Media Literacy Audit
Report on UK adults’ media literacy

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Executive summary

The promotion of media literacy is a responsibility placed on Ofcom by 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”. This report is structured according to the elements in this definition:

- **Access** includes take-up of media devices, volume and breadth of use.

- **Understand** includes interest and competence in using the features available on each platform, extent and levels of concern about content, trust in internet sites, trust in news, and knowledge of regulation and funding sources.

- **Create** includes people’s confidence in engaging with creative content, and their interest in carrying out creative tasks, notably using social networking sites.

While almost everyone engages with the media to some degree, the extent of media literacy varies across the population, and this variation is apparent across each of the three elements of media literacy outlined above. We have found that age and socio-economic group play a pivotal role in the extent of a person’s media literacy.

Use of media technologies by people under 55 years old continues to grow. In particular, 16-24 year olds are at the forefront of using, and getting the most out of media devices, in terms of in-home access, the way they use media, and their confidence in using the various devices. Households containing children, and those in socio-economic groups AB and C1, are also more likely to use media.

In contrast, older people, generally those over 65, and people who are in the C2DE socio-economic groups tend to be less involved with media than others in the population.

The extent of media literacy also depends on people’s media understanding; whether they understand the influences on the content they consume, whether they evaluate what they see and hear, and whether they are concerned about any aspects of the multimedia world in which they live.

Our research findings in this area suggest that younger people’s enthusiastic take-up of new media and their technical skills are not necessarily complemented by a good understanding of the ways in which media content is funded and regulated. Similarly, their confidence in using the internet may mean that they are not necessarily exercising appropriate critical thinking or care when using websites. This might expose them to unsuitable material or to other risks, such as those relating to the security of their personal information. Their confidence may be a consequence of their insufficient awareness of the potential risks associated with internet use.

Older people and C2DEs (particularly DEs) use fewer functions and are less likely to be confident in using a range of media platforms, notably the internet. They are more likely to be concerned about what is on the internet and television, and their concerns are limiting the way they use websites. Confidence (or lack of it) is also playing a part. Compared with the general population, over-65s are less likely to use new websites, or to critically evaluate the new websites they do use. They are also less likely to be willing to share their personal details in order to access websites, and are less likely to seek learning support to overcome their concerns.
Carrying out creative tasks online generally requires more sophisticated skills than simply finding information, which people are more confident about.

Social networking sites are an example of a creative activity on the internet. One in five internet users say they have a profile on a social networking site. People tend to use them for a range of activities, although the main one is communicating with people they know.

**Access**

**Take-up and use of media continues to increase**

Over four in five people have a mobile phone, digital television or access to digital radio at home, and three in five have the internet at home. Take-up of mobile phones, digital television and the internet has continued to grow over the last two years, along with other digital devices such as MP3 players and recordable DVDs. This growth has happened across all demographic groups, but at varying levels. The groups that have experienced the greatest growth in multiple platform ownership (mobile, digital television and the internet) are those aged 20-24 and 35-44, people who are working and those living in rural areas.

As a result of growth in take-up of digital television and in-home internet, the availability of digital radio services has also increased significantly. However, a significant proportion of those with access to digital radio in this way do not listen to digital radio services. Furthermore, there has been a decrease in the proportion who say they listen to radio, regardless of the platform they use, from 77% in 2005 to 69% in 2007.

As well as being leaders in the take-up of new media, young people (under-35s, but particularly 16-24 year olds) also take part in a wider range of media activities, spend more time on the internet and use the internet for a wider range of activities than other demographic groups.

Across the general population, television is still the dominant media platform, relative to other media, and this is more strongly expressed among older people and the C2DE socio-economic groups. When we asked adults which media device they would miss the most television was the most mentioned device. However, younger people were less likely to mention television. For the youngest adults (16-19 year olds) two in five would miss their mobile phone the most, and one in five would miss using the internet, or watching television, most. Among 20-24 year olds, the media device they would miss the most is split between the three platforms, with one in three saying they would miss watching television the most, one in four would miss their mobile phone most, and one in four would miss the internet most.

Since 2005 there has been an increase across the population in the proportion of people who say they would miss watching television, using their mobile phone or the internet the most. Over the same time period there has been a decrease in those saying they would miss listening to the radio or music over a hi-fi device the most.
Older people and socio-economic groups D and E continue to have lower than average take-up

Between 2005 and 2007 take-up of the internet and digital television increased both for 20-24 year olds, and for people living in rural areas, at a faster rate than for the general population.

Figure 1: Growth in take-up by platform, 2005 and 2007, by age and socio-economic group

Among older people (over-65s) take-up of digital television has increased; among 65-74s it has risen from 56% to 69% and among over-75s it has gone up from 36% to 58%. However, overall take-up among 64-74s and over-75s continues to lag behind the national average (82%). Furthermore, the increase in take-up of the internet at home over the last two years among over-65s is lower than the UK average. This means that the gap between older people and the population in general in take-up of the internet has remained the same, if not slightly widened.

Take-up of digital television and the internet among people in the DE socio-economic group is increasing at the same rate as the average for the UK population. However, ownership levels for digital television (72% vs 82%) and the internet at home (35% vs 62%) are still lower than average among the DE group.

People who do not own a digital television, have the internet at home or have a mobile phone are more likely to give voluntary reasons for non-ownership. Voluntary reasons such as having no need for the device, or satisfaction with devices already owned, are the main reasons people give for not intending to get a device, rather than involuntary reasons such as affordability and access.

- digital television – 44% give a voluntary reason while 12% give an involuntary reason
- internet at home – 42% give a voluntary reason while 24% give an involuntary reason
• mobile phone – 65% give a voluntary reason while 8% give an involuntary reason

The remaining people either intend to get the device in the next 12 months or do not know whether they will or not.

**People are using more than one media device at the same time**

Along with increased take-up and use of media devices, people are also using more than one device at the same time. While watching television, two in three people say they also talk on the phone, use the internet, listen to music/radio or play games. Three-quarters say that they use another media device at the same time as using the internet. When people do use another media device while watching television or using the internet, it is most likely to be a mobile or fixed-line phone.

Again, young people are at the forefront of this trend. The presence of children in the household is also associated with concurrent use of media devices.

**Understand**

**Older people and C2DEs are less likely to be aware of, understand the benefits of, and feel confident in using, media functions and services**

The majority of people express interest in some of the functions that are available on digital television and radio, the internet and mobile phones.

Interest and confidence in using the interactive functions varies both within and between platforms. However, overall interest is highest for internet and mobile functions, and lowest for digital television and radio functions.

For most of the functions we assessed, the majority of those who expressed interest in the function also said they felt confident about using it (the exceptions were DAB radio functions). However, some groups of people are interested, but not confident.

Those who have the lowest levels of awareness, understanding of benefits and confidence in using the functions are over-45s, females, C2DEs, people who are not working or those who have no children at home. People living in Scotland, Wales or Northern Ireland also have lower levels of awareness of, understanding of, and confidence in using functions, although this may be related to demographic profiles rather than to differences between nations.

**Most people say they evaluate online websites they haven’t used before**

Many, but not all, people say they evaluate the new websites they use; they make checks when they visit new websites or before they enter personal details. For example, when visiting a new website, people are now more likely to check how up-to-date the site is (49%) than they were in 2005 (28%). The majority of internet users make some form of judgement about a website before they enter any personal details. ABC1s express more concerns, and are more likely to check new websites, yet they are more willing to enter their personal details when registering on a new website. This may mean that ABC1s feel a higher degree of reassurance because they have carried out checks before deciding to enter their personal details.

In contrast, C2DEs and over-65s have the least confidence in using the internet and do not typically make informed judgements about websites; they are also more likely to say that they would never enter their personal details to register with a new website. Their usage
levels are also lower; perhaps as a result of their lower tendency to evaluate what they see, and their lower levels of confidence.

The extent to which people do or do not trust content varies according to the genre they are seeing or hearing, or the information they are consuming. Looking specifically at perception of news and factual programming on television, 46% believe most of what they see, 27% say their belief varies according to the channel, and 24% are sceptical. Those who are most likely to believe news and factual programmes are 45-54s, female and C1s. Those more likely to be sceptical are males and 16-24 year olds.

People’s awareness of funding and regulation of content differs by platform and by demographic group. In general, people are more familiar with the arrangements for broadcasting, particularly television, and BBC content on television and radio. However, there is greater confusion about how websites and mobile phone content are funded and regulated.

16-24 year olds, who we have identified as some of the more prolific media users, are the least likely to know about media content funding and regulation. They are more likely to think that content is regulated when it is not.

**Concern about what is on television and the internet has increased since 2005**

The increase in concern between 2005 and 2007 could be evidence of people’s greater awareness of what they are watching, reading and hearing. For example, people who are most likely to mention that they are concerned about online financial security say they carry out checks on new websites and make judgements before entering their personal details.

People are more likely to mention something they are concerned about on the internet than on other platforms. The overall proportion expressing a concern about the internet has increased from 58% in 2005 to 63% in 2007. The concerns most mentioned are offensive content (57%), risk to society/values (38%) and risk to finances and devices (25%). Concern about risk to finances and devices are driven by increasing concerns about identity fraud. As mentioned above, this is also reflected in the extent to which people say they exercise caution before entering their personal details. The top three issues in 2005 were offensive content (45%), risk to society/standards/values (31%) and risk to personal privacy (20%).

However, the evidence does not suggest that these concerns are diminishing people’s overall appetite for using the internet. For example, the people who are more likely to mention a concern in relation to the internet (ABC1s, 35-54s, people with children) are also the most prolific internet users.

Over half of the people we spoke to said that they were concerned about what is on television (55%), an increase from 46% in 2005. This rise is due to an increase in the percentage of people who mentioned concerns about poor quality content, from 10% in 2005 to 35% in 2007. The top three mentions in 2007 are poor quality content (35%), offensive content (34%) and not trusting content/believing it faked or biased (7%). In 2005 offensive content was the most-mentioned concern (35%), followed by poor quality content (10%) and risks to society/values/standards (7%).

Two in five internet users are aware of ‘free’ file-sharing services. Although the majority of people are aware that it is often illegal to download content from these services, opinion is split over whether this should be the case. Younger people (16-24s), in particular, support the view that this should not be illegal.
Create

With the exception of uploading photographs, relatively few people have taken part in creative activities online.

Participation in creative activities is not universal among internet users. Among the creative activities considered in the research, uploading photographs is the only activity that has either been done by, or is of interest to, the majority of internet users. At least two-thirds say they are not interested in the other creative activities discussed, such as creating a website or contributing to a wiki. 16-19 year olds (75%) and 20-24 year olds (74%) are more likely than other internet users (51%) to have carried out a creative activity.

Two-thirds of internet users are confident that they can use creative elements, although a quarter are not. Those who are least confident are more likely to be over 45, or female.

Social networking was the online phenomenon of 2007, with much media coverage and academic thinking dedicated to it. One-fifth of internet users say they have a page or profile on a social networking site. The youngest adults are the most likely to have a profile: over three in five 16-19 year olds and two in five 20-24 year olds say they have a profile, compared to just three in ten people among over-35s.

Communicating with people they know is the main activity people say they use social networking sites for. Some people also use the sites for meeting friends of friends (35%) and people they do not know (17%). Over one in five 16-24s say they have met someone online they didn’t previously know, a higher proportion than in the general population.

Learn

There is a preference for informal learning compared to classroom learning.

Most adults have not experienced training about digital functions such as creating content and setting access controls, although the proportion that have had such training has increased from 22% in 2005 to 27% in 2007. Considering this lack of experience of formal ICT training, it is unsurprising that people say they prefer to learn about media through friends and family, by reading manuals and through trial and error. Different learning strategies are adopted by different groups. For example, females prefer to learn from friends and family and males are more likely to say they prefer to use a manual, or trial and error.

Older people (over-65s) are the least likely to have experienced any learning or to have a preference for a learning method. This lack of participation, together with older people’s lack of confidence, and their lower levels of interest in, and experience of using the internet, significantly limit the benefits that they are able to realise from having in-home internet access.

Attitudes and behaviour

Attitudinal and behavioural analysis identified five groups, defined by their level of engagement with media platforms.

We have identified five segments based on people’s relationship with media devices: Engaged; Economisers; Pragmatists; Hesitants and Resistors. Our analysis shows that

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1 A wiki is software that allows registered users, or anyone, to collaboratively create, edit, link, and organise the content of a website, usually for reference material.
people’s media literacy differs according to their attitudes about media, and their media behaviour.

As already discussed, we have identified gaps in media literacy by demographics such as age, socio-economic group, and the presence of children in the home. By looking at how people differ on the basis of their media attitudes and behaviours, we can identify how these various media literacy gaps might be addressed.

<table>
<thead>
<tr>
<th>Engaged (20%)</th>
<th>Pragmatists (30%)</th>
<th>Economisers (8%)</th>
<th>Hesitants (31%)</th>
<th>Resistors (9%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The youngest segment; 58% are under 35</td>
<td>59% are aged between 35 and 64</td>
<td>The second-youngest segment; 52% are under 35</td>
<td>The second-oldest segment; 53% are 35-64, and 29% are 65 or over</td>
<td>The oldest segment; 71% are 65 or over</td>
</tr>
<tr>
<td>57% are male</td>
<td>57% are female</td>
<td>51% are male</td>
<td>54% are female</td>
<td>54% are female</td>
</tr>
<tr>
<td>66% are ABC1</td>
<td>69% are ABC1</td>
<td>60% are C2DE</td>
<td>57% are C2DE</td>
<td>67% are C2DE</td>
</tr>
<tr>
<td>73% are working full- or part-time</td>
<td>70% are working full- or part-time</td>
<td>54% are not working</td>
<td>55% are not working</td>
<td>84% are not working</td>
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The Engaged and Pragmatists have the strongest relationships with media devices. The Engaged are very enthusiastic about media and how it fits into their lives. Media plays an important role in Pragmatists’ lives, but they are more functional in their approach to media than are the Engaged. Both of these groups are fairly confident, and use the media literacy skills they already have to determine their use of various media devices.

Economisers, who tend to be younger, have a positive relationship with media technology, but they are limited to a certain extent by costs, whether perceived or actual. In order to encourage this group’s media literacy they need to be informed on two fronts; about the potential benefits they could get from making the most of devices, and about their options for affordable accessing and use of media. Economisers also need support to ensure they are confident using media.

Analysis has shown that Hesitants are aware that they are not getting the most out of technology, but they also have a tendency to dismiss the technology (due to a lack of confidence) rather than to experiment with it. Media literacy support is likely to benefit this group more than any of the other segments. The support should involve helping Hesitants to understand media technology, starting from the basic skills and showing them the benefits.

Resistors have the weakest relationship with media devices, and display little or no interest in changing this situation; either by acquiring devices, increasing their interest or confidence in using media, or becoming critically aware. Resistors’ lack of interest is a key difference
between this group and Hesitants. Any media literacy support will need to first provide a reason for this group to become interested in another, or a new, device.

**Urban and rural**

*With the exception of internet ownership and use, there are few differences between those living in urban and rural areas.*

People living in rural areas are more likely to have the internet at home (67%) than those living in urban areas (61%), a consequence of higher than average growth in having the internet at home over the last two years.

Despite their lower level of take-up, people in urban areas spend more time on the internet at home (8.3 hours per week compared to 7.3 hours per week) than rural users, and use the internet for a greater breadth of activities (3.3 activities compared to 2.9 activities, out of a list of 18 activities), particularly for communicating, and for work. People in urban areas are more likely to use the internet to communicate, look for work/studies and for news.

There are also some urban/rural differences regarding television. People living in urban areas are more likely to know that television programmes are regulated. In contrast, people living in rural areas are more likely to know about the 9pm watershed.

**Nations and regions**

Across the four nations and the English regions there are many similarities in the extent of media literacy. Some of the variations will be due to demographic differences, rather than geographical, cultural or statutory frameworks. For example, in London people are more likely to regularly use their mobile, and when asked, they say they would miss using their mobile or the internet the most. This is also characteristic of responses from 16-24 year olds.

The following summaries aim to highlight the key differences from the UK average. A detailed outline of each nation is in section 8 of this report.

