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<td></td>
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<td>• Safety and security</td>
<td></td>
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<td>• The extent and level of concerns</td>
<td></td>
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<tr>
<td>5 Learning</td>
<td>33</td>
</tr>
<tr>
<td>• Experience of and preference for learning</td>
<td></td>
</tr>
</tbody>
</table>
Executive summary

Background to the segmentation and this report

As part of the 2008 Media Literacy Audit research¹, data about people’s attitudes and behaviours relating to communications technologies were analysed and a total of five segments were identified, based on the relationship people have with media devices.

This report gives a brief overview of all five segments identified though the attitudinal and behavioural questions, and looks in detail at the three particular segments that have lower take-up and use of media devices; these segments are referred to as ‘Hesitants’, ‘Economisers’ and ‘Resistors’. These segments are useful as they illustrate the types of people who tend to have lower levels of digital engagement and to show that within these there are people with different characteristics, demographics, behaviours and attitudes. By looking at each of the different segments compared to the general adult population and compared to each other, we can see the different ways in which the development and promotion of media literacy can be targeted, to reach particular segments rather than the group as a whole.

Segmentation analysis groups people together based on their defining behaviours and attitudes, but within each group there are still differences between individuals. As mentioned above, the three segments all tend to have lower take-up and use of different devices, and people within these segments account for 91% of all UK adults who do not have access to the internet at home².

The following table summarises the attitudes and behaviours of each of the five segments across the whole of the adult population. Details of the size of each of the five segments in the UK population, and the demographic profile of the three segments of interest, are shown in section 2.

¹ Reports available at:
http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_emg08/
http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_childrens08/
http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/

² Within the three segments there are some people who do have access to the internet at home. However, they do not necessarily use this personally, or have a narrower breadth of use than the general UK population.
### Summary of attitudes to media services, by segment

<table>
<thead>
<tr>
<th>Segment</th>
<th>Engaged</th>
<th>Pragmatist</th>
<th>Economisers</th>
<th>Hesitants</th>
<th>Resistors</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely to be...</td>
<td>Younger, ABC1, in metropolitan areas</td>
<td>35-54, ABC1 and affluent</td>
<td>Younger, C2DE, from metropolitan areas</td>
<td>Older (although 43% under 45), more women than men</td>
<td>Older</td>
</tr>
<tr>
<td>Most likely to own and use...</td>
<td>Everything</td>
<td>Everything within reason – where they can see a benefit</td>
<td>Everything but the internet – with one eye on costs</td>
<td>A mobile phone, but probably live in households with things they don't use</td>
<td>Nothing, or only digital television</td>
</tr>
<tr>
<td>Most likely to say...</td>
<td>I couldn’t do without it. That’s clever – how do I get more out of it?</td>
<td>What use is it – will I use it?</td>
<td>I’d really like to be able to do that</td>
<td>Someone else does that</td>
<td>It’s just not for me</td>
</tr>
<tr>
<td>Most likely to be put off because...</td>
<td>I have too many other things to do</td>
<td>I can already do that another way – why do I need this as well?</td>
<td>I can’t afford it</td>
<td>I don’t know where to start, I’m afraid of breaking it</td>
<td>I’d get no value or benefit from this</td>
</tr>
</tbody>
</table>

### Key characteristics of Resistors, Hesitants and Economisers

The following section aims to bring to life the three segments looked at in detail within this report – ‘Resistors’, ‘Hesitants’ and ‘Economisers’.

**Resistors (10% of UK adults)**

The Resistors tend to be detached from digital services, believing them to be of little relevance to their lives - and actively resist technology adoption.

Resistors are considerably less likely than the general adult population to have taken up digital television or the internet at home, and they also tend not to have mobile phones. Take-up of the internet is unlikely to change among this segment in the immediate future, as a clear majority of non-owners feel they have no need for the internet.

While television is important to Resistors, few of those with a multichannel television service have any interest in the interactive services available. A majority of Resistors are unaware of funding and regulation for newer media, and they are also less aware of the 9pm television watershed.

Compared to the general adult population, Resistors are both less likely to have any experience of learning about digital technology and less likely to have any interest in this type of learning.

Resistors are more likely than the general population to be 65 or older, female, not working (often retired), and close to half live on their own. Money is likely to be an issue as they tend to be in the E socio-economic group. They are more likely to have a health condition or disability than the average population.
Hesitants (31% of UK adults)

The Hesitants may have access to a range of digital services at home, but they tend to use them little, primarily due to a lack of confidence, knowledge or interest.

Hesitants are as likely as all UK adults to use a mobile phone on a regular basis, but their interest in using their mobile phone is mostly limited to calls and texts.

Compared with the general adult population, Hesitants are less likely to live in households with digital television. Interest in using the interactive services available with digital television is lower among Hesitants.

Again compared with the general adult population, Hesitants are less likely to live in households with the internet. In addition, they are less likely to say they will get internet access at home in the next year, mostly through choice.

Among those that do have access to the internet at home, Hesitants use the internet for fewer functions or activities, for fewer hours per week and with considerably less confidence compared to adults as a whole. While some Hesitants are simply not interested in the tasks that can be performed using the internet, others lack confidence.

The relative lack of experience with, and confidence in, using the internet also affects the judgements that Hesitants make regarding websites and their concerns about providing personal information online. Hesitants are both less likely to make checks on, or judgements about, websites and more likely to say they would not be prepared to provide personal information on the internet. In addition, few are confident that they can tell whether a website is truthful and reliable. Among Hesitants, a majority are unaware of funding and regulation for newer media.

There is a clear preference for learning about digital technology through friends and family over more formal or more independent methods. Among some, there is also an indication of an appetite to learn about the internet.

Although this group tends to be older (65+), four in ten are aged 44 or under, and although more likely to be female than the general population, over four in ten are males. They are more likely to be in C2DE socio-economic groups and less likely to be working than the overall adult population.

Economisers (8% of UK adults)

Although Economisers take-up of other digital media, such as digital television and mobile phones, is at similar levels to all UK adults, they are considerably less likely to have access to the internet at home.

The Economisers see clear value in the full range of benefits that digital services can offer and take advantage of the platforms at their disposal – but costs, whether perceived or actual, may be limiting further take-up and use, particularly of the internet.

Economisers tended to say that they were unsure if they would get internet access at home in the next year. This is likely to be linked to perceived affordability issues relating to getting
access and paying a monthly subscription, but may also be partly due to Economisers being more likely to live in the parental home.

