Media Literacy Audit

Report on adult media literacy

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## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreword</td>
<td>3</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>4</td>
</tr>
<tr>
<td>1 Introduction</td>
<td>6</td>
</tr>
<tr>
<td>2 Overview of media literacy</td>
<td>11</td>
</tr>
<tr>
<td>3 Comparisons across platforms</td>
<td>25</td>
</tr>
<tr>
<td>4 Television</td>
<td>31</td>
</tr>
<tr>
<td>5 Radio</td>
<td>38</td>
</tr>
<tr>
<td>6 Internet</td>
<td>44</td>
</tr>
<tr>
<td>7 Mobile phones</td>
<td>57</td>
</tr>
<tr>
<td>8 News</td>
<td>65</td>
</tr>
<tr>
<td>9 Attitudes and preferences</td>
<td>72</td>
</tr>
<tr>
<td>10 Looking forward</td>
<td>81</td>
</tr>
</tbody>
</table>

### Annex

| 1 Research methodology     | 83   |
| 2 Technical appendix       | 86   |
Foreword

This report presents the results of detailed research undertaken by Ofcom to assess the extent of media literacy in the UK population.

Under Section 11 of the Communications Act 2003, Ofcom is required to bring about, or to encourage others to bring about, a better public understanding of the nature and characteristics of the material published by means of the electronic media and the processes and systems by which this is delivered.

Electronic communications networks play a central role in daily life. They underpin all businesses and are central to the workings of a modern democracy. Ofcom defines media literacy as the ability to access, understand and create communications in a variety of contexts. Without such skills, people’s ability to participate effectively in the workplace and in society may be greatly diminished.

The research programme examines the views and experiences of different groups – adults, the young, old, disabled and members of ethnic minority groups – as well as people in different parts of the UK. This first report examines adults.

We draw no specific conclusions in this report, however we hope it will serve as a useful source of current public opinion on a matter of increasing interest to many people.

David Currie
Chairman of Ofcom
Executive Summary

The promotion of media literacy is a new responsibility placed on Ofcom arising from Section 11 of the Communications Act 2003.

Ofcom’s definition of media literacy, developed after formal consultation with stakeholders, is ‘the ability to access, understand and create communications in a variety of contexts’. Media literacy gives people the confidence and knowledge to get the most out of the many media platforms that now exist.

In order to gain an initial picture of the levels of media literacy across the UK, Ofcom commissioned an audit of how UK adults and children access, understand and create communications, with Ofcom’s particular focus being on electronic communications. In this context, our definition of access is much wider than availability or take-up of the platforms. Rather, it focuses upon interest, awareness, usage and competence relating to each platform. Understanding relates to how content (such as television and radio programmes, internet websites, or mobile video and text services) is created, funded and regulated.

Some of the elements of this audit - such as attitudes towards the provision of news, or knowledge of content regulation – apply to traditional analogue television and radio as well as their newer digital counterparts. But for the most part, this audit focuses on the four main digital media platforms – not only digital television and digital radio, but also the internet and mobile phones - as these are the ones where there is most divergence between different groups within the UK in terms of understanding, take-up and usage.

This publication reports on adults; a report on children’s media literacy will also be published in the spring of 2006. We will separately publish in depth reports on media literacy among minority ethnic groups, older people, those with a disability, and those in the devolved Nations and the English regions.

In summary, our findings are as follows:

- Television remains the most familiar, and popular, media platform for most people, with high levels of knowledge of the watershed (before which certain types of programme content, unsuitable for children, may not be shown), and how channels are funded. Although television is still mainly used for its ‘traditional’ functions, some 30% of those with digital TV say they have interacted with it.

- Whilst the number of people in our survey who have access to digital radio services is high at 77%, one in three adults is unaware that they can listen to digital radio services through either their digital TV or internet service. 27% of all UK adults say they ever listen to digital radio, and of these, over two-thirds (68%) say they now listen to more radio stations as a result.

- A key reason for people getting the internet is to access information, but there are many other reasons. Nearly three-quarters of internet users use email at least weekly. Levels of concern about internet content are higher than for other platforms, and concerns over entering personal details are prevalent. Interest and competence among internet users for various tasks is generally high, although nearly one-third are not confident about blocking email spam or computer viruses.
Media Literacy Audit: report on adult media literacy

- Mobiles are an ubiquitous media technology for the 16-24 age group. Younger people have embraced the enhanced functionality of mobile phones, whilst for older users they remain predominantly communications tools. However, the use of the mobile as a ‘memory device’ to look back at stored texts and pictures is commonplace for all age groups.

- Age is a significant factor in media literacy. Over 65s have significantly lower levels of media literacy than other age groups. The research shows that amongst older people lower usage is partly attributable to a perceived lack of need for new digital services.

- Take-up and usage of digital platforms among minority ethnic groups is higher than the UK average, partly because minority ethnic groups are younger than the UK population as a whole. However, the over 45s from minority ethnic groups have lower levels of media literacy compared to UK adults as a whole. Levels of trust in news, and knowledge of funding mechanisms and regulation, are lower overall. General levels of concern across the digital platforms are higher among ethnic minority groups than the UK average with the exception of the internet.

- Levels of concern about programming and other types of content vary across platforms, with little concern over mobile content. Levels of self reported ability and understanding in relation to content controls indicate that for the internet, a sizeable minority are not confident about blocking viruses or email scams. Most people are not yet aware of content controls on mobile phones.

- Levels of concern do not appear to be related to usage or uptake of the different media platforms, but are independent of these factors.

- Many people, especially the elderly, say they prefer to learn media skills from family and friends and do so by themselves rather than in formal groups. The highest area of interest for many people is in learning how to use the internet. One third of people say they are interested in learning more about digital platforms and services.
Section 1

Introduction

1.1 Background and objectives

The promotion of media literacy is a new responsibility placed on Ofcom arising from Section 11 of the Communications Act 2003.

Ofcom’s definition of media literacy, developed after formal consultation with stakeholders, is ‘the ability to access, understand and create communications in a variety of contexts’.

In order to gain an initial picture of the extent of media literacy across the UK, Ofcom commissioned an ‘audit’ of how UK adults and children access, understand and create communications, with a particular focus on electronic communications. In this context, access has a much wider definition than take-up or accessibility issues: it includes understanding of what each platform and device is capable of and how to use its functions; while understanding relates to how content (such as television and radio programmes, internet websites, or mobile video and text services) is created, funded and regulated.

Some of the elements of this audit - such as attitudes towards the provision of news, or knowledge of content regulation – apply to traditional analogue television and radio as well as their newer digital counterparts. But for the most part, this audit focuses on the four main digital media platforms – not only digital television and digital radio, but also the internet and mobile phones - as these are the ones where there is most divergence between different groups within the UK in terms of understanding, take-up and usage.

The key objectives of the audit were:

- To provide a rich picture of the different elements of media literacy across the key platforms of TV, radio, the internet and mobile phones (including some comparisons with other media such as the press and computer games)
- To understand the extent to which there are relationships between the elements of media literacy – for example, is the level of an individual’s competence in using the features available on a given platform related to how long they have owned the device and how often they use it? Are levels of concern about the platform related to ownership or usage levels?
- To understand the extent to which there are relationships between the platforms – does interest in, or knowledge and usage of one platform impact upon interest in, or knowledge and usage of another?

Understanding of these areas will help to target both Ofcom’s and stakeholders’ resources for the promotion of media literacy.

The results of this audit provide a benchmark of many of the key elements of media literacy. It is Ofcom’s intention to repeat this audit in future, to track how these elements evolve over time.

The development of the audit was informed by a number of pieces of prior research that Ofcom commissioned:
• A review of the literature on adult media literacy, carried out by Professor Sonia Livingstone of the London School of Economics

• A review of the literature on children’s media literacy, conducted by Professor David Buckingham of the Institute of Education, University of London

• A qualitative investigation of media literacy, carried out by The Knowledge Agency

The scope of the audit was also informed by Ofcom’s Media Literacy Research Forum. Ofcom’s Content Board provided valuable advice and input throughout the project.

1.2 Defining media literacy

Ofcom’s definition of media literacy is ‘the ability to access, understand and create communications in a variety of contexts’.

This summary statement is amplified on our website (www.ofcom.org.uk/advice/media_literacy) in the section ‘what is media literacy?’ This is worth quoting in full, as it acts as a starting point for the parameters of our audit:

Media literacy has parallels with traditional literacy, the ability to read and write text. Media literacy is the ability to ‘read’ and ‘write’ audiovisual information rather than text. At its simplest level media literacy is the ability to use a range of media and be able to understand the information received.

At a more advanced level it moves from recognising and comprehending information to the higher order critical thinking skills such as questioning, analysing and evaluating that information. This aspect of media literacy is sometimes referred to as ‘critical viewing’ or ‘critical analysis’.

A media literate person should be able to, for instance, use an electronic programme guide to find the programme they want to watch. They may agree or not with the views of the programme maker, or just enjoy the programme. They may also recognise that the programme maker is trying to influence them in some way. They may interact with the programme using interactive features or by telephone. And they may respond to the programme by writing to or emailing the broadcaster with their point of view. People may also be able to use communications technology to create their own video and audio content.

Media literate people should be able to use the internet to find information and accept that sometimes what they find may represent a particular view rather than a statement of objective fact. They will be able to control what they and their children see to avoid being offended. They may also be confident enough to be able to order and pay for goods and services online and to create their own website and contribute to a chatroom discussion.

The purpose of this audit is to begin to track the media literacy of the UK population (both adults and children). To do this, we needed to translate our definition into quantifiable elements and so have used the following as proxies for some of the key areas of media literacy. It is important to note that our definition of ‘access’ is much wider than simple availability or take-up of the platforms. Rather, it focuses upon interest, awareness, usage and competence.

1 Adult Media Literacy: a review of the research literature (Ofcom, 2005).
2 The Media Literacy of Children and Young People: a review of the research literature (Ofcom, 2005).
3 Please see www.ofcom.org.uk/advice/media_literacy for details and membership.
‘ACCESS’

- Interest in and awareness of the digital features of the various media platforms
- Usage, volume of usage, breadth of usage of the platforms
- Competence in using the features available on each platform
- The extent and level of concerns with each platform
- Knowledge of and competence in using content controls, such as ability to block unwanted email messages

‘UNDERSTANDING’

- Knowledge of regulation
- Knowledge of how elements of each media platform are funded
- Trust in news outlets on each medium
- Trust in internet sites

‘CREATING’

- The ability of individual users to create their own content
- The ability of users to interact with the medium or with other users

This list indicates the core elements investigated in the study. However, we also asked a range of other questions about media habits and preferred media forms, which add a further context or background to the research.

1.3 ‘Scoring’ media literacy

Media literacy is not a ladder, whereby the more you ‘score’, the greater your media literacy. For example, it is not the case that higher levels of trust in news sources, or higher levels of concern about media, or higher levels of usage, necessarily indicate ‘greater’ or ‘lesser’ media literacy.

That said, in order to analyse our findings within a meaningful framework, we needed to identify those elements of media literacy which are generally seen as bringing positive benefits to users, and those where the benefits are less clear.

The ‘positive’ elements of media literacy, whereby higher levels of score are generally agreed to approximate with benefits, are interest, awareness, competence, breadth of use, knowledge and creation.

The ‘contested’ or neutral elements of media literacy, whereby higher levels are not necessarily an indication of benefit, are concern, trust, and volume of use.

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4 While interaction is not strictly an element of creativity (it could also for example be positioned under ‘access’), it has a connection to it. Interactivity is arguably a first step along the road to creativity, as people learn to (want to) manipulate the technology and develop their skills by interacting with the content. We report on interaction within each of the platform sections, while in our summary we keep to a more focused definition of ‘create’ meaning the active generation of content.
We report on all of these elements together, to provide a varied picture of the extent and range of media literacy.

There is a further debate about whether a 'lack' of media literacy in these areas is necessarily a bad thing. ‘Rational rejection’ is a legitimate response to the digital world, if it is a response formed from knowledge and understanding of what is on offer.

This audit does not have a prescriptive agenda, nor should it be taken as indicating Ofcom’s view of the communications world. Rather, it provides an overview of the key constituent parts of media literacy, to act as a resource for stakeholders to develop their varied strategies, and as a baseline for further research.

1.4 Research methodology

Over 3,200 adults (aged 16+) and over 1,500 children (aged 8–15) were interviewed. The study was conducted for Ofcom by the research agency saville rossiter-base, and fieldwork took place from 8 June to 5 August 2005.

In order to be able to report more fully on their media habits, the sample sizes of some key groups were boosted:

- Those in the devolved Nations of Wales, Scotland and Northern Ireland
- Those in minority ethnic groups
- Those with a disability (aged under 65)

Full details of the research methodology can be found at Annexes 1 and 2. Copies of the survey are available from our website at www.ofcom.org.uk/advice/media_literacy

1.5 Structure of report

This report focuses on adult media literacy.

The report begins by considering the overall elements of media literacy across each of the four main platforms – television, radio, the internet, mobile phones - and the extent of the differences in attitudes and behaviour between some of the core sub-groups from the UK profile as a whole. It places these elements within a wider, scene-setting context of take-up of the platforms across the UK, and the key differences in take-up according to particular socio-economic and demographic factors.

Section 3 then looks at the relationship between elements of media literacy, and whether media literacy on one platform is correlated with media literacy on another, for example in terms of higher levels of interest in the digital features of the different platforms, or higher levels of concern about what is on the various platforms.

Sections 4 - 7 examine each platform in turn, providing further insights into the extent of media literacy for each.

Section 8 focuses on the topic of trust in news sources, as news is a key illustration of how people evaluate content (such as programmes or internet sites) across platforms.

Finally, section 9 provides details about adults’ overall attitudes towards and preferences for key media platforms, and also indicates learning and educational preferences.

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5 Rational rejection can be defined as a lack of engagement by people due to their decision that the benefits of the technology are insufficiently attractive or compelling.
1.6 Further publications

This core report provides the media literacy audit findings for UK adults. A series of further reports will be published separately focusing on:

a) Children (and their parents)
b) Nations and English regions
c) Minority ethnic groups
d) Those with a disability under 65
e) Older people
Section 2

Overview of media literacy

This section sets out the results for the key parameters of media literacy, using some aggregate measures which are further broken down in the following sections on each of the platforms.

It begins by placing these within a background, scene-setting context of overall take-up figures for the platforms under discussion as well as a range of other media devices.

Summary

A high-level snapshot of the core elements of media literacy shows that there are variations between the platforms, and that television remains the dominant platform in terms of people's knowledge and interest.

Levels of interest, competence and usage are highest for the core, familiar functions of each platform.

Understanding of industry funding and/or regulation is much higher for the more established platforms - TV and radio - than for the internet. Breadth of use of the internet for all age-groups is greater than that for mobile but levels of concern over internet content are high.

When comparisons are made at this high level between the sub-groups investigated in the audit, it emerges that in broad terms, age is the single most significant defining factor in levels of media literacy, with those aged 16-24 far more likely to display higher levels of media literacy, with the exception of knowledge of funding and regulation.

There are relatively few differences at this top-line level between those with a disability aged under 65 and the rest of the UK population.

2.1 Context: take-up of platforms and devices

This audit is not intended to report on the availability or take-up of different platforms and services. However, in order to set its findings in context, the audit begins by recording existing levels of take-up, as reported by those who took part in the survey. Figure 1 shows the extent of (self-reported) home take-up for the four key platforms. Please note that these figures were asked of our Media Literacy Audit respondents, who were questioned between June and August 2005.

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6 The figures are slightly different than the figures that Ofcom publishes in its Communications Market Review, due to question wording and timing of fieldwork. That said, there are no differences of statistical significance between these figures and those from Ofcom's other penetration data from this period.
Media Literacy Audit: report on adult media literacy

Figure 1  Ownership of key platforms across all UK adults from Audit survey

<table>
<thead>
<tr>
<th>Platform</th>
<th>Ownership (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile phone</td>
<td>82%</td>
</tr>
<tr>
<td>Digital TV</td>
<td>62%</td>
</tr>
<tr>
<td>Internet</td>
<td>54%</td>
</tr>
<tr>
<td>Digital radio</td>
<td>44%</td>
</tr>
</tbody>
</table>

Broadband take-up stands at 64% of those with internet access at home, and 35% of all UK adults.

As might be expected, these overall penetration figures differ considerably by the age of the individual, shown in Figure 2:

Figure 2  Ownership of key platforms by age

The dotted horizontal lines in Figure 2 indicate the average ownership levels across all respondents for each of the four platforms. With the exception of mobile phones (where 25-34s are the most likely to own), each of the other three platforms is most likely to be owned by the 35-44 age group. Ownership levels for each platform dip below the average for the population as a whole above the age of 55, and are lowest in each case for those aged 65 and over.

Ownership levels amongst UK adults highlight a key finding for digital radio, reflected in other studies. The proportion saying they have access to digital radio services at home should be at least as high as the proportion saying they have internet access or a digital TV service, given that digital radio is available through both of these platforms.

However, only 44% of our survey respondents say they have digital radio, whereas the actual figure (including internet and TV penetration) is 77%, and so one in three UK adults is unaware they currently have access to digital radio services.