**The few variations in media literacy in the English regions are mainly due to demographic differences**

The population of England makes up 83% of the UK population; therefore, there are very few instances where media literacy in England differs from the UK as a whole. This summary focuses on differences within the English regions.

There are some regional variations in the take-up of media devices, with mobile phone ownership highest in London and lowest in the East Midlands. Having the internet at home is most likely in the South East, and lowest in the North West. Take-up of digital television does not vary across the nations, but within England digital television is comparatively less common in the East Midlands.

In the North West and the West Midlands people tend to consume more traditional media than in other regions. Those in the North West are more likely to watch television, while those in the West Midlands are more likely to read newspapers/magazines and watch DVDs. In contrast to London, people from the North West and the West Midlands are more likely to say they would miss watching the television the most.

People in the North West are more likely to say they *tend to trust what they see and hear on the television and the internet* than those in other regions.
Internet users in the East of England are more likely to have a social networking profile, and those in the West Midlands are less likely.

**People in Scotland are more likely than those anywhere else in the UK to use more than one media device at the same time**

Take-up of digital television, mobile phones and the internet has increased in Scotland since 2005, but having the internet at home is still lower (51%) than the UK average (62%).

While the incidence of electronic gaming is lower in Scotland than in the UK (25% vs 31%), Scottish people are as enthusiastic as their counterparts in the rest of the UK, spending as much time playing.

Adults in Scotland are less likely to regularly use their mobile phone or the internet. The importance of the television is clear; when asked which device they would miss the most, they are more likely to say the television, compared with the UK in general.

Using more than one device while watching the television or using the internet is higher in Scotland:

- 80% of adults in Scotland use another device at the same time as watching television, compared with the UK as a whole (69%);
- 83% of adults in Scotland use another device at the same time as using the internet, compared with the UK as a whole (74%);

In general, fewer people in Scotland mention concerns about the key media devices: television, the internet, radio, mobile phones and gaming.

People in Scotland also differ from the UK in general in terms of learning preferences. They are more likely to say that they prefer to learn through friends and family, or through trial and error.

Internet users in Scotland are more likely to have a social networking profile (27%) than those in the UK (22%).

**People in Wales are less likely to use more than one device while watching television or using the internet, than the UK in general**

Take-up of digital television and mobile phones has increased significantly since 2005, although internet ownership in Wales (53%) is lower than in the UK as a whole (62%).

Compared to the UK, adults in Wales are more likely to regularly listen to music on a hi-fi/CD/tape player, and less likely to regularly use the internet. People in Wales are also more likely than people in the UK in general to say they would miss their television the most.

People in Wales are less likely than those in the UK as whole to use more than one media device at the same time:

- 61% of adults in Wales use another device at the same time as watching television compared with the UK (69%).

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2 Electronic gaming includes hand held games consoles, games consoles connected to a television, computer games online, computer games on a PC or CD ROM games
• 63% of adults in Wales use another media device while using the internet compared with the UK (74%).

People express a similar level of concern about media content and devices in general, with the exception of what is on television; people in Wales are more likely than the UK average to have concerns about what is on television.

Levels of trust in television and internet content are lower in Wales than in the UK in general; nearly half (49%) say they do not trust what they see and hear on television, compared with 41% in the UK. They are more likely to agree that it does not matter how websites are funded (62%) than the UK average (52%).

**Although in-home internet take-up is comparable to the UK average, people in Northern Ireland spend less time on the internet**

Multiple platform ownership in Northern Ireland is similar to the UK average. Take-up of digital television, mobile phones and the internet has increased significantly since 2005, with similar levels to the UK as a whole (52%).

Although having the internet at home, and breadth of internet use, are at similar levels to the UK, people in Northern Ireland spend less time on the internet than elsewhere in the UK. They are also more likely to spontaneously mention something they are concerned about on the internet (59%) than the UK average (54%).

Despite lower take-up of electronic games in Northern Ireland (23%) compared to the UK (31%), people are more likely to mention a concern about gaming (29% vs 22%).

People in Northern Ireland express a higher level of distrust in what they see on the internet. Two in five (41%) disagree that *they tend to trust what they see or hear on television* compared with the UK (31%).
Section 2

Introduction

2.1 Background

As outlined in the Ofcom Annual Plan, a media literate society will have the skills, knowledge and understanding people need to make full use of the opportunities presented by both traditional and new communications services. It will enable people to protect themselves and their families from possible risks presented by new services. We need to continue working with other public bodies, and with our stakeholders, to fulfil Ofcom’s aim of supporting UK children and adults in acquiring the ability to engage confidently with the ever-growing range of sophisticated communications services.

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

Ofcom’s work to promote media literacy is intended:

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

This report is a research-based report and provides an update of the Media Literacy Audit which was published in 2006. Where possible, we show changes in measures over time as well as examining responses by demographic variations where relevant. See Annex 3 for full analysis by age, gender, nation, socio-economic group, impairment and rural or urban location.

2.2 Defining media literacy

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’.

The purpose of the Audit as a whole is to track media literacy within the UK population (both adults and children). To do this, we needed to convert our definition of media literacy into quantifiable elements, and so have used the following measures 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 media behaviour such as they way devices are used.

The following box summarises the elements of the media literacy framework:

<table>
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<td>• Use, volume of use and breadth of use of the platforms</td>
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<th>Understand</th>
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<tr>
<td>• Interest in, and awareness of, the digital features of the various media platforms</td>
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<td>• Knowledge of regulation</td>
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4 See www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/medialit_audit/
• Knowledge of how elements of each media platform are funded
• Trust in platform content
• Trust in news programming on television
• 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

Create
• The ability of individual users to create their own content
• The ability of users to interact with the media devices or with other users.

The above 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 further context and background to the research.

2.3 Objectives

The key objectives of the Audit are:

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

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

2.4 Methodology

This report draws mainly on research from two sources of consumer research; the Adult Media Literacy Audit and the Ofcom Communications Tracking Survey.

Where appropriate, data are also drawn from BARB.

Ofcom Adult Media Literacy Audit

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

Full details of the research methodology can be found at Annex 1.
**Ofcom Communications Tracking Survey**

The Ofcom Communications Tracking survey takes place on a monthly basis. It provides us with continuous understanding of consumer behaviour in the UK communications markets, helping us to monitor change and assess the degree and success of competition.

Approximately 700 face-to-face interviews are conducted throughout the UK each month. Communications tracking data referenced in this report is from Q3 (July, August and September) and Q4 (October, November and December) 2007.

Full details of the research methodology can be found at Annex 1.

### 2.5 Statistical reliability

Significance testing at the 95% confidence level was carried out. This means that where findings are reported as ‘significant’, there is only a 5% or less probability that the difference between the samples is by chance, and is different from the main population. Where findings are reported as ‘significant’, this is what is being referred to.

### 2.6 Structure of report

The report is structured according to Ofcom’s definition of media literacy.

Section 3: ‘Access’ covers people’s take-up of media, their use of, and relationship with, the various devices.

Section 4 ‘Understand’ covers the extent to which people understand the influences on what they see, read or hear, as well as their critical awareness.

Section 5 ‘Create’ covers people’s engagement with creative activities such as uploading photos, social networking and contributing to websites. It also covers people’s levels of confidence in using creative elements, and their opinions on some creative activities such as downloading content from shared sites.

Ongoing learning is important in the dynamic media landscape we live in. Section 6 covers people’s learning experiences and learning preferences.

Section 7 presents a segmentation based on people’s attitudes to, and behaviour with media devices. By looking at each segment we can draw conclusions about the relationship between people’s levels of engagement with media and their media literacy.

Section 8 explores the extent of media literacy in the UK nations and English regions.

Annex 1 presents a detailed explanation of the research methodologies used.

Annex 2 is a glossary of terms used throughout this report.

Annex 3 looks at media literacy on a platform by platform basis: digital television, digital radio, the internet, mobile phones and electronic gaming.

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2.7 Further publications

Alongside this report, separate media literacy reports will also be published, focusing on UK children and on ethnic minority groups.
Section 3

Access

This section looks at access and use of media devices in households. It also explores reasons for using media platforms, and which platforms people prefer to use for different purposes.

3.1 Access: summary

Digital take-up in UK households is continuing. Adults own more media devices and access more media platforms in general, and spend more time using the internet than they did two years ago.

Although a wide range of digital media devices are available, television continues to be the dominant media, and while almost all people regularly watch television, this is particularly true for over-65s.

However, television is increasingly competing with mobile phones and the internet for time and attention, particularly for young people. While television tends to be the platform people would miss the most, young people are just as likely to say they would miss the internet or mobile phone most. Since 2005 more people have mentioned the internet, mobile and television and fewer have mentioned music and radio devices as the media device they would miss the most.

People are also consuming multiple media at any one time; for example, watching television and talking on the phone or using the internet at the same time.

There has been an increase in take-up of the internet for people living in rural areas and for 20-24 year olds. Although having the internet at home has increased among over 55s by 3% since 2005, it has not increased at the same rate as the average population (7%).

The main reason people give for not having a particular media platform in their home is a lack of need for it, or satisfaction with their current platform. The second reason they tend to give, although to a lesser extent, is expense.

3.2 The communications landscape has changed since 2005

Digital take-up in UK households continues. Adults own more devices and media platforms in general, and spend more time using the internet than they did in 2005. These changes are due to a number of factors; some more prominent than others.

Technology is changing at an ever-increasing pace, resulting in the availability of a variety of devices as well as greater functionality in the devices people are already familiar with. Market changes have also influenced take-up, particularly of broadband.

Figure 2 shows that take-up of key media devices such as mobile phones, digital television, the internet (broadband) and access to digital radio have all increased since 2005. Of these four media, take-up has increased the most for digital television, from 62% in 2005 to 82% in 2007, followed by the internet, which has increased by eight percentage points, from 54% in 2005 to 62% in 2007.

There has been an increase in the proportion of people who have access to digital radio services at home, from 77% in 2005 to 88% in 2007. This is partly due to increases in take-
up of digital television and the internet; through which people can also listen to the radio. Over the same time period digital radio listening has increased by only three percentage points, from 27% to 30%, which suggests that despite people having access to digital radio, they are not necessarily using it.

**Figure 2: Take-up of media platforms in the home, 2005 and 2007**

![Figure 2: Take-up of media platforms in the home, 2005 and 2007](image)

In general, accessing the internet anywhere (whether inside or outside the home) has increased since 2005 (from 59% to 63%). Out-of-home access is predominantly at work, but can also be at friends’ houses, a library or in school/college.

The extent to which people are adopting media platforms in the home varies by demographics. Platform take-up is generally highest among under 45s, the ABC1 and C2 socio-economic groups and people in households with children. There is a tendency for take-up of the internet and digital television to be higher among 16-19 year olds and 25-34 year olds than among 20-24 year olds. For example, in-home ownership of the internet drops from 82% among 16-19s to 64% among 20-24 year olds (see Figure 3 below). One explanation for this could be that 20-24 year olds have left the family home, with its internet access, and have not set it up in their new home, particularly if this is shared accommodation.
Due to growth in platform take-up, multiple platform ownership has increased significantly since 2005

Multiple platform ownership has increased significantly since 2005, with a subsequent decrease in single platform ownership and in people without access to any digital platform. Although there are now fewer people who have one or no digital platforms, their demographic profile has not changed significantly.

Figure 4 shows that the proportion of people who have the internet, a mobile and digital television at home has increased from 39% in 2005 to 53% in 2007. Of those who have two platforms, a mobile phone and digital television is the most common combination.
Figure 4: Multiple platform ownership – 2005 and 2007

Take-up of three media platforms is fairly mainstream, with large groups of the population, such as under-55s, and ABC1/C2s, leading relatively high levels of platform take-up. Since 2005 the highest rate of take-up growth has been among 20-24s, 35-44s, people who are working and those living in rural areas (see Figure 5).

Figure 5: Growth in take-up of three media platforms

Since 2005 take-up of multiple platforms among 16-19 year olds has grown at a lower rate than average. However, this may be due to the fact that there was already a high level of take-up before 2005, and penetration among this age group continues to be higher than average.

Six per cent of people have indicated they do not have any digital platform in the home; a decrease from 9% in 2005 (see Figure 4 above).
People with impairments\(^6\), DEs and over-75s are more likely than others to say they do not have any digital platforms in the house.

The decrease in people saying they do not have any of the platforms coincides with an increase in the proportion of over-75s who say they own a mobile phone and/or digital television.

The presence of children in the household influences internet take-up; those without children are less likely to have the internet.

Non-ownership, and the reasons for not having a mobile phone, digital television or the internet are explored in more detail below.

**Figure 6: Non-ownership of internet, digital television and mobile phone, among core groups**

![Graph showing non-ownership of internet, digital television, and mobile phone among core groups.](image)

\(T1/TN1/M1 \text{ – Various}
Base: All adults 16+ (2005)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

3.3 Some progress has been made in improving take-up, but older people still have lower levels of internet take-up

*Take-up of digital television has increased by 20 percentage points, and the internet by eight percentage points, since 2005. Take-up of platforms has increased at a faster rate for 20-24s and for people living in rural areas. However, over the same time period take-up of the internet continues to be lower among over-55s than among the general population.*

Take-up of both digital television and the internet among 20-24 year olds and those living in rural areas are above the UK averages (see Figure 7). Although having the internet at home has increased for over-55s since 2005, it is increasing at a lower rate than for the general population (a 3% increase in take-up, compared with 8% for the general population). This suggests that older people continue to have lower levels of take-up, and also that if the current growth rate continues, the gap could increase.

\(^6\) Includes people who have a hearing, visual or mobility impairment
For each media platform that people do not currently own, we asked them how likely they are to purchase it in the next 12 months. Based on what people said, we expect to see the take-up of digital television continuing, with over a quarter of current non-owners saying they intend to get a digital television in the next 12 months. The intention to get digital television has increased from 15% in 2005 to 27% in 2007 (see Figure 8).

Fifteen per cent of non-owners say they intend to get the internet in the future, with no change since 2005.

The intention to get the internet at home in the future decreases with age, particularly among over-55s; it is also lower for people in the AB socio-economic group.

Figure 8 illustrates people’s intention to get each media platform, as well as the reasons people give for not getting each platform.

A lack of need for the platform, and satisfaction with current services, are the main reasons people are not taking up digital platforms

We asked people who did not have access to digital television, the internet or mobile phones why they did not intend to get access in the next 12 months. A variety of reasons were given, which can generally be categorised as either voluntary or involuntary.

Voluntary reasons for not owning a device include a perceived lack of need for the platform or satisfaction with an alternative platform. Involuntary reasons are where people feel they do not have a choice about taking up a platform, and this is primarily due to affordability. In order to report the relative importance of voluntary versus involuntary, we have calculated the way people answered the question in the following way:

- voluntary reasons include anyone who mentioned a voluntary reason such as ‘no need’ and did not mention an involuntary reason such as cost; and
involuntary reasons include anyone who mentioned an involuntary reason (such as cost or not being able to pick up a signal) regardless of whether they gave a voluntary reason as well.

When studying the reasons why people have not taken up access to a platform it is also important to note that some respondents may give a voluntary reason because they do not wish to discuss sensitive affordability issues with the researcher. It is therefore possible that involuntary reasons are understated.

Forty-four per cent say they do not intend to get a digital television for voluntary reasons and 42% do not intend to get the internet for voluntary reasons (see Figure 8 below).

The most mentioned reason for not getting each platform is that people do not see a need for it. In general, older people and DEs, the dominant groups who do not have home access, are most likely to say they do not intend to get the platform because they do not need it. With respect to the internet, ABs are also more likely to say they have no need for it.

Of the people who do not have digital television, the percentage who say they do not have it because of affordability has decreased from 37% in 2005 to 12% in 2007. Freeview has helped to drive the increase in digital television ownership and has made it possible for many people to afford digital television. However, at the same time there has been an increase in those who see no need to switch to digital, or are happy with their current analogue service.

The data suggest that 25-34 year olds see their main barrier as affordability, while over-65s tend to see no need to change.

Two-thirds of people who do not have a mobile phone give a voluntary reason for not intending to get one. Combined with the relatively high penetration of mobile phones, this suggests that the market is near saturation.