Half of all Economisers currently using the internet do so only outside the home: five times the level found across all internet users. Economisers are less confident internet users and use the internet differently to the general adult population; for example, relatively few use the internet for communication (emails, chatrooms or instant messaging), information sourcing or transactions, and they are less likely to trust what they encounter online. The relative lack of experience with, and confidence in using, the internet also affects the judgements that Economisers make regarding websites and their concerns about providing personal information online.

Compared to adults as a whole, Economisers are relatively unaware of how television programmes and radio stations are funded and whether they are regulated.

Economisers show more willingness to learn independently, through reading manuals or trial and error, compared to the other segments with lower take-up of digital media, but few state a preference for formal learning. There is also a greater degree of interest in learning about digital technology among Economisers.

Half of all Economisers are aged 16-34 and most are in C2DE socio-economic groups, particularly DE.
Section 1

Introduction

1.1 Background

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

Ofcom’s definition of media literacy, developed after consultation with stakeholders, is:

‘the ability to access, understand and create communications in a variety of contexts’.

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003 and 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 is designed to give an accessible overview of media literacy among adults in the UK with lower levels of take-up or lower use of certain digital media at home. The aim of the report is to support people working in this area to develop and promote media literacy among this group. It is based on a much larger programme of research – Ofcom’s Media Literacy Audits, which were published in 2008³.

The key objectives of the audits 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 will help to target both Ofcom’s and stakeholders’ resources for the promotion of media literacy.

³ http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_emg08/
http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_childrens08/
http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/
1.2 What we mean by media literacy

In order to monitor media literacy through research we used the following measures as proxies for some of the key areas of media literacy (see box below).

**Access**
- Use, volume of use and breadth of use of the platforms
- Reasons for non-take-up of services

**Understand and create**
- Interest in, and awareness of, the digital features of the various media platforms
- Competence in using the features available on each platform
- Knowledge of and competence in using content controls, such as the ability to block unwanted email messages
- The ability of individual users to create their own content
- The ability of users to interact with the medium or with other users
- Knowledge of how elements of each media platform are funded
- Knowledge of regulation
- Trust in internet sites
- The extent and level of concerns for each platform

1.3 Research methodology and analysis

The Ofcom Adult Media Literacy Audit is a quantitative survey that involved conducting in-home, face-to-face interviews with 2905 adults aged 16 and over throughout the UK. Fieldwork took place from October to December 2007.

The main points of reference in this report are between a nationally representative sample of the UK adult population and adults identified through segmentation as either ‘Hesitants’, ‘Resistors’ or ‘Economisers’. These three segments within the UK adult population show relatively low take-up of certain digital media, in particular the internet. The three segments of interest account for 91% of all UK adults who do not have access to the internet at home.

A total of 998 interviews were conducted with adults identified through segmentation as Hesitants, 292 with Resistors, and 258 with Economisers.

Significance testing at the 95% confidence level was carried out. 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.

The initial research to develop the segmentation was conducted in 2007, and the attitudinal and behavioural questions necessary to identify each of the segments were included in the Media Literacy Audit questionnaire.

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4 [http://www.ofcom.org.uk/research/cm/consumer_engagement/]
Section 2

Segment sizing and demographic profiles

Responses to audit questions about people’s attitudes and behaviours relating to communications technologies were analysed and a total of five segments were identified, based on the relationship people have with media devices. This section gives an overview of the three particular segments that are the focus of this report; Hesitants, Resistors and Economisers. These three segments have lower levels of take-up of certain media devices, and particularly lower take-up of the internet.

2.1 Segments within the UK population with lower take-up of digital media

The Hesitants, Resistors and Economisers together account for half (49%) of all UK adults aged 16 and over. The segments range in size; Economisers account for 8% of all UK adults, Resistors for 10% of all UK adults and Hesitants for 31% of all UK adults.

The three segments of interest account for 91% of all UK adults who do not have access to the internet at home. Within the three segments some do have access to the internet at home. However, they tend to either not use it themselves, or have a narrower breadth of use than the general UK population.

Figure 1: Breakdown of segments in the UK adult population

While the segments have been defined by media attitudes and behaviour, there are also differences in the demographics of each segment.

**Hesitants** tend to be older than UK adults as a whole (29% aged 65 and over vs. 19% of all adults) although 43% are aged 44 or under. The group shows a skew towards females (54% vs. 46% males), and they are more likely than adults as a whole to be in C2DE socio-economic groups (57% vs. 45% of all adults). They are less likely to be working (45% vs. 56% of all adults). They are more likely than the general population to have a gross household income of £7,500 – £11,499 (29% vs. 16%) or £11,500 – £17,499 (21% vs. 14%).

**Resistors** are considerably more likely than UK adults as a whole to be aged 65 and over (71% vs. 19% of all adults), with a skew towards females (54% vs. 46% males). They are more likely than adults as a whole to be in C2DE socio-economic groups (67% vs. 45% of all adults) – particularly E, and considerably less likely to be working (16% vs. 56% of all adults) (often due to retirement). They are more likely to live on their own (44% vs.
16%) and to have a health condition or disability which limits their activities. In terms of income, they are more likely than the general population to have a gross household income below £7,500 (34% vs. 10%) or £7,500 – £11,499 (31% vs. 16%).

Economisers are considerably more likely than UK adults as a whole to be aged 16-34 (52% vs. 33% of all adults), with equal representation of males and females. They are more likely than adults as a whole to be in C2DE socio-economic groups (60% vs. 45% of all adults) – particularly DE, and match the UK adult population in terms of the proportion who are working (54% vs. 56% of all adults). In terms of income, they are more likely than the general population to have a gross household income below £7,500 (21% vs. 10%) or £7,500 – £11,499 (23% vs. 16%).

Figure 2: Demographic profile by segment – Hesitants, Resistors and Economisers

Base: All adults aged 16+ (2905 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
Section 3

Access

In this context, access refers to the availability to use, navigate and manage equipment, content and services rather than simply the availability of services. Without access, people may have limited scope for developing the skills and confidence that could benefit them in various aspects of their life. The report then explores levels of actual usage by individuals, reasons for using media platforms and preferred media activities, as this starts to give a richer understanding of this group’s overall media literacy.

3.1 All three segments have lower take-up of the internet at home

Adults in the Hesitants segment have lower levels of access to media devices than adults overall: household ownership of digital radio (80% vs. 88%), digital television (75% vs. 82%), and the internet (31% vs. 62%) is lower among Hesitants than among UK adults as a whole.

The same is true for adults in the Resistors segment, but to a greater extent: household ownership of digital radio (58% vs. 88%), digital television (55% vs. 82%), and the internet (18% vs. 62%) is lower among Resistors than among UK adults as a whole.