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7 Base: All UK adults (3,244). Questions T2, R1, I3, M2, prompted responses, single coded.
8 Base: All UK adults (3,244). Questions T2, R1, I3, M2, prompted responses, single coded.
2.2 Ownership of media devices at home

As well as these core platforms, we wanted to build a picture of the levels of uptake of the range of other media devices currently available, in order to provide a useful context for our investigation of media literacy. All adults were prompted with a list of media devices and were asked to say which they have in their household. Figure 3 below shows their responses.

Newer technologies are more prevalent in the homes of younger adults, those aged under 65 in higher income households, and minority ethnic groups. Ownership of digital cameras and camcorders, DVD recorders and players, games consoles and MP3 players are all higher amongst these groups. Different levels of ownership for each of these devices by the six age groups covered in the audit are shown in Figure 4 below.

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9 The PVR figure is higher than industry estimates. This is often the case when asking respondents about PVRs, as there is likely to be some confusion with premium subscription Sky packages.
10 Base: All UK adults (3,244). Questions A8A-J, prompted responses, multi-coded.
Home access to each of these devices is lowest amongst those aged 65 and over, with the highest levels of ownership typically amongst those aged 35-44.

The youngest adults, aged 16-24, differ most in terms of their relatively high levels of ownership for games consoles and MP3 players.

For most of the devices, levels of ownership can be seen to decline for those aged 55 and over. However, ownership of games consoles, digital cameras, digital camcorders, and DVD recorders appear to decline from the age of 45 upwards.

For certain of these devices, having the device or platform at home may not necessarily mean that the individual questioned is an active user. Therefore, we also asked respondents whether they used each of the devices mentioned in Figure 3. It is useful to look at the responses given for games consoles and MP3 players, to see whether the older adults who say they have these at home are also using them.

While 54% of 45-54s say they have a games console in their household, this figure reduces to 19% who say that they use it, although this is still a significant figure.

A similar pattern emerges for MP3 players. While 24% of 45-54 year olds say they have one in their household, this drops to 10% who say that they use it, or one in ten of this age-group.

We now turn to how these platforms and devices are used and thought about – in other words the core elements of media literacy.

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11 Base: All UK adults (3,244). Questions A8A-J, prompted responses, multi-coded.
### 2.3 A snapshot of media literacy

Figure 5 illustrates the presence of the key elements of media literacy in order to provide an initial, top-line view. Each icon represents up to 25% of the population under discussion – the population either UK adults as a whole for those elements relating to opinions or knowledge, or those with access to the platform for those elements relating to habits.

#### Figure 5 Snapshot of media literacy

<table>
<thead>
<tr>
<th>Element</th>
<th>TV</th>
<th>Radio</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest in (digital) features (prompted)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awareness of (digital) features of interest</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Competence (for tasks of interest)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge of content controls</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concern (platform generically)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge of industry funding/regulation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust in news outlets</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creating content</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Key: 0 icons = Not applicable, 1 icon = Up to 25%, 2 icons = 26-50%, 3 icons = 51-75%, 4 icons = 76-100%

At this headline level, a rather positive story emerges. For example, those interested in a variety of tasks to do with the internet said they could do over three quarters of them with confidence. Over three quarters of UK adults respond correctly to questions about TV funding and regulation.

This snapshot also shows that consistency is rare across media platforms. While awareness of the digital features of each of the platforms is high for all those who say they are interested in such features, the other elements paint a more mixed picture.

For example, interest in digital features is higher for TV than for the other platforms, and knowledge of industry funding and regulation is higher for TV and radio than for the internet. In broad terms, media literacy is greater for TV than for the other platforms, which is unsurprising given (analogue) TV’s longer lifespan and familiarity.

We now examine each of the elements in turn. The text in italics refers to the method by which the element was constructed for the purposes of analysis, before highlighting some of the key findings. These areas are discussed in more detail, along with demographic breakdowns, in subsequent sections of the report.

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12 Whilst most of the elements refer to the digital platform, the exceptions are ‘concern’, ‘industry funding/regulation’, and ‘trust in news outlets’, which each refer to the platforms generically, in other words including analogue where relevant. The strength of presence for each element is mostly based on index measures, as detailed in the next section.
2.4 Overview of media literacy by platform

Interest and awareness

Our audit asked respondents whether they were interested in a variety of features of each of the media platforms, and also if they were aware of such features.

Figure 6 summarises the results of these questions. The strength of each element is shown both as the shaded proportion of the ring and as a percentage.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Digital TV</th>
<th>Digital Radio</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest in features</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amongst all adults</td>
<td>59%</td>
<td>47%</td>
<td>48%</td>
<td>47%</td>
</tr>
<tr>
<td>% of maximum potential</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awareness</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amongst those interested</td>
<td>89%</td>
<td>78%</td>
<td>91%</td>
<td>93%</td>
</tr>
<tr>
<td>% of maximum potential</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

‘Interest in (digital) features’

All adults were prompted with a list of features for each of the digital platforms and were asked to state whether each was of interest to them or not (questions T14, R14, I23, M17)\(^\text{13}\). The index measure is the proportion of features of interest to adults.

Respondents were most interested in the features of digital TV (in addition to those features already available on analogue TV), with around three-fifths of the features of interest to all adults\(^\text{14}\). Interest in the digital features of the other three platforms are at around half of the maximum potential\(^\text{15}\). Amongst the mobile phone features covered by the audit, two-thirds of all adults are interested in the voice and text features of mobile phones (such as making calls and sending text messages) and, despite their relatively recent availability, one-third of all adults are interested in the newer information/entertainment features available (such as getting location information and watching live news and sport).

Similarly, for each of the other platforms the features of more interest are those which have been established for longer and which are integral to the use of the platform. For example, ‘a crystal clear picture’ is of interest to more adults (81%) than ‘channels where you can buy things directly through your TV’ (46%).

In other words, people appear to be most interested in that which is already familiar to them.

‘Awareness of (digital) features of interest’

Those interested in a feature for a given platform were asked to state whether they were already aware of this platform feature (questions T14, R14, I23, M17). The index measure is the proportion of features of interest that were already known to adults.

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\(^{13}\) The survey questionnaire can be found at [www.ofcom.org.uk/advice/media_literacy](http://www.ofcom.org.uk/advice/media_literacy).

\(^{14}\) Features included ‘a crystal clear picture’, ‘more than five channels to choose programmes from’, ‘channels where you can buy things directly through your TV’, and ‘possible to select different viewing angles or different matches for sports events such as Wimbledon and the Olympics’.

\(^{15}\) The maximum potential being interest in all digital features for a platform.
Figure 6 shows that amongst those interested in the digital features of each platform, awareness of those features is very high. Awareness is slightly lower for digital radio features, however. This mirrors the point above, that awareness and interest are closely linked.

It might be expected that those who expressed interest in the digital features of each of the four platforms are those that actually have the technology. However, there are some sizeable gaps between those that are interested and those that have the platforms – some 30% of those interested in digital TV features do not yet have digital TV, 42% of those interested in digital radio services say they do not have access to them (although many are not aware that they already have access via their TV or the internet and so the problem may be related to understanding of the terminology), and 31% of those interested in internet features do not have access to the internet. Only 6% of those interested in mobile phone features do not already own a mobile phone, reflecting high ownership levels of mobile phones overall.

Usage, concern and competence

The next set of media literacy elements relate to usage, concern and competence (see Figure 7). Please note that the elements relating to volume of use and level of concern include both analogue as well as digital TV and radio platforms.

**Figure 7 Usage, concern and competence**

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>Radio</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Volume of usage</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>per week</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amongst owners</td>
<td>21.6 hrs</td>
<td>15.2 hrs</td>
<td>9.9 hrs</td>
<td>20 calls 28 texts</td>
</tr>
<tr>
<td><strong>Level of concern</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of maximum potential amongst all adults</td>
<td>27%</td>
<td>6%</td>
<td>38%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Digital TV</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Digital Radio</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Internet</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Mobile phone</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Breadth of usage</strong></td>
<td></td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>% of maximum potential amongst owners</td>
<td>n/a</td>
<td>n/a</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Competence with digital features</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of maximum potential amongst owners</td>
<td>75%</td>
<td>n/a for non-DAB owners</td>
<td>76%</td>
<td>88%</td>
</tr>
<tr>
<td><strong>Knowledge of content controls</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amongst owners</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% of maximum potential</td>
<td>81%</td>
<td>n/a</td>
<td>57%</td>
<td>17%</td>
</tr>
</tbody>
</table>

‘Volume of usage’

TV sees the highest volume of self-reported usage of the four platforms, at close to 22 hours per week, followed by radio and then internet (with usage outside the home taken into consideration for both of these platforms). The volume of mobile phone use is assessed in terms of calls made and texts sent by owners per week.
‘Level of concern’

This measure adds responses to a number of questions regarding nominating any concerns about the platform (questions T21, R19, I32, M20), and being ‘very concerned’ or ‘quite concerned’ about the platform (questions T22, R20, I33, M21). The index measure is a percentage of the maximum possible.16

Levels of concern are:

- negligible for radio;
- around a quarter of the maximum potential for mobile phone;
- slightly higher than this for TV; and
- highest for internet at two-fifths of the maximum potential.

Whilst concern about TV and the internet mostly relates to content, this is much less likely for mobile phones, where concern tends to relate to health issues resulting from usage of the phones themselves or from mobile phone masts.

As is discussed later in this report, levels of concern are largely independent of the amount of time a given platform has been owned, or the extent to which it is used.

‘Breadth of usage’

Measures for breadth of usage are available for internet and mobile phone owners, who were prompted with an extensive list of possible uses and were asked to state the frequency with which they used the internet or their mobile phone for each.

Whilst the overall index measures for breadth of usage are similar for both the internet and mobile phone (at around one-fifth of the maximum potential17) (figure 7), the mobile phone breadth of use measure is strongly skewed by the youngest adult users. In comparison, breadth of use of the internet is more consistent across all ages.

While there is one main weekly use for the internet (sending and receiving emails – 70%) and two main weekly uses for mobile phones (making calls (85%; sending texts (70%), the internet has a greater breadth of use. Half (47%) of all mobile phone users only make calls or send texts in a typical week, but very few (6%) internet users only send e-mails in a typical week.

One reason that breadth of use of mobile phones is less than for the internet, is that mobile phone breadth of use is heavily skewed towards 16-24 year old owners, with all other age groups being far less likely to use their mobile phones for an array of uses. Amongst internet owners, however, breadth of use is more consistent for those aged between 16 and 54. Looked at another way, while 41% of mobile phone users make three or more different uses of their mobile phone in a typical week, 63% of internet users do likewise with the internet.

Those with greater breadth of use are more likely to be under 35, male, and from a minority ethnic group (in particular those aged under 45).

Whilst breadth of use for the internet and mobile phones is greater amongst those making the heaviest use (in terms of hours used/ numbers of calls made/ texts sent), there is little

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16 The maximum possible being either ‘very concerned’ or ‘quite concerned’ about the platform, or nominating any concerns about the platform.

17 The maximum potential being weekly use of all possible uses.
relationship between breadth of use and length of ownership (in terms of how many years a platform has been owned).

‘Competence (with digital tasks)’

All in households with TV, multi-channel TV, internet and who owned mobile phones were prompted with a series of tasks and were asked to say for each whether the task was of interest to them and, if so, whether it was something they could do with confidence (questions T15, T17, I24, M18). The index measure is based on a count of all tasks of interest which owners said they can do with confidence. It should be noted that these measures of competence are based on tasks which are of stated interest to users of each platform.

No competence measures are shown for digital radio as these were mostly specific to DAB radio sets, whereas the majority listening to digital radio at present are doing so through their digital TV service or the internet. It should also be taken into consideration that the tasks used to assess mobile phone competence (for example ‘send a text message’ and ‘store a new contact on your mobile phone’) are considerably more straightforward (and everyday) than the tasks used to assess digital TV or internet competence.

Figure 7 shows high levels of self-rated competence for tasks relating to digital TV, the internet and mobile phones.

For example, 67% say that they are both interested in and confident about ‘finding out more using the interactive button’, and 50% that they are interested and confident about ‘setting up a menu of favourite channels’.

Turning to the internet, 86% of those with internet access at home say they are both interested and confident about ‘using email to contact friends and relatives’, and 81% say they are both interested and confident about being able to ‘visit websites to find out the latest news’.

Finally, some 88% of those with a mobile phone say they can ‘lock the phone so that it won’t dial numbers by mistake’ and also 88% say they can ‘store a new contact’ on their mobile.

‘Knowledge of content controls’

Measures relating to content controls vary across the platforms. The TV measure shows awareness of the 9 pm watershed (question T25). The internet measure relates to an index across those with internet access who say they are interested and able to block computer viruses/ e-mail spam (question I24) and who say they use ‘professional signs’ (such as system message, padlock symbol, links to trusted sites) to judge website security (question I38). The mobile phone measure relates to an index across those with a mobile phone aware of age verification, security and filtering systems (question M12).

As shown in Figure 7, knowledge of TV content controls through awareness of the 9 pm watershed (before which certain types of programme content, unsuitable for children, may not be shown) is very high.

For the internet, the measure is related to the extent that internet users say they carry out various checks or say they are confident about blocking computer viruses or email spam. According to this index measure, just over half of users can control content.

By contrast, only a minority of mobile phone owners – 17% - demonstrate knowledge of the content controls available on the most recent mobile phones – perhaps reflecting the
relatively recent arrival of potentially problematic content on this platform. This rises to 28% of those aged 16-24.

**Understanding and creation**

Figure 8 shows the elements of media literacy relating to understanding and creation, not all of which are applicable to each of the platforms. The elements relating to industry funding and regulation, and trust in news outlets, report on TV and radio generically rather than just their digital platforms.

**Figure 8 Understanding and creation**

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>Radio</th>
<th>Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry funding/ regulation</td>
<td>80%</td>
<td>58%</td>
<td>34%</td>
</tr>
<tr>
<td>Trust in news outlets</td>
<td>78%</td>
<td>76%</td>
<td>63%</td>
</tr>
<tr>
<td>Creating content</td>
<td>n/a</td>
<td>n/a</td>
<td>13%</td>
</tr>
</tbody>
</table>

‘Knowledge of industry funding/regulation’

*This measure adds responses to questions regarding awareness of commercial and non-commercial funding (questions T19, T20, R17, R18, I30, I31) and also regulation for TV and radio (T23 and R2). The index measure is a percentage of the maximum possible.*

Knowledge of how TV is funded, and whether or not it is regulated, is fairly high, at an index level of 80%. When broken down into particular questions, 84% say that BBC TV programmes are mainly funded by the licence fee, rising to 95% of those aged 55-64. By contrast, 63% of those aged 16-24 give the correct answer, with over one quarter saying they don’t know. Similarly, 55-64s are more likely to know how programmes are mainly funded on ITV, Channel 4 and Five (89%) compared to 60% of 16-24s. In total, 76% of UK adults give the correct response of ‘advertising’. 81% of all UK adults say that TV programmes are regulated.

Levels of knowledge about industry funding and regulation for radio are not as high. The overall index measure is 58%. 65% of respondents say that BBC radio stations are mainly funded by the licence fee (ranging from 50% of those aged 16-24 to 76% of those aged 45-54). 52% of respondents say that advertising is the main method of funding for ‘other radio stations such as Classic FM, Virgin and Talk Sport’. Finally, 59% of UK adults think that radio is regulated, with over one quarter (27%) saying they don’t know.

18 There are no applicable measures of understanding and creation in relation to mobile phones to report on in this section.
Awareness of how internet search-engine websites are funded is fairly low at 25% overall, although awareness of how the BBC website is mainly funded is higher. 46% of all UK adults think that the BBC website is mainly funded by the licence fee.

The lower figure for search-engine websites is in part a reflection of internet take-up, as the question was asked of all UK adults. There is a difference between those with and those without the internet at home – 37% of those with the internet give the correct answer to the question (advertising or advertisers pay when users click through to their website) compared to 10% of those without.

‘Trust in news outlets’

All adults were asked to use a five point scale to indicate the extent to which they would trust or distrust particular TV, radio, internet and press news outlets (question Z8). An index measure for each of the four types of media was calculated based on all giving a rating for each outlet from the list. For example, those giving a rating for two of the three news websites of which one was a ‘would trust’ rating and one was a ‘would not trust’ rating would have an index measure of 50% for extent of trust and 50% for extent of distrust. Neither/nor responses were not included.

Trust was assessed in respect of particular news outlets for each of TV, radio and the internet. Trust in types of newspapers has been shown in Figure 8 for comparison.

Trust in TV and radio news outlets is highest, at over three quarters of the maximum potential\(^{19}\). The measure for internet news websites is rather lower, at around two-thirds of the maximum potential.

Trust for each of these three types is, however, higher than the measure for newspapers, which stands at below half the maximum potential.

‘Creating content’

Three measures have been used to create the index measure – those with internet access who say they have their own website, their own web-log, and who can edit and organise photos on a computer for viewing with confidence (questions I14, I24). The index measure is an average across these three.

As shown in Figure 8, the measures relating to content creation are internet- and PC-based. Current levels of content creation are low, at just over one-tenth of the maximum potential.