Figure 8: Intention to get each media platform in the home

Various – Can you tell me if you intend to get digital television/internet access/mobile phone at home in the next year or so? And can you tell me why that is?
Base: All adults aged 16+ who do not have digital television (n=795) / internet access (n=1222) / mobile phone at home (n=517)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007
*Source: Ofcom communications tracking survey Q3 and Q4 2007

Figure 9 shows the reasons people give for not intending to get internet access in the next 12 months as well as a breakdown by age. Overall, people who do not have the internet at home are more likely to mention a voluntary (42%) than an involuntary (24%) reason for not intending to get access in the next 12 months.
Figure 9: Intention to get internet at home, 2005 and 2007, and by age

The voluntary reason most likely to be given by people of all ages, and particularly by over-55s, is lack of interest or perceived need (53%). Expense is the next most-mentioned reason for not getting the internet (14%); under-55s and DEs are more likely to mention this.

Younger adults and people with children in the household are more likely to mention involuntary reasons than other demographic groups.

The table below shows the profiles of people who do not have digital television, the internet or a mobile phone at home, both for voluntary and involuntary reasons.

Table 1: Demographic profile of people who have voluntary or involuntary reasons for not having the internet

<table>
<thead>
<tr>
<th>Non-owners - voluntary reasons</th>
<th>Non-owners - involuntary reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>E socio-economic group</td>
<td>E socio-economic group</td>
</tr>
<tr>
<td>55-64</td>
<td>16-54</td>
</tr>
<tr>
<td>Single household and don’t have children</td>
<td>Female</td>
</tr>
<tr>
<td>Retired/not working</td>
<td>Retired</td>
</tr>
<tr>
<td>More likely to have an impairment</td>
<td>More likely to have an impairment</td>
</tr>
</tbody>
</table>

Of those who do not have a mobile phone, 15% intend to get a mobile phone in the next 12 months. The most frequently given reasons for not doing so are: not perceiving a need for a mobile phone (63%), and because of cost (8%).

In response to a separate question 68% of people who do not currently have a mobile phone say they would not use one even if they had one. Consistent with spontaneous reasons people gave for not owning a mobile phone, fewer people said that mobile phones were not worth the money (56%).
3.4 People are using a number of digital devices in addition to television, the internet and mobile.

Take-up of some digital media services has stayed the same while take-up of others has increased since 2005. As with digital television, the internet and mobile phones, take-up of other media devices is higher among ABC1s and younger people.

Figure 10 shows that, of the other types of media devices we asked people about, video recorders are the only device where there has been a significant decrease in take-up. This is perhaps not surprising for an analogue based device considering the rise of digital television, and because many retailers are no longer stocking them. However, take-up of MP3 players, recordable DVDs and digital video recorders (DVRs) has increased since 2005.

Take-up across all devices (with the exception of video tape recorders) is higher among ABC1s and younger people.

Figure 10: Media device ownership, 2005 and 2007

Digital devices such as DVRs have implications for the way we view content, and are enabling the viewing of content away from the linear schedule. People now have much greater choice in that they can watch what they want when they want. The interactive features of digital television, such as the red button and the ability to select viewing angles, are also giving people greater choice over what they watch.

Although people are accessing digital radio stations, actual listening is not growing at the pace of some other digital media. Since 2005, significantly fewer people have reported listening to radio via traditional radio sets. But we have not seen similar growth in listening to digital radio channels, suggesting that people are turning off the radio rather than switching to a digital platform.

Household ownership of games consoles has remained unchanged. Actually participating in electronic games is predominantly a younger person’s activity; 70% of 16-19s and 58% of 20-24s use gaming consoles, portable consoles, computer games or online games, compared with an average of 31% for the general population. Males and people with children in the house are also more likely to participate than others.
Take-up of portable music devices has increased significantly from 2005.

**Overall, although use of the internet and mobiles is increasingly important, television is still the dominant media**

Take-up of digital services is increasing, while there has been a decrease in using traditional media such as newspapers and radios. Television is still the dominant media activity, although it is increasingly competing with mobile phones and the internet, particularly for young people’s time and attention.

Figure 11 shows that as using digital platforms and devices continues to rise, it is increasing at the expense of traditional media activities. Watching television, using a mobile phone, using the internet and listening to portable music devices have all increased since 2005. In contrast, reading newspapers, listening to the radio, watching videos/DVDs, and listening to music on hi-fi/CD systems have all decreased.

**Figure 11: Regular media activities, 2005 and 2007**

Older people (aged 65+) are more likely to regularly use traditional media such as watching television or listening to the radio, and less likely to participate in other electronic media activities (see Figure 12).
Figure 12: Range of regular media activities, by age

A1 – Which of the following do you regularly do?
Base: All adults aged 16+ (2905 aged 16+, 206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 341 aged 45-54, 187 aged 55-64, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

People are spending more time online than in 2005 (see Figure 13 below). This has increased from 9.9 hours in 2005 to 12.1 hours in 2007. Much of this growth comes from more time spent on the internet at home. ABs tend to spend the most time online, while over-65s and those living in rural areas spend the least time online, compared to others.

Figure 13: Volume of internet use per week, 2005 and 2007

According to BARB data, the number of hours per week that adults spend watching television has remained the same over the last two years. Older people (over-65s) continue to watch the most television, while younger people (16-24) watch the least.
16-24 year olds and 25-34 year olds are spending less time watching television than they did in 2005.

**Figure 14: Hours per week spent watching television, 2005 and 2007**

On average, gamers spend 4.7 hours per week playing games through a console or on a computer. Under 25s, males, or those in the DE socio-economic group spend the most time playing games.

**Figure 15: Volume of time spent gaming per week**

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G3 – How many hours in a typical week would you say you play electronic games?

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
People are using more than one media device at the same time

*People are more likely to use another media device while using the internet than while watching television.*

We asked people whether they ever use other media devices when they are watching the television or using the internet. The results are shown in Figure 16 below.

Two-thirds of people say they ever use another device while watching the television, and three-quarters say they do this while using the internet. For both platforms, the most popular concurrent activities are talking on the phone, whether a landline or a mobile. Twenty-four per cent of people use the internet while watching television and 38% watch television while they are using the internet.

**Figure 16: Using another device while watching television or using the internet**

![Figure 16](image)

People are more likely to use more than one media at a time if they have internet access in the living room.

Although concurrent use of media devices happens across all demographic groups, younger people are much more likely to do this than the average. However, age is not the only factor which influences the extent to which people do this. People who have children are more likely to be using more than one media device at a time than those without, although this could be influenced by age factors as well as by the presence of children.

People who have hearing, visual or mobility impairments are less likely to simultaneously use more than one media device.

The following Figure 17 and Figure 18 show the media devices that people ever use at the same time as watching television or the internet. This illustrates clearly the drop in simultaneous media use by age.
Figure 17: Media used while watching television, by age

Figure 18: Media used while using the internet, by age

Younger people consider their mobile phone or the internet equally important as television

While around half of people we spoke to say they would miss television the most, young people (16-24) are more likely to say they would miss their mobile phone or the internet than others. People are using media platforms for a variety of reasons, some such as television for passive reasons while others such as the internet for more active reasons.
We wanted to understand how much importance people attach to the various media platforms they use. To do this we asked respondents to state the one media activity they would miss doing the most.

Considering the fact that almost all adults regularly watch television, it is not surprising that watching television is the activity people say they would miss the most. As Figure 19 shows, despite the dominance of television, there have been some changes in people’s media choices, compared with 2005.

Since 2005, more people say they would miss television, the mobile phone or the internet the most, and fewer people say they would miss traditional media, such as radio and music played on a hi-fi/CD player.

**Figure 19: Most missed media activity, 2005 and 2007**

<table>
<thead>
<tr>
<th>Activity</th>
<th>2005</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watch television</td>
<td>44%</td>
<td>52%</td>
</tr>
<tr>
<td>Listen to music on a hi-fi/CD/tape player</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Listen to the radio</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Use a mobile phone</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Use the internet via a computer/laptop</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Read newspapers/magazines</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Watch videos/DVDs</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Listen to a portable music device/MP3 player</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Play console/computer games</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

A2 – Which one of these would you miss doing the most?
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007

Age, gender and socio-economic group play a significant role in people’s choice of media device as the one device they would miss the most (see Figure 20 and Figure 21). Younger people (16-24) are more likely than anyone else to say they would miss their mobile phone or the internet the most. In fact, 16-19s are the only age group in which television is not the most mentioned device. People are more likely to say they would miss the television as they get older.
Figure 20: Media activity would miss the most, by age

Figure 21 illustrates clear gender and socio-economic group differences. Males are more likely to miss using the internet and reading newspapers/magazines and females are more likely to miss watching television and listening to music on a hi-fi/CD player.

The importance of the television varies by socio-economic group, from 40% among ABs to 61% among DEs.

Figure 21: Most missed media activity, by gender and by socio-economic group
It will be interesting to see whether the importance of devices other than television continues to rise as the current 16-24s get older, or whether this is synonymous with youth and early adopter tendencies, and some other media device takes this space.

3.5 People use media platforms for a variety of reasons, and use a wide range of digital functions

The reasons for using media platforms can be as diverse as the ways they are used, and different platforms can fulfil similar needs - for example, the television and radio are both used by people for relaxation.

Around half of television viewers say the main reason they watch television is to relax, followed by keeping up with the news and passing the time (see Figure 22). Radio appears to have the greatest variety of main reasons for listening to it; one in four listen to relax and a similar proportion say they have it on in the background. Around one in ten say the main reason they listen to the radio is to keep up with news (14%) or for fun (11%).

The main reasons people cite for using the internet are more active than for the services mentioned above; 47% use it to find out or learn things, 23% for contact with other people and 11% for fun.

The main reason for using a mobile phone is to communicate with others.

Figure 22: Main reason for using media platform

It is also clear that motivations for use can differ by age almost as much as they can by platform. Across the four platforms younger people (16-24s) and males are more likely to use a device to have fun and to keep up with sport, while over-65s want to keep up with news and pass the time. In general, younger people are also using more functions than anyone else.

Younger internet users (16-19s) are more likely to say they use the internet for contact with other people than others.
Communication is the most mentioned activity on the internet

While the main reasons for using the internet are to find out / learn new things or to keep in contact with other people, when it comes to what people actually do when they are using the internet, the most mentioned activity is communication.

People use the internet for a wide range of functions; more than is possible to include in this research. In order to understand the extent to which people are using the internet we prompted them with a list of 18 functions and asked them whether they did any of these on a weekly, or less frequent, basis. For simplicity of reporting we have summarised these 18 functions into eight categories.

Around three-quarters of internet users say they use the internet for communication purposes, including sending and receiving emails and using online chat rooms or instant messaging (IM). Nearly half find out information for their work or studies, and two in five conduct transactions such as banking, buying items online, using auction sites such as eBay or booking holidays.

Significantly fewer people (between 24% and 22%) use the internet to look at news websites, use creative functions (such as downloading software, maintaining a website or blog or using social networking sites) or for entertainment (this includes playing games online, listening to radio stations and looking at adult-only websites).

When asked, around one in ten say they have used the internet for public or civic purposes such as finding out information about public services provided by local or national government or looking at political/campaign/issues websites.

On average, people use the internet for 3.2 different activities.

**Figure 23: Internet activities carried out at least once a week**

Internet use does differ significantly by demographic group. In general, ABs and those living in urban areas use the internet for a wider variety of activities than other groups. As Figure 24 illustrates, people’s appetite for conducting transactions online differs by age; 16-44s
(and particularly 25-44s) are more likely to buy things, through auction sites such as eBay, or retail sites; and 25-34s do their banking online.

**Figure 24: Internet activities carried out at least once a week, by age**

People’s confidence in using the internet influences the number of ways in which they use the internet as well as the extent to which they try new sites. The more confident people are, the more functions they use and the more new sites they visit.

**Mobile phone activities carried out**

We asked people what they use their mobile phone for, apart from making and receiving calls. Not surprisingly, communication functions still featured heavily. Apart from making and receiving calls, people are communicating via SMS text, photo messaging, and by sending/receiving emails. People are also taking advantage of the convergent functions of their mobile phone; sending and receiving photos and images, listening to music or radio, and accessing the internet. See Figure 25 below for a full breakdown of the mobile functions people use.
Figure 25: Mobile phone activities carried out

As with use of the internet, certain demographic groups are more likely than others to use a variety of mobile phone functions; people using a wide range of functions are more likely to be under 54 and ABC1s.

7 Results shown for functions where 5% or more people use them
Section 4

Understand

Under the heading of ‘understand’ we have investigated people’s understanding of media services and content in a number of ways:

- interest and confidence in using a variety of interactive functions across media devices;
- awareness and knowledge of funding sources and the regulatory landscape;
- levels of trust in media;
- attitudes to freedom and controls on media;
- level of caution exercised when using new websites; and
- concerns people have about media platforms and their content.

4.1 Understand: summary

Levels of interest and confidence in using interactive functions and services vary both within platforms and between platforms. However, overall interest is highest for internet and mobile functions and lowest for digital television and radio functions.

For each of the functions we assessed, the majority of those who expressed interest in the function also said they felt confident about carrying out the task. However, there are groups of people who are interested but don’t feel confident.

The people who have the lowest awareness of functions, level of understanding of the benefits and lowest confidence using them are people over the age of 45, females, C2DEs, people who are not working or those who have no children at home. People living in Scotland, Wales or Northern Ireland also had lower awareness of, understanding of, and confidence using, various functions. However this is more likely to be due to demographic differences rather than differences between nations.

Within each platform there are some functions where people have a marked lack of confidence. This is particularly the case for security-related functions on digital television and the internet.

The confidence to be able to find the right information, to use creative elements and to assess whether a website is truthful and reliable is related to the user’s breadth of use of the internet as well as the extent to which they use new websites rather than stay with the ones they know.

People are equally likely to say that they see the main role of television being to inform and educate as they are to see its role as entertainment. They are more likely to see the role of radio as entertainment, and the role of the internet to inform and educate.

Awareness and understanding of funding and regulation does differ by platform, with a greater level of knowledge about broadcasting (particularly television) than the internet, mobile and gaming.
Despite their relatively high levels of take-up of media platforms, 16-24s have the lowest awareness of funding sources and the regulation of platform content. This is particularly the case for the internet, where they are more likely to believe that user-generated content is regulated than the general UK population.

For radio, the internet and mobile, people are more likely to agree that users must be protected from offensive or inappropriate content than that the platform should be free to be expressive and creative. In the case of television, a similar percentage of people agree with both opinions.

People express varying levels of trust in platform content. Trust is highest for radio content (61%) and similar for content on television (41%) and on the internet (42%).

The majority of people exhibit a degree of caution when they are online; 78% undertake some sort of check when they use a new site (most often checking how up-to-date the site is, or assessing the overall look and feel of it). People also look for either professional signs (such as the kite mark or padlock) or rely on personal instinct before entering their personal details, when registering on a new website.

The same groups of people, C2DEs and over 65s, are the least likely to check a new website or make a judgement before entering personal details. They are also the most likely to say they only look at websites they know.

People expressed the most concern about what is on the internet and television, followed by mobile phones and radio. With the exception of mobile phones, the percentage of people mentioning that they are concerned about a platform has increased since 2005.

Poor quality and offensive content are the main concerns about what is on television. Offensive content is the main concern about what is on the internet, and this has increased since 2005. However, the largest single increase in concern (from 1% in 2005 to 16% in 2007) is connected with identity fraud and online security which is driving concern for financial and device security.

In general, those people who are concerned are more likely to be females, people who have children, ABC1s and 35-54s.

Two in five internet users are aware of free file-sharing services. While the majority of people are aware that it is often illegal to download content from these services, opinion is split over whether this should be the case. Younger people (16-24s) in particular support the view that it should not be illegal.
4.2 Interest and confidence in using interactive functions varies by platform

Media technology enables people to use many different interactive functions, whether they are accessed via television, radio, the internet or mobile phone.

We asked a series of questions to determine:

- the level of interest people have in various digital functions; and
- the confidence with which they can use those digital functions.