By contrast, those in the Economisers segment have similar levels of access to digital radio (both 88%) and digital television (85% vs. 82%) compared to adults overall, but a much lower level of access to the internet at home (32% vs. 62%).

Figure 3: Take-up of media platforms in the home

3.2 For those with home access to the internet, all three segments are less likely to be internet users

Some adults who live in households with internet access do not use the internet themselves. Non-users in households with internet access account for around one in twenty (6%) of all UK adults, or one in ten (10%) of those with the internet at home.
The incidence of non-users in households with the internet is higher among each of the segments of interest: it accounts for one-third of Hesitants with internet access (36% vs. 10% of all adults with internet access), close to half of Resistors with internet access (44% vs. 10%), and two in five Economisers with internet access (38% vs. 10%).

The number of interviews conducted with adults who live in households that have access to the internet but who do not use the internet totalled 146 adults across the three segments of interest. Therefore, it is not possible to look at these adults in any more detail. However, the three segments account for 86% of adults who have access to the internet at home and do not use the internet.

**Figure 4: Access to and use of the internet at home**

<table>
<thead>
<tr>
<th></th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Resistors</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have access at home</td>
<td>56%</td>
<td>11%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>and do not use</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have access and use</td>
<td>44%</td>
<td>8%</td>
<td>20%</td>
<td>88%</td>
</tr>
<tr>
<td>the internet at home</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

IN1 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?

*Base: All adults aged 16+ (2905 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)*

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

### 3.3 Hesitants and Resistors are unlikely to get internet access, mostly through choice

People who did not have home access to the internet were asked whether they intended to get access at home in the next year or so. Those that did not intend to get access in the next year or so were asked why, and their reasons were categorised as either voluntary or involuntary. Voluntary reasons are dominated by a perceived lack of need for the internet, while involuntary reasons mostly relate to affordability, or a lack of knowledge or understanding of the technology.

**Hesitants** differ from all adults without home internet access in being less likely to say they will get access in the next year (9% vs. 15%), and more likely to give a voluntary reason for not getting access (46% vs. 42%). One in four Hesitants give an involuntary reason for not getting access, which is comparable to the measure for all UK adults without access to the internet at home (26% vs. 24%). Two involuntary reasons stand out for Hesitants, both of which relate to affordability: that getting the internet at home is too expensive generally (12% vs. 12% of all adults) and that the monthly payment for the internet is too expensive (10% vs. 11% of all adults).

**Resistors** are also considerably more likely than UK adults as a whole to say they do not intend to get home internet access in the next year and give a voluntary reason for this (59% vs. 42% of all adults). Very few Resistors say they will get internet access at home in the next year (2% vs. 15% of all adults). One in three Resistors give an involuntary reason for not getting internet access, which is similar to the measure for all UK adults (30% vs.
24%). One involuntary reason is more likely to be given by Resistors compared to all adults: that they don't know how to use a computer (14% vs. 8%).

**Economisers** are more likely than UK adults as a whole to say they intend to get the internet at home in the next year (30% vs. 15%), or that they are unsure whether this will happen (31% vs. 19%). Compared to all adults, Economisers are considerably less likely to give a voluntary reason for not intending to get internet access at home in the next year (18% vs. 42%). We can infer from this that few Economisers have chosen not to have the internet at home. Economisers have a younger profile than the other two segments, and so this degree of uncertainty could be due to Economisers still living in the parental home or being unclear as to what their financial situation may be in a year’s time. Two involuntary reasons stand out for Economisers, both of which relate to affordability: that getting the internet at home is too expensive generally (22% vs. 12%) and that the monthly payment for the internet is too expensive (17% vs. 11%).

**Figure 5: Intention to get home internet access in the next 12 months**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Will get</th>
<th>Won't get - involuntary reasons</th>
<th>Won't get - voluntary reasons</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>All adults 16+</td>
<td>15%</td>
<td>24%</td>
<td>42%</td>
<td>19%</td>
</tr>
<tr>
<td>Hesitants</td>
<td>9%</td>
<td>26%</td>
<td>46%</td>
<td>19%</td>
</tr>
<tr>
<td>Resistors</td>
<td>3%</td>
<td>30%</td>
<td>59%</td>
<td>9%</td>
</tr>
<tr>
<td>Economisers</td>
<td>30%</td>
<td>21%</td>
<td>18%</td>
<td>31%</td>
</tr>
</tbody>
</table>

(IN18/ IN20 – Can you tell me if you intend to get internet access at home in the next year or so? And can you tell me why that is? Base: All adults aged 16+ who do not have internet access at home (1222 aged 16+, 699 Hesitants, 241 Resistors, 186 Economisers) Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007)

3.4 All three segments are less likely to be internet users, and there is a skew towards use outside the home among Economisers

Across all UK adults, close to two-thirds (63%) use the internet at home or anywhere else. There is a good deal of overlap within this overall figure; over half of all UK adults use the internet at home (56%), while one in three uses the internet anywhere else (36%). Less than one in ten (7%) of all UK adults uses the internet only at a location other than their home. The picture of internet use is very different among each of the three segments.

One in four Hesitants uses the internet at all (25% vs. 63% of all UK adults), with most of this accounted for by use at home (20% vs. 56%) rather than anywhere else (9% vs. 36%).
One in ten Resistors uses the internet at all (11% vs. 63% of all UK adults), and again most of this is accounted for by use at home (10% vs. 56%) rather than anywhere else (4% vs. 36%).

Two in five Economisers use the internet at all (40% vs. 63% of all UK adults). Unlike the general adult population and the other two segments, more Economisers use the internet outside the home (30%) than use it at home (20%). Put another way, half of Economisers (50%) who use the internet access the internet only outside the home, compared with one in ten (11%) of all adults who use the internet.5

So while Hesitants and Resistors differ from all UK adults simply in terms of being less likely to use the internet at all, Economisers are also more likely to undertake use outside the home among the proportion who are internet users. A key characteristic of this segment is that their desire for media devices is hindered by affordability, which fits with this profile of internet use outside the home.

Figure 6: Where the internet is used

3.5 Hesitants and Resistors are much less likely to regularly use newer media, but there is a mixed picture for Economisers

Hesitants are considerably less likely than adults as a whole to say they regularly use newer media such as the internet (20% vs. 56%), MP3 players (9% vs. 25%) or games consoles (9% vs. 21%). They are, however, as likely as all UK adults to be regular mobile phone users (74% vs. 77%).

Resistors are less likely to be regular users of almost all of the media we asked about, with the exception of watching television (99% vs. 97%). Regular use of newer media is the lowest among all three segments; namely mobile phones (2% vs. 77%), the internet (8% vs. 56%), MP3 players (3% vs. 25%), and games consoles (5% vs. 21%).