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\(^{19}\) The maximum potential being a ‘would trust’ rating for all news outlets rated.
2.5 An overview of the sub-groups covered by the audit

We have so far shown the presence of the media literacy elements for the UK as a whole in order to build an overall picture. However, a key purpose of the audit is to examine sub-groups within the UK population, and compare and contrast their respective levels of media literacy.

This report does not aim to provide detailed findings on each of those sub-groups – separate reports will be published in the coming months on minority ethnic groups, older people and those with a disability. For Scotland, Wales, Northern Ireland and the regions of England, Ofcom will shortly publish a major report covering issues of coverage, access and take-up. This will be accompanied by the findings, by nation and English region, of this media literacy audit.

For now, we provide a brief overview of each of the sub-groups, by comparing the overall position of that group with the UK as a whole to assess the extent to which their media literacy varies. The extent of the variation is indicated as higher or lower than the UK average as follows:

Where no arrow is shown in Figures 9 and 10 this indicates little variation from the UK average for the sub-group and media literacy element in question.

It is important to note that the media literacy elements described in Figures 9 and 10 combine all four platforms, and so there will be some cases where higher or lower results than the UK average for a particular platform are not apparent. Such differences are reported on in the platform-specific chapters, and also in the supplementary reports.

Figure 9  Media literacy elements in devolved nations comparative to UK overall
Figure 9 compares the Scotland, Wales and Northern Ireland to the UK average\textsuperscript{20}.

At this overview level, each of the devolved nations shows slightly lower levels of our main elements of media literacy compared to the UK as a whole. Responses to individual questions, examined in our supplementary report on the UK nations, underpin this finding, with somewhat lower levels of media literacy occurring in Northern Ireland.

This difference can in part be explained by socio-economic and demographic factors. It also appears to be the case that in Northern Ireland people appear to be more interested in face to face communications than those in other parts of the UK.

These findings will be reported upon and analysed in more detail in Ofcom’s major forthcoming report on the devolved Nations and the English regions.

<table>
<thead>
<tr>
<th>Figure 10</th>
<th>Media literacy elements comparative to UK overall amongst key sub-groups</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Interest in features</td>
</tr>
<tr>
<td>Aged 16 to 24</td>
<td>↑↑</td>
</tr>
<tr>
<td>Aged 65 plus</td>
<td>↓↓</td>
</tr>
<tr>
<td>Minority ethnic group</td>
<td>↑</td>
</tr>
<tr>
<td>Any disability (aged 65)</td>
<td>↑</td>
</tr>
<tr>
<td>Low income (aged under 65)</td>
<td>↓</td>
</tr>
<tr>
<td>Rural</td>
<td>↓</td>
</tr>
</tbody>
</table>

The first and second rows within Figure 10 show (mostly) higher levels of media literacy for the youngest adults (aged 16 to 24) and (mostly) much lower levels of media literacy for the oldest adults (aged 65 and over).

That said, amongst the youngest adults the comparison against the UK overall is not consistently higher, with evidence of lower measures for awareness of funding and regulation amongst this group. The youngest adults also express the least concern about the various platforms.

\textsuperscript{20} No findings are shown for England as a whole because the size of the population relative to the size of the UK population (84\%) means that any findings for England will always be very close to the overall UK findings.
Age also goes some way to explain the differences, and lack of differences, between the UK overall and the other sub-groups shown in Figure 10. The minority ethnic group as a whole has a younger profile to the UK as a whole (see Annex 1 for more details). As such it is not surprising to see mostly higher levels of media literacy for this group, although this is less marked than the comparison for the youngest adults. Amongst the minority ethnic groups there are, however, indications of lower awareness of funding and regulation and lower levels of trust in news outlets. It should be noted that when the minority ethnic group is split between those under 45 and those over 45, the latter group display lower levels of media literacy overall.

A large proportion of individuals with a disability or in low income households are aged over 65. As already stated, those over the age of 65 tend to have much lower levels of media literacy than the UK average. Therefore, in order to get a clearer picture of the effects of disability and low income on levels of media literacy, those aged over 65 have been excluded from these two sub-groups (see Annex 1 for more details). As a result, there are relatively few differences for those with a disability and those in low income households compared to the UK overall in terms of interest, awareness and usage, although more differences emerge in relation to understanding and levels of concern for those on lower incomes.

The following sections of this report provide more detail on each of these media literacy elements.
Section 3

Comparisons across platforms

This section examines the extent to which the elements of media literacy fit together – either on one particular platform, or across the range of platforms.

We look at the relationships between these elements of media literacy, to see whether a strong (or weak) presence of some of them makes it more or less likely that other elements will be similarly present. In other words, which elements make an impact on other parts of media literacy?

We also look at whether media literacy is consistent across platforms – in short, whether there is evidence for saying that there is such a thing as a media literate person, who is comfortable across all platforms.

Summary

Media literacy varies across platforms. Around half of our media literacy elements show some kind of correlation across the platforms.

The elements of media literacy that have stronger mutual relationships are interest in, and awareness of digital features, breadth of use of the possible tasks, and competence in using the features of the platform – in other words, those relating to appetite for digital media. Individuals showing a higher presence of these particular media literacy elements are more likely to be younger and in higher income households.

Levels of concerns appear to be unrelated to other media literacy elements, including length of ownership or type of use. For those people who have concerns about a platform, their concern does not appear to arise from increased usage or length of ownership, although for internet users the level of concern does appear to increase slightly with greater usage.

Length of ownership and volume of use do not generally appear to be related to types of understanding (in terms of funding and regulation) for radio and TV. However, for the internet these elements are mutually related – knowledge of internet funding mechanisms is higher for those familiar with the platform.

Whilst trust in news outlets is strongly related across the platforms, this element is not related to any other elements of media literacy.

3.1 How do the elements of media literacy fit together?

A key rationale for this audit is to explore the relationships between the different elements of media literacy. Whilst we cannot state with certainty that one media literacy element drives another, our analyses have sought to identify those areas where there is a relationship between elements for an individual. For example:

- Does the amount or frequency of use relate to the amount of concern felt about a platform?
- Is there a relationship between length of use (in terms of how many years a platform has been owned by an individual) and breadth of use (in terms of how many different tasks a platform is used for by an individual at least weekly)?
Our analyses show that the presence of our media literacy elements for an individual appears fragmented rather than coherent, in that the presence of only a few of these media literacy elements are related to the presence of others.

**Figure 11  Relationships between media literacy elements**

**‘ACCESS’**
- Interest in and awareness of the digital features of the various media platforms
- Usage, volume of usage, breadth of usage of the platforms
- Competence in using the features available on each platform
- The extent and level of concerns with each platform
- Knowledge of and competence in using content controls, such as ability to block unwanted email messages

**‘UNDERSTANDING’**
- Knowledge of regulation
- Knowledge of how elements of each media platform are funded
- Trust in news outlets on each medium
- Trust in internet sites

**‘CREATING’**
- The ability of individual users to create their own content
- The ability of users to interact with the medium or with other users

Figure 11 shows the four elements of media literacy that are related to each other more strongly than the other elements, in terms of having the strongest correlations indicating similar results for an individual.

In other words, an individual with a higher level of interest in the digital features of a platform is likely to have a higher level of awareness of those benefits, a greater breadth of use of the possible tasks, and a higher degree of competence for platform tasks.

Because these elements are related to each other, it is also true that an individual with a lower level of interest is likely to have a lower level of awareness of digital features, less breadth of use and a lower degree of competence.

### 3.2 Divide between greater and lesser interest, awareness and competence

Further analysis has been conducted to understand which types of individuals have a higher or lower presence in terms of interest in digital platform benefits, awareness of those benefits of interest, and competence at digital platform tasks. The types of individuals on either side of this ‘divide’ are shown in Figure 12.
To some extent, this divide encapsulates those with an *appetite* for the media platforms under analysis, compared to those with relatively less appetite.

### 3.3 Other relationships between media literacy elements

There are indications that some further elements of media literacy are interrelated.

Amongst those who own any platform, there is a ‘reasonable’ relationship between length of ownership and volume of use. In other words, it appears that those who have owned a platform for longer are likely to have a higher volume of use.

To a limited extent it seems likely that there is a causal relationship between these elements of media literacy (length of ownership and volume of use) and the ‘core elements’ of interest, awareness of digital features, breadth of use and competency. For example, volume of use (the more you use) can drive competency (the confidence you have to undertake various digital tasks), and vice versa.

However, this relationship is not consistent across the platforms, being more true for the internet and mobile phone, and less true for TV and radio.

Importantly, concern is mostly unrelated to other media literacy elements for an individual. Concerns about TV, radio and mobile phones are not related to usage of those platforms, but concerns about the internet do increase slightly with volume of usage.

In other words, it would appear that levels of concern are largely independent of aspects of media knowledge, usage or access; that ‘increased’ media literacy does not impact in either direction on levels or types of concern.

Understanding (in terms of awareness of regulation and knowing how platforms are funded) is relatively independent of other media literacy elements for TV and radio. However, for the internet there is a strong relationship between understanding and length of ownership, volume and breadth of usage, and interest in digital features.
3.4 What are the media literacy relationships across platforms?

We have examined how the various elements of media literacy relate to each other within each platform. We now turn to examining the relationships across platforms.

An analysis technique called correlation has been used to assess the levels of media literacy elements across platforms. A few elements of media literacy have stronger relationships across the platforms, in that an individual gives similar responses regarding that element across the different platforms. The strength of the cross-platform relationships for the various elements of media literacy are shown in Figure 13 below, with the elements shown in ranked order from the strongest cross-platform relationship at the top and the weakest at the bottom.

Figure 13 Strength of cross-platform relationship for media literacy elements

<table>
<thead>
<tr>
<th></th>
<th>Strength of relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trust in news outlets</td>
<td>STRONG – This very strong cross-platform relationship exists because of a consistent view of news over and above the individual media</td>
</tr>
<tr>
<td>Awareness of features of interest</td>
<td>STRONG – Those aware of features of interest for one platform are likely to be aware of features of interest for all (and vice versa)</td>
</tr>
<tr>
<td>Interest in features</td>
<td>MODERATE TO STRONG – Those interested in features for one platform are likely to be interested in platform features for all (and vice versa)</td>
</tr>
<tr>
<td>Breadth of use</td>
<td>MODERATE – Those making more uses of the internet are likely to also make more uses of their mobile phone</td>
</tr>
<tr>
<td>Competence</td>
<td>MODERATE – Some evidence of cross-platform competence, but weak for mobile and radio</td>
</tr>
<tr>
<td>Industry funding and regulation</td>
<td>MIXED – from a weak relationship for TV and internet, to moderate for radio and internet, and a strong relationship for TV &amp; radio</td>
</tr>
<tr>
<td>Volume of use</td>
<td>MIXED – Moderate relationship between volume of use of mobile and internet, otherwise not related</td>
</tr>
<tr>
<td>Length of use</td>
<td>WEAK TO MODERATE – Some relationship between length of using TV and radio, TV and internet, mobile and internet, otherwise not related</td>
</tr>
<tr>
<td>Concern</td>
<td>WEAK TO MODERATE – Concerns tend to be about quite different issues for each platform</td>
</tr>
</tbody>
</table>

Figure 13 shows that there are few elements of media literacy which are consistent for an individual across the platforms. There are only two which are strongly related cross-platform: trust in news outlets and awareness of digital features of interest.

The strong cross-platform relationship for trust in news outlets means that an individual with higher than average levels of trust in the news on one platform is likely to have higher than average levels of trust in news on other platforms, and vice versa. This strong relationship probably exists because the individual’s relationship with news brands transcends the individual media. For example, we see high levels of trust in BBC TV and radio news extended to the BBC’s news website.

The strong cross-platform relationship for awareness of digital features of interest means that an individual with high awareness of digital TV features is likely to have high awareness of internet, digital radio, and mobile phone features, and vice versa.

Other relationships across platforms are less strong, and just three others have a moderate cross-platform relationship for an individual: interest in digital features; breadth of use of the internet and mobile phones; and competence for digital tasks.
3.5 Cross-platform ownership

In order to understand whether media literacy on one platform is linked to media literacy on another platform, or whether it is a function of how many of the platforms and services people have access to, it is useful to investigate the extent to which ownership of the key platforms is interlinked – whether take-up of the platforms (and consequent extent of media literacy) is predominantly amongst one group, or more spread out.

Figure 14 illustrates the extent to which each of the three key platforms of mobile phone, digital TV and internet at home are owned\(^21\), whether on their own, as part of a pair of platforms, or where all three platforms are owned.

**Figure 14 Extent of cross-platform ownership for mobile phone, digital TV and internet**\(^22\)

The area in the centre of Figure 14 indicates that 39% of UK adults own all three of these platforms, representing just under three-quarters of the current potential for cross-ownership (calculated by dividing 39% by the 54% with home access to the internet).

Those with all three platforms (39% of all UK adults) are more commonly males (41%), those with children at home (52%), minority ethnic groups (50%), those living in dense urban areas (41%), and those in higher income households (53%). As might be expected, cross-platform ownership is higher amongst younger adults, with close to half (45%) of those aged under 65 owning all three platforms compared to one in ten (11%) of those aged 65 and over.

Levels of cross-platform ownership are also slightly lower amongst those aged under 65 with any disability, at 35% compared to 39% of all UK adults. In terms of types of disabilities,

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\(^21\) Please note that digital radio has been excluded from this analysis because it is not distinct from the other platforms, being available through digital TV and the internet.

\(^22\) Base: All UK adults (3,244).
those with hearing difficulties are the least likely to own all three platforms (at 31%), whereas those with mobility difficulties do not differ from the UK average in this respect.

Where just one of the three key platforms is owned it is most likely to be a mobile phone, this applying to one in seven (15%) of all UK adults. Very few only own digital TV (5%) or only have home access to the internet (1%).

Around one in ten (9%) UK adults does not own any of these three key platforms. Non-ownership is strongly related to age, and accounts for one in three (31%) adults aged 65 and over. Non-ownership is only slightly higher amongst low income households (11%).

One in three digital TV owners (34%) does not have internet access at home and one in four with the internet (24%) does not have digital TV.
Section 4

Television

This section examines television in depth, taking the core elements of media literacy and comparing responses between different sub-groups within the population. We asked questions about TV generally as well as focusing on the digital platform. As set out earlier, three in five (62%) of our respondents say they have digital TV at home.

Summary

Levels of competence for tasks related to TV are generally high, although over one quarter of those with digital TV say that they cannot with confidence set up a menu of favourite channels.

People have high levels of awareness of regulation, channel funding and the watershed. Just under half say that they have concerns about TV, with one-third giving offensive content as a concern. Older people are more likely than younger people to say that they are concerned.

Just under one third (30%) of those with digital TV claim to have used the red button as a result of seeing something onscreen. Interacting with TV is most common among the 25-34 age group, with 52% having done so.

4.1 Reasons for acquiring digital TV

Those with digital TV, and those stating they intend to get digital TV in the next 12 months, were asked to nominate (without prompting) their reasons for getting a digital TV service at home. Figure 15 below compares the reasons given by owners and those intending to get digital TV.

Additional channels are the key attraction of digital TV overall, with a stronger emphasis on the quantity of channels and the quality of picture amongst those who intend to acquire the platform. Longer-term owners are the most likely to have acquired for particular channels, as is also the case for minority ethnic groups and males.
4.2 Volume of TV viewing

Levels of TV self-reported viewing vary significantly by sub-group. Figure 16 shows the three main types of weekly viewing for all adults with a TV at home, and for particular sub-groups.

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23 Base: All with digital TV (1,998), All intending to get digital TV (153). Questions T10 and T12, spontaneous responses, multi-coded.

24 The particular responses shown in Figure 15 under ‘more channels’ are ‘to get more TV channels’, ‘not enough choice in the main four/ five channels’, and ‘more programmes/ more variety’. The particular responses under ‘particular channels/ coverage’ are ‘to get the extra BBC channels’, ‘for the football’, ‘for the (other) sports coverage’, ‘to get CBeebies/ children’s channels’, and ‘for the news’. These two overall groups of responses (‘more channels’ and ‘particular channels/ coverage’ have been added together and are shown under ‘any channel mention’).

25 Three questions were asked to assess the volume of TV viewing: hours per week watching TV as it is broadcast (shown in Figure 16 as ‘live TV’), hours per week watching recorded TV programmes previously shown live (‘recorded TV’), and the number of pre-recorded DVDs or videos watched per week (with this number multiplied by 1.5 to estimate the number of hours per week).

26 Base: All adults with a TV at home (3,197). Questions T5A-C, prompted responses, single coded.
Across all UK adults the average (self-reported) weekly live TV viewing stands at 19.4 hours, plus 2.2 hours time-shifted, and an average of 3.2 hours watching videos or DVDs (2.1 videos or DVDs watched, multiplied by an estimated 1.5 hours each).

This provides an overall estimate of 21.6 hours of TV viewing per week on average. This figure is lower than the official BARB television viewing figure for 2004 (27.7 hours for adults aged 16+), although this discrepancy is to be expected given the difference in methodologies and the likelihood of self-reported estimates being lower.