Interest in platform functionality is highest for internet and mobile

We asked people about several functions for each platform, and found that interest is higher for the internet and mobile phones (which are task-oriented and more functional by definition), and lower for traditionally passive media (television and radio). Most people who are interested in the various functions are also confident about using them. There are clear differences in the demographic profiles of people who are aware, interested and confident compared with those who are not.

The level of interest varies by platform (Figure 26). Most people who say they are interested in the various functions also say they are confident about using them. Across all these platforms, 16-24 year olds show the most interest.

Almost all adults aged 16+ who own the device in question say they are interested in the internet (97%) and mobile phone (94%) functions, and 61% of digital radio listeners are interested in using digital radio functions.

Figure 26: Interest shown in any interactive function, by platform
People who are interested in the various functions are more likely to say they are confident in using the features. However, some people are interested but do not have the confidence to take advantage of certain functions.

Interest and confidence in interactive functions are discussed by platform later in this section.

There are clear demographic differences by platform between those who are interested and confident, and those who are not

Looking across all four digital platforms, there are groups of people who are more interested and confident, and groups who have less interest and confidence (see Table 2 below). These groups are largely unchanged since 2005.

Table 2: Summary of demographic differences between awareness of, interest in and confidence with digital functions

<table>
<thead>
<tr>
<th>Greater awareness, interest and confidence</th>
<th>Lower awareness, interest and confidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Aged under 45 years</td>
<td>• Aged 45 years and over</td>
</tr>
<tr>
<td>• Males</td>
<td>• Females</td>
</tr>
<tr>
<td>• ABC1</td>
<td>• C2DEs</td>
</tr>
<tr>
<td>• Working</td>
<td>• Not working</td>
</tr>
<tr>
<td>• Children at home</td>
<td>• No children at home</td>
</tr>
</tbody>
</table>

Digital television functions

Digital televisions allow viewers to use many different interactive functions including blocking access to content by setting a PIN code, selecting different viewing angles, setting up a menu of favourite channels and using the interactive button on the remote. When we asked about these four functions, people expressed the most interest in using the interactive button on the remote control (58%) and setting up a menu of their favourite channels (52%). Around two in five are interested in using a PIN to block access to certain channels or programmes (43%) and in selecting different viewing angles or matches for sports events (42%) (see Figure 27).

Blocking access to certain channels or programmes by setting a PIN code is an important way in which people (parents in particular) can manage potentially inappropriate content on television. While 25% of people who have a digital television are confident about being able to block access, 17% say they are interested but not confident about using this function. In particular, 25-44s and females are less likely to be confident about using this function.
Figure 27: Interest and confidence in using digital television services

While levels of confidence between groups differ across each of the functions, in general people who are regular internet users are more interested and confident about using digital television functions.

Digital radio functions

When analysing interest and confidence in using digital radio functions, the functions we assessed are available only on DAB\(^8\) radio sets (not through the internet or digital television, which can also be used to receive digital radio), and may not be uniformly available on all DAB radio sets.

Figure 28 shows that interest and confidence is highest in \textit{being able to listen to stations not available through the airwaves and seeing the details of which music is being played while you are listening to it}. Just over half (53%) are interested in pausing and rewinding live radio, although one in three (32%) are not confident that they can do this.

Least interest is shown for recording programmes as they are being played (53% are not interested).

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\(^8\) DAB stands for Digital Audio Broadcasting
Internet functions

People are least confident in installing security features and software. Those who are not confident using the internet, particularly in using creative elements and being able to tell whether a website is truthful and reliable, are more likely to limit their breadth of use and the extent to which they visit new websites.

It is not possible to measure people’s interest and confidence in all of the functions that people can use on the internet, so in this research we have focussed on nine functions, in the areas of communication, information searching, security, transactions and content creation.

In general, people expressed more interest in, and confidence with, the functions we asked about on the internet than on any other platform. Over half of all internet users showed interest in all of the functions, with the exception of joining online debates and listening to the radio.

Confidence in using internet functions is correspondingly higher than for other platforms. Despite the higher levels of confidence, some people are interested, but not confident in using particular functions, specifically installing security features like a firewall, anti-spy or antivirus software (25%) and installing software that can block access to certain sites (25%). These functions are of particular interest to females and those with children at home.
There is also some interest in internet functions among non-users. The functions they are most interested in are sending email, transferring digital photos to a PC, buying things and finding out about hospital/leisure information (17% - 19% showed interest). Among non-users the most interested groups are 16-24s, C1s or those who have children in the household.

In addition to talking to people about what they used the internet for, we asked internet users how confident they feel about using the internet in a more general sense (see Figure 30 below). We asked them how confident they feel about:

- finding information or content they want online;
- using creative elements (including online and on mobile phones); and
- being able to tell if a website is truthful and reliable.

Considering their levels of confidence in carrying out individual online functions, it is not surprising that most internet users are confident they can find the content or information they are looking for when they go online (91%); over half of these are very confident (58%).

However, people are not as confident about using creative elements in media such as the internet or mobile phones, or knowing whether a website is trustworthy.

While two-thirds of adults are confident to some extent that they can use creative functions on devices such as mobile phones and the internet, a quarter are not confident that they can do this.

As shown in Figure 30, approximately three in five (59%) are confident that they can tell whether a website is truthful and reliable, one in five are neutral (neither confident nor not confident) (18%) or not confident (20%).
Consistent with confidence in using individual functions across platforms, those who are most likely to be confident with the internet are 16-24s, males, ABC1s or those with children in the household.

Over-45s (particularly over-65s) or females are the groups most likely to say that they are not confident.

Confidence in using the internet is important, not only for using specific functions, but also because it may influence the breadth of use and the extent to which people use new websites. Those who are confident in using the internet are more likely to use a wider range of internet functions and are more likely to use the internet for a greater variety of activities (3.4 activities compared with 1.4 activities among those who are not confident). As a consequence of their limited use of internet functions, those who are not confident are more likely to visit the same websites repeatedly.

**Mobile phone functions**

We asked people how interested and confident they feel about using five different mobile phone functions, including communicating, sharing photos, using mobile security and accessing web portals (see Figure 31 below)

Interest (and confidence) is highest for sending text messages and locking the phone to prevent numbers being dialled by mistake. Interest is lowest in accessing mobile operators’ internet sites from the phone.

Age and socio-economic group continue to play a role in people’s relationship with media. Those with the most interest and confidence across the functions are 16-44s or ABs; and those who have the least interest are over-65s, DEs or those with no children in the household.
The main role of media devices: to entertain, or to inform and educate

Television, radio and the internet all have a role to play, both as a form of entertainment and to inform and educate. This role as a teaching tool is reinforced by the fact that most people have learned useful things from the television and internet.

Platforms that deliver content have the potential to entertain people, inform and educate them, or both. In order to understand what people feel is the main role of content on television, radio, the internet and electronic gaming, we asked them how far they agreed or disagreed with the following statements:

- the main role of the [platform] should be to provide entertainment; and
- the main role of the [platform] should be to inform and educate.

We found that over half of people see the main role of television (55%) and radio (63%) as both: to entertain and to inform or educate (see Figure 32 below). C2DEs or those living in rural areas are more likely to think broadcasting platforms should be for entertainment.

Looking at the individual statements, people are as likely to say the main role of television is to entertain as they are to say it is to inform and educate (both 77%). For radio, people are more likely to say the main role is to entertain (82%) rather than inform and educate (70%).

For 46% of people, the role of the internet is also dual, but unlike television and radio, more people are likely to see its role as informing and educating rather than providing entertainment. Those people who see the internet as providing a dual role are more likely to be 16-24s and males.

Older people (over-55s), being less likely to use the internet than others, are less likely to agree that the main role of the internet is to inform and educate.
Despite people’s views on the main role of television and the internet, it is clear that both platforms have value as a learning tool. This is evidenced by the fact that most people say they have *personally learned useful things* from television (84%) and the internet (88%). Learning from watching television or using the internet is a way of providing knowledge, particularly for 55-64s and males.

Four in five people (82%) agree that the main role of gaming should be to provide entertainment. However, there does not appear to be a consensus about whether the skills you need to play electronic games are useful in everyday life, as shown in Figure 32. Interestingly, under-25s (who make up most of the adult gaming population), are the most likely to disagree with this.

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Note: people were not asked if they agreed that the main role of gaming was to inform and educate.
4.3 The role of critical awareness

Critical awareness of content on the internet is essential. Media literacy has a role to play in this, given that people’s increased confidence in evaluating and assessing information will help them to take advantage of information sources, such as health information. However, education and literacy in general also play a very important role in enabling people to read information freely available on the internet in a critical way. The lack of confidence that many people feel in being able to tell whether a site is truthful or reliable is further evidence of the need to help people develop evaluation skills.

Critical awareness in this report covers:

- understanding of sources of content funding;
- understanding of presence of regulation; and
- the extent to which people evaluate information online.

People are most aware of the source of funding for television and less aware of how other content platforms are funded

Awareness and understanding of funding and regulation varies by platform, with a greater level of knowledge about broadcasting (particularly television) than the internet, mobile or gaming. Despite higher media usage levels among younger adults (16-24s,) they have the lowest awareness of funding and regulation.
Funding of television content
BBC channels are funded by the licence fee and commercial public service broadcast (PSB) channels are funded by advertising (programme sponsorship provides a secondary revenue stream).

Funding of radio content
BBC stations are funded by the licence fee and commercial stations are funded by advertising (programme sponsorship provides a secondary revenue stream).

Funding of websites
The BBC website is funded by the licence fee and search engine websites such as Google are funded by advertising.

Of all the platforms, people are most aware of the licence fee funding of BBC television (80%). Awareness that advertising provides the main funding of commercial television is also comparatively high at 70%.

In comparison, knowledge of radio station funding is lower. When asked, three in five (62%) people correctly stated that BBC radio stations are funded by the licence fee, and 56% stated that commercial stations are mainly funded by advertising.

People are less knowledgeable about the funding of websites, particularly search engines, and as a result are more likely to say they do not know how they are funded. Over two in five people do not know how the BBC website is funded (46%) and half do not know the main source of funding for search engines websites (52%).

With the exception of internet search engines (where funding awareness has remained unchanged) awareness of funding sources has decreased since 2005.
In contrast to the confidence expressed about using interactive functions, and the breadth of use of the internet, younger adults are often the least aware of sources of funding and least able to describe the regulatory status of content. Knowledge, particularly of broadcasting, increases with age. However, females and C2DEs are less aware than others, and also awareness is lower among those who do not use the internet.

In addition to assessing opinions about funding, we also asked people whether they agreed or disagreed with the following statement: "as long as the [platform] provides good content it does not really matter who owns it or how it is funded."

People are more likely to agree with this statement in relation to broadcasting content than they are for internet content. This disparity could be due to a number of reasons, including a greater understanding of how broadcasting content is currently funded and regulated.

Across all platforms, around one in five disagree that the source of funding does not matter.

Although the overall level of agreement about whether it matters how television or radio stations are funded has not changed since 2005, there has been a decrease in the proportion who say they strongly agree with the statement. It is not possible to compare results for the internet over time as this was not collected in 2005.
Across the three platforms, ABs are more likely than other socio-economic groups to say that it matters how content is funded. There are age variations between the platforms as well; 55-64s are more likely to disagree that it does not matter how television is funded and 35-44s are more likely to disagree with the statement that it does not matter how the internet is funded.

**There is greater awareness of the broadcasting regulatory environment than about internet or mobile phone content regulation**

Understanding about regulation is highest for broadcasting, particularly television programmes. A greater degree of confusion exists about the status of content regulation for the internet and mobile phones.

**Television regulatory environment**

BBC channels are regulated by the BBC Trust and Ofcom and UK commercial channels are regulated by Ofcom.

**Radio regulatory environment**

BBC stations are regulated by the BBC Trust and Ofcom and UK commercial stations are regulated by Ofcom.

**Internet regulatory environment**

There is no statutory regulatory body generally responsible for audiovisual content on the internet.

The BBC Trust, established by Royal Charter, issues a service licence for bbc.co.uk which encompasses BBC iPlayer and can consider any complaints about its content.

The Association for Television On-Demand (ATVOD) is a self-regulatory body committed to protecting consumers of on-demand audiovisual content on services provided by its members. Its current full members are BT, On Demand Group, Virgin Media, Channel 4, BBC (Affiliate Member), Tiscali, FilmFlex and ITV.
Sites based on user-generated content (UGC) are not subject to any statutory regulation, beyond the prohibition on illegal content.

**Mobile phone content regulatory environment**

All UK mobile phone operators comply with a voluntary code, under which they commit to controlling under-18s’ access to adult content. This is achieved through the application of an internet filter by the mobile operator.

- Mobile operators have an age check system under which new subscribers must show that they are 18 or over when purchasing a handset or contract to have the filter removed.
- In addition, a subscriber can request that the block be applied to an existing mobile number.

**Electronic gaming regulatory environment**

There is an industry self-regulatory framework in place for video games, under which games are voluntarily rated and labelled under the Pan European Game Information system (PEGI). PEGI ratings (3+, 7+, 12+, 16+ and 18+) provide information to consumers about the ages for whom a particular game is appropriate. In addition, in the UK, games with adult content (gross violence, criminal or sexual activity) must be reviewed and rated by the British Board of Film Classification, and bear a BBFC label. Under the Video Recordings Act 1984, games which receive BBFC 18 rating must not be sold to minors.

The majority of people are aware that content is regulated on television (79%) and over half are aware of radio regulation (58%). In comparison, one in three (33%) are aware that internet content is not formally regulated and 31% are aware that mobile phone content is not regulated.

People are, therefore, more likely to be unsure about the status of content regulation on the internet or mobile phones. Since 2005 the level of people saying they do not know about the regulatory status of content on these platforms has increased.
Use of a platform does not necessarily translate into knowledge of its regulatory landscape. Regular users of the internet and mobile phones are more likely to state incorrectly that the content is externally regulated, than the population in general.

There are a number of demographic similarities among those who are aware of broadcasting content regulation. Those who are aware are more likely to be over 35, ABC1, males and working.

For mobiles and the internet where there is greater confusion about regulation of content, there are fewer demographic similarities across platforms.

- 16-19s, 35-54s or C1s are more likely to say internet content is regulated
- 25-34s, C1s or people with children are more likely to believe mobile content is regulated

Across all platforms, over-55s, C2DEs, those without children in the household, those not working or with an impairment are more likely to say they don’t know if the platform content is regulated or not.

### Focus on broadcasting regulation: the watershed

One element of television regulation is the watershed. The watershed is a requirement that any content which contains material that is unsuitable for children should not, in general, be shown before 21:00 or after 05:30.

Radio does not have a watershed; instead, broadcasters are required to have “particular regard to times when children are particularly likely to be listening”\(^\text{10}\).
Figure 37 below shows levels of awareness of broadcasting regulation over the last two years.

Most people (92%) are aware that there is a television watershed, and knowledge of this increases with age. Furthermore, 78% are able to say correctly that the watershed is 9pm. Those who are least aware are the youngest (16-19s) and oldest (over-75s) and DEs.

Despite the majority being aware of the watershed, awareness of the correct time of the watershed has decreased from 81% in 2005 to 78% in 2007.

People are less aware of radio regulation, with 23% giving the correct answer (that there is no watershed) for radio content.

A quarter think there is a watershed on the radio and two in five do not know whether there is or not. The remaining 13% believe there is a watershed but are unable to state a time.

**Focus on internet regulation: regulation of internet content**

We asked people whether they thought programmes/clips shown on broadcasters’ own websites, or sites like YouTube, and user-generated videos, were regulated or not.

There is a degree of confusion among people about what, if any, internet content is regulated. Over half of those surveyed (57%) were unable to say whether the content we asked about is regulated. Furthermore, belief that there is some form of audio and visual content regulation is higher among internet users, and those downloading content such as films and music. Consistent with this trend, 16-24s (the group most likely to be downloading user-generated content) are more likely than others to believe content is regulated.
Focus on mobile phone content regulation: access to adult content

Four in five people who have a mobile phone are not aware of either of the elements of the mobile phone content control system, with no change in awareness since 2005. If people are aware of any form of content control, this is most likely to be awareness of age checking processes.

Those aware of either element are most likely to be 16-34s, males and ABC1s.