While Economisers are more likely than adults as a whole to regularly use a mobile phone (88% vs. 77%) and games consoles (35% vs. 21%), they are considerably less likely than the adult population overall to regularly use the internet (37% vs. 56%).

5 Analysis of the Media Literacy Audit data more broadly shows that people who only use the internet outside the home tend to use this for a narrower range of activities than those who use it at home.
Each of the three segments, therefore, are less likely to use the internet as a regular activity. Use of the internet among Resistors is at a low level (36 interviews conducted with Resistors who use the internet at home or elsewhere) and it is not possible to report robustly on what this segment use the internet for or their confidence with internet functions.

Figure 7: Regular media activities

3.6 A minority of Hesitants and Economisers use the internet for any particular activity in a given week

Weekly use of the internet for each of the eight types of functions and activities that we covered is lower among Hesitants compared to the ‘all adult’ measures. For example, while a majority of all adult internet users use the internet at least weekly for communication (using emails, chat rooms, instant messaging), this activity accounts for less than half of the Hesitants who use the internet (41% vs. 76%). The other type of use of the internet with the greatest gap between Hesitants and all adult users is for transactions (10% vs. 41%). As well as being less likely to be internet users compared to adults as a whole, Hesitants use the internet for fewer functions or activities.

The picture is broadly similar for Economisers, up to a point. The top three internet functions and activities for all adult users are less likely to be undertaken by the Economisers who use the internet; that is: communications (45% vs. 76%), work or studies information (30% vs. 48%), and transactions (20% vs. 41%). Unlike Hesitants, however, Economisers do not differ to any significant extent from the general adult population in their use of the internet for the less frequently-used functions or activities, such as keeping up to date with news (18% vs. 24%), creativity (such as looking at social networking sites) (24% vs. 22%), entertainment (17% vs. 22%), finding leisure information (11% vs. 14%), and public/civic information (6% vs. 11%). While they are less likely to use the internet compared to adults as a whole, and less likely to use the more popular functions, Economisers match all adults in the degree to which they use the internet for less commonly-used functions. This is likely to be due to the younger profile of Economisers, as young adults outstrip adults as a whole in their use of the internet for creativity, entertainment and leisure information.
Figure 8: Internet activities carried out at least once a week among internet users

Given the narrower use of the internet compared to all adult internet users, it is not surprising that both Hesitants and Economisers use the internet for fewer hours in a typical week. While the average across all adult users is 12.1 hours per week, Hesitants use the internet for an average of 4.5 hours per week and Economisers use the internet for an average of 6.2 hours per week.

3.7 Hesitants and Economisers are less likely to visit new websites

Most Hesitants who use the internet only use websites they have used before in a typical week, and this more limited experience of new websites is much more common than among all adult internet users (62% vs. 35%). One in ten Hesitants says they visit lots of new websites in a typical week; around half the measure found across the general adult population (9% vs. 19%).

Economisers are not as likely as Hesitants, but less likely than all adult internet users (46% vs. 35%), to say they only use websites they have used before in a typical week. As with Hesitants, one in ten Economisers says they visit lots of new websites in a typical week; close to half the measure found across the general adult population (11% vs. 19%).
3.8 Television is the most important medium for each of the three segments

To understand how much importance people attach to the various media they use, we asked them to say which single media activity they would miss doing the most. This identified that television remains a popular medium for all three of the groups.

**Hesitants** are more likely than adults as a whole to say they would miss the **more traditional medium** of **television** (65% vs. 52%) and **newspapers/magazines** (7% vs. 5%), and **less likely** to say they would miss using **newer media** such as a mobile phone (7% vs. 13%), or the internet (2% vs. 12%). Responses from Hesitants regarding the internet are likely to reflect their relative lack of access to the internet. Hesitants match all adults in terms of having a mobile phone (89% vs. 85%) but are less likely to say this is the medium they would miss the most (7% vs. 13%).

**Resistors** are much more likely than adults as a whole to say they would miss television (74% vs. 52%) and are also more likely to say they would miss radio (11% vs. 8%). While being more likely to miss these more traditional media, Resistors are the **least likely** to say they would miss newer media such as a mobile phone (0% vs. 13%), or the internet (1% vs. 12%). Resistors have the oldest profile of the three segments, and their strong preference for television over other media reflects this.

**One in two Economisers** says they would miss television the most, matching the measure for all adults (both 52%), and **one in four** says they would miss their mobile the most (24% vs. 13%). **Very few** say they would miss using the internet the most (3% vs. 12%).
Figure 10: Most missed media activity

A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (2905 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)
Source: Ofcom research, fieldwork carried out by Saville Roselter Base in October to December 2007
Section 4

Understand and create

In this section we look at people’s understanding of media services and content in terms of their degree of interest and confidence in using the types of services or functions available through different media devices, and their experience of, and interest in, creating content and using the internet for creative functions. We also assess their awareness of funding sources and regulation, their levels of trust in media, caution when using websites, and concerns regarding media and associated content.

4.1 Hesitants and Resistors are generally uninterested in interactive television services

Those who have multichannel television at home were asked whether they were interested in and confident using four different interactive services: setting up a favourite channels menu; blocking access to certain channels or programmes by setting a PIN code; selecting different viewing angles or different matches for sports events; and using the interactive button on the remote control.

Both Hesitants and Resistors are more likely than the general adult population to say they are not interested in these four interactive services available through multichannel television. As both of these segments have an older profile, and are less likely to have children in the household, it is perhaps understandable that there are lower levels of interest in blocking access to certain channels or programmes with a PIN code. However, a majority in both of these segments also say they are uninterested in the more everyday functions, such as using the interactive button, or setting up a favourite channels menu. Resistors are the least likely to be interested in each of these four interactive services. Across the four digital television services, 39% of Hesitants and 28% of Resistors are interested in and confident using any of the services, which is considerably lower than the measure of 56% for all adults.

There is a mixed picture for Economisers compared to the general adult population. Economisers who have multichannel television at home are more confident in setting up a favourite channels menu, but less confident selecting different viewing angles or different matches for sports events. Much of this relative lack of confidence is due to a belief that their television set does not have this capability. Levels of interest and confidence in the other multichannel television interactive services that we asked about do not differ between Economisers and the general adult population. Across the four digital television services 63% of Economisers are interested in and confident using any of the services, which is comparable to the measure of 56% for all adults.

Across these interactive television services, there is little evidence that a lack of confidence with the technology is acting as a barrier to full use. It is rather that Hesitants and, in particular, Resistors do not see these services as being of benefit to them.
4.2 Lower interest and lower confidence with internet functions among Hesitants and Economisers

Those who use the internet at home or elsewhere were asked whether they were interested in and confident using nine different internet functions.