Figure 16 shows that age is a key discriminator in terms of volume of TV viewing, with those aged 65 and over watching close to 10 additional hours of TV per week, compared to 16-24 year olds. TV viewing is similarly high amongst those living in a low income household (aged under 65), or those with a disability (aged under 65) - in particular those with hearing or mobility difficulties.

This discrepancy between groups is partly explained by the extent to which ‘all or most leisure time’ is spent at home. We asked respondents how much of their leisure time is spent at home in a typical week (by selecting from a prompted list of time-periods). 17% overall said ‘all/almost all’ of their leisure time is spent at home. This rose to 37% of those over 65 (and fell to 5% of those aged 16-24). C2DEs were more likely to select ‘all/almost all’ in comparison to ABC1s (19% and 14% respectively). Those with a disability were also more likely to spend ‘all/almost all’ leisure time at home (28% compared to 13% of those without a disability).

We also examined who were most likely to be heavy TV viewers. We defined heavy TV users as watching 35 or more hours of TV (live or time-shifted) per week. This group accounts for 15% of all UK adults, with an average of 50 hours TV viewing per week - more than double the average for all UK adults.

There is no difference in the overall profile of TV use (in terms of light, medium, and heavy viewers) between terrestrial and digital TV viewers as a whole. Thus, heavy users are not more likely to have digital TV. There is, however, some indication that those acquiring digital TV in the last year are heavier viewers, reflecting the older profile of those newest to digital TV.

### 4.3 Monthly spend

Amongst those with cable or satellite TV, the average self-reported monthly spend on the TV service received is £33. Six per cent of cable or satellite subscribers pay over £50 per month for their TV service. Two groups are more likely to spend more per month on their TV service: those aged 16-24, and those in a minority ethnic group.

### 4.4 Competence with TV tasks

We wanted to understand more about the levels and types of skill people have in using the functions available on their television. All adults with a TV at home (99% of all UK adults) were prompted with a series of ‘tasks’ associated with television, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and, if so, whether it was a task they could do with confidence. Those with digital TV were also presented with a series of digital TV-specific tasks and taken through the same options. Finally, those who said they had a PVR at home (Sky+/ TiVo) were prompted with a PVR-specific task. Figure 17 below summarises the responses for each task.
Interest in and competence in carrying out the various tasks shown in Figure 17 are generally high, with those who are competent outweighing the proportion who are interested in the task but don’t classify themselves as being able to do it with confidence.

The task with the lowest level of competence is shown at the bottom of Figure 17: ‘Select different viewing angles or different matches for sports events such as Wimbledon or the Olympics’ – with 38% able to do with confidence, and 35% stating they feel unable to do so, although interested. This is also the task with greatest numbers of people saying they weren’t interested or had no need for it.

It is of note that despite the fact that many people have owned a video recorder for many years, one in five say that while interested, they aren’t confident about setting up a video recording in advance of a programme being broadcast.

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27 Base: All with a TV (3,197), *Base: All with digital TV (1,998), **Base: All with a PVR (395). Questions T15 and T17, prompted responses, single coded.
4.5 Awareness of TV regulation, channel funding and watershed

Turning to the elements of media literacy that relate to understanding of the platform, TV stands out as generating the highest levels of awareness of regulation and channel funding\textsuperscript{28}, and also of the content control afforded by the 9pm watershed.

**Figure 18 Awareness of TV regulation, channel funding and watershed\textsuperscript{29}**

<table>
<thead>
<tr>
<th>Awareness of 9pm watershed</th>
<th>Aware</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>81%</td>
<td>6%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Aware that TV is regulated</th>
<th>Aware of how commercial channels mainly funded</th>
<th>Aware of how BBC TV mainly funded</th>
</tr>
</thead>
<tbody>
<tr>
<td>81%</td>
<td>76%</td>
<td>84%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Aware of how BBC TV mainly funded</th>
<th>Aware of how BBC TV mainly funded</th>
</tr>
</thead>
<tbody>
<tr>
<td>84%</td>
<td>11%</td>
</tr>
</tbody>
</table>

The overall index measure combining all these elements (excepting licence fee funding) is 80%. A couple of groups show lower levels of awareness - those aged 16-24 (63% of maximum potential\textsuperscript{30} compared to 80% for all UK adults); and those from minority ethnic groups (66% of maximum potential).

As noted previously, the issue of age may impact to some extent upon the other two groups, as both have a younger profile in comparison to the UK as a whole.

4.6 Concerns about what is on TV

Just under half (46%) of all with a TV at home nominate (without prompting) any concerns ‘about what is on TV’.

Nominations from adults are dominated by content concerns, as indicated in Figure 19, which shows the proportion of all adults nominating any concerns, along with the top areas of concern mentioned.

**Figure 19 Concerns about what is on TV\textsuperscript{31}**

<table>
<thead>
<tr>
<th>Concerns about what is on TV</th>
<th>Any nominations</th>
<th>Content offensive</th>
<th>Content poor quality</th>
<th>Risk to society/ standards/ values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any nominations</td>
<td>46%</td>
<td>35%</td>
<td>10%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Nominations regarding offensive content are higher with each age group, rising from 15% for 16-24s to 49% for those aged 65 and over. Females are also more likely to make this

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\textsuperscript{28} The question asked respondents for ‘the main method’ of funding for ITV, Channel 4 and Five.
\textsuperscript{29} Base: All UK adults (3,244). Questions T20, T23 and T25, spontaneous responses, single coded.
\textsuperscript{30} The maximum potential being awareness of TV regulation and how commercial TV channels are funded and the 9pm watershed.
\textsuperscript{31} Base: All UK adults (3,244). Question T21, spontaneous responses, multi-coded.
nomination (at 40% versus 30% for males), as are those with any disability (aged under 65) (42%), and adults from minority ethnic groups (43%).

Overall, one in ten (8%) UK adults claims to be ‘very concerned’ about television. Almost all of these had nominated a concern relating to offensive content.

Concern is not related to volume of use of TV or the length of ownership (for digital TV), but does increase through each age band from 35 upwards. This relationship between age and concern may explain the higher levels of concern for those with a disability, with this group being older than the UK average despite having excluded those aged 65 and over. However, concern is also slightly higher amongst minority ethnic groups, who have a younger age-profile.

4.7 Interaction and personalisation

Finally, we turn to the issue of how people interact and personalise their TV. Although this is not (yet) creativity per se, it is useful to see it as a potential stepping stone to the creation of content, by enabling users to become familiar with the technology of the platform.

All adults with a TV at home were shown the options detailed in Figure 20 below and were then asked whether they had ever done any of these as a result of seeing something on television. The percentages shown in Figure 20 are based on each age group with the necessary devices to interact in each way (e.g. ‘pressed red button’ is based on those in households with digital TV, ‘visited website’ is based on those with the internet at home, and so on). For example, it is not the case that those aged 45 and over send more emails overall than those aged 16-24, but that of those with the relevant platforms the older age-group is more likely to make use of email than, say, texting.

Figure 20 Interacting with TV, based on those with relevant technology

Interacting with TV amongst adults is most common among the 25-34 age group, with 52% in this age group having done so. There is a steep decline in interaction from age 45 upwards. Pressing the red button and visiting websites are the most common forms of interaction for each of the age groups, and there is a cross-over from sending texts to making a phone call for those aged 35 and over.

Base: All with TV at home and with the necessary platforms/devices necessary to interact in each way. Question T8, prompted responses, multi-coded.
Amongst those with a television at home and either internet access, a mobile phone or
digital TV (90% of all UK adults), one in three (34%) have interacted having seen something
on television using a mobile phone (to send a text message), the internet (to send and e-mail
or visit a website) or the interactive button on their TV remote control. This is more common
amongst those aged 16-44 (43%), and those aged under 65 in higher income households
(47%), but does not differ particularly in terms of gender.

Claimed levels of confidence in using the interactive button to find out more about a
programme or advert as it is showing, or to select different viewing angles or matches for
sports events, amongst those with digital TV at home stands at 69% overall. Interacting with
TV in this way is more common amongst those aged 25-34 (86%), males (76%), those aged
under 65 with no disability (76%), minority ethnic groups (75%), and those aged under 65 in
higher income households (78%).

Elsewhere, of those with digital TV at home (62% of all UK adults), half say they can set up a
menu of their favourite TV channels with confidence. This measure is higher amongst those
aged 16-44 (59%), males (57%), those aged under 65 with no disability (56%), minority
ethnic groups (57%), and those aged under 65 in higher income households (59%).

Figure 21 shows the main reasons given for digital interaction with TV – in other words,
excluding those responses that mentioned letter writing, or making a phone call. Entering
competitions and voting are key motivations for such interactivity, as is the desire to find out
more about a particular feature.

**Figure 21: Reasons for digital interaction with TV**

- To enter a competition: 32%
- To find out more about something featured on TV: 32%
- To vote/nominate: 31%
- To respond to a programme feature: 13%
- To donate to charity: 11%
- To take part in a quiz: 11%

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33 Base: All with digital TV who have interacted digitally with TV (634).
Section 5

Radio

This section examines radio in depth, taking each of the core elements of media literacy and comparing responses between different sub-groups within the population. It looks at the various types of digital radio access – digital audio broadcasting (DAB), internet and via digital TV – as well as including some questions relating to radio in general terms, in other words including analogue means of reception.

Summary

27% of adults say they listen to digital radio services – over two thirds of those who do, say they now listen to more radio stations than they did before.

Radio is second to TV in terms of people’s levels of awareness of regulation and how national commercial stations are mainly funded. Over half of UK adults are aware of these elements, although younger people are less likely to be aware.

There are very low levels of concern about radio. One in ten (9%) UK adults nominates (without being prompted) any concerns, and just 1% say they are ‘very concerned’ about what is on the radio. Those from a minority ethnic group are more likely to be concerned, with 1 in 5 (20%) saying they have any concerns.

One in five adults aged 25–54 says they have interacted with the radio in some way (including letters or phone calls). Focusing on ‘digital’ interaction, nearly one quarter of 16–24s say they have interacted with the radio, with their interaction mostly through texting.

5.1 Reasons for acquiring digital radio

Given the relatively low user base for digital radio, it is particularly important to examine the reasons respondents give for take-up. Those with digital radio and those stating they intend to get digital radio in the next 12 months, were asked to nominate (without prompting) their reasons for getting digital radio at home. Figure 22 shows the reasons given by owners and those intending to get digital radio.
In contrast to the reasons given for acquiring digital TV, quality (of sound) is the key attraction of digital radio.

The appeal of the access platform (availability via digital TV and the internet) amongst digital radio owners reflects the previous finding that the majority of those with digital radio are accessing it through their internet and TV services. The method of access is, however, not nominated as a reason to start listening by those who intend to get digital radio.

### 5.2 Volume of radio listening per week

The volume of radio listening per week is broken down into hours per week listening at home, in the car, when out and about using a personal radio or a mobile phone (shown in Figure 23 as ‘out & about’), and at work/ school/ college. Figure 23 shows these volumes of weekly listening for all adults, and for particular sub-groups.

Across all UK adults the average (self-reported) weekly radio listening at home stands at 8.6 hours, plus 6.6 hours elsewhere. This provides an overall estimate of 15.2 hours listening per week on average. This figure is lower than the RAJAR figure for Q2 2005\(^{36}\), with this discrepancy to be expected given the difference in methodologies (RAJAR being based on diary prompts) and the likelihood of self-reported estimates being lower.

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\(^{34}\) Base: All adults with digital radio (852) All adults intending to get digital radio (226). Questions R10 and R12, spontaneous responses, multi-coded.

\(^{35}\) Figure 22 shows separately those that mentioned ‘more stations’ in general, and those that specifically mentioned BBC stations. When the BBC stations are combined with the ‘more stations’ response, 35% of owners and 41% of those intending to get cite more stations.

\(^{36}\) RAJAR Q2 2005 figure of 21.6 hours per week.
Figure 23 shows relatively few differences in terms of total listening volumes across most of the sub-groups detailed, although radio listening at home is highest amongst older people aged 65 and over and lowest amongst those from minority ethnic groups.

Figure 24 below also shows volumes of weekly radio listening, but this time filters responses by the method of listening: those that say they listen through a traditional AM/FM radio, through digital television, through the internet, or through a DAB digital radio set.

Hours listening to radio at home are rather higher for those listening through a DAB set and those listening through the internet.

We also looked at those who can be categorised as ‘heavy’ radio listeners, defined as those listening to 33 or more hours of radio (in any location) per week. This group accounts for 14% of all UK adults, with an average of 50 hours radio listening per week, close to 3½ times the average for all UK adults.

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37 Base: All UK adults (3,244). Questions R5A-E, prompted responses, single coded.
38 Base: All UK adults (3,244). Questions R5A-E, prompted responses, single coded.
Heavy radio listeners differ most from other radio listeners in terms of the hours they listen to the radio at their workplace, which stands at 15 hours per week compared to 3 hours per week for all UK adults.

5.3 Awareness of radio regulation and commercial funding

Radio is second to TV in terms of people’s levels of awareness of regulation and how national commercial stations are mainly funded. Over half of UK adults are aware of these elements, as indicated in Figure 25 below.

![Figure 25](image)

65% of respondents say that BBC radio stations are mainly funded by the licence fee (ranging from 50% of those aged 16-24 to 76% of those aged 45-54). 52% of respondents say that advertising is the main method of funding for ‘other radio stations such as Classic FM, Virgin and Talk Sport’. Finally, while 59% of UK adults think that radio is regulated, over one quarter (27%) say they don’t know.

The combined ‘index’ measure is 58%. Groups which stand out in terms of lower levels of awareness include:

- Those aged 16-24 (46% of maximum potential)
- Those in low income households aged under 65 (47% of maximum potential)

5.4 Concerns about what is on radio

Concerns about radio are low. Just one in ten (9%) UK adults nominates (without prompting) any concerns ‘about what is on radio’. Nominations from adults, whilst low, mostly relate to content in terms of bad language (whether spoken or song lyrics) and poor quality content (in terms of advertising breaks, and content being ratings-driven).

Overall, just 1% of UK adults claim to be ‘very concerned’ about what is on the radio.

Concern is not related to volume of use of radio or the length of ownership (for digital radio), and (unusually) concern barely differs across age groups. The only group showing higher levels of concern regarding radio is the minority ethnic group, with one in five (20%) nominating any concerns about radio overall.

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39 Base: All UK adults (3,244). Questions R17 and R21, spontaneous responses, single coded.
5.5 Interacting with radio

Finally, we wanted to assess the extent of interactivity taking place with radio content. All children and adults who listen to radio at all were shown the options detailed in Figure 26 below and then asked whether they had ever done any of these as a result of hearing something on the radio. The percentages shown in Figure 26 are based on those in each age group with the necessary devices to interact in each way (e.g. ‘visited website’ is based on those with the internet at home, ‘send text’ is based on those with a mobile phone, and so on).

Figure 26 Interacting with radio, based on those with relevant technology

As Figure 26 shows, interaction with radio is relatively low for all age groups. Interacting with radio is most common amongst the 16-24 age group, with 27% having done so. In comparison, around one in five aged between 25 and 64 have done so, falling to just 9% of those aged 65 and over.

Visiting websites is the most common forms of interaction for each of the age groups, with handover from sending texts to making a phone call happening for those aged 25 and over.

Amongst those who listen to the radio at all (91% of all UK adults), around one in ten (13%) have interacted having heard something on radio using a mobile phone (to send a text message) or the internet (to send and e-mail or visit a website). This is more common amongst 16-24 year olds (23%), males (16%), and those aged under 65 in higher income households (19%).

Figure 27 shows the main reasons given for digital interaction with radio – in other words, excluding those responses that mentioned letter writing, or making a phone call. Entering competitions and responding to a particular feature are the key motivations for such interactivity.

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40 Base: All who listen to radio and have the necessary platforms/devices necessary to interact in each way. Question R8, prompted responses, multi-coded.
Figure 27: Reasons for digital interaction with radio

- To enter a competition: 38%
- To respond to a programme feature: 36%
- For more information: 12%
- To request a song: 8%
- To donate to charity: 6%
- To speak ‘on air’: 5%

Base: All with digital radio who have interacted digitally with radio (313).
Section 6

Internet

This section examines respondents’ access to, usage of and opinions about the internet, taking each of the core elements of media literacy and comparing responses between different sub-groups within the population. It also details respondent views on issues such as internet security, and the types of website most used for information.

Summary

Internet usage is split broadly between two-thirds at home, and one-third either at work or elsewhere.

Minority ethnic groups are more likely to spend a greater amount of time and money per month on the internet than other groups.

Most groups have a fairly wide breadth of use of the internet, although this is less the case for those aged over 65. People living in rural areas have a relatively high use of the internet for transactions.

People mostly use branded sites for gathering information about a product, holiday or health issues, although there is also use of individual, user-generated sites, particularly for a new product.

Interest and competence among internet users for various tasks is generally high, although a minority are not comfortable blocking email spam or computer viruses (32%).

Only one-quarter of the UK population knows how search engine websites are mainly funded, although this rises to 37% of internet users.