**Figure 39: Awareness of age checking systems on mobile phones, 2005 and 2007**

M3 – Were you aware that the mobile phone networks have introduced age checking systems (DESCRIPTION PROVIDED)? Were you aware that you can apply filters to mobile phones to prevent access to inappropriate websites using the phone?
Base: Adults aged 16+ who use a mobile phone (n=2481)/ 2005(n=2550)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007
Focus on gaming content regulation

Twenty nine percent of respondents believe gaming is regulated. Those groups most likely to participate in gaming are more likely to think the content is regulated than others: 16-19s, males, ABC1s and people with children in the household.

Those who do not know whether gaming is regulated are those who are least likely to participate in gaming: over-55s and DEs.

The balance between the competing desire for freedom of platform content to be expressive and creative, and protecting users from potentially inappropriate or offensive content is complex

We asked people the extent to which they agreed or disagreed that:

• content must be free to be expressive and creative; and
• users must be protected from offensive and inappropriate content.

When we asked people to respond to both statements we found that many people agreed with both attitudes. Although there is an element of overlapping content requirements, for each of the platforms around three-quarters agree users must be protected.

Table 3: Percentage who agree that platform content must be free to be expressive and creative and users must be protected from offensive and inappropriate content

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio content</td>
<td>63%</td>
</tr>
<tr>
<td>Television content</td>
<td>55%</td>
</tr>
<tr>
<td>Internet content</td>
<td>46%</td>
</tr>
<tr>
<td>Mobile phone content</td>
<td>37%</td>
</tr>
</tbody>
</table>

Agreement that content must be free to be expressive and creative is highest for radio (77%) and television (72%), particularly among 55-64 year olds, males and ABC1s. At the same time, there is a broadly similar level of agreement that television (76%) and radio (79%) users must be protected.

There is a different perception, however, for the internet and mobile phones. Over three-quarters of people agree that internet users must be protected from seeing inappropriate or offensive content (an increase from 2005) and over half of all adults agree that internet sites must be free to be expressive and creative (a decrease from 2005). This apparent support for protection from content is consistent with a rise in levels of concern about offensive and inappropriate content on the internet, as we shall see later in this chapter.

Opinion about mobile phone content is less divided. Over three-quarters (77%) agree that users must be protected from inappropriate or offensive content compared to two-fifths (40%) who agree that content must be free to be expressive and creative.
Media Literacy Audit: Report on UK adults’ media literacy

Figure 40: Attitude to platform content: *must be free to be expressive and creative vs users must be protected from offensive or inappropriate content*

<table>
<thead>
<tr>
<th>Platform</th>
<th>Free</th>
<th>Protected</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>31%</td>
<td>49%</td>
</tr>
<tr>
<td>Radio</td>
<td>34%</td>
<td>44%</td>
</tr>
<tr>
<td>Internet</td>
<td>21%</td>
<td>37%</td>
</tr>
<tr>
<td>Mobile</td>
<td>14%</td>
<td>56%</td>
</tr>
</tbody>
</table>

There are clear demographic variations in the opinions held by people about content. The groups who are more likely to know about broadcasting funding and regulation are also more likely to agree that *content must be free to be expressive and creative*, and are summarised in Table 4 below. However, in the case of the internet and mobile, 16-24s who are the least likely to know about funding and regulation are the most likely to agree with this statement.

Those most likely to say that *users must be protected from inappropriate or offensive content* are 35-44 year olds, females, people in rural areas or those with children in the household.

| Agree – Broadcasting content must be free to be expressive and creative | 55-64 years Males ABC1s |
| Agree – Internet content must be free to be expressive and creative | 16-24 Males People in rural areas |
| Agree – (All platforms) Users must be protected from inappropriate or offensive content | Over 65s Females C2DEs People with children in household |

4.4 The extent to which people evaluate and trust information differs significantly by demographic group

*With the numerous sources of information available, it is essential that people can evaluate what they are reading, seeing or hearing, and decide whether they trust it. People seem to be divided over their attitudes about the trustworthiness of platform content. However,*
messages about the need to critically assess online content are reaching online users, with people increasingly making judgements about websites and carrying out checks before using new sites or entering their personal details.

**Trust in content differs by platform and will be influenced by the nature of the content people are consuming**

Levels of trust in content differ by platform, with trust highest for radio content. Despite the varying levels of trust expressed by respondents, most people agree that television is very influential in shaping public opinion.

It is important for people to critically evaluate content, regardless of what platform it is available on. In order to add to our knowledge of how people interpret media content we asked respondents the extent to which they agreed or disagreed with the following statement: *when I watch television (listen to the radio, visit websites) I tend to trust what I see (hear or read).* This gives us a broad indication of the extent to which people trust platform content, however it does not take into consideration how trust differs by genre; we look into this further with television.

Three in five people say they tend to trust what they hear on the radio (61%). Similar proportions agree they tend to trust what they find on the internet (42%) or see on television (41%). For each platform, C2DEs are more likely to trust content than others.
Genres shown on television differ significantly from cartoons to drama, reality television to news and factual programmes and therefore we would expect perception of trust to differ by the genres people watch.

We wanted to assess the extent to which people trust television news and factual programmes, and whether this depended on the channel or programmes the content was shown on. Just under half (46%) who watch television news and factual programmes say they believe most of what is shown. However, the remaining viewers are critically evaluating about what they view:

- 27% say their level of belief varies according to the channel; and
- 24% are sceptical about the information on these programmes.

There are also clear demographic differences between those who trust most of what is shown on news and factual programming and those who are more critical. These differences are summarised in the table below.

Table 5: Perception of news and factual programmes, by demographic profile

<table>
<thead>
<tr>
<th>Believe most of what is on news and factual programmes</th>
<th>Sceptical about information/ belief varies by channel</th>
</tr>
</thead>
<tbody>
<tr>
<td>45-54s, females and C1s</td>
<td>Males and 16-24s</td>
</tr>
</tbody>
</table>

Despite the fact that some people (31%) do not, as a matter of course, agree they trust most of what is shown in news and factual programming, most people agree that television is very influential in shaping public opinion about political and other important issues (81%).

The internet is perceived by fewer people to be influential, although over half (56%) do agree that it is influential. Considering the profile of regular internet users in general, it is not surprising that those who believe the internet is influential are more likely to be under-55s,
ABC1s and people with children in the household. However, across all demographic groups, a higher proportion say that television is influential than say the same about the internet.

We also asked people how they perceive reality television programmes. Figure 42 shows that, of those who watch reality television programmes, three in five think the content is made up. However, people are divided over whether this is wrong (27%) or entertaining (33%). Over-45s are more likely to say it is wrong than younger people, as are people in the C1 socio-economic group.

**Figure 42: Perception of reality television programmes**

4.5 People are increasingly checking new websites before using them, particularly checking how up-to-date the information is

*People are more likely to check how up-to-date information is on a website they have not visited before than they were in 2005. The likelihood of people making their own assessment of the website, as opposed to taking recommendations from others, varies by demographic.*

When visiting a new website, a user can assess the site to establish whether it is trustworthy or not. Some of the checks that people may make are:

- checking how up to date the information is;
- assessing the overall look and feel of the site;
- asking others whether they have visited the site;
- checking information across other sites; and
- finding out who has created the web page.

Figure 43 shows the percentage of people who visit new sites that carry out some kind of check when they first visit an unfamiliar site. Three-quarters of these users say they make at least one of the above checks when they first use a website.
The check undertaken most often is how up-to-date the site is; this has increased significantly since 2005\textsuperscript{11} (28% vs 49% in 2007). Assessing the overall look and feel of the website (41%) is the next most-mentioned check, followed by asking someone else (31%), looking at information across other sites (28%) or checking who has created the page and why (16%).

**Figure 43: Checks made when visiting new websites**

![Bar chart showing the percentage of people who check different aspects of a new website](chart)

IN16 – Thinking about new websites you visit, which, if any, of these things would you check?

Base: Adults aged 16+ who use the internet at home or elsewhere and ever visit new sites (1536 aged 16+, 167 aged 16-19, 144 aged 20-24, 307 aged 25-34, 426 aged 35-44, 426 aged 35-44, 282 aged 45-54, 207 aged 55+)

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

There are a number of demographic variations in the type of checks people make on new websites. ABC1s are more likely to check how up-to-date the information is on the site (as are people living in urban areas), to make an assessment on the overall look and feel of the site and to look at information across other sites (as are 35-44s).

Females, those with children in the household or 25-34s are more likely to ask others if they have been on the particular site, and males are more likely to have checked who has created the page and why.

Customer ratings of a website or the product or service that is being purchased are another way that people can assess whether they would like to use the online service.

Figure 44 shows that over three-quarters of people who have bought something online find the customer ratings or feedback scores very, or quite, useful (78%). Those who have children in their household and 25-34s are significantly more likely to find customer ratings and feedback useful.

\textsuperscript{11} Due to differences in question wording this is the only check that can be compared with 2005.
4.6 People look for professional signs or rely on personal instinct when they make a judgement about whether to enter their personal details

There are a number of ways people can assess whether they should enter their personal details. However, to take advantage of these mechanisms people have to be confident in judging whether a website is trustworthy or not.

As reported at the beginning of this section, although people tend to be confident about finding the information they want, they are not as confident about judging whether a website is trustworthy or not. Approximately three in five (59%) told us they are confident in doing this, one in five say they are neither confident nor unconfident (18%) while 20% do not feel very confident.

When we asked respondents about making judgements before entering their personal details into a website, we found that over three-quarters (77%) make some kind of judgement when they use a new website, either basing this on instinct or looking for specific signs.

The most mentioned judgements are based on looking for professional signs (looking for a padlock symbol, system messages and kitemarks) and relying on personal instinct (such as familiarity with the company, and looking professional).
Using peer signs, such as recommendations from friends and peer reviews, has increased since 2005, as has relying on personal instinct. However, the percentage of people who would not make a judgement or who would not trust any site has not changed since 2005.

The type of judgement a person might make varies by age, socio-economic group and gender and these are consistent with variations in confidence, and with making checks.

- 16-24s are more likely to make a judgment based on personal instinct.
- ABs are more likely to have taken into consideration professional signs (along with 25-54 year olds and C1s) as well as personal instinct.
- Females are more likely to use recommendations from friends (consistent with females’ preference for learning in general).

Despite concerns about online personal security, some people do not make any judgements before entering their personal details (11%); they are more likely to be 16-24s (17%). People who do not make any judgement are more likely to be C2DEs and over- 65s. These groups are also the lowest internet user groups.

Six per cent of people would not trust any website; these are more likely to be over-55s.

## 4.7 People are cautious about sharing their personal information

*When registering on a website, people are more likely to be happy with giving their email address rather than other personal details. However, around half of the people we spoke to expressed some concern with giving out any personal details. Older people and C2DEs were most likely to say they would never give out certain personal contact details."

We asked people how they feel about entering a number of different personal details when registering on a new site. Around half of the people we spoke to say they have some concerns about sharing certain types of personal information (see Figure 46) and around one-fifth said they would never enter their mobile phone number, debit card details or home phone number when registering on a website. People appear to be most comfortable providing their personal email address.
Identity fraud, and a fear of others using one’s personal details, are issues of concern for some people. This is consistent with a decrease in the proportion of people who are less happy to give out their personal email address and a rise in the proportion of people who are concerned about giving out their mobile phone number, home address and home details compared with 2005.

Figure 46: Information prepared to give when registering on sites

There are some clear age and socio-economic trends surrounding information sharing:

- In general, over-65s and C2DEs are less prepared to give out details about themselves and more likely than others to say they are not prepared to give personal email addresses, home address, or debit or credit card details when registering on sites. Additionally, C2DEs are more likely to say they would never give their mobile or home phone number.

- In contrast, ABC1s are more likely than others to be prepared to give their credit or debit card details.

- 16-34s are less likely than others to say they would give their home phone number. However, this could be because many 16-34s use their mobile as their first point of contact, rather than a reluctance to give a home phone number for security reasons.

The data suggest that ABC1s, who are concerned and taking precautions with their personal details, feel more comfortable about giving out credit and debit card numbers. This could be because they have assessed the website, and satisfied themselves that it is secure.

In comparison, C2DEs and over-65s feel less comfortable about entering their details. They are also less likely to make a judgement about whether they should enter details, and less likely to use new websites.

However, not everyone takes precautions before entering personal details. In particular, 16-24s, who use the internet the most, are the least concerned about identity fraud issues, and
are less worried about giving personal details and less likely to make a judgement about the website before entering details.

4.8 Sites such as NHS Direct are most popular for online health information

Information can be found on a wide variety of websites, including government sites, branded corporate sites and peer-to-peer sites. For health information, there are public service sites such as NHS Direct and peer-to-peer sites such as support groups. To use sites, people need to critically assess and evaluate the information, rather than simply accepting what they read.

The proportion of people who have used the internet to find out information about an illness remains broadly similar to 2005 (42% and 41% respectively). However, as Figure 47 shows, people are accessing this information in different ways; it seems that they are moving away from peer-to-peer sites to formal/professional sites. The percentage of people using public service sites such as NHS Direct or NHS 24 has increased from 65% in 2005 to 70% in 2007. Over the same time period there has been a decrease in those using support groups’ websites (45% compared to 37%), high street chemists’ websites (17% compared to 13%) or those of individual patients (10% compared to 6%).

Figure 47: Types of internet information sources used for health information, 2005 and 2007

Use of the different websites does differ by demographic group. 25-34s (compared with over-45s) and C2DEs are more likely than other groups to use public sites such as NHS Direct. The increase in C2DEs finding out about health information online is influencing the increased use of public service sites. 55-64s and ABC1s are more likely to seek information from support groups’ websites and 16-24s are more likely to use high street chemists’ websites. Use of public service sites and support group websites has increased among females and C2DEs since 2005.

4.9 More concern about television and internet content

People have the most concerns about what is on internet and television, compared with other platforms, and the proportion mentioning concerns has increased since 2005. The rise
in concerns regarding the internet is influenced by an increase in mentions of online identity fraud and financial security, and is consistent with people’s behaviour in checking new sites and exercising caution before entering personal details. The rise in concerns about what is on the television is the result of an increase in concerns about poor quality content.

We wanted to investigate whether people are concerned about what is on the television, radio and the internet, and whether people have any concerns about mobile phones and gaming in general. We asked people, unprompted, if there was anything they were concerned about. To measure the extent of their concern we then asked people, for each platform, to rate their concern on a scale from very concerned to not at all concerned.

People are most likely to have concerns about what is on the internet (63%), followed by the television (55%) mobile phones (34%), gaming (30%) and finally radio (12%) (see Figure 48 below).

Concerns about television, radio and the internet have increased since 2005, while concerns about mobile phones have decreased.

Figure 48: Concerns about platforms, 2005 and 2007

The increase in mentions about what is on television is due to an increase in mentions about poor quality content. Further details by platform are discussed in the following sub-sections.

Despite the increase in the number of concerns people mention about television and radio, there has not been a subsequent increase in the depth of concern or worry they have about broadcasting. That is, there has been no change in the percentage of people who say they are very, or fairly, concerned (see Figure 49).

The increase in the mention of concerns about what is on the internet is partially due to a rise in concern about two specific issues; offensive content and financial/device security online. With regards to offensive content, more people say they are concerned about paedophiles and content unsuitable for children than in 2005. The second issue, and the largest increase since 2005, is the proportion of people saying they are concerned about identity fraud and other people using their personal details (from 1% in 2005 to 16% in 2007) which is driving the increase in mentions about financial security.
Figure 49: Extent of concern about media platforms

<table>
<thead>
<tr>
<th>Platform</th>
<th>Very concerned</th>
<th>Fairly concerned</th>
<th>Neither/Don't know</th>
<th>Not concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TV</strong></td>
<td>2005: 28%</td>
<td>22%</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td></td>
<td>2007: 32%</td>
<td>21%</td>
<td>14%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>Radio</strong></td>
<td>2005: 6%</td>
<td>21%</td>
<td>31%</td>
<td>52%</td>
</tr>
<tr>
<td></td>
<td>2007: 9%</td>
<td>11%</td>
<td>34%</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Internet</strong></td>
<td>2005: 17%</td>
<td>31%</td>
<td>16%</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>2007: 19%</td>
<td>33%</td>
<td>16%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>Mobile</strong></td>
<td>2005: 6%</td>
<td>19%</td>
<td>30%</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>2007: 8%</td>
<td>17%</td>
<td>16%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Not only are more people mentioning concerns about what is on the internet, but the issues are worrying people more than they did in 2005. That is, there has been an increase in the percentage of people telling us they are very, or fairly, concerned.