Interest levels among Hesitants are lower than the general adult population of internet users for each of the nine internet functions that we asked about. Across the nine internet functions, 72% of Hesitants are interested in and confident using any of the services, which is considerably lower than the measure of 94% for all adults. Levels of interest are markedly lower among Hesitants compared to all adult internet users for four of the nine functions; banking over the internet (28% vs. 60%), buying things over the internet (52% vs. 82%), installing filtering software (48% vs. 77%), and installing security features (53% vs. 82%). There are no particular differences within the Hesitants population that point to a certain group or groups with lower interest.

While levels of interest are lower among Hesitants, there is some evidence that confidence is lower, even among those who are interested. For five of the nine internet functions, there are higher levels of lack of confidence among Hesitants, compared to the general adult population: transferring photos (27% vs. 18%), installing security features (31% vs. 25%), using email (23% vs. 10%), finding out about local services (20% vs. 10%), and buying things over the internet (14% vs. 10%). As discussed earlier, Hesitants use fewer of the functions and services available via the internet on a weekly basis – for some, this is influenced by a lack of confidence, while for others it is due to a lack of interest. Where differences are shown within the Hesitants segment, it is most often the case that females and those in C2DE socio-economic groups lack confidence with internet functions.

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6 Use of the internet among Resistors is low and the number of interviews achieved with internet users within this segment in the research sample is too low (36 interviews) to report on this segment regarding their confidence with internet functions.
Among **Economisers**, interest levels are lower than among the general adult population for **seven of the nine internet functions** that we covered, and at the same level for the other two functions. Across the nine internet functions, 85% of Economisers are interested in and confident using any of the services, which is lower than the measure of 94% for all adults. **Levels of interest are markedly lower** among Economisers compared to all adult internet users for **three of the nine functions:** banking over the internet (34% vs. 60%), installing **filtering software** (52% vs. 77%), and installing **security features** (60% vs. 82%).

While levels of interest in internet functions are generally lower among Economisers, there is also evidence that **confidence is lower** among those who are interested. There are higher levels of a lack of confidence for six of the nine internet functions: transferring photos (33% vs. 18%), installing security features (31% vs. 25%), finding out about local services (25% vs. 10%), using email (21% vs. 10%), buying things over the internet (17% vs. 10%), and joining in debates through posting comments on websites (15% vs. 8%). As shown earlier, Economisers are less likely to use the internet on a weekly basis for the more popular internet services and functions. While this can be said to reflect a lack of interest for some, there are issues with confidence using the internet for others.

The sample size of Economisers does not allow analysis of differences between sub-groups within the Economiser population on these measures.

**Figure 12: Interest and confidence in using internet functions**

<table>
<thead>
<tr>
<th>Activity</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
<th>Hesitants</th>
<th>Economisers</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install security features like a firewall, anti-spy or antivirus software</td>
<td>25%</td>
<td>31%</td>
<td>27%</td>
<td>37%</td>
<td>44%</td>
<td>27%</td>
<td>37%</td>
</tr>
<tr>
<td>Install software on a computer which can control or block access to certain websites</td>
<td>22%</td>
<td>29%</td>
<td>27%</td>
<td>33%</td>
<td>40%</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Transfer photos from a digital camera or mobile phone to a computer</td>
<td>24%</td>
<td>29%</td>
<td>29%</td>
<td>35%</td>
<td>42%</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>Use e-mail to contact friends and relatives</td>
<td>19%</td>
<td>23%</td>
<td>23%</td>
<td>30%</td>
<td>37%</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Buy things over the internet</td>
<td>15%</td>
<td>18%</td>
<td>18%</td>
<td>27%</td>
<td>34%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Find out about local services including the council, hospital, leisure facilities and so on</td>
<td>21%</td>
<td>25%</td>
<td>27%</td>
<td>33%</td>
<td>40%</td>
<td>27%</td>
<td>40%</td>
</tr>
<tr>
<td>Do my banking over the internet</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>11%</td>
<td>18%</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Join in debates about subjects that interest me through posting comments on websites</td>
<td>12%</td>
<td>16%</td>
<td>18%</td>
<td>27%</td>
<td>34%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Listen to radio over a computer</td>
<td>13%</td>
<td>15%</td>
<td>17%</td>
<td>27%</td>
<td>34%</td>
<td>17%</td>
<td>27%</td>
</tr>
</tbody>
</table>

INTA4 – Please look at the options shown on this card. I’m going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one I’d like you to say which of the options on the card applies to you.

*Base size too low to show for those who use the internet at home or elsewhere among Resistors (n=36)
4.3 A minority of Hesitants and Economisers has experience of using the internet for creative functions

While one in two adult internet users has experience of using the internet for at least one of the seven types of creative activities we asked about, this is true for one in five Hesitants (20% vs. 51%). The most frequently-done creative activity is uploading photos to the internet (17% vs. 43%), with no other single activity undertaken by more than 10% of Hesitants. Around one in ten Hesitants (9%) who use the internet has ever set up a social networking site profile. By comparison, one in five (22%) of all adult internet users has a social networking profile. Other than uploading photos to the internet (15% interested), there is very little evidence of interest in any of the creative activities among Hesitants. The older profile of Hesitants is a likely factor in this relative lack of experience and interest; Hesitants aged under 45 are twice as likely to have undertaken any of the creative activities as Hesitants aged 45 and over (27% vs. 14%).

Experience of creative activities using the internet is also below the all-adult measure among Economisers (although more common than among Hesitants); accounting for two in five who use the internet, compared to one in two across all adult internet users (38% vs. 51%). As with Hesitants, the most frequently-done creative activity is uploading photos to the internet (32% vs. 43%). Around one in seven Economisers (14%) who use the internet has ever set up a social networking site profile. These measures compare to one in five (22%) of all adult internet users with a social networking profile. While there is more evidence of interest in these creative activities than among Hesitants, this does not extend beyond the levels of interest found across all adults.

Figure 13: Experience of creative activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uploaded photos to the internet</td>
<td>24%</td>
<td>17%</td>
<td>30%</td>
</tr>
<tr>
<td>Set up a personal profile on a website like Piczo, Bebo, hi5, Facebook or MySpace</td>
<td>9%</td>
<td>3%</td>
<td>14%</td>
</tr>
<tr>
<td>Contributed comments to someone else’s blog</td>
<td>10%</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Set up your own website</td>
<td>10%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Set up your own blog</td>
<td>8%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Made a short video and uploaded it to the internet</td>
<td>6%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Contributed to a wiki</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

\* Base size too low to show for those who use the internet at home or elsewhere among Resistors (n=36)

Base: All who use the internet at home or elsewhere (1723 aged 16+, 250 Hesitants, 103 Economisers)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
4.4 Economisers match all adult internet users in accessing music and video content online

Compared to all adult internet users, Hesitants are considerably less likely to have ever used the internet to listen to or download music (25% vs. 57%), watch or download video clips (24% vs. 54%) or to watch or download longer video content such as films or television programmes (12% vs. 38%).