Just over one-quarter of home internet users say they are happy to give out their credit and debit card details on the internet, rising to over half who are happy to give out their email address. People who have used the internet for longer, and more frequently, are less likely to be concerned.

Around half of internet users say they would look out for ‘professional signs’ such as kitemarks or padlocks before entering such information on a site new to them, although one in ten says they would not, and one in twelve says they would not trust any site.

Levels of concern about the internet are relatively high in comparison to other platforms, with some differences in concern between broadband and dial-up users. Non-users are less likely to be concerned than those with the internet at home.

7% of internet users say they maintain a website or weblog/ blog on at least a weekly basis. This is more common amongst broadband owners and minority ethnic groups.
6.1 Reasons for acquiring internet access

Those with internet access (54% of our sample), and those stating they intend to get internet access in the next 12 months, were asked to nominate (without prompting) their reasons for doing so. Figure 28 below shows the aggregated reasons given by owners and also by those intending to get the internet.

Figure 28 Reasons for acquiring internet access

A wider variety of reasons are given for acquiring the internet than for the other platforms covered by this audit. Longer-term owners are more likely to have acquired for the information content, in particular for schoolwork / studies and to be able to work from home (other reasons in this category included news, and research). Amongst those intending to get access, there is a clear influence of recommendation by friends and family.

6.2 Volume of internet use

While our focus is on internet users with home access, we were also keen to understand where else people access the internet. Three questions were asked to assess the volume of using the internet in different locations: hours per week used at home, at work / school / college, and anywhere else, as Figure 29 shows:

Figure 29 Volume of internet use per week

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42 Base: All with the internet at home (1,613), All who intend to get the internet at home (187). Questions I16 and I18, spontaneous responses, multi-coded.

Across all UK adults the average (self-reported) weekly use of the internet stands at 9.9 hours across all locations, with this average very broadly split two-thirds at home and one-third anywhere else. The method of access is a key discriminator, with the average weekly use for broadband users at twice that for dial-up users (12.7 versus 6.6 hours per week).

Minority ethnic groups are also far more likely to spend longer on the internet, much of this at work or place of education. Over 65s are very unlikely to access the internet anywhere but at home.

Heavy internet users were defined as those using the internet for 15 hours or more per week at any location. This group accounts for 12% of all UK adults, with an average of 28 hours use per week, close to three times the average for all UK adults. One-third of this heavy use is made at the user’s workplace or place of education.

Over one in four (28%) with broadband access are heavy users, compared to just one in ten (11%) dial-up users. Those getting the internet over 5 years ago are also more likely to be heavy users, with the reverse being true for those getting the internet in the last year or so, perhaps reflecting the older profile of the newest users.

### 6.3 Monthly spend

Amongst those with the internet at home, the average (self-reported) monthly spend on the internet service received is £19. One in twelve (8%) pays over £30 per month. Broadband users pay an average of £21 per month, and dial-up users £14.

Minority ethnic groups stand out in terms of spending more per month on their internet service, with an average monthly spend of £25, and the proportion spending over £30 at 21%. Average spend amongst adults from minority ethnic groups is relatively higher amongst those aged under 45 (at just over £26), but is also higher than the UK average amongst older adults aged 45 and over from minority ethnic groups (at £22).

As might be expected, heavy internet users are also heavy spenders, with 10% of heavy users paying over £30 per month, and an average monthly spend of £22.

### 6.4 Breadth of use of the internet

As well as volume of use, it is also important to understand the activities that people carry out online. In particular, we were interested in the range of activities displayed.

All adults using the internet at all were prompted with 24 possible uses and were asked to say for each whether they used the internet for this, and how often. The long list of types of use have been grouped into the eight broad types for ease of comparison, and are shown in Figure 30 below. Each band indicates the proportion of internet users in each group making each type of use at least weekly, with these bands stacked on top of each other to give an indication of breadth of use amongst the different types of internet users.

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44 The uses shown in Figure 30 under ‘Communication’ are ‘Sending & receiving e-mails’, ‘Using online chat rooms’, ‘Using Instant Messaging/ MSN Messenger/ AOL Messenger etc.’. The uses shown under ‘Work/ studies information’ are ‘Finding information for your work/ job/ your studies/ homework’. The uses shown under ‘Leisure information’ are ‘Following latest scores/ sports results as they happen’, ‘Finding information for your leisure time or holidays’, ‘Finding information about cinema/ theatre/ live music’. The uses shown under ‘Transactions’ are ‘Making bookings – travel, accommodation, concert tickets etc.’, ‘Shopping’, ‘Banking and paying bills’, ‘Gambling’, ‘Buying and selling on auction sites – eBay, QXL, etc.’, ‘Renting DVDs’. The uses shown under ‘Entertainment’ are ‘Gaming’, ‘Downloading music/ videos/ software’, ‘Listening to radio stations’, ‘Looking at adult-only websites’. The uses shown under ‘News’ are ‘Looking at local/ regional/ national/ international news’. The uses shown under ‘Public/ civic’ are ‘Finding out about public services’, ‘Looking at political/ campaign/ issues websites’, ‘Looking at local community websites’. The uses shown under ‘Creativity’ are ‘Maintaining a website or weblog/ blog’.
A comparison against the types of use made by all internet users (shown in the first column of Figure 30) shows that a greater breadth of use is being made by younger users, those in minority ethnic groups and those using broadband to access the internet. As might be expected, more uses are made by heavy users and also the longest-term users. Broader use is also much more common for male than for female internet users, with entertainment and leisure information showing the greatest difference in levels of use by gender.

As shown in Figure 30, three types of internet use are more prevalent amongst those aged 16-24: work/studies information, leisure information, and entertainment. By contrast, younger users are less likely than the UK average to use the internet for transactions or for news, whilst users aged 65 and over are more likely to use the internet for news.

Figure 30 also shows adults from minority ethnic groups making more types of use of the internet compared to all adult users. There are some variations for the particular types of use made by minority ethnic groups, with much higher levels of use for work/studies information and (in particular) for communication – whether e-mail, Instant Messaging or chat rooms. By contrast, use of the internet for transactions (such as banking or shopping) is lower than the UK average amongst minority ethnic groups (at 36% versus 45%). The greater breadth of use of the internet amongst minority ethnic groups is most evident amongst adults aged under 45.

Adults aged 65 and over are less likely to make each of the uses shown in Figure 30. The largest gaps are, perhaps unsurprisingly, use of the internet for work/studies information, but also for leisure information (both 21% below the UK average for weekly use).

Those with a disability (aged under 65) are slightly less likely to make each of the types of use shown in Figure 30, leading to a lower breadth of use than the UK average. Those in a low income household (aged under 65) mostly show lower levels for the different types of use, with the exception of entertainment, which is slightly higher than the UK average.

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45 Base: All UK adults who use the internet (1,740). Question I11, prompted responses, single coded.
Across the different demographic groups detailed in Figure 30, those living in rural areas are second only to broadband users in terms of using the internet at least weekly for transactions, arguably a key benefit of the internet for this group.

Turning to the individual uses of the internet rather than the grouped areas, a similar picture emerges. Figure 31 below shows the top 10 individual uses made using the internet on at least a weekly basis for all UK adults with the internet, alongside some of the key demographic groups covered by the audit. The measures for these other groups have been shown in terms of the extent to which they differ (whether higher or lower) from the overall UK adult measure in each case.

**Figure 31  Top 10 weekly uses made of the internet**

<table>
<thead>
<tr>
<th>All users</th>
<th>Aged 16-24</th>
<th>Aged 65+</th>
<th>Minority ethnic groups</th>
<th>Any disability aged under 65</th>
<th>Low income household aged under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending/ receiving e-mails</td>
<td>70%</td>
<td>-2%</td>
<td>-2%</td>
<td>+11%</td>
<td>-9%</td>
</tr>
<tr>
<td>Finding information for work/ studies</td>
<td>52%</td>
<td>+6%</td>
<td>-21%</td>
<td>+6%</td>
<td>-5%</td>
</tr>
<tr>
<td>Finding information for leisure/ holidays</td>
<td>34%</td>
<td>-</td>
<td>-15%</td>
<td>-5%</td>
<td>-1%</td>
</tr>
<tr>
<td>Banking &amp; paying bills</td>
<td>31%</td>
<td>-14%</td>
<td>-5%</td>
<td>-7%</td>
<td>-6%</td>
</tr>
<tr>
<td>Using Instant Messaging</td>
<td>30%</td>
<td>+20%</td>
<td>-18%</td>
<td>+19%</td>
<td>-7%</td>
</tr>
<tr>
<td>Looking at news</td>
<td>25%</td>
<td>-5%</td>
<td>+2%</td>
<td>+3%</td>
<td>-6%</td>
</tr>
<tr>
<td>Finding information about sports</td>
<td>20%</td>
<td>+9%</td>
<td>-13%</td>
<td>+5%</td>
<td>-5%</td>
</tr>
<tr>
<td>Finding information about cinema/ theatre/ live music</td>
<td>20%</td>
<td>+12%</td>
<td>-15%</td>
<td>-1%</td>
<td>-6%</td>
</tr>
<tr>
<td>Downloading music/ videos/ software</td>
<td>19%</td>
<td>+23%</td>
<td>-17%</td>
<td>+4%</td>
<td>-3%</td>
</tr>
<tr>
<td>Shopping</td>
<td>19%</td>
<td>-1%</td>
<td>-6%</td>
<td>-1%</td>
<td>-5%</td>
</tr>
</tbody>
</table>

### 6.5 User-generated content

In order to find out the extent to which internet users make use of, and find legitimate, sites other than those of big brands, we asked internet users whether they ever used the internet to find out more about a place to go on holiday, an illness, or a new product. Overall, 73% say they use the internet to find out more about a place to go on holiday, an illness, or a new product. 48% to investigate a new product, and 41% to find out more about an illness. 17% said they did not use the internet for such things.

We then asked about the types of site used, with respondents able to give more than one answer. While the majority of people use branded sites such as those of high-street travel agents, shops or chemists, plus consumer or action groups, use is also made of individual,

---

46 Base: All UK adults who use the internet (1,740). Question I11, prompted responses, single coded.
user-generated sites. These latter appear to be more extensively used by those investigating transactions rather than for health matters (see Figure 32).

For example, 28% of those who ever use the internet to find out more about a new product say they tend to look at an ‘individual’s review or comments’. This drops to 19% of those investigating a holiday who say they look at an ‘individual holidaymaker’s diary or account’, but only one in ten (10%) of those investigating an illness say they would use an ‘individual’s or patient’s diary or account’.

**Figure 32** Types of website used for different types of information-gathering

<table>
<thead>
<tr>
<th>Holidays</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Online travel agent, e.g. Expedia, Opodo</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High street travel agent, e.g. Thomas Cook</td>
<td>39%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Websites that have reviews and recommendations from travellers</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual holiday maker's diary or account</td>
<td>19%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local community site</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer/supplier's websites such as Sony, Samsung etc</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High street website such as Dixon's</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consumer group website such as Which?</td>
<td>38%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review website</td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual's reviews or comments</td>
<td>20%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Health</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Public site such as NHS Direct/NHS 24</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support group sites for particular illnesses</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>High street chemist such as boots.co.uk</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual patient's diary or account</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 6.6 Competence with internet tasks

A further way of investigating the types of skills people feel they possess online was to ask how confident they were in carrying out particular tasks. All adults with the internet at home (54% of all) were prompted with a series of such tasks associated with the internet, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and if so, whether it was a task they could do with confidence. Figure 33 below summarises the responses for each task.

---

47 Base: All who use the internet at all (1,746); those who use internet for different types of activity. Questions I26 and I 27, prompted responses, multiple responses.
Interest in and competence in carrying out the various tasks shown in Figure 33 are generally high, with competence outweighing the proportion who are interested but say they cannot do with confidence in each case. Interest in using the internet to listen to radio is notably lower, however.

The high proportions of people not able to block viruses or spam are discussed in the next section.

6.7 Awareness of internet funding and content controls

In order to find out how knowledgeable people were about some of the funding models for the internet, we asked about search engines – as being a key tool or gatekeeper of the internet; and about the BBC website. We also looked at how comfortable people felt about controlling the content they received.

Figure 34 sets out the gaps in people’s understanding of some areas of internet funding, and also levels of confidence about setting content controls.

---

**Figure 33** Competence with internet tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Can do with confidence</th>
<th>Interested, can’t do with confidence</th>
<th>Not interested/ no need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use e-mail to contact friends &amp; relatives</td>
<td>86%</td>
<td>14%</td>
<td>0%</td>
</tr>
<tr>
<td>Visit websites to find the latest news</td>
<td>81%</td>
<td>19%</td>
<td>0%</td>
</tr>
<tr>
<td>Edit &amp; organise photos on a computer for viewing</td>
<td>58%</td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Block e-mail spam/ unwanted e-mail messages</td>
<td>58%</td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Block computer viruses</td>
<td>57%</td>
<td>37%</td>
<td>6%</td>
</tr>
<tr>
<td>Listen to live radio over a computer</td>
<td>49%</td>
<td>38%</td>
<td>13%</td>
</tr>
<tr>
<td>Listen at a later date to a radio programme already broadcast</td>
<td>34%</td>
<td>27%</td>
<td>39%</td>
</tr>
</tbody>
</table>

---

**Figure 34** Awareness of internet funding and content controls

- **Aware how search engine websites mainly funded**: 25% aware, 51% interested and confident, 24% not confident.
- **Aware how BBC website mainly funded**: 46% aware, 41% interested and confident, 13% not confident.
- **Interested and confident in ability to block viruses/spam**: 58% aware or able, 10% don’t know/not interested, 32% not confident.

---

48 Base: All with the internet at home (1,613). Question I24, prompted responses, single coded.
49 Base: All UK adults aged 16+ (3,244), *All who use the internet at home (1,613). Questions I24, I31, spontaneous responses, single coded.
One quarter of UK adults know the main way of funding for search engine websites\(^50\). Half of UK adults are unsure (51\%) and one fifth gave an incorrect answer. Unsurprisingly, internet users are more likely to get the right answer (37\% compared to 25\% for all adults), although 41\% are still unsure.

Turning to content controls, 58\% of home internet users say they are interested in, and confident about, blocking viruses/spam (as also shown in Figure 33).

One in five (19\%) with internet access at home state that ‘someone else tends to’ block computer viruses, and / or block e-mail spam / unwanted e-mail messages. This reliance on others for blocking is more common amongst those aged 45-54 (25\%), females (27\%) and those with children at home (21\%), but is not significantly different for those with a disability.

Most of the blocking is done on their behalf by another adult in the household, with a slightly higher incidence of this being done by a child aged 16 or over where a male adult is relying on someone else.

6.8 Understanding of internet regulation

We asked our respondents whether they thought the internet was regulated (‘in terms of what can be shown and written’), and then asked those who answered positively who they thought was responsible. Responses are shown in Figure 35.

**Figure 35 Understanding of internet regulation\(^51\)**

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, regulated</td>
<td>29%</td>
</tr>
<tr>
<td>No, not regulated</td>
<td>30%</td>
</tr>
<tr>
<td>Don't know if the internet is regulated</td>
<td>40%</td>
</tr>
<tr>
<td>Ofcom</td>
<td>4%</td>
</tr>
<tr>
<td>The internet sites themselves</td>
<td>2%</td>
</tr>
<tr>
<td>The internet service providers</td>
<td>2%</td>
</tr>
<tr>
<td>Other nominations</td>
<td>7%</td>
</tr>
<tr>
<td>Don't know who is responsible</td>
<td>17%</td>
</tr>
</tbody>
</table>

The purpose of the question was to provide a snapshot of current understanding about whether or not the internet appears to people to be regulated, rather than a detailed investigation of what forms this might take.

---

\(^50\) In response to the question ‘How do you think search engine websites such as Google or Ask Jeeves are funded?’ the ‘correct’ responses were judged to be ‘advertising on the website’ and ‘advertisers pay when users click through to their website’.

\(^51\) Base: All adults aged 16+ (3244); all those who believe the internet is regulated I35, I36.
Light users are just as likely as heavy users to say that the internet is regulated, although less likely to say that the internet is not regulated (35% and 46% respectively).

Those with the internet at home are more likely to say the internet is not regulated (38%) than those without (21%). But they are also more likely to say the internet is regulated (34% compared to 24% of those without the internet at home).

Those from the ABC1 socio-economic group are more likely to say the internet is not regulated (35%) compared to C2DEs (25%). C2DEs are more likely to say they don’t know (48%) compared to ABC1s (33%).

In terms of age, 35-44s are most likely to say that the internet is not regulated (37%) compared to 29% for 16-34s.

6.9 Security and the internet

In order to find out how comfortable internet users felt about the security of the internet in terms of personal details, those adults who use the internet at home were prompted with six types of personal details they could be asked to disclose when using the internet, and asked how likely they were to provide these details.