However, as mentioned earlier the increase in concerns about financial security appears to be having a positive impact on people evaluating websites before using them or entering their personal details.

When we look at the demographic profile of people who are concerned about the various platforms, a number of commonalities emerge. Similar groups of people express concern across all platforms: females, over-35s, ABC1s and parents. These groups are generally more likely to be confident in using media technology.

Table 6: Demographic profile of those concerned about media content

<table>
<thead>
<tr>
<th>Mentions of a concern</th>
<th>Television</th>
<th>Radio</th>
<th>Internet</th>
<th>Mobile phones</th>
<th>Gaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over-25s Females Children in HH ABs</td>
<td>ABC1s</td>
<td>35-54s Females Children in HH ABC1s</td>
<td>35-54s</td>
<td>Females Children in HH ABs</td>
<td></td>
</tr>
<tr>
<td>Very/fairly concerned</td>
<td>Over-25s ABs Single HHs</td>
<td>35-54s</td>
<td>Over-35s ABs</td>
<td>55-64s Females ABs Children in HH</td>
<td></td>
</tr>
</tbody>
</table>
Poor quality and offensive content are the main concerns about what is on television

People are concerned about a variety of issues in connection with television. Figure 50 shows the percentage of concerns, categorised into three main areas: poor quality content (35%), offensive content (34%) and a lack of trust about the truthfulness of programmes (7%).

**Figure 50: Concerns about television, by age**

The incidence of concerns about what is on television increases with age, and is higher among females and ABs. People with children in the household are particularly concerned about television content that contains violence in general, sex/nudity and people behaving badly, but overall, they do not have any more concerns than people who don’t have children in the household.

16-19s and 20-24s are the most likely to say they do not have any concerns.

Figure 51 shows the extent of this concern over the last two years. Just over half of people tell us they are not concerned about what is on television, while one in three say they are very, or fairly, concerned. Those most concerned are the over-25s, ABs and people who live on their own.
One in ten are concerned about what is on the radio

People mention fewer concerns about what is on the radio than for any other media platform assessed in this research. Around one in ten (12%) mention concerns about radio, with ABC1s (18%) most likely to mention a concern. There are no other demographic variations.

Concerns about what is on the radio are categorised as poor quality content (5%), offensive content (5%), distrust programmes/fixed/fake or biased (1%).

Figure 52: Concern about what is on the radio, by age

Consistent with the fact that most people (88%) did not mention a spontaneous concern about radio content, a broadly similar proportion (83%) say they are not concerned about anything on the radio.
Figure 53: Concern about what is on radio, 2005 and 2007

<table>
<thead>
<tr>
<th></th>
<th>Very concerned</th>
<th>Fairly concerned</th>
<th>Neither/ Don't know</th>
<th>Not concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>6%</td>
<td>10%</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>4%</td>
<td>11%</td>
<td>83%</td>
<td></td>
</tr>
</tbody>
</table>

RT: So overall, how concerned are you about what is on the radio?  
Base: All adults aged 16+ (n=2905)  
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

There has been an increase in the concerns mentioned about financial and device security since 2005

As mentioned earlier, offensive content and online security are the most mentioned online concerns, and have increased most in mentions since 2005.

Concerns about offensive content include sexual and violent content, websites showing sexual content, violent content and content that is unsuitable for children. Looking at the individual concerns mentioned, the top two spontaneously mentioned concerns are about paedophiles/perverts masquerading as younger people, and sexual content/pornography.

Concerns about security involve other people getting hold of personal details or phone numbers, claims for money, insecure sites and computer viruses. There has been a significant increase in concerns about identity fraud; up from 1% in 2005 to 16% in 2007.
Concerns about identity fraud and the misuse of personal details do appear to be influencing how some people use the internet. As mentioned earlier, people have told us that they are less happy about giving certain personal details than they were in 2005 and are making judgements about websites before giving their personal details.

Concerns about the confidentiality of personal details are not restricted to the online world. Figure 55 shows that over two-thirds of people (69%) are either very, or fairly, concerned about the amount of personal information that companies or government hold about them.
A number of recent incidents have brought the issue of confidentiality of personal data into the spotlight. During the time that fieldwork was undertaken for this report, the loss of disks from HM Revenue and Customs (HMRC) containing people’s personal information was extensively covered in the media. Overall levels of concern about the holding of personal information were not significantly different before and after the incident was covered by the press, but those who strongly agreed that they are concerned about personal information that the government or companies hold about them did increase significantly; from 37% before the news story, to 44% after it. It would appear that the coverage increased the level of concern among those who were already concerned.

People may also be concerned about the level of personal information held about them because they have specific concerns about intrusion into people’s personal lives by government or companies who hold such information.

For simplicity, we have categorised the concerns people have about the internet into five groups (see Figure 56);

- offensive content (includes sexual content/pornography, content that is unsuitable for children, violent content);
- risk to society/values (websites instructing how to be terrorists and how to commit suicide, racist/far right websites, websites that show abuse, cyberbullying);
- risk to finances/devices (identity fraud/access to personal details, insecure sites, claims for money/phishing, others getting access to my phone line, computer viruses);
- personal privacy (includes spam/unwanted emails); and
- poor quality content.

The proportion of people who express concern about what is on the internet increases with age and peaks among 35-54 year olds (who are often parents), of whom three-quarters have
Parents are generally more likely to have concerns about what is on the internet than those who do not have children.

**Figure 56: Age profile of people who have concerns about the internet**

In particular, parents are more likely than those who do not have children in the household to be concerned about paedophiles, sexual content, inappropriate content for children, violence, websites showing abuse of children, identity fraud/access to personal details, computer viruses, spam, pop-up advertising and insecure sites.

Overall, internet users have more concerns about what is on the internet than people who do not use the internet (see Figure 57). Because we asked all interviewees this question, regardless of whether they use the internet, the lower percentage of people concerned in older age groups is likely to be related to a lower take-up of the internet at home among this group.
In order to place the concerns people feel in context, we asked adults about their actual level of concern about what is on the internet. In 2005 48% of all adults said they were very, or fairly, concerned, compared with 54% in 2007 (see Figure 58). This level of concern is predominantly among 25-54s.

Consistent with the findings we have seen throughout the report, the youngest adults (16-24s) show the least concern about the internet.

**Figure 58: Level of concern about the internet**

In one three has a concern about mobile phones

As shown in Figure 59 one in three people (34%) spontaneously mention a concern about mobile phones. Over-25s (between 34% and 39% across the age groups) are more likely than 16-24s (25%) to mention something they are concerned about, and ABs (46%) are more likely to be concerned than others.
We have categorised concerns about mobiles in the following way:

- **risk to society** *(includes misuse of camera phones/the phenomena known as "happy slapping" and children having phones at a young age)*;
- **affordability**;
- **risk to health** *(includes health issues related to using handsets and from masts)*;
- **risk to personal safety** *(includes being a target for stealing your mobile phone)*; and
- **risk to privacy** *(refers to intrusion into other people’s space / public space)*.

**Figure 59: Areas of concern about mobile phones**

Just under a quarter of people (23%) are concerned to some extent about mobile phones; 6% are very concerned and 17% are fairly concerned. Two thirds (67%) are not concerned about mobile phones.
Figure 60: Overall concern about mobile phones, 2005 and 2007

Most people concerned about gaming are concerned about offensive content

Three in ten people spontaneously mentioned something they are concerned about with respect to gaming (30%).

We categorised concerns about gaming in the following way:

- offensive content;
- risks to society (including encouraging children to stay indoors and impacts on social skills); and
- risks to health (including contributing to obesity and health issues in general). Note, risks to health is not shown in Figure 61 as only responses of 5% or more are shown and 3% mentioned a concern about this.
Females are more likely to be concerned about offensive content (28%), as are people with children in the household (27%). Similarly, females are more likely to be concerned about risks to society (14%), as are ABs (17%).

One-quarter of people are very or fairly concerned about gaming. Those who fit the gaming profile (that is, under-24s) are the least likely to express concern, while those who are less likely to play electronic games are the most likely to be concerned (over-55s).
In order to assess how people feel about gaming, particularly in the offline world, we asked them the extent to which they agreed or disagreed that:

- violent games can affect behaviour in the real world;

- violent games can have more of an impact on people's behaviour than violence in television and films; and

- the skills you need to play games well are useful in everyday life.

Our research found that there is a perception among some people that violent games can affect behaviour in the real world (68%) and that they may have more of an impact on people's behaviour than violence on television or in films (50%).

One in three agree that the skills you need to play games well are useful in everyday life.

Ofcom does not have research which investigates actual behaviour or skills as a result of playing electronic games.
As discussed previously, older gamers (35+) are more likely to agree with the various statements than are younger gamers. This is particularly the case with older gamers, who are more likely to agree that the skills gained from gaming could be useful in everyday life. Conversely, they are more likely to see a downside of gaming, with a higher proportion agreeing that violence in games can have more of an impact on people’s behaviour than violence on television or in films.

### 4.10 Opinion is split on whether free downloads of copyright protected content from file sharing services should be illegal

People can download music and films in one of two ways. One way is to buy music or films from an online store like iTunes. The other way is to download the content from a file-sharing service (such as those available on Limewire or Kazaa) where an individual shares copies of the content for free.

It is illegal to share/download copies of rights-protected content without the permission of the rights holder.

Just over half of internet users are aware of online music shops (52%) and 42% are aware of file sharing services. The profile of those aware of both of these is similar to the profile of internet users; awareness decreases with age and is higher among ABC1s and people with children in the household.

The majority of people (84%) who are aware of ‘free’ file-sharing services are aware that using such services can be illegal (Figure 64). Awareness of the legal position is highest among males and ABC1s, while DEs are more likely to say they are not aware.
People are divided about whether this activity should be illegal, and opinion varies significantly with age. Overall, 46% of the people we spoke to feel that this type of downloading should be illegal, and 38% feel it should be legal. The remaining 15% do not know.

Figure 65 below illustrates people’s opinion of illegally downloading content by age and socio-economic group. The people most likely to support the view that it should not be illegal are younger people (16-24s) where around half have this view. In contrast, over-35s (and particularly over-65s) are more likely to think free downloading from file-sharing services should be illegal as are ABs.

25-34s are more likely than others to say they don’t know whether they think it should be illegal or not.
Section 5

Create

This section looks at people’s ability to create content and their confidence using the internet for creative functions.

5.1 Create: summary

Overall, people are more confident that they can find the information they are looking for than in using creative elements on platforms such as the internet or mobile phones. Two-thirds of internet users are confident they can use creative elements, but one-quarter are not.

Those who are least confident are more likely to be over 45 and female.

Despite a majority of people saying they feel confident in using creative elements, when we asked them about carrying out specific creative activities, with the exception of uploading photographs to the internet, people are more likely to say they are not interested.

As with many measures relative to take-up and use of technology, 16-24s are more likely than others to display interest or to have experience of doing the activity.

Social networking sites have been very much the online phenomenon of 2007. One-fifth of the internet users we spoke to say they have a social networking profile and one in ten is interested in having one. Online social networkers are dominated by younger age groups, particularly 16-19s, of which 63% have a page or profile.

Respondents who have a profile say they use the sites fairly frequently, with 80% accessing them at least once a week.

People use social networking sites mainly for communication, particularly with people they know. However, 17% said they contact people they don’t know; 16-24s are more likely to say this than any other age groups.

5.2 People are more confident finding out information online than they are using creative elements

Two-thirds of people are confident in using creative elements, but this is significantly lower than confidence levels for finding information online.

As discussed previously, 66% of internet users say they feel very, or fairly, confident about using creative elements offered on media such as the internet or mobile phones. However, this level of confidence is significantly lower than that expressed for finding the content or information people want when they go online (see Figure 66).

At the other end of the scale, one in four internet users do not feel confident that they can use creative elements.
Confidence in using creative elements is higher among younger people (16-24s and 25-34s), males and ABC1s. Those who do not feel confident in using the creative elements are more likely to be over 45s or females.

5.3 With the exception of uploading photos, the majority of people are not interested in creative functions

For the purposes of this research we selected several different types of online activities which reflect different forms of creativity. These are:

- uploading photos to the internet;
- setting up a personal profile on a social networking website;
- contributing comments to someone else’s blog;
- setting up a website or blog;
- making a short video and uploading it to the internet; and
- contributing to a wiki.

Figure 67 illustrates that the most mentioned activity that internet users are interested in is uploading photos to the internet (61%) and 43% of internet users say they have already done this. Around one in ten users are interested in setting up a social networking profile, contributing to a blog and setting up a website. In comparison fewer are interested in, or have set up, their own blog, or have made a short video and uploaded it, or contributed to a wiki.
Across all of the interactive activities, 16-19s are significantly more likely to take part than older people (see Figure 68 below). Interestingly, people in households with children are less interested in carrying out creative activities, despite the fact that they tend to be more prolific internet users than people without children. Over-35s and females are also more likely to say they are not interested.

There is little variation between people who have already participated in creative activities and those who are interested in doing so.
Internet users listen to or download music more frequently than film or television programme content

We asked internet users how often, if at all, they listen to, watch or download video clips, music content or television programmes. Figure 69 shows that over half of all users say they listen to or download music (56%) or watch or download short video clips (55%), and nearly two in five (38%) watch or download longer videos such as films or television programmes.

People who view or download video and music content tend to do so either weekly or less often. Relatively few do this on a daily basis. Internet users were less likely to have ever watched or downloaded longer videos such as films or television programmes than the other activities we assessed.
People who watch/download video clips or longer visual content such as television programmes or films tend to be younger (16-24), males, living in an urban area and without children in the household.

5.4 Social networking sites

Younger people, particularly 16-24s dominate the profile of online social networkers. Social networking sites are mostly used for staying in contact with people they already know, although some contact people they do not know.

Social networking sites offer people new and varied ways to communicate via the internet, whether through their PC or their mobile phone. Examples include MySpace, Facebook and Bebo. They allow people to easily and simply create their own online page or profile and to construct and display an online network of contacts, or ‘friends’. Users of these sites can communicate via their profile both with their ‘friends’ and with people outside their list of contacts.

One in five internet users have set up their own social networking profile or page, and they tend to be under 34

One-fifth of internet users say they have set up their own profile or page, while a further one in ten say they are interested in doing so (Figure 70). Two thirds are not interested at all.

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**Figure 69: Frequency of viewing and downloading video and music content**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Daily</th>
<th>Weekly</th>
<th>Less often</th>
<th>Never do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen to or download music online</td>
<td>6%</td>
<td>20%</td>
<td>30%</td>
<td>43%</td>
</tr>
<tr>
<td>Watch or download short video clips such as music videos or comedy clips</td>
<td>4%</td>
<td>18%</td>
<td>33%</td>
<td>46%</td>
</tr>
<tr>
<td>Watch or download longer videos such as films or TV programmes</td>
<td>8%</td>
<td>25%</td>
<td>62%</td>
<td></td>
</tr>
</tbody>
</table>

IN15A-C – I am now going to read out some things that can be done on the internet, and would like to know how often, if at all, you do each one.

Base: Adults aged 16+ who use the internet at home or elsewhere (n=1723)

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

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12 For further details see Social Networking: A qualitative and quantitative research report into attitudes behaviour and use published 2 April 2008
http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/
Figure 70: Proportion who have set up their own page or profile on a website such as Piczo, Bebo, hi5, Facebook or MySpace

Figure 71 shows that the youngest adults are more likely than any other age group to have a profile on a social networking site (63% of 16-19s vs 22% of internet users in the general population). Compared with 16-19 year olds, having a profile is less likely among 20-24s, although 46% do have one, followed by 28% of 25-34s. Having a social networking profile decreases significantly among over-35s.