Among Economisers, however, the proportion of internet users who access music online or watch online video content is at much the same level as all internet users. Half of Economisers have used the internet to listen to or download music (51% vs. 57%), or to watch or download video clips (51% vs. 54%) and one in three has used the internet to watch or download longer video content such as films or television programmes (36% vs. 38%). While Economisers are less likely than all adult internet users to have experience of using the internet for communication, work or studies information, transactions, or creative functions, they match all adult internet users in accessing music and video content online.

Figure 14: Frequency of viewing and downloading video and music content

4.5 Economisers have high levels of interest and confidence in using mobile phone functions, while Hesitants appear interested in the basic functions only

We assessed mobile phone owners’ levels of interest and confidence in using five functions on a mobile phone. None of the Resistors interviewed in this survey had their own mobile phone, and so the findings reported in this section refer only to Hesitants and Economisers.

Interest levels among Hesitants are lower than among the general adult population of mobile phone users for each of the five mobile phone functions that we covered. Across these functions, 73% of Hesitants are interested in and confident using any of the services, which is lower than the measure of 88% for all adults. Levels of interest are markedly lower among Hesitants compared to all adult mobile phone owners for three of the five functions: sending a text message to more than one person at a time (44% vs. 71%), taking photos and sending them to others using the phone (47% vs. 71%), and accessing
**mobile operators’ internet sites** from the phone (20% vs. 43%). Within the Hesitants population, **interest** in the mobile functions is typically **higher** among those aged **under 45** and **females**. It appears that **Hesitants** with a mobile phone are **unlikely to be interested** in the functions **beyond basic calls and texts**.

While overall levels of interest are lower among Hesitants, there is **some evidence** that **confidence is lower** among those who are interested. Two of the five mobile phone functions show greater levels of lack of confidence among Hesitants, compared to the general adult population: **sending a text message** (14% vs. 8%) and **locking the phone** (13% vs. 9%). Where differences are shown within the Hesitants segment, it is most often the case that those **aged 45 and over lack confidence** with mobile phone functions.

Among **Economisers**, interest levels are higher than among the general adult population of mobile phone users for **four of the five mobile phone functions** that we covered (the exception being access to mobile operators’ internet sites). Across the five mobile phone functions, 95% of Economisers are interested in and confident using any of the services, which is higher than the measure of 88% for all adults. Within the Economisers population, **interest and confidence** in the mobile functions is typically **higher** among those aged **under 45**.

Three of the five mobile phone functions show **higher levels of confidence** among **Economisers** compared to the general adult population: **sending a text message** (89% vs. 81%), **locking the phone** (84% vs. 77%), and **sending a text message to more than one person at a time** (64% vs. 56%). This last function, however, also sees a **higher level of lack of confidence** among Economisers, compared to the general adult population (21% vs. 15%).

**Figure 15: Interest and confidence in using mobile phone functions**

M4A-E – Please look at the options shown on this card. I’m going to read out some different types of things that you can do with some kinds of mobile phone, and for each one I’d like you to say which of the options on the card applies to you.

**Base:** Adults aged 16+ with a mobile phone (2481 aged 16+, 906 Hesitants, 248 Economisers)

**Source:** Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

* Base size too low to show mobile phone users among Resistors (n=0)
4.6 Economisers are relatively unaware of how all types of media content are funded, while Hesitants and Resistors are less aware for online content

Broadly speaking, awareness of the main source of funding for television programmes and radio stations among Hesitants and Resistors is at the same level as found across all UK adults. The exception to this is awareness of commercial radio funding, which is lower for Resistors compared to the general adult population. The two segments show a similar profile to each other in terms of awareness of BBC website and search engine funding; both groups being less aware than all UK adults. This is perhaps unsurprising, given that both Hesitants and Resistors are less likely to have the internet at home and less likely to use the internet at all.

Awareness of media content funding is rather different among Economisers. While around half or more are aware of how BBC and commercial radio and television content is funded, awareness is lower among Economisers compared to all UK adults. Economisers are also less aware than adults generally of how the BBC website is funded and how search engines are funded. Economisers have a younger profile compared to the general adult population, and the relatively low awareness of media content funding is most evident among young adults.

Figure 16: Understanding sources of media content funding

T8-T9 R5-R6/H3A-H3B – How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?/ How would you say BBC radio stations are mainly funded?/ How would you say the other main radio stations are mainly funded?/ How do you think the BBC’s website is mainly funded?/ How do you think search engine websites such as Google or Ask.com are mainly funded?

Base: All adults aged 16+ (2005 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
4.7 Resistors and Hesitants are less sure about content regulation

A majority of Hesitants say that television broadcasts are regulated, with no particular difference to the general adult population in this respect. For each of radio, internet, mobile phone and gaming, however, Hesitants are more likely than adults as a whole to say they don’t know whether content is regulated or not. This lack of certainty regarding regulation is most evident for each of the newer media, with a majority of Hesitants unable to say whether content on the internet (53% vs. 41%), on mobile phones (58% vs. 49%) or in gaming (60% vs. 50%) is regulated.

While most Resistors say that television broadcasts are regulated, one in five is unsure (18% vs. 11%). This represents a relative lack of awareness of regulation for television, compared to the general adult population, and this is evident to a greater extent across the other media we asked about. Resistors are the segment least likely to have an opinion as to whether content across the board is regulated.

There is a less consistent picture for Economisers regarding regulation of media content. While most say that television broadcasts are regulated, close to one in five is unsure (17% vs. 11%), which indicates a relative lack of awareness compared to the general adult population. Responses regarding regulation of the internet and of mobile phone content do not differ from all adults, however, with close to half unsure. There is no consensus within the Economisers population as to whether radio is regulated, but around two in five believe that it is regulated (37% vs. 29%).

Figure 17: Whether believe platform content is regulated
4.8 Hesitants and Resistors are less sure whether online content is regulated

Within the UK adult population as a whole there is confusion as to which types of internet content, if any, are regulated; three in five of all adults (57%) are unsure. Responses from Economisers do not differ from the general adult population, but both Hesitants (76%) and Resistors (86%) are considerably more likely to be unsure whether any of the types of internet content asked about are regulated.

