technology does not differ across the socio-economic groups at an overall level or for any of the particular aspects that we asked about.

### 7.3 Most adults have a preferred way to learn about digital technology

Adults were shown a list of ways of learning about digital technology and were asked to say which they prefer. Informal learning methods such as learning from friends and family (48%) or reading the manual (45%) are more popular than attending a class (9%). Compared to 2007, more adults said they prefer to learn through attending a class (9% vs. 6%) and more adults said they had a preferred way to learn (93% vs. 91%), but the overall picture of preferred ways to learn is very similar.
In 2009, there are a number of differences between demographic groups in relation to their preferred ways to learn about digital technology. Those aged 65 and over are more likely than adults as a whole to say they prefer to learn through friends and family (58% vs. 48%), and females are more likely to prefer this way of learning than males (58% vs. 37%).

Those aged 45-54 are more likely than adults as a whole to say they prefer to learn through reading the manual or following the instructions (54% vs. 45%), and males are more likely to prefer this way of learning than females (50% vs. 41%). Adults in AB socio-economic groups are also more likely than adults as a whole to prefer to learn through reading the manual or following the instructions (53% vs. 45%), while those aged 65 and over are less likely (38% vs. 45%).

Younger adults aged 16-24 and aged 25-34 are more likely than adults as a whole to say they prefer to learn through trial and error (both 53% vs. 42%) while adults aged 65 and over and those in DE socio-economic groups are less likely (23% and 36% vs. 42%). Males are more likely to prefer to learn through trial and error than females (50% vs. 36%).

Adults in AB socio-economic groups and those aged 65 and over are more likely than adults as a whole to say they prefer to learn from attending a class (13% and 14% vs. 9%), while adults in C1 socio-economic group are less likely to prefer this way of learning (6% vs. 9%).

Adults aged 65 and over and those in DE socio-economic groups are more likely than adults as a whole to say they do not have a preferred way of learning about digital technology (14% and 9% vs. 7%).

Figure 77 shows the preferred way to learn, if any, for adults in each age group in 2009. It is clear that a preference for learning from friends and family increases with age and a preference for learning through trial and error decreases with age.
Figure 77: Preferred ways to learn about digital technology in 2009, by age

Z5 – We have discussed digital television and radio, the internet, mobile phones and games players. Which of these are ways you prefer to learn about using such services or products? (prompted responses, multi-coded)

Base: All adults aged 16+ (253 aged 16-24, 274 aged 25-34, 374 aged 35-44, 274 aged 45-54, 276 aged 55-64, 373 aged 65+)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009