Furthermore, while take-up of social networking profiles is relatively high among 12-15 year olds, the likelihood of having a profile still peaks among 16-19 year olds.
Interestingly, while home take-up of broadband (and thus the ability to easily access social networking sites) varies by socio-economic group, actual use of the sites appears to vary little by socio-economic group.

Although the likelihood of having a social networking profile does not vary significantly by socio-economic group, there are differences between internet users who do not currently have a profile and those who are interested in having one. Most older internet users (55+) are not interested in setting up their own profile and ABs are more likely than others to say they are not interested (71% vs 67% of internet users). DEs are more likely than other socio-economic groups to say they are interested in setting up a profile.

Consistent with numerous media reports, the top three sites in Ofcom’s research were Facebook, MySpace and Bebo\(^\text{13}\) (see Figure 72). The majority of adults who have a social networking profile have their profile on Facebook (62%). Nearly half reported having a profile on MySpace and one-third have one on Bebo.

There is evidence that some people have a profile on more than one social networking site, with internet users in this research indicating profiles on an average of 1.6 sites. Thirty-nine per cent of adults say they have two or more profiles.

There were insufficient social networking users in our study aged over 35 to examine whether there are any differences in the choice of site among this age group. However, among those aged under-35, there were no variations in choice of site between 16-24s and 25-34s.

There was some socio-economic variation, with ABC1s more likely to have a profile on Facebook than C2DEs, who were more likely to have a profile on MySpace.

**Figure 72: Social networking sites adults have profiles on**

[Chart showing the percentage of adults and those aged 16-24 with profiles on different sites]

Respondents with a profile on a social networking site say they use the sites fairly frequently, with 87% accessing them at least once a week, and 50% at least every other day. The youngest adults visit social networking sites most frequently, with 38% visiting every day and 24% visiting every other day.

Figure 73: Frequency of visiting social networking sites

![Chart showing frequency of visiting social networking sites](chart)

**People use social networking sites mainly for communication**

Communicating with others is the most-mentioned activity on social networking sites, and this mainly takes place between people who already know each other:

- 69% talk to friends and family they see a lot;
- 65% talk to friends and family they rarely see; and
- 47% look for old friends.

Over one in three (35%) social networkers say they talk to people who are friends of friends and 17% say that they talk to people they do not know. Those who report talking to people they do not know are significantly more likely to be 16-19 year olds (24%) than 25-34 year olds (7%).

While most people use social networking sites for communication, they are not limited to this activity; people also say they look at other people's profiles without leaving messages (40%) and listen to music/find out about bands (29%). 16-19 year olds (52%) and males (34%) are more likely than others (29% UK average) to say they use such sites to listen to music.

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It is not possible to say whether these online social networkers personally know people they classify as friends of friends.
Figure 74: Types of uses of social networking sites, by age

IN33 – Do you regularly use these sites for any of the things shown on this card?  
Base: All adults who have a current profile (n=347)  
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007  
* Caution small base size
Section 6

Learn

This section looks at people’s learning experiences with respect to media devices, and people’s experience and preference for learning elements of media literacy.

6.1 Learn: summary

There is some level of interest in learning about how media works, but the majority of the people we spoke to did not show any interest in the functions we asked about. The most popular subject is learning about using the internet rather than about specific media topics.

The preferred learning strategies are the more informal options (as opposed to classroom teaching) such as asking friends and family, reading a manual and through trial and error. There are demographic differences between people in the ways they prefer to learn, as well as between people who have learning preferences and those who do not. Nine per cent said that they do not have any learning strategies; these people are likely also to be less confident about using the technology in general, C2DEs and over-65s.

Some people may not be interested in learning about technology because they have never had any experience of learning about this subject in a classroom. Just over one-quarter say they have learnt about technology in a classroom.

Given the move in recent years to include lessons about television and ICT in formal education, it is not surprising that training or classes are more likely to have been experienced by 16-19s than by others.

6.2 People prefer to learn in informal ways

Three in ten people are interested in learning about media technology; this level of interest has remained unchanged since 2005.

From what people have told us, it is apparent that most people seem to prefer an informal approach to learning, which may reflect their past learning experiences.

Nearly one-third of people (31%) are interested in learning about some form of digital media; particularly ABC1s and 16-34s. There has been little change in the level of interest expressed since 2005.
Media Literacy Audit: Report on UK adults’ media literacy

Figure 75: Interest in learning about digital technology, 2005 and 2007

Of the four topics we asked people about, using the internet was the most mentioned topic. Less than 10% said they are interested in learning about creating a website, editing digital content or understanding how programmes are made, setting controls on websites or mobiles, understanding how media content is funded or learning how to make television programmes for the local community.

We asked people how they prefer to learn about digital technology, and in general, people mentioned informal learning methods rather than a more formal, structured classroom environment. The three most mentioned methods are asking friends and family (48%), reading the manual (45%) and through trial and error (40%). The incidence of learning by asking friends and family and through trial and error has increased since 2005.

Figure 76: Preference for learning about digital technology, 2005 and 2007

Not surprisingly, people learn in different ways and learning preferences differ by demographic group.

- Females are more likely to prefer learning from friends and family
Males and ABC1s are more likely to prefer reading the manual, trial and error (16-44s) or going to a class.

However, not everyone has a learning strategy; 9% say they do not have a preferred method of learning, and these people tend to be C2DEs and over-65s. It is important to note that these people are also in the demographic groups who tend to show a lack of interest in the various functions of digital technology, are unaware of the digital functions they could use and are also the least likely to have digital platforms in the home.

The contribution of friends and family to the learning process is particularly clear among younger people. We asked people to what extent they agree or disagree that their friends go to them if they have questions about the internet (see Figure 77). The youngest adults (16-19s) are the most likely to act as leaders to their friends and family, followed by 20-34s and males. These results suggest that people who are ABC1s, have children in the household and are aged between 20 and 54 also have a role to play in encouraging their friends and family to make more use of technology.

Figure 77: Level of agreement: my friends tend to come to me if they have questions about the internet

![Figure 77: Level of agreement](image)

Figure 77 shows people are more likely to say they have learnt about digital technology through formal classes than they were in 2005 (27% versus 22%). Learning about using the internet is the most likely topic (20%) learnt through training, an increase from 2005 (17%).
Figure 78: Experience of learning about digital technology, 2005 and 2007

29 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on... Can you tell me which, if any, of these have you learned more about through classes or any other type of training?
Base: All adults aged 16+ (206 aged 16-19, 207 aged 20-24, 473 aged 25-34, 661 aged 35-44, 489 aged 45-54, 341 aged 55-64, 356 aged 65-74, 167 aged 75+)
Source: Ofcom research, fieldwork carried out by Savills Rossiter-Base in October to December 2007

Given the move in recent years to include lessons about television and ICT (information and communications technology) in formal education, it is not surprising that training or classes are more likely to have been experienced by 16-19s (42% of 16-19s say they have learnt about the internet in this way, compared with 20% of the total population). ABC1s and under-34s are also more likely to have learnt about creating their own website or editing digital content through formal lessons.

It will be interesting to track the preference for non-classroom based learning in the future, as younger adults are more likely to have had experience of formal education about digital technology in the classroom, whereas the majority who are adults now have learnt about digital technology outside the classroom.
Section 7

Media attitudes and behaviours

This section examines how people’s attitudes towards media devices affect their media literacy.

7.1 Media attitudes and behaviour: summary

We have identified five segments of the population based on their relationship with media devices: Engaged, Economisers, Pragmatists, Hesitants and Resistors. Analysis shows that people’s media literacy differs by their attitudes towards media and their media behaviour.

7.2 Purpose and overview

In 2005 a segmentation was developed for Ofcom in a bespoke study: Consumer Engagement with Digital Services. The study aimed to determine the extent to which consumer typologies existed in terms of consumers’ engagement with technology – both across technologies, and within the key platforms of television, radio, mobile telephones and the internet.

This segmentation involved three phases of research (in-depth interviews, a quantitative phase and follow-up in-depth interviews). The interviews focused on three key areas: people’s attitudes to technologies, their reasons for acquiring devices, and their interest in the range of benefits offered.

Detailed analysis identified a list of questions which differentiated people’s behaviour. Using this reduced list of questions in the Media Literacy Audit we assessed whether this was still a relevant way of looking at people’s attitudes and behaviours in the media landscape.

Research conducted for the Media Literacy Audit showed that people’s behaviour differed more by their engagement with media devices than by the type of media literacy they have. The segmentation also shows that people’s level of engagement with technology does influence the media literacy they have with specific devices.

7.3 Overview of segments

Using both attitudinal and behavioural questions we analysed data from the 2007 Media Literacy Audit and identified five segments:

- Engaged – 21% of the population
- Pragmatists – 30% of the population
- Economisers – 8% of the population
- Hesitants – 31% of the population
- Resistors – 10% of the population

Due to the similarities of the segments, compared with the original segmentation we have combined details from the qualitative research conducted for the original segmentation.

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15 See http://www.ofcom.org.uk/research/cm/consumer_engagement/
developed in 2005, to bring to life the various segments and to help the reader understand and identify them.

**Figure 79: Breakdown of segments in the population**

The segments that we have identified tend to fit on a spectrum of engagement ranging from Resistors, who have very little engagement with media devices, through to the Engaged, who have a high level of association. Economisers and Pragmatists have fairly similar levels of engagement. However, they differ on key variables such as demographics and attitudes, and so have a different approach to take-up of devices and in some media literacy measures.

**Figure 80: Level of engagement with media**

The following table summarises the attitudes and behaviours of the various groups with respect to their engagement with media devices. The summary helps to give a picture of how attitudes are impacting on the type of engagement people have and an insight into the type of support people may need to take full advantage of the benefits that some devices could bring them.

For example, by comparing the Pragmatists and the Economisers it is clear that while they have broadly similar levels of take-up (perhaps with the exception of the internet, for some) their views of technology are quite different. Pragmatists need to be convinced of the benefit of a technology to their lives (or the benefit of learning to use various functions) before they will consider adopting it. In contrast, Economisers are relatively eager for media services, but affordability is a barrier and limits their engagement.

Although Hesitants have higher levels of engagement than Resistors, overall, they are much less engaged than the rest of the population. A key difference between these two groups is...
the reasons they give for not taking advantage of media services; Resistors are not interested and would need to be shown a clear benefit, while Hesitants lack the knowledge to use media devices themselves. Ongoing media literacy support might allow them to take advantage of these services.

**Table 7: Summary of attitudes to media services, by segment**

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

**Demographic profile**

The five groups we have identified include people from a variety of demographic backgrounds. Considering the relationship between people’s age and socio-economic group, as explored in earlier chapters, it is not surprising that some of the segments we have identified, based on media attitudes and behaviour, also differ by these demographics. Figure 81 below illustrates the demographic variables that differ significantly between the attitudinal and behaviour segments. It is important to remember that while demographics do differ by segment, segments are not exclusively represented by any particular demographic.

People who are regarded as being engaged with media are more likely to be male and under-35s than other groups. Like Pragmatists, they are also more likely to be ABC1 and working.

Economisers tend to be younger (52% are under-35s),

In contrast, Resistors are older than any other segment; seven in ten are 65 or older, and they are less likely to be working.
Media Literacy Audit: Report on UK adults’ media literacy

Figure 81: Demographic profile, by segment

Overview of media literacy by segment

It is not surprising that Engaged people show the most interest in digital television and internet functions. The majority of Pragmatists and Economisers are also interested.

Hesitants are significantly more likely to be interested in digital functions than Resistors.

Table 8: Interest in digital functions, by segment

<table>
<thead>
<tr>
<th></th>
<th>Engaged</th>
<th>Pragmatists</th>
<th>Hesitants</th>
<th>Resistors</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interested in digital TV functions</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>83</td>
<td>68</td>
<td>43</td>
<td>29</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>Interested in internet functions</td>
<td>100</td>
<td>99</td>
<td>38</td>
<td>17</td>
<td>70</td>
</tr>
</tbody>
</table>

In general, Pragmatists are the most knowledgeable about how platform content is funded and regulated.

Awareness of how television and radio is funded is lower among Economisers than among other groups. Resistors’ awareness of BBC broadcasting is on a par with other groups; however, they are less aware of how commercial broadcasting and websites are funded and regulated.
Table 9: Awareness of funding and regulation, by segment

<table>
<thead>
<tr>
<th></th>
<th>Engaged</th>
<th>Pragmatists</th>
<th>Hesitants</th>
<th>Resistors</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of BBC TV funding</td>
<td>75</td>
<td>85</td>
<td>82</td>
<td>81</td>
<td>68</td>
</tr>
<tr>
<td>Aware of commercial TV funding</td>
<td>66</td>
<td>76</td>
<td>71</td>
<td>67</td>
<td>59</td>
</tr>
<tr>
<td>Aware of BBC radio funding</td>
<td>62</td>
<td>68</td>
<td>59</td>
<td>62</td>
<td>51</td>
</tr>
<tr>
<td>Aware of commercial radio funding</td>
<td>55</td>
<td>65</td>
<td>53</td>
<td>45</td>
<td>48</td>
</tr>
<tr>
<td>Aware of BBC website funding</td>
<td>44</td>
<td>55</td>
<td>33</td>
<td>26</td>
<td>35</td>
</tr>
<tr>
<td>Aware of search engine website funding</td>
<td>34</td>
<td>38</td>
<td>15</td>
<td>10</td>
<td>18</td>
</tr>
<tr>
<td>Believe TV programmes are regulated</td>
<td>78</td>
<td>88</td>
<td>77</td>
<td>72</td>
<td>71</td>
</tr>
<tr>
<td>Believe radio broadcasts are regulated</td>
<td>60</td>
<td>71</td>
<td>50</td>
<td>45</td>
<td>49</td>
</tr>
<tr>
<td>Believe internet content is regulated</td>
<td>33</td>
<td>33</td>
<td>19</td>
<td>11</td>
<td>26</td>
</tr>
<tr>
<td>Believe mobile phone content is regulated</td>
<td>27</td>
<td>26</td>
<td>13</td>
<td>5</td>
<td>24</td>
</tr>
</tbody>
</table>

In general, Pragmatists are the most concerned about what is on television, the internet and electronic games.

Resistors are the least concerned about what is on the internet, although this is likely to be strongly influenced by the fact that they do not have the internet at home.

Table 10: Concerns about media platforms, by segment

<table>
<thead>
<tr>
<th></th>
<th>Engaged</th>
<th>Pragmatists</th>
<th>Hesitants</th>
<th>Resistors</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerned about TV</td>
<td>24</td>
<td>31</td>
<td>26</td>
<td>29</td>
<td>22</td>
</tr>
<tr>
<td>Concerned about radio</td>
<td>6</td>
<td>7</td>
<td>4</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Concerned about internet</td>
<td>54</td>
<td>66</td>
<td>48</td>
<td>37</td>
<td>49</td>
</tr>
<tr>
<td>Concerned about mobile phones</td>
<td>24</td>
<td>23</td>
<td>20</td>
<td>27</td>
<td>18</td>
</tr>
<tr>
<td>Concerned about gaming</td>
<td>20</td>
<td>29</td>
<td>21</td>
<td>20</td>
<td>17</td>
</tr>
</tbody>
</table>
In terms of showing cautious behaviour, people who are Engaged are most likely to carry out some form of checking when they use a new website, and Economisers are the least likely to do this. However, in making a judgement about whether to enter personal details on a website, Pragmatists are the most cautious and Hesitants are the least.

Engaged people are significantly more likely than others to have some experience of creative activities online, followed by Pragmatists.

Table 11: Online activities, by segment

<table>
<thead>
<tr>
<th></th>
<th>Engaged</th>
<th>Pragmatists</th>
<th>Hesitants</th>
<th>Resistors</th>
<th>Economisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any checks on new websites, among internet users</td>
<td>86</td>
<td>77</td>
<td>70</td>
<td>*</td>
<td>62</td>
</tr>
<tr>
<td>Any judgements made before entering personal details online, among internet users</td>
<td>76</td>
<td>83</td>
<td>64</td>
<td>*</td>
<td>71</td>
</tr>
<tr>
<td>Experience of any creative activities online, among internet users</td>
<td>68</td>
<td>49</td>
<td>20</td>
<td>*</td>
<td>38</td>
</tr>
</tbody>
</table>

7.4 Portraits of the segment groups

The following section aims to bring to life the various groups, by describing their media attitudes and behaviour as well as their media literacy skills.