Figure 18: Whether believe online content is regulated

IN40 – Which, if any, of the following do you think are regulated in terms of what can be shown on the internet?
Base: All adults aged 16+ (2005 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)
Source: Ofcom research, fieldwork carried out by Savills Rossiter-Base in October to December 2007
4.9 Resistors are relatively unaware of the television watershed

Although two in three Resistors (69%) are aware that there is a television watershed starting at 9pm, awareness is lower than among the general adult population (78%). Awareness of the watershed among Hesitants and Economisers does not differ from the all-adult measure.

**Figure 19: Perceptions of the television watershed**

4.10 Economisers are more likely to trust television but least likely to trust what they see on the internet

Despite being more likely than the general adult population to say they would miss television the most of all the types of media we covered, both Hesitants and Resistors do not differ from all adults in the extent to which they trust what they see on television. Conversely, Economisers are neither more nor less likely than the general adult population to choose television as their most-missed media activity, but this segment is more likely to say they trust what they see on television.

Both Hesitants and Resistors are more likely than adults as a whole to say they trust what they hear when they listen to radio, while responses from Economisers are much the same as those from the general adult population.

Forty-two per cent of the general adult population who use the internet and 46% of Hesitants who use the internet agree that they tend to trust what they encounter when they visit websites. This level of trust is lower among Economisers compared to the measure for all adults, however, and a higher percentage are unsure.
4.11 Hesitants and Economisers are less confident using the internet to find content or information, for creative purposes, or in being able to tell whether websites are truthful and reliable

As Hesitants using the internet are lower-volume users, regularly undertaking a narrower range of tasks online than internet users as a whole, it is perhaps not surprising to see that few are very confident both in terms of finding what they want online and using creative elements. In addition, very few Hesitants are very confident being able to tell if a website is truthful and reliable. Levels of confidence among Hesitants are consistently lower than among all adult internet users.

These findings also apply to Economisers, although to a less marked degree than Hesitants. That is, the proportion that is very confident finding what they want online, using creative elements and being able to tell if a website is truthful and reliable is lower in all cases compared to all adult internet users.

This lack of confidence may be a result of the relative lack of experience of internet users in both segments, and could also be a barrier to broader, higher-volume use.
Figure 21: Confidence in using the internet

<table>
<thead>
<tr>
<th></th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>That you can find the content or information you want when you go online</td>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
</tr>
<tr>
<td></td>
<td>56%</td>
<td>48%</td>
<td>33%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Using the creative elements that media such as the internet and mobile phones offer</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
<td>Not very confident</td>
</tr>
<tr>
<td>37%</td>
<td>26%</td>
<td>20%</td>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Being able to tell if a website you use is truthful and reliable</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
<td>Not very confident</td>
</tr>
<tr>
<td>48%</td>
<td>35%</td>
<td>29%</td>
<td>11%</td>
</tr>
</tbody>
</table>

In9/10/11 – How confident are you...
Base: Adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 250 Hesitants, 103 Economisers)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007
* Base size too low to show for those who use the internet at home or elsewhere among Resistors (n=36)

4.12 Hesitants and Economisers are less likely to check new websites before using them

Both Hesitant and Resistor internet users are less likely than all adult internet users to visit new websites. However, among those that do visit new websites, four in five adults claim to make any check from those we asked about when visiting a new website. This behaviour is least common among Economisers, and also lower among Hesitants than for all adults. No more than one in three adults in either segment makes any of the individual types of checks that we asked about. So, in addition to their relatively narrow experience of using the internet, they are less likely to assess the new websites they do use.

Figure 22: Checks made when visiting new websites

<table>
<thead>
<tr>
<th></th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>How up to date the information is</td>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
</tr>
<tr>
<td>49%</td>
<td>25%</td>
<td>31%</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall look and feel of site</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
<td>Not very confident</td>
</tr>
<tr>
<td>41%</td>
<td>32%</td>
<td>26%</td>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ask someone else if they’ve been to the site</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
<td>Not very confident</td>
</tr>
<tr>
<td>31%</td>
<td>32%</td>
<td>26%</td>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Information across other sites</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
<td>Not very confident</td>
</tr>
<tr>
<td>41%</td>
<td>32%</td>
<td>26%</td>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Who has created the page and why</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td>Fairly confident</td>
<td>Neither/nor</td>
<td>Not very confident</td>
</tr>
<tr>
<td>30%</td>
<td>25%</td>
<td>31%</td>
<td>12%</td>
</tr>
</tbody>
</table>

IN16 – Thinking about new websites you visit, which, if any, of these things would you check?
Base: Adults aged 16+ who use the internet at home or elsewhere and ever visit new sites (1536 aged 16+, 186 Hesitants, 88 Economisers)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
* Base size too low to show for those who use the internet at home or elsewhere and ever visit new websites among Resistors (n=22)
4.13 Hesitants and Economisers have more concerns about the security of entering personal details online

When registering on a website, users may be asked to provide different types of personal details. Across each of the six types of personal information that we covered, both Hesitants and Economisers are less likely to say they are happy to provide the information, and are broadly more likely to say they would never provide the information, compared to all adults who use the internet.

**Figure 23: Information prepared to give when using websites**

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>All adults 16+</th>
<th>Hesitants</th>
<th>Economisers</th>
<th>NA/don't have this</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering your e-mail address</td>
<td>42%</td>
<td>31%</td>
<td>41%</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>Entering your home address details</td>
<td>57%</td>
<td>24%</td>
<td>44%</td>
<td>20%</td>
<td>8%</td>
</tr>
<tr>
<td>Entering your mobile phone number</td>
<td>58%</td>
<td>26%</td>
<td>56%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Paying by entering your credit card details</td>
<td>42%</td>
<td>21%</td>
<td>35%</td>
<td>30%</td>
<td>4%</td>
</tr>
<tr>
<td>Paying by entering your debit card details</td>
<td>33%</td>
<td>21%</td>
<td>27%</td>
<td>34%</td>
<td>7%</td>
</tr>
</tbody>
</table>

While three in four Hesitants (75%) and four in five Economisers (79%) would make some kind of judgement about a website before entering personal details, this is below the level for the general adult population (83%). This difference is linked to Hesitants (13%) and Economisers (11%) being more likely to say they would not trust any site in terms of entering personal details, compared to all adults (6%). Hesitants are less likely to make judgements based on professional signs such as looking for a padlock symbol or a kitemark (33% vs. 48%) and also less likely to make judgements based on personal instinct (34% vs. 45%) before entering personal details. As with checks on new websites, it seems likely that this may be a result of the relative lack of experience using the internet among adults in these segments.