Figure 36 Entering personal details on the internet

<table>
<thead>
<tr>
<th>Personal e-mail address</th>
<th>Would never do this</th>
<th>NA/DK</th>
<th>Some concerns</th>
<th>Happy to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td>54</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home address</th>
<th>Would never do this</th>
<th>NA/DK</th>
<th>Some concerns</th>
<th>Happy to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td>36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mobile phone number</th>
<th>Would never do this</th>
<th>NA/DK</th>
<th>Some concerns</th>
<th>Happy to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td></td>
<td></td>
<td></td>
<td>34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home phone number</th>
<th>Would never do this</th>
<th>NA/DK</th>
<th>Some concerns</th>
<th>Happy to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td></td>
<td></td>
<td></td>
<td>30</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Credit card details</th>
<th>Would never do this</th>
<th>NA/DK</th>
<th>Some concerns</th>
<th>Happy to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td></td>
<td></td>
<td></td>
<td>28</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Debit card details</th>
<th>Would never do this</th>
<th>NA/DK</th>
<th>Some concerns</th>
<th>Happy to do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td></td>
<td></td>
<td></td>
<td>26</td>
</tr>
</tbody>
</table>

While a significant minority of people say they ‘would never’ disclose their telephone numbers (one in four), addresses appear to be of less concern (one in ten).

There is strong evidence that willingness increases with use: there are lower levels of concern for the heaviest and longest-established users. The minority ethnic group stands out in terms of high levels of willingness to enter personal details, in particular those aged under 45.

All internet users were then asked ‘could you tell me whether you would make a judgement about a website before entering these details?’. Responses to this question are shown in Figure 37 below, and have been grouped into three broad types of checks.

---

52 Base: All UK adults who use the internet at home (1,613). Questions I37A-F, prompted responses, single coded.
Those more likely to judge by checking for professional signs are younger, more affluent, and heavier users. A wider variety of checks are made by more experienced internet users, both in terms of volume and length of use. However, the minority ethnic group stand out as among the least likely to make any judgements before entering personal details (and among the most willing to enter details, as detailed previously).

One in eight (13%) with the internet at home would not make any checks. This measure does not vary particularly by the age of the user, but is considerably higher (at 24%) for users from minority ethnic groups. This response is slightly more common amongst heavier internet users (at 14% versus 11% of light users).

One in twelve (8%) with the internet at home are at the other end of the spectrum, in terms of stating they would not trust any site to enter these types of personal details. Whilst the base of users aged 65 and over is low (63 respondents), this response is very much more common here (at 17%). Not trusting any sites is also more common amongst minority ethnic groups (at 14%).

Elsewhere in this audit, all adults were asked to state the extent to which they agreed or disagreed with the statement ‘You can’t trust anyone these days’. Across all adults, 30% agreed with this statement, and levels of agreement were higher both for 16-24s and for over-65s, and amongst the less affluent. Those agreeing with the statement are significantly more likely than average to say they would never enter the types of personal information detailed in Figure 36, suggesting that trust in people is very likely to be related to willingness to enter personal details, or perhaps that levels of trust are connected to personality or character.

All adults were also asked to state the extent to which they agreed or disagreed with the statement ‘I am concerned about the personal information and details that companies or the government may hold about me’. Across all adults, 75% agree, with levels of agreement higher amongst older adults and those from more affluent households. Those agreeing with the statement, however, do not differ significantly in terms of their willingness to enter the types of personal information detailed in Figure 36.

---

53 Base: All UK adults who use the internet at home (1,613). Question I38, spontaneous responses, multi-coded.
6.10 The legality of downloads

We asked those who use the internet whether they were aware that ‘there are illegal as well as legal ways to access films, music and computer software on the internet’.

The vast majority of internet users (83%) are aware, with 17% saying they are unaware. Those with dial-up connections are less aware than broadband users (25% and 13% respectively).

We then asked those that said they were aware whether they thought that they should be illegal. As Figure 38 illustrates, the majority of users overall think that such downloads should be illegal. Internet users aged over 55 are particularly sure that they should be, although half of 16-24s think that such downloads should not be illegal.

![Figure 38](image)

6.11 Concerns about what is on the internet

As noted earlier, concerns about the internet are the highest of all the platforms analysed. Over two-thirds (70%) of all with internet access at home nominate any concerns ‘about what is on the internet’. By comparison, fewer than half (44%) of those with no internet access at home nominate any concerns.

Nominations from adults are dominated by content concerns, as indicated in Figure 39, which shows the proportion of all adults with internet access nominating any concerns, along with those mentioned most frequently. Nominations from those with broadband and those with dial-up access are also shown.

---

54 Base: Those who use the internet at all and aware there are illegal ways to access films, music and computer software on the internet (1179) I40.
Those with different methods of access to the internet have differing types of concern (with the exception of offensive content). Those with a broadband connection (more typically heavier and longer-term users) are slightly more likely to nominate concerns relating to risk to personal privacy, their finances, or their computers, whilst those with a dial-up connection are more likely to nominate concerns relating to a risk to society / standards and values.

Beyond the method of access, amongst all adults (and not just those with access to the internet), concern regarding offensive content (at 45% for all UK adults) is higher for those aged from 35-54 (at 57%), and females (at 48% versus 42% of males). Concerns about offensive content are not higher for adults from minority ethnic groups and those with any disability (aged under 65).

One in five (17%) of all UK adults claims to be ‘very concerned’ about the internet. Almost all of these nominate a concern relating to offensive content, plus ‘risk to society’ for a majority.

Overall, levels of concern are higher amongst those aged 35-64; females; those with children at home; those with a disability (and aged under 65); those in higher income households (and aged under 65), and those from minority ethnic groups.

6.12 Creativity

Finally, we look at the issue of creativity as it relates to the internet.

Levels of creativity are not significant at present, with the extent of creativity at 13% of the potential maximum. This is based on three measures: having own website, having own weblog, and ability to edit and organise photos on a computer for viewing.

This ‘umbrella’ measure of creativity is higher for adults aged 16-34, those from Indian and Pakistani minority ethnic groups, those in higher income households and those with children at home. However, even amongst those with higher levels of creativity this measure does not exceed one quarter of the potential maximum.

Amongst those who use the internet at all (59% of all UK adults), 5% say they have their own website. This measure does not differ particularly by age, but is higher for males than for females (7% versus 2% of internet users). Broadband users are also more likely to have their own website than those using dial-up internet access (7% versus 2%), with broadband use also indicating longer-term users and heavier users of the internet.

---

55 Base: All UK adults with internet access aged 16+ (3,244). Question I32, spontaneous responses, multi-coded.
56 The potential maximum being those who have their own website and their own weblog and edit/ organise photos on a computer for viewing.
Of all internet users, 3% say they have their own web-log / blog / online diary. The profile of those more likely to do so matches the profile of those more likely to have a website: males (7%) and those with broadband access (4%).

Elsewhere in the audit, all internet users were asked whether they maintained a website or weblog / blog. Overall, 7% of internet users claim to do this at least weekly, and the discrepancy between this figure and the lower figure claiming to have their own weblog suggests that the former represents those who contribute to weblogs. This measure is more common amongst those aged 16 to 44 (9%), males (11%), and those from minority ethnic groups (15%). As with owning a weblog, making contributions to a weblog is much more common amongst those with broadband rather than dial-up access (10% versus 3%).

The third element used to establish a measure of creativity was those with internet access at home responding that they can edit and organise photos on a computer for viewing with confidence. Amongst all those with internet access, around three-fifths (58%) gave this response, with this measure being higher amongst those aged under 35 (71%), and males (68%).
Section 7

Mobile phones

This section examines mobile phones in depth, taking each of the core elements of media literacy and comparing responses between different sub-groups within the population.

<table>
<thead>
<tr>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age is a key differential in reasons for having a mobile phone, with those aged 35 and under more likely to have got one for keeping in touch with others, those aged 16-24 for texting and those aged 55 and over more likely to have got one for emergencies.</td>
</tr>
<tr>
<td>Similar differences emerge in the volume of weekly calls and texts, with most variation by age.</td>
</tr>
<tr>
<td>One in five mobile phone owners spend over £30 a month – rising to one in three 16-24s.</td>
</tr>
<tr>
<td>Over one quarter of UK adults say that they look back at stored texts on a weekly basis, and one in five say they look back at stored photos. One in four says they take photos on a weekly basis with their phone.</td>
</tr>
<tr>
<td>Concerns about mobiles mainly focus on risks to health from using the phones themselves and from the masts.</td>
</tr>
<tr>
<td>Few mobile phone users are aware of the possibility of age verification or filters on newer mobile phones, and those with children at home are no more likely than those without to be aware.</td>
</tr>
<tr>
<td>Use of enhanced functionality is more common amongst younger age-groups. For others, the mobile phone remains predominantly a communications tool.</td>
</tr>
</tbody>
</table>

7.1 Reasons for acquiring a mobile phone

Those with a mobile phone, and those intending to get a mobile phone in the next 12 months, were asked to nominate (without prompting) their reasons for getting a mobile phone. Figure 40 below shows the reasons given by owners, but unlike other platforms, responses from those intending to get a mobile phone are not shown as base sizes are too small. Figure 40 also indicates which types of people are more likely to give each reason for getting a mobile phone.
Age has a strong influence on the reasons for getting a mobile phone. Those aged 55 and over are more likely to have acquired a mobile phone for use in emergencies, whilst those aged under 35 are more likely to have acquired a mobile phone to keep in touch with others, and the youngest adults are more likely to have acquired for texting.

Adults from minority ethnic groups are more likely to give both of the two main reasons for acquiring a mobile phone (at 62% and 68% respectively), but with these measures showing a stronger motivation to acquire in order to keep in touch with friends and family, as well as a broader range of reasons for acquiring overall.

Amongst older people aged 65 and over with a mobile phone, by far the majority (82%) acquired their phone for emergency use, with just one-third (35%) looking to keep in touch with others.

For those aged under 65 with a disability, a slightly higher proportion than the UK average acquired for emergencies (59% versus 56%), and fewer acquired to keep in touch with others (at 44% versus 54%). Acquiring for emergencies appears to be higher amongst those with hearing or mobility difficulties, although base sizes are relatively small. Amongst those with hearing difficulties, one in five (21%) acquired the phone for texting (versus 13% of all with a disability and 16% of all UK adults).

### 7.2 Volume of mobile phone use

Two questions were asked to assess the volume of mobile phone use: the number of calls made per week and the number of text messages sent per week. Figure 41 shows these two volumes of weekly use for all adults with a mobile phone, and for particular sub-groups of interest.

---

57 Base: All UK adults with a mobile phone (2,550). Question M13, spontaneous responses, multi-coded.
Across all adults users the average (self-reported) weekly volume of calls made stands at 20, plus 28 text messages sent per week. It is evident that age has a huge impact on volume of use generally, and the volume of text messages sent in particular. An analysis across age bands shows that call volumes fall off rapidly for those aged 35 and over, with text message volumes halving for those aged 25-34 compared to those aged 16-24.

Beyond the age of the mobile phone owner there is relatively little variation from the overall combined volumes of calls and texts for adults from minority ethnic groups and those with any disability (aged under 65). Indeed, adults from minority ethnic groups send rather fewer texts than the average shown in Figure 41. Those in a low income household (aged under 65) match the UK average for calls made, and show a higher than average volume of texts sent.

Amongst all those with a disability (aged under 65), the volume of calls made is the same as the UK average, but this average is higher for those with visual difficulties (at 22) compared with those with hearing or mobility difficulties (at 16 and 15 respectively). Similarly, the volume of texts sent is similar to the UK average amongst all those with a disability (at 26 versus 28), but is much higher for those with hearing difficulties (at 23) compared with those with visual or mobility difficulties (at 11 and 8 respectively).

We looked in more detail at those who are using their mobiles most. Two definitions are required: heavy callers and heavy texters. Heavy callers have been defined as those making over 30 calls per week. This group accounts for 13% of all UK adults, with an average of 72 calls per week, almost four times the average for all UK adults. One in three heavy callers is also a heavy ‘texter’.

Heavy texters have been defined as those sending over 35 texts per week. This group accounts for 19% of all UK adults, with an average of 86 texts per week, three times the average for all UK adults. Half of all heavy texters are also heavy callers.

Whilst heavy callers are more commonly those who have had their phone for longer, this is not the case for heavy texters. Both heavy callers and texters make a greater breadth of use of their phones, in terms of the number of different uses made on a weekly basis.

Two in five (38%) heavy callers and one-third (32%) of heavy texters have a 3G phone, compared to one in ten (11%) of all mobile phone users.

---

58 Base: All UK adults with a mobile phone (2,550). Questions M8 and M9, prompted responses, single coded.
7.3 Monthly spend

Amongst those with a mobile phone, the average monthly spend is £22. One in five mobile phone owners (18%) spends over £30 per month.

Groups which stand out in terms of spending more per month on their mobile phone: those aged 16-24 (an average of £31), and those in a minority ethnic group (both younger and older adults) (£33). Furthermore, 10% of 16-34s spend over £50 per month.

7.4 Breadth of use of mobile phones

In order to find out more about the types of activity people carry out on their mobiles, all adults with a mobile phone were prompted with 22 possible uses and were asked to say for each whether they used their mobile phone for this, and how often. The long list of types of use have been grouped into the six broad types shown in Figure 42 below. Each band indicates the proportion of mobile phone owners in each group making each type of use at least weekly, with these bands stacked on top of each other to indicate the breadth of use amongst the different types of mobile phone users.

Figure 42 Key types of use made of mobile phones at least weekly⁵⁹

![Figure 42: Key types of use made of mobile phones at least weekly](image)

It is clear that the youngest users and those with a 3G phone have a greater breadth of use. Beyond this, only a minority of mobile phone users are using their phone in a typical week for anything other than basic communication (i.e. making calls or sending text messages).

Mobile phone owners aged 65 and over differ most from the average in terms of types of use made on a weekly basis. This is principally because two in five (40%) of these older users do not make any use of their phone in a typical week, tying in with the previous finding that the vast majority of these older owners acquired their phone for emergency use. By contrast, those aged under 65 with a disability do not differ particularly from all mobile phone owners in terms of types of use made.

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⁵⁹ Base: All UK adults with a mobile phone (2,550). Questions M10, prompted responses, single coded.
Figure 43 below shows the top five individual uses made using mobile phones on at least a weekly basis for all UK adults with a mobile phone, alongside some of the key demographic groups covered by the audit. The measures for these other groups have been shown in terms of the extent to which they differ (whether higher or lower) from the overall UK adult measure in each case.

**Figure 43  Top five weekly uses made of mobile phones**

<table>
<thead>
<tr>
<th>Activity</th>
<th>All users</th>
<th>Aged 16-24</th>
<th>Aged 65+</th>
<th>Minority ethnic groups</th>
<th>Any disability aged under 65</th>
<th>Low income household aged under 65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Making personal/business calls</td>
<td>85%</td>
<td>+8%</td>
<td>-27%</td>
<td>+8%</td>
<td>-4%</td>
<td>-1%</td>
</tr>
<tr>
<td>Sending personal/business text messages</td>
<td>70%</td>
<td>+24%</td>
<td>-53%</td>
<td>-2%</td>
<td>-</td>
<td>+12%</td>
</tr>
<tr>
<td>Looking back at stored text messages on your phone</td>
<td>28%</td>
<td>+28%</td>
<td>-24%</td>
<td>+3%</td>
<td>-2%</td>
<td>+9%</td>
</tr>
<tr>
<td>Taking photos using the phone</td>
<td>24%</td>
<td>+34%</td>
<td>-22%</td>
<td>+3%</td>
<td>-3%</td>
<td>+6%</td>
</tr>
<tr>
<td>Looking back at stored photos on your phone</td>
<td>21%</td>
<td>+32%</td>
<td>-21%</td>
<td>-1%</td>
<td>-1%</td>
<td>+6%</td>
</tr>
</tbody>
</table>

This confirms the sharp distinction in the range of activity between the different age-groups. It is also of note that those in low income households tend to make slightly more use of their mobiles than the UK average, especially in the area of texting (likely to be an outcome of its relative cheapness when compared to mobile voice calls).

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60 Base: All UK adults with a mobile phone (2,550). Question M10, prompted responses, single coded.
7.5 Competence with mobile phone tasks

As well as range of usage, we investigated how confident people felt about a range of ‘tasks’ relating to mobile phone use. All adults with a mobile phone were prompted with a series of such tasks, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and if so, whether it was a task they could do with confidence. Figure 44 below summarises the responses for each task.

Figure 44 Competence with mobile phone tasks

Interest in and competence at the various tasks shown in Figure 44 are generally very high, with competence outweighing the proportion who are interested but can’t do with confidence by a significant margin in each case except ‘accessing mobile operator’s internet sites from your phone’, which elicits much higher ‘not interested/ no need’ nominations (at 40%).

This is in part an outcome of the fact that these tasks are mostly related to the core functions of the device.

There are, of course, differences in responses by age, with half of those with a mobile phone aged over 65 (46%) saying they have no interest or need for texting. Those without children at home are more likely to be uninterested (16%) compared to those with children (6%).

7.6 Content controls

Few mobile phone users are aware of the possibility of age verification or filters on newer mobile phones. 83% of respondents are unaware of either of these elements – which are by no means applicable to all mobile phones - with more awareness of age verification (13%) than filtering (5%).

Those with children at home are no more likely than those without to be aware. However, the 16-24 age group is more knowledgeable about such controls – one in five says they are aware of age verification, and one in ten of filtering.