Engaged (21%)

The Engaged segment are keen and adventurous digital users for whom technology plays a broad and important role in delivering practical benefits, and also offers social and leisure opportunities. They have each of the three key devices (mobile phone, digital television and the internet) and spend the most time on the internet. They often use more than one platform at a time, such as talking on their mobile or using the internet while they are watching television. They are very positive about the benefits of technology, confident in their ability to master technologies, and keen to keep up. Some of them believe that they are not getting as much as they could from digital technology, and this is to a great extent a product of their own enthusiasm, as they are keen to use all the potential functions of a device.

This segment is willing to experiment with new technology and has the confidence to learn about products/applications through trial and error rather than relying on manuals or tuition, though their busy lifestyles can also be a barrier to fuller exploitation of existing platforms; digital technology is not always their top priority. They are the only segment which wants to keep their technology constantly updated.

In addition, word of mouth and peer advocacy play an important role in uptake and engagement for this group. Highest engagement comes when a device clearly offers lifestyle benefits which are combined with an 'ingenuity' factor - "I've recommended (DAB) to friends but it's not got the wow factor that would make it a huge topic of conversation"

They like to help their friends with any questions they have about technology and encourage them to take advantage of media devices. Their widespread use of, and confidence in using,
various digital devices means that they do not have as many concerns as some other groups and have fewer concerns about giving out their personal details than others.

Although this group are more likely than others to be 16-34 (58%), close to half are aged over 35, similarly, while they are more likely to be ABC1s (66%), 34% are C2DE. Half (48%) live in cities and large towns.

**Pragmatists (30%)**

The Pragmatists are confident with, and feel knowledgeable about, technology, but engage with digital services in a more cautious and considered manner.

- They have the main media platforms and many media devices.
- They use more than one device at the same time, although not as much the Engaged segment.

Their adoption of new technology is primarily driven by need, and so the levels of engagement with each platform diverge more slowly from ‘traditional’ applications (e.g. the television is for audiovisual entertainment, the mobile phone is for communication) - “I tend to compartmentalise things. For me the phone is all about communication”. They invariably agree that “I prefer to wait until new technology products have become cheaper and better before thinking about buying them”. Technology has a much higher profile within work, organisation and communication than in leisure activities, where they are more traditional in their activities than the Engaged group. The exception is where technology delivers convenience, such as watching television when they want. Busy lifestyles are an issue for Pragmatists, with their rounded lifestyles involving family, work, exercise and leisure.

Although the majority of Pragmatists believe that media have mixed roles, around one in four think their main role should be to inform and educate.

Compared to other segments, Pragmatists are more knowledgeable about funding sources and are aware of how the various media sectors are regulated. This group is also more concerned about what is on television and the internet and this is likely to be reflected in their use of platforms for specific purposes.

While Pragmatists appear to operate within a comfort zone because of their heavily compartmentalised and rational attitude to new technology, they are prepared to try new things out if it is worth their while and they feel confident.

Pragmatists are more likely to be 35-54 (46%), socio-economic group AB (36%) or C1 (34%) – they are by some distance the most affluent segment.

**Economisers (8%)**

The Economisers see clear value in the full range of benefits that digital services can offer and take advantage of the platforms at their disposal – but costs, whether perceived or actual, may be limiting further take-up and use, particularly of the internet. Although some own a mobile, digital television and the internet, over half have just a mobile and digital television. Due to their comparatively low take-up of in-home internet, they are more likely than others to access the internet elsewhere.

An additional factor for limiting take-up might be a general lack of self-confidence and relatively low educational levels might also be a factor.
Once they have adopted a technology, they take full advantage of what is at their disposal – for example, often using the more advanced/interactive functionality of digital television. They have high expectations about what can be delivered, and poor service performance (in terms of speed of content delivery) can therefore alienate them, effectively discouraging them from repeating the experience as often as they would like.

They participate in gaming and, of all the segments, they spend the most time playing games.

In some instances there is a degree of confusion about the type of costs attributable to the platforms, for example there is still a perception among some that the Freeview digital television platform involves an ongoing subscription.

Affordability, possibly accompanied by uncertainty and unwillingness to invest time in investigating, restricts this segment from realising the full value they could derive from digital communications services.

Compared to all adults, Economisers have a lack of awareness about funding sources (32% are not aware that BBC television programmes are mainly funded by the licence fee) and regulation (29% do not know that television programmes are regulated). They see both television and radio having a dual role; that they need to be free to be expressive and creative, while at the same time the audience needs to be protected.

They are skewed towards 16-34s (52%), and 40% are in the DE socio-economic group, although relatively few (6%) are in full-time education.

**Hesitants (31%)**

The Hesitants tend to have access to a range of digital services at home but use them little, primarily due to lack of confidence, knowledge or interest. The majority have mobile phones (around two-thirds), but use them almost invariably for voice and basic text. In the absence of support and guidance, many have taken the easier option of turning their back on digital services, as they are uncomfortable with trying something new in case it goes wrong. This group needs considerable back-up to get them started and to help them gain confidence and experience in the use of digital communications services.

They display the largest media literacy gaps. Many in this group are acutely aware that they are not getting the most out of technology but they tend to dismiss what they do not understand rather than experiment with it. They feel that manuals/help menus are written for those with a greater level of knowledge and feel unable to advance without more thorough guidance, often mentioning face-to-face tuition as the ideal. Phrases such as “I need someone to hold my hand” are common. In some cases, a key part of this support would be reassurance that they are not going to break anything or incur costs by experimenting, but others have a genuine need for much more detailed guidance to get them started. Without support many will take the easier option of turning their back on digital services.

“I’d really like someone to sit down with me and show how [the internet] works”

“I’ve got to see somebody doing it two or three times and then I can do it”

“I would need my hand held to get it all set up”

“I went to a place to ask about doing an internet thing, but they said they’d give us a CD and I’d have to go home and do it myself, but then there’s no one to ask. It’s no good with an on-screen menu. It doesn’t really help.”
Although this group tends to be older, 43% are aged 44 or under, and although more likely to be female than the general population, over 4 in 10 are males.

**Resistors (10%)**

The Resistors are detached from digital services, believing them to be of little relevance to their lives - and actively resiting technology adoption. However, this initial rejection frequently masks a sense of being daunted by technology and a desire for digital products and services that are easier and simpler.

Given the older age profile of this segment, coupled with the step change in behaviour required to overcome their self-imposed restrictions, opportunities for a significant increase in engagement in the short term are probably limited.

Resisters tend to be 65 years or older, live on their own (44%) and be retired. Money is likely to be an issue as they tend to be in the E socio-economic group. They are more likely to have an impairment than the average population.
Section 8

Nations and Regions

This section compares key measures from the 2007 Media Literacy Audit across each of the four UK nations, highlighting any significant differences compared to the measure for the UK as a whole. Where base sizes allow, significant differences for the nine English regions are also shown, compared to the measure for England as a whole.

When looking at the English data it is important to remember that because the population of England represents 83% of the population of the UK as a whole, findings for England will be similar to those for the UK. Throughout this report we will highlight many variations by nation. It is important for the reader to note that some variations between nations will be influenced by demographic rather than geographic, cultural or statutory frameworks.

Summary - England

Fifty-four per cent of adults in England own digital television, a mobile phone and the internet, up from 40% in 2005. Take-up of each of these media has also increased significantly since 2005. Along with Northern Ireland, England has the highest take-up of the internet at home (63%).

Take-up of various media devices varies by English region. Mobile phone ownership is highest in London and lowest in the East Midlands. Households in the South East are most likely to have the internet at home, while households in the North West have the lowest levels of take-up. In contrast, take-up of digital television does not vary greatly across the English regions, with the exception of comparatively lower take-up of digital television in the East Midlands.

Reasons for not intending to get the internet are more likely to be voluntary than involuntary.

Among internet users in England the estimated volume of internet use per week is 12.3 hours, and this is most likely to be spent on communicating, looking for work or studies information, and conducting transactions such as banking or shopping online. The majority (91%) are confident that they can find the information they want, although one in twenty internet users say they are not confident.

One in three adults in England play electronic games, playing for an estimated 4.6 hours per week.

Since 2005 there has been an increase in regular use of several media activities: using a mobile phone, using the internet, and listening to a portable music device or MP3 player. At the same time there has been a decrease in reading newspapers/ magazines, listening to radio, watching DVDs/ videos and listening to music on a hi-fi/ CD/ tape player. There are some differences in regular media activities across the English regions, and these reflect demographic differences:

- those in London are more likely to use a mobile phone;
- those in the North West are more likely to watch television;
- those in the West Midlands are more likely to read newspapers/ magazines and to watch videos/ DVDs; and
those in the East of England are more likely to listen to music on a hi-fi/CD/tape player.

Half of all adults in England say that watching television is the media activity they would miss the most and this has increased since 2005 (44%). Over the same time period there has been an increase in the proportion saying they would most miss using a mobile phone and using the internet. Fewer adults say they would miss listening to radio or listening to music on a hi-fi/CD/tape player. There are some differences for the most-missed media activity across the English regions:

- those in the West Midlands and the North West are more likely to miss watching television; and
- those in London are more likely to miss using a mobile phone or the internet.

Two in three adults in England use another media device while also watching television, most often talking on the phone. Three in four adults in England use other media device while using the internet, again most commonly talking on the phone.

People are more likely to say they are concerned about what is on the internet than on any other platform we discussed. Half (54%) of all adults in England are concerned about what is on the internet, an increase since 2005. Two in five (37%) adults in England are concerned about what is on television, unchanged since 2005. One in four (24%) adults in England are concerned about mobile phones, again unchanged since 2005. A similar proportion (23%) are concerned about gaming. One in twenty (7%) adults in England are concerned about what is on radio, unchanged since 2005.

While two in five adults in England say they tend to trust what they see on television, one in three do not. Those in the North West are more likely to say they trust what they see, while those in the South West are more likely to say they do not. This may reflect differences in viewing habits as the statement encompasses all programme genres shown on television.

Responses are similar regarding the internet among internet users, with two in five saying they tend to trust what they read or see on websites, while one in four do not. Those in the North West are more likely to say they trust what they read and see, with no particular region more likely to say they do not.

Half of all internet users (51%) in England believe that it doesn’t matter who owns the websites or how they are funded, so long as there are good websites. The internet is more likely to be seen as having a role in providing education than providing entertainment. Similarly, internet users are more likely to feel that users should be protected from inappropriate or offensive content than to feel that internet sites should be free to be expressive and creative.

One in five internet users (equivalent to one in eight adults) have a page or profile on a social networking site. Adults in the East of England are more likely and those in the West Midlands are less likely to have a social networking site profile. Facebook, MySpace and Bebo are the most commonly used sites. Half of those with a social networking site profile visit these sites at least every other day. Just under half of all social networking site users in England have profiles that can be seen by anyone. Social networking sites are mostly used for contact with friends or family, with around one in five users using the sites to talk to people they don’t know.

There are three main preferred methods of learning about digital technology: through friends or family, through trial and error, and by reading the manual. Since 2005, adults in England
are more likely to say they prefer to learn through friends or family. Few (7%) state a preference for learning through going to a class, and this has decreased since 2005.

### Summary - Scotland

Forty-six per cent of adults in Scotland own digital television, a mobile phone and the internet, an increase from 30% in 2005, but still lower than the UK average (53%). Take-up of each of these media has also increased significantly since 2005, although internet ownership in Scotland (51%) is lower than in the UK as a whole (62%).

Reasons for not intending to get the internet are more likely to be voluntary than involuntary, but there has been an increase in the proportion having involuntary reasons (27%) since 2005 (19%). Involuntary reasons primarily relate to issues of affordability.

Among internet users in Scotland the estimated volume of internet use per week stands at 11.1 hours, which does not differ significantly from the UK. The most common uses are communicating, looking for work or studies information, and conducting transactions such as banking or shopping online. The breadth of use of the internet in Scotland is similar to the other nations. In line with the other nations, nine in ten are confident they can find the content or information they want when they go online, with one in twenty internet users not confident.

One in four adults in Scotland play electronic games, for an estimated 5.6 hours per week. Despite the incidence of gamers in Scotland being lower than the UK average (25% compared to 31%), the average amount of time Scottish gamers spend playing is not significantly different from the UK average.

Since 2005 there has been an increase in the proportion of people who regularly use a mobile phone and listen to a portable music device or MP3 player, and a decrease in regular reading of newspapers/magazines. Compared to the UK as a whole, adults in Scotland are less likely to regularly use a mobile phone or the internet.

Three in five adults in Scotland say that watching television is the media activity they would miss the most, which is higher than the measure for the UK as a whole (57% compared to 52%). The percentages that mention television and the internet has increased since 2005. Fewer adults say they would miss listening to radio or listening to music on a hi-fi/CD/ tape player than in 2005.

Four in five adults in Scotland use another media device while also watching television, most commonly talking on a phone. Simultaneous use of media while watching television or using the internet is higher in Scotland that it is in the UK.

- 80% of adults in Scotland use another device at the same time as watching television, compared with 69% in the UK as a whole; and
- 83% of adults in Scotland use another media device while using the internet, compared with 74% in the UK as a whole.

In general, people in Scotland are less likely to mention something they are concerned about on the internet, television or radio, or have concern about mobile phones or electronic games. Furthermore, in contrast to the UK, where concerns have increased since 2005, there has been little change in Scotland.

People are more likely to mention a concern about what is on the internet than on any other platform we discussed. Nearly half (47%) of all adults in Scotland are concerned about what
is on the internet and one in four (24%) are concerned about what is on television. In comparison, fewer people say they are concerned about mobiles or gaming; one in ten (12%) are concerned about mobile phones and 14% are concerned about gaming. Just 1% of adults in Scotland are concerned about what is on the radio.

While nearly half of all adults in Scotland say they do tend to trust what they see on television, one in four do not. Fewer people in Scotland do not agree that they trust what they see on television, compared with the UK (26% compared to 31%). Responses are similar regarding the internet among users in Scotland, with two in five users saying they tend to trust what they read or see on websites while one in three do not, and this is similar to the UK. Across both platforms the variations in levels of trust could be due to differences in the type of content that people are viewing.

Over half of all internet users (57%) in Scotland believe that it doesn't matter who owns the websites or how they are funded, so long as they are good websites. The internet is more likely to be seen as having a role in providing education than in providing entertainment. Similarly, internet users are more likely to feel that users should be protected from inappropriate or offensive content than to feel that internet sites should be free to be expressive and creative.

One in four internet users (equivalent to one in seven adults) have a page or profile on a social networking site, higher than the UK as a whole (27% compared to 22%). Base sizes are low\(^\text{16}\), but there are indications that Bebo is the most commonly used site in Scotland. Social networkers in Scotland appear to access social networking sites more frequently than social networkers in the UK in general; 96% visit the sites weekly compared to 80% in the UK. Similar to the UK, social networking sites are mostly used for contact with friends or family. However, users in Scotland appear to be more likely to use social networking sites to talk to people they don't know, compared to users in the UK as a whole, with around one in three users visiting the sites to talk to people they don't know.

Consistent with the UK, there are three main preferred methods of learning about digital technology: through friends or family, by reading the manual (preference for these methods has increased since 2005, and are higher than the UK average) and through trial and error. Few (3%) state a preference for learning through going to a class, and this is lower than the measure for the UK as a whole (6%).

Summary - Wales

Forty-four per cent of adults in Wales own a digital television, a mobile phone and the internet; this has not changed to any significant extent from 2005, and is lower than the UK as a whole (53%). Take-up of digital television and mobile phones has increased significantly since 2005, although internet ownership in Wales (53%) is lower than in the UK as a whole (62%).

Reasons for not intending to get the internet are more likely to be voluntary than involuntary, but there has been in increase in the proportion having involuntary reasons (29%) since 2005 (17%). Involuntary reasons primarily relate to issues of affordability.

Although fewer people have the internet in Wales than the UK average, the estimated volume of internet use per week is broadly similar (11.1 hours in Wales, 12.1 hours in the UK). The most common uses are communicating, looking for work or studies information, and conducting transactions such as banking or shopping online. The breadth of