As shown previously, internet users in both segments are much less likely to undertake transactions or buy things online. The lack of trust shown here, and concerns about giving
personal information online, may be barriers to using the internet in this way, both for Hesitants and Economisers.\(^7\)

**Figure 24: Judgements made about a website before entering personal details**

\[\text{IN42 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/debit card details, home/mobile number, home/e-mail address) (Spontaneous responses)}\]

Base: Adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+, 250 Hesitants, 103 Economisers)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

* Base size too low to show for those who use the internet at home or elsewhere among Resistors (n=36)

4.14 **Hesitants and Resistors are most concerned about television, while Economisers are most concerned about the internet**

We asked people to tell us if they have any concerns about what is on television, radio, the internet, mobile phones or gaming.

**Hesitants** are less likely than the general adult population to have concerns about each of the platforms, except television – where concerns match the all-adult measure. Across the media platforms, Hesitants have most concerns about television (57% vs. 55%) and the internet (55% vs. 63%); over half mention any concerns for each of these two platforms. Hesitants are more likely than the general adult population to have concerns about the internet, but concerns about television are at a similar level to all adults. The top three concerns about television mentioned by Hesitants are: violence (22% vs. 21% of all adults), bad language (18% vs. 16%), and too many repeats (18% vs. 14%). The top three concerns about the internet mentioned by Hesitants are: people masquerading as younger people online (34% vs. 36% of all adults), sexual content/pornography (27% vs. 31% of all adults), and unsuitability for children (18% vs. 22%). Around one in three (31% vs. 34%) has any concerns about mobile phones, one in four (26% vs. 30%) has any concerns about gaming, and less than one in ten (7% vs. 12%) has any concerns about radio.

There is a more mixed picture when comparing Resistors and adults as a whole in terms of their concerns about the media platforms. Resistors have the most concerns about television, and to a greater degree than all adults (62% vs. 55%). The top three concerns about television mentioned by Resistors are: violence (28%), sex/nudity (20%) and too many repeats (20%). The platform of second highest concern to Resistors is the internet.

\(^7\) Figure 24 also indicates that Hesitants and Resistors are more likely to say some of the statements about giving personal information do not apply to them e.g. both Hesitants and Resistors are more likely to say they don’t have personal email address and Hesitants are more likely to say they don’t have a credit card.
but to a lesser degree than found for all adults (43% vs. 63%). The top three concerns about the internet mentioned by Resistors are: people masquerading as younger people online (27% vs. 36% of all adults), sexual content/ pornography (16% vs. 31% of all adults), and unsuitability for children (12% vs. 22%). Concerns regarding the other three platforms do not vary particularly from the levels found for all adults. Around two in five (38% vs. 34%) have any concerns about mobile phones, one in four (27% vs. 30%) has any concerns about gaming, and around one in eight (13% vs. 12%) has any concerns about radio.

**Economisers** have most concerns about the internet, and to a similar degree as found for all adults (62% vs. 63%). The top three concerns about the internet mentioned by Economisers are: people masquerading as younger people online (41% vs. 36% of all adults), sexual content/ pornography (31% vs. 31% of all adults), and unsuitability for children (23% vs. 22%). The platform of second highest concern to Economisers is television, but to a lesser degree than found for all adults (43% vs. 55%). Economisers are also less likely than adults as a whole to have any concerns about mobile phones (26% vs. 34%) or gaming (25% vs. 30%), but to a similar degree for radio (13% vs. 12%).

**Figure 25: Concerns about media platforms**

![Bar chart showing concerns about media platforms](image-url)
Section 5

Learning

5.1 Resistors are the least interested in learning about digital technology

All adults were prompted with a list of five ways of learning about digital technology such as digital television and radio, the internet and mobile phones, and asked to say which they preferred.

Hesitants are more likely than the general adult population to say they prefer to learn through friends and family (53% vs. 48%) or to say they have no interest in learning about digital technology (12% vs. 9%). They are less likely to be interested in learning by reading the manual (33% vs. 45%), or through trial and error (31% vs. 40%), and less likely to want to learn by going to a class (4% vs. 6%).

Resistors are considerably more likely than adults as a whole to state they have no interest in learning about digital technology (27% vs. 9%). As a result they are less likely to state a preference for learning through any of the means we asked about, apart from through friends/family, where the results do not differ from all UK adults.

Economisers do not differ from adults as a whole, with around half preferring to learn through friends and family (47% vs. 48%) or by reading the manual (47% vs. 45%).

Figure 26: Preference for learning about digital technology

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Z8 – We have discussed digital television and radio, the internet and mobile phones. Please tell me which of these are ways you prefer to learn about using such services?
Base: All adults aged 16+ (2915 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
5.2 Hesitants and Resistors are unlikely to have experience of learning about digital technology

While one in four UK adults (27%) has experience of learning about digital technology through classes or another type of training, this is much less common among Hesitants (13%) and least common among Resistors (6%).

As with their preference for learning about digital technology, Economisers do not differ from the general adult population in their experience of learning through training or classes (26% vs. 27%).

Figure 27: Experience of learning about digital technology

5.3 Interest in learning more about the internet among Hesitants and Economisers

At an overall level, Hesitants are less interested than all UK adults in learning more about any of the types of digital technology that we asked about (18% vs. 31%). However, Hesitants are as interested in learning about the internet as the UK adult population as a whole (11% vs. 12%).

Among Resistors, only around one in ten is interested in learning more about the types of digital technology that we asked about (8% vs. 31%), and no particular type of technology stands out as being of more interest to this segment.

Economisers are more likely than the UK adult population as a whole to be interested in learning more about the types of digital technology we asked about (39% vs. 31%). This
A higher level of interest is mostly driven by interest in learning more about the internet (19% vs. 12%).

Figure 28: Interest in learning about digital technology

Z10 – And which, if any, of these would you be interested in learning more about?
Base: All adults aged 16+ (2905 aged 16+, 998 Hesitants, 292 Resistors, 258 Economisers)
Shows responses from 5% or more of all adults.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Any
- All adults 16+ 39%
- Hesitants 31%
- Resistors 18%
- Economisers 11%

Using the internet
- All adults 16+ 19%
- Hesitants 11%
- Resistors 8%
- Economisers 3%

Creating a website
- All adults 16+ 10%
- Hesitants 8%
- Resistors 1%
- Economisers 1%

Editing digital content
- All adults 16+ 7%
- Hesitants 3%
- Resistors 3%
- Economisers 2%

How programmes are made
- All adults 16+ 6%
- Hesitants 5%
- Resistors 1%
- Economisers 1%