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61 Base: All UK adults with a mobile phone (2,550). Question M18, prompted responses, single coded.
7.7 Understanding of mobile phone regulation

Respondents in our survey were asked whether they thought the ‘mobile phone service’ was regulated. Those who thought it was were then asked which organisation or entity they thought regulated the service. Responses are given in Figure 45.

Figure 45 Understanding of mobile phone regulation

The purpose of the question was to provide a snapshot of current understanding about whether or not the mobile telephone service appears to people to be regulated, rather than a detailed investigation of what forms this might take.

People with children at home are slightly more likely to think mobile phones are regulated, at 33% compared to 25% of those without. This is also reflected in the finding that those aged 35-44 are most likely to think they are regulated (39%) compared to 25% of those aged 16-24.

7.8 Concerns about mobile phones

Two-fifths (42%) of all adults with a mobile phone nominate (without prompting) any concerns ‘about mobile phones’, while one-third (32%) of those adults with no mobile phone say they are concerned.

The main area of concern relates to health, as indicated in Figure 46.

Figure 46 Concerns about mobile phones

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62 Base: All adults aged 16+ (3244) M22, M23.
63 Base: All UK adults aged 16+ (3,244). Question M20, spontaneous responses, multi-coded.
Nominations regarding concerns relating to risks to health (20% of all UK adults) are lowest amongst 16-24s (at 13%), but otherwise do not vary particularly by age. They are slightly higher for those with any disability (aged under 65) (at 25%), and in particular amongst those with hearing difficulties (at 37%). Concerns about risk to health are also higher amongst those in higher income households (aged under 65) (at 28%).

Five per cent of all adults claim to be ‘very concerned’. Amongst those very concerned there are equal nominations relating to ‘health’ and ‘risk to society’.

7.9 Personalisation

Of all mobile phone owners (82% of all UK adults), four-fifths (79%) say they can change the ringtone to another one available on their phone. This measure accounts for almost all owners aged 16-24 (99%), and is also higher than average for those aged 25-44 (92%).

Other than age, this measure is somewhat higher amongst men compared to women (82% and 76% respectively), those aged under 65 (86%), and minority ethnic groups (87%).
Section 8

News

Opinions about news across the different platforms provide a useful indicator of the extent to which people evaluate content according to the platform it is received from. It is also, of course, a key factor in democratic engagement and understanding, and as such an important component of media literacy.

This section examines habits and perceptions about news provision through the use of different media for news provision, and the extent of trust that people say they have towards news outlets on the various platforms.

Summary

Most adults use multiple news sources. Levels of trust in news are highest for those that use most sources.

One in 5 UK adults says they use the internet to keep up with national news, with those aged between 16-44 more likely to do so than those aged over 45.

Overall, trust is highest for the traditional UK-based TV channel bulletins and 24-hour news outlets, closely followed by radio news, with over three-quarters of UK adults saying they trust such outlets. News websites are next, with nearly two-thirds saying they trust them. Trust is lowest for the press with just under half saying they trust newspapers – although there are significant differences in the levels of trust for individual press titles.

People aged 35-44 are more likely to trust news outlets, whereas younger adults are less likely to do so. Trust in news outlets also varies across different minority ethnic groups.

People that define themselves as involved in politics or campaigning appear (slightly) more likely to be sceptical of news sources, especially those on the internet.

8.1 Sources used for news

All adults were prompted with a list of news sources and were asked to state which they use to keep up with national news, and which one of those sources they use the most for national news. Figure 47 shows the sources used at all and used most across all adults, with responses from particular sub-groups highlighted where they show a higher incidence for news sources used at all.
Most adults use multiple sources for news. Two in five UK adults use three or more of the listed sources for national news, with this being more common amongst those living in higher income households.

One in five UK adults uses only one source. This is more common amongst females, those with children at home, those with a disability (and aged under 65) and those in low income households (and aged under 65).

Adults from minority ethnic groups (in particular those aged 45 and over) use fewer news sources generally, with the most marked difference shown for newspapers (at 59% versus 70% for all UK adults). There are indications that use of magazines, however, is slightly higher amongst adults from minority ethnic groups (at 17% versus 13%).

Trust in news sources is highest for those using the most (five or more) sources for news, and is lowest for the small proportion of UK adults who say they don’t tend to follow national news (shown at the bottom of Figure 47).

### 8.2 Use of the internet for news

As shown in Figure 47, amongst all UK adults one in five (18%) uses the internet to keep up with national news. Figure 48 below looks at which types of adults are more and less likely to do so.

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64 Base: All UK adults (3,244). Questions Z6 and Z7, prompted responses, multi-coded for use at all, single coded for use most
Use of the internet for news is clearly more common for those aged 16-44, and declines considerably for each subsequent age group. Broadly, use of the internet for news is more common amongst younger adults, those from minority ethnic groups, males, and those in higher income households. Amongst adults from minority ethnic groups, use of the internet for news is more common amongst under 45s (at 32%).

Of course, this profile fits with the profile of those more likely to have internet access, although news content would not necessarily form part of an internet user’s repertoire of activity.

8.3 Summary of extent of trust in news outlets

Figure 49 shows the index measures for the extent of trust and extent of distrust for the four media types, based on those giving ratings for any of the titles from an illustrative list within each media type.

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65 Use of the internet to keep up with national news

66 Base: All UK adults (3,244). Question Z6, prompted responses, multi-coded.

All adults were prompted with a list detailing particular TV, radio, internet and press news ‘titles’ in order to assess trust in news outlets. The titles were chosen to be as widely available as possible and to illustrate a range of titles for each of the four types of media. Adults were asked to use a five point scale to indicate the extent to which they would trust or distrust each news outlet. An index measure for each of the four types of media was calculated based on all giving a rating for each outlet from the list. For example, those giving a rating for two of the three news websites of which one was a ‘would trust’ rating and one was a ‘would not trust’ rating would have an index measure of 50% for extent of trust and 50% for extent of distrust.
Figure 49 shows that trust in TV and radio news outlets stands at around three quarters of the maximum potential, with trust in internet news websites at around two-thirds of the maximum potential.

Levels of distrust are below 10% of the maximum potential for TV and radio news outlets, and rather higher for internet news websites, at 15% of the maximum potential. However, the extent of trust is lower and the extent of distrust is higher for newspapers compared to TV, radio and the internet news outlets.

There are notably lower levels of trust overall for three of the seven minority ethnic groups covered by the audit: Bangladeshi, Middle Eastern and Pakistani. This finding applies to each of the four media types shown above.

Levels of trust for each of the four media types are consistently lowest amongst the youngest adults (aged from 16 to 24), and are usually highest amongst those aged from 35 to 44. Similarly, levels of distrust are highest for TV and radio amongst those aged 16 to 24, but do not differ significantly for the internet and newspapers. The extent of these differences compared to the levels of trust and distrust for all UK adults are shown in Figure 50 below.

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67 Base: All UK adults (3,244). Index measures used. Question Z8, prompted responses, single coded.
68 The maximum potential being a ‘would trust’ rating for all news outlets rated.
Elsewhere in the audit, all adults were asked to state the extent to which they agreed or disagreed with the statement ‘I consider myself to be involved in political or campaigning issues’. Across all adults, 9% agreed with this statement. Levels of agreement were higher amongst those aged 65 and over and those from minority ethnic groups.

Whilst levels of trust in TV news, radio news and newspapers are lower amongst those agreeing with this statement compared to all adults, the differences are minimal, at 2-3%.

Levels of trust in news websites however show a larger range. Those who consider themselves involved in political or campaigning issues are 5% below the all-UK adult measure for trust in news websites. In other words, it seems that the more politicised are (slightly) more likely to be sceptical of news sources, especially those of the internet.

### 8.4 Detail of levels of trust in news outlets

This section looks in more depth at the individual news media outlets, to explore the extent of trust apportioned.

Figures 51 and 52 below show the proportion of UK adults stating that they trust or distrust each of the particular TV, radio, and internet news ‘titles’ used to assess trust in news outlets, starting with TV and radio below. Press outlets are summarised into categories.

The TV news outlets include the bulletins from the main channels, the major UK-based news channels, Teletext, and Fox News and Al-Jazeera for comparative purposes. The radio news outlets include the BBC’s Radio 4 and also the World Service. From the commercial radio sector, the national Virgin Radio was included plus generic ‘local/regional commercial stations’. Online news outlets were represented by bbc.co.uk, Yahoo and MSN, chosen because they were the sites of their type with most traffic during the period of research. Press outlets are divided into daily and weekly local and regional newspapers, national broadsheets and national tabloids.

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**Figure 50** Levels of trust and distrust amongst the youngest adults

<table>
<thead>
<tr>
<th>All adults</th>
<th>Aged 16-24</th>
<th>Aged 35-44</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trust</strong></td>
<td><strong>Distrust</strong></td>
<td><strong>Trust</strong></td>
</tr>
<tr>
<td>UK TV news</td>
<td>77%</td>
<td>8%</td>
</tr>
<tr>
<td>Radio news</td>
<td>73%</td>
<td>7%</td>
</tr>
<tr>
<td>News websites</td>
<td>63%</td>
<td>15%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>46%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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69 Base: All UK adults (3,244). Question Z8, prompted responses, single coded.
As Figure 51 shows, levels of trust for BBC and ITV news are almost identical. In terms of their demographic profile, there is no particular difference between those who trust TV news bulletin broadcasts (from BBC ONE or TWO, ITV, Channel 4 or Five) and those who trust the 24 hour news channels (Sky News, BBC News 24, and ITV News channel). For both, levels of trust are generally higher amongst those aged 25 and over, females, and those in higher income households.

The two TV news outlets based outside the UK (Fox News and Al Jazeera) attract high levels of ‘don’t knows’, but also the highest levels of distrust. Al Jazeera elicits different responses from white adults and adults from minority ethnic groups. Whilst 7% of white adults trust Al Jazeera, this figure rises to 21% for adults from any minority ethnic group and higher still for Middle Eastern adults. Across all minority ethnic group adults, this measure of trust is higher amongst younger (aged under 45) adults (at 24% versus 17% for those aged 45 and over).

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70 Base: All UK adults (3,244). Question Z8, prompted responses, single coded.
In comparison to TV and radio news outlets, internet news websites see little difference in the proportion of adults who would not trust these news outlets, but much higher levels of ‘don’t knows’. It is of note that BBC online news is significantly more trusted than either Yahoo News or MSN News – quite possibly an outcome of the strength of its existing brand in this regard on TV and radio – but still much less trusted than BBC TV or radio news. Those without internet access are unlikely to give an opinion for this media type, and those with internet access do not differ from the UK average in terms of levels of distrust.

Trust in news websites tends to be higher amongst those aged from 35 to 44 and white adults. By contrast, levels of distrust in news websites tends to be higher amongst those aged 55 and over, those with any disability and aged under 65 and those in low income households and aged under 65.

It is clear that newspapers have the highest levels of distrust compared to UK TV, radio and news websites, with distrust levels increasing through local and regional newspapers, broadsheets, to the tabloids.

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71 Base: All UK adults (3,244). Question Z8, prompted responses, single coded.
Section 9

Attitudes and preferences

In this final section of the report we consider the four main platforms together, and examine people's attitudes and preferences towards them. We look first at which media people are using, and which they are most attached to.

We then turn to how they prefer to use different methods of communication for different circumstances. We look at attitudes towards technology generally, and attitudes towards the need for protection on different platforms, before focusing on the types of media education and training that people have had, and which they are most interested in.

Summary

Watching television is the most popular media activity overall, although differences emerge between age-groups, with using a mobile phone being preferred by 16-24s, and nearly one in five of this group nominating listening to music as the media activity they would miss most.

Online communications have become the preferred method for one in five UK adults in a number of areas – catching up with distant friends and relatives, checking a bank balance, and booking holidays – although more people for the latter transactions still prefer to do this in person. Once again, younger adults are far more likely to use texting and mobile phone calls for various types of communication.

Half of UK adults (46%) prefer to learn about digital services and products from reading written instructions. Asking for help from family and friends is the preferred method for two fifths of the population, and is the most popular among the over 65 age group.

People give mixed, somewhat contradictory messages about their levels of interest in new media technologies, and their interest in learning more about them. There is agreement with the statement that they 'don't get the most from the technologies they have', and one in five say they would 'like to learn more but don't know how'. One third say they are interested in learning more.

People feel simultaneously that content should be free to be expressive, and also that users should be protected. It is of note that freedom of expression is less supported for the internet and mobile.

9.1 Media usage and attachment

A key theme for the media literacy audit is to understand media platforms in relation to each other, to see how the balance of usage is currently constituted and be in a position to track how this may change over time. All adults were asked to choose from a list of nine media activities to indicate which they regularly do, and which of these they would miss doing the most. Figure 53 shows the findings from these two questions with all percentages based on all adults.

72 'Regularly do' being defined by respondents themselves.
Whilst seven of the nine are regular media activities across all adults, it is clear that watching TV is the most preferred, with close to half of all adults choosing this as the activity they would miss the most. By contrast, around one in six who regularly use the internet and one in seven who regularly use a mobile phone choose these as the activities they would miss the most. Similarly, whilst one in five (21%) adults regularly play console or computer games, very few name this as their most preferred media activity.

As might be expected, regularly playing console or computer games is more common amongst the youngest adults, with 54% of 16-24 year olds naming this as a regular activity. Whilst playing games declines with each subsequent age category, it is of note that one in six (16%) of those aged 35-54 play games regularly, and that games playing falls to a low level (3%) for those aged 65 and over.

In order to understand which media activities are more likely to be preferred by different age groups, Figure 54 shows the preferred activities nominated by age. The media activities nominated as preferred by at least 10% of any given age group have been shown, and so listening to a portable music device, watching videos/ DVDs, and playing console/ computer games are not shown in this analysis.

Whilst watching TV is the most preferred media activity (through being the most likely to be nominated as the one activity that would be missed the most) for those aged 25 and over, adults aged 16-24 are slightly more likely to name using a mobile phone as their preferred media activity.

Each of the other five media activities are named as being preferred by a minority of adults overall, but some interesting patterns appear across the age groups. Listening to music on a hi-fi / CD or tape player is nominated by around one in five (18%) adults aged 16-24 as their preferred media activity, but this measure falls to just 8% of those aged 65 and over. By contrast, listening to the radio is much more likely to be named as the preferred media activity for those aged 45 and over, rising to 21% of those aged 65 and over.

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**Figure 53** Preferred media activity amongst all adults

- Watch television: 95%
- Read newspapers/ magazines: 78%
- Listen to radio: 77%
- Use a mobile phone: 73%
- Listen to music on hi-fi etc.: 71%
- Watch videos/ DVDs: 66%
- Use internet via computer: 50%
- Play console/ computer games: 21%
- Listen to portable music device: 18%
- Regularly do: ■
- Would miss the most: ■

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73 Base: All UK adults (3244), Questions A4 and A5, prompted responses, multi-coded for regularly do, single coded for would miss doing the most.
Nominations for using a mobile phone as the preferred activity fall with each subsequent age group, from 28% for 16-24 year olds to just 1% of those aged 65 and over. Whilst around one in ten adults aged 16 to 44 name using the internet as their preferred activity (11% each), this measure tails off significantly from age 45 upwards. By contrast, nominations for reading newspapers / magazines as the preferred activity only reach double figures for those aged 55 and over, and only account for 1% of those aged 16-24.

We also explored media preferences through a series of questions that asked people to indicate their preferred form of communication in a number of possible circumstances.

### 9.2 Preferred method of communication

Adult respondents in our audit were given six communications options to choose from and were asked to choose one of these as the way they would prefer to make contact in a range of different circumstances. The preferred communications options for the different circumstances are shown in Figure 55. 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.

Despite the prevalence of mobile phones amongst UK adults, the home / landline phone is generally more likely to be chosen for communication than sending a text message or making a mobile phone call. That said, nearly one in three adults prefers texting to get in touch with a friend to arrange to meet.

One in five adults now prefers to use the internet to catch up with friends and family. Nearly one in four prefers the internet for booking a holiday. It is of note, however, that communication with public services, exemplified here by 'contacting the local council', appears to be less oriented to new media, with only 4% of adults preferring to contact the council by internet, and the vast majority by home/landline telephone (of course, this lower figure is also likely to be related to the availability of online council services).

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74 Base: All UK adults (3244). Question A5, prompted responses, single coded.
The communication preferences amongst UK adults aged 16-24 differ significantly from those for all UK adults for certain circumstances, as illustrated in Figure 56.

Compared to all UK adults, those aged 16-24 show a much stronger preference for mobile phones (whether calling or texting) for communication, with this particularly the case when communicating with friends.

However, the proportion choosing to communicate by e-mail/website does not differ so clearly.

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**Base:** All UK adults (3,244). Questions Z2A-H, prompted responses, single coded.

**Base:** All UK adults aged 16-24 (493). Questions Z2A-H, prompted responses, single coded.
9.3 Attitudes towards new technology

Respondents were prompted with four statements regarding attitudes towards new technology and were asked the extent to which they agreed or disagreed with each of them.

As Figure 57 illustrates, what emerges is a mixed, somewhat contradictory picture – people are both cautious about technology, yet also say they embrace it.

![Figure 57 Attitudes towards technology](image)

Those adults more likely to hold positive attitudes towards technology generally (in terms of being interested and trying to keep up) are, unsurprisingly, given our earlier findings, under 35s, males, those in higher income households, and younger adults (aged under 45) from the minority ethnic groups.

This ambivalence is manifest in Figure 58 which looks at people’s views about whether the media platforms under discussion should be free to publish what content they like, and whether protection should exist.

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77 Base: All UK adults (3,244). Questions A1A-E, prompted responses, single coded.
As Figure 58 illustrates, people feel simultaneously that content should be free to be expressive, and also that users should be protected. Of course, such views are not mutually exclusive, but it is of note that freedom of expression is less supported for the internet and mobile. In part, this is due to higher levels of neutrality expressed by respondents, but these platforms also gather the highest levels of active disagreement with the idea that content should be free (17% and 15% respectively).

Levels of agreement with either statement about mobile phones do not vary considerably by age group.

There is more distinction for views about the internet. While 65% of 16-24s think that internet content should be free to be expressive and creative, this drops to 47% of those aged 55-64. Those with the internet at home are more likely to agree (62%) than those without (37%). That said, there are few age differences in responses to the need for internet users to be protected (with the exception of those aged over 65). People with the internet at home are again more likely to agree (80%) than those without (65%).

We also asked respondents for their levels of agreement with the statement as long as TV/radio provides good programmes it doesn’t matter who owns the channels/stations or how they’re funded. Responses are shown in Figure 59.
The majority of respondents agree with the statement that the ownership and funding of TV and radio is immaterial if the content is good. However, 1 in 5 disagrees with it, and a further 1 in 5 is unsure. There is little difference by age-group.

9.4 Media education and training

Finally, we asked people to agree or disagree with a series of statements about their knowledge of digital TV, mobile and the internet, and their interest in learning more (Figure 60).

**Figure 60 Attitudes to television, radio, the internet and mobile phones**

Over one third of people indicate that they are getting what they want from the platforms. Over half agree that they don’t get the most from the technologies they have, with nearly one quarter agreeing strongly with this statement.

55% would appear to be happy with their current level of knowledge, with over one quarter agreeing strongly with this statement.

That said, one in five says they would like to learn more but don’t know where to go: a similar proportion to those saying they don’t get a chance to learn about the technologies because someone else in the household takes charge of them, with women and parents more likely to agree with this statement (men 12%, women 25%; parents 25%, non-parents 13%).

We also asked for people’s preferred methods of learning about ‘digital television and radio, the internet and mobile phones’. They were prompted with five ways to choose from. Figure 61 shows the responses for each of the five ways of learning for each age group covered in the study.

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80 Base: All UK adults (3,244). Questions Z5A-E, prompted responses, single coded.
81 Choosing as many of the five ways as applied to them.
Learning from written instructions scores is most popular overall (46%), although it shows a clear decline for those aged 55 and over, as is also the case for learning through trial and error / experimentation (36% overall). Learning through asking for help from friends and family increases slightly across the age groups (41% overall), and is the most popular for the over 65 age group.

There are clear preferences in terms of ways of learning by gender, with women showing a preference for learning from friends and family (50%, compared to 31% of men) and men showing a preference for learning through trial and error (44%, compared to 30% of women).

Learning by going to a class/ learning in a group appears to have little appeal across all the age groups (8% average across all groups), with learning from the supplier/ store faring little better (12% average).

The proportion claiming they have no interest in learning about digital services and products increases sharply for those aged over 55, rising to 37% of the over-80s.

We further explored the prospect of training and education about the media by asking whether people had learnt about a variety of different media topics, ranging from skills to more creative applications, as well as some traditional ‘media studies’ topics such as how TV programmes are made. The results are shown in Figure 62.

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82 Base: All UK adults (3,244). Question Z4, prompted responses, multi-coded.
One third of adults (32%) say they are interested in learning more about these elements. One in seven (14%) is interested in learning about the internet, and one in 10 about creating a website. It is of note, however, that more people appear to be interested in learning about TV dramas and TV news than in setting filters on the internet, TV or mobile.

Experience of and interest in learning more is higher, though still accounts for a minority, amongst those aged under 35, adults from minority ethnic groups and those in higher income households.

Around one in five (22%) UK adults say they have experience of learning through classes or training about these uses and processes behind the media. Experience beyond the internet appears to be scant.

16 – 24 year olds are more likely to have learned about TV drama, TV news, and funding; but 45 – 54s are just as likely as 16 – 24s to say they have learned through training about using the internet (21% and 23% respectively).

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83 Base: All UK adults (3,244). Questions Z16 and Z17, prompted responses, multi-coded.
Section 10

Looking forward

The scope of this audit has been ambitious. It has examined a wide range of types of media usage and related opinions, on all key platforms, across a variety of demographic groups. That said, the key conclusions can be distilled into a small number of inter-related themes.

- Age is a significant delineator of the extent and types of media literacy, with mobiles an ubiquitous media technology for the 16-24 age group. Over-65s have significantly lower levels of media literacy than other age-groups.
- Platforms are seen in ‘traditional’ terms – there are few signs yet of a widespread recognition of their wider digital functions. People appear to be reasonably comfortable where they are.
- Knowledge of industry funding and regulation across the platform varies. A significant majority of respondents know how the TV industry is funded and that it is regulated. Over half of UK adults know about the radio industry. Two in five internet users know how search engine websites are mainly funded, although this drops to one quarter of UK adults as a whole.
- Levels of concern vary across platforms, with little concern over mobile content. Levels of self-reported ability and understanding in relation to content controls indicate that for the internet, a sizeable minority are not confident about blocking viruses or email scams. Most people are not yet aware of content controls on mobile phones.
- Many people, especially the elderly, say they prefer to learn media skills from family and friends and do so by themselves rather than in formal groups. The highest area of interest for many people is in learning how to use the internet. One third of people say they are interested in learning more about digital platforms and services.

Because media literacy encompasses such a broad spectrum of issues and areas, it is impossible to reach an unqualified verdict on the present overall state of media literacy across the UK. Rather, the picture is mixed, with different elements of media literacy on different media platforms for different types of person showing different results.

The question that remains is whether, given the potential for harmful and offensive content on the newer platforms, the levels of understanding and ability to use the available functions is acceptable or whether users need to be encouraged to expand their platform ‘repertoire’ to include newer functions, building on their existing knowledge and skills.

This audit provides a significant first step in benchmarking a number of these key elements of media literacy, for both Ofcom and its stakeholders to digest and build upon.

Finally, it is worth turning to the future. We will conduct further research in this area, and repeat this audit in future years, to track how these elements evolve over time. Taking a five year timeframe, we may expect some of the core media literacy areas to look rather different from today:

- Wider usage of interactive and enhanced functions on DTV
- Growth in use of internet for access to public as well as commercial services
- Growth in validity and usage of user-generated content
• Growth in range of use of mobile and of internet

It is important to remind ourselves that the rate of change in digital communications is likely to continue apace. The media landscape will change considerably over the coming years.

In order that people can take full advantage of the potential civic, cultural and commercial benefits of such development – as well as arm themselves against the potential difficulties or drawbacks – the development and deepening of understanding and confidence needs to continue to grow. This audit has revealed a good beginning, with firm foundations to build upon.
Annex 1

Research methodology

‘Core’ interviews with adults

A total of 2,357 ‘core’ interviews were conducted in English with adults aged 16 and over. All interviews were conducted in the respondents’ homes by a team of interviewers across 303 locations in the UK. Minimum quotas were applied for these interviews based on the respondent’s age, gender and working status in order to achieve samples of interviews which were representative for each of the four UK nations. The count of ‘core’ interviews per nation is 1,078 in England, 414 in Scotland, 429 in Wales, and 436 in Northern Ireland.

Previous Ofcom research studies had indicated relatively low take-up of broadband in Wales and Northern Ireland, and so the ‘core’ interviews were boosted through screening for an additional 41 broadband users in Wales and an additional 40 broadband users in Northern Ireland.

Interviews with adults from minority ethnic groups

The ‘core’ interviews with adults detailed above would not fully represent adults from minority ethnic groups because interviews were conducted in English, and some respondents may feel more comfortable being approached to take part in the research by a researcher from the same ethnic background as them. A specialist ethnic research agency was therefore used to conduct 703 interviews in home with adults aged 16 and over from seven minority ethnic groups. Interviews were conducted in the mother tongue of each respondent, and targets were set to achieve a minimum of 100 interviews with adults from each of the following groups:

- Indian, Pakistani, Bangladeshi, Black Caribbean, Black African, Middle East & Arabic origin, Chinese

A total of 160 interviews were conducted with adults from minority ethnic groups as part of the ‘core’ study, thus an overall total of 863 interviews across the seven groups detailed above was conducted.

The 2001 Census indicates the adults from minority ethnic groups have a younger profile than white adults in the UK, with 74% of adults from minority ethnic groups aged from 16 to 50 compared with 56% of white adults. The younger profile of UK adults in minority ethnic groups is reflected in this research study. For example, the average age across all white adults interviewed is 46 years, compared to an average of 38 years amongst adults from minority ethnic groups. Given that age is a key indicator in terms of the presence of media literacy, this strong influence of age needs to be taken into consideration when reviewing the findings for minority ethnic groups.

Interviews with adults with visual or hearing difficulties

The ‘core’ interviews with adults were boosted with an additional 50 interviews with adults aged 16-65 with visual difficulties and an additional 53 interviews with adults aged 16-65 with hearing difficulties. In both cases these difficulties were self-defined by respondents, with all adults taking part in the research indicating which, if any, types of physical difficulties they have (question S4). These boost interviews were mostly achieved through interviewers visiting blind centres and deaf clubs in order to approach potential research respondents, with qualified British Sign Language users assisting the interviewer where necessary.
Amongst those with visual difficulties there were no requests for a Braille version of the questionnaire, instead the prompt material and self-completion elements of the questionnaire were read out to respondents by the interviewers.

**Interviews with adults in low income households**

For the purposes of this audit, low income households have been defined as those with a total annual household income of under £11,500 before tax and deductions.

**Older people, those with a disability and those in low income households**

There is a strong relationship between age and two other key measures for this study: those in low income households, and those with a disability. Figure 63 indicates the extent of this relationship.

**Figure 63  Relationship between age, low income, and disability**

The data in Figure 63 indicates that the proportion of adults aged 65 and over in low income households is twice that for all UK adults (59% cf. 26%), and the proportion of adults aged 65 and over with a disability is twice that for all UK adults (50% cf. 25%). This strong relationship between age, low income and disability means that findings which appear to relate to those with a disability and/ or those in low income households may actually relate to older people within these groups, rather than the groups as a whole. For example, mobile phone ownership is 14% below the UK average for all adults with a disability and 14% below the UK average for all adults in low income households. Once both groups are defined based on those aged under 65, however, mobile phone ownership does not differ from the UK average for those with a disability aged under 65, and mobile phone ownership is just 2% below the UK average for those in low income households aged under 65. In order to disentangle this relationship, we have focused our attention on those in low income households who are aged under 65 and those with a disability who are aged under 65. Findings from the interviews conducted with all older people aged 65 or over are also detailed in this report.

**Interviews with adults**

The data reported in this document has been weighted to match the profile for each of the four UK nations in respect of age, gender, working status and social economic grade. The boost interviews conducted in Wales and Northern Ireland with broadband owners and the boost interviews conducted across the UK with people aged under 65 with a disability have been corrected ahead of this weighing in order not to skew the overall profiles. Figure 64 below shows the breakdown of the 3,244 interviews conducted with adults aged 16 and over for this study overall. Other than the counts of interviews shown for the four UK nations, there will be overlap between the other groups shown.

---

84 Base: All UK adults (3,244).
**Figure 64  Number of interviews conducted within each group**

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>1,816</td>
</tr>
<tr>
<td>Scotland</td>
<td>437</td>
</tr>
<tr>
<td>Wales</td>
<td>495</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>496</td>
</tr>
<tr>
<td>Older people aged 65 and over</td>
<td>480</td>
</tr>
<tr>
<td>Minority ethnic group</td>
<td>863</td>
</tr>
<tr>
<td>People with a disability aged under 65</td>
<td>496</td>
</tr>
<tr>
<td>People in low income households aged under 65</td>
<td>289</td>
</tr>
</tbody>
</table>
Annex 2

Technical appendix

Sample design

For the ‘core’ interviews with adults, quotas were set to achieve a minimum of 1,000 interviews in England and 400 interviews in each of Scotland, Wales and Northern Ireland. Interviews were conducted across 303 sampling points: 138 in England and 55 in each of the other three nations. Quotas were set for each individual sampling point in terms of the age, gender and working status of the adults to be interviewed, with these quotas representing the demographic profile of the sampling point in question.

A specialist sampling agency (Business Geographics) was used to draw the sampling points and prepare the quotas for each sampling point, using Output Areas (OAs) as classified by the 2001 Census. Interviewers were then provided with specific addresses to approach regarding the research. The average OA contains around 130 households in England and Wales, around 160 households in Scotland, and around 150 households in Northern Ireland. This approach therefore affords tight control over the addresses an interviewer can call at. All interviews were conducted in respondents’ homes, using paper questionnaires and prompt material.

The OAs selected as sampling points for each nation were chosen to be representative of the nation in question in terms of urbanity. Each OA carried the Business Geographics Urbanity Indicator; comprising seven categories classified according to the size of the settlements they contained and the degree of isolation as determined by their proximity to larger settlements. The classification is defined in the following table.

**Figure 65 Classification of urbanity indicators**

<table>
<thead>
<tr>
<th>Category</th>
<th>Urbanity</th>
<th>Category Name</th>
<th>Definition</th>
<th>Residential addresses</th>
<th>Interviews achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Urban</td>
<td>Large City</td>
<td>The 9 largest cities in GB</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>2</td>
<td>Urban</td>
<td>City/Large Town</td>
<td>Other settlements over 100,000 population</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>3</td>
<td>Urban</td>
<td>Medium Town</td>
<td>Settlements 10,000-100,000 population</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>4</td>
<td>Urban</td>
<td>Small Satellite Town</td>
<td>Settlements 2,000-10,000 population and within 10 miles from a larger settlement</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>5</td>
<td>Urban</td>
<td>Isolated Small Town</td>
<td>Settlements 2,000-10,000 population and more than 10 miles from a larger settlement</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>6</td>
<td>Rural</td>
<td>Accessible Rural</td>
<td>Settlements less than 2,000 population and less than 10 miles from a larger settlement</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>7</td>
<td>Rural</td>
<td>Remote Rural</td>
<td>Settlements less than 2,000 population and more than 10 miles from a larger settlement</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>
The ‘core’ interviews with adults were supplemented with a series of boost interviews: broadband owners in Wales and Northern Ireland, adults aged under 65 with visual difficulties, adults aged under 65 with hearing difficulties, and adults from minority ethnic groups, as detailed in Annex 1.

**Weighting**

The ‘boost’ interviews detailed previously were weighted back to their natural incidence in a pre-weighting stage. All data was subsequently weighted to the profile for each of the four UK nations using target rim weights for age, gender, social grade, working status and region. The weighting figures are from the 2001 Census data, and are shown in Figure 66 below.

**Figure 66  Weighting profiles for UK nations and regions**

<table>
<thead>
<tr>
<th>Figures are based on household (except social grade which is based on those 16-64)</th>
<th>UK</th>
<th>England</th>
<th>Wales</th>
<th>Scotland</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender – Male 15+</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Gender – Female 15+</td>
<td>52%</td>
<td>52%</td>
<td>52%</td>
<td>53%</td>
<td>52%</td>
</tr>
<tr>
<td>Age – 15-34</td>
<td>33%</td>
<td>33%</td>
<td>31%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Age – 35-54</td>
<td>35%</td>
<td>35%</td>
<td>34%</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Age – 55+</td>
<td>33%</td>
<td>33%</td>
<td>35%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Social Grade - AB</td>
<td>24%</td>
<td>26%</td>
<td>21%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Social Grade – C1</td>
<td>30%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>Social Grade – C2</td>
<td>18%</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Social Grade - DE</td>
<td>27%</td>
<td>26%</td>
<td>31%</td>
<td>34%</td>
<td>30%</td>
</tr>
<tr>
<td>Working Status – working</td>
<td>57%</td>
<td>57%</td>
<td>51%</td>
<td>55%</td>
<td>51%</td>
</tr>
<tr>
<td>Working Status – not working</td>
<td>43%</td>
<td>43%</td>
<td>49%</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Region - London</td>
<td>12%</td>
<td>15%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – South East</td>
<td>14%</td>
<td>16%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – South West</td>
<td>8%</td>
<td>10%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – Midlands/East</td>
<td>25%</td>
<td>30%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – North East</td>
<td>13%</td>
<td>15%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – North West</td>
<td>11%</td>
<td>14%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region - Scotland</td>
<td>9%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region - Wales</td>
<td>5%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – Northern Ireland</td>
<td>3%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
In addition to these target weights detailed above, additional weighting was applied for the interviews conducted in Northern Ireland in order to match data from the Ofcom Residential Communications Survey for ownership of the internet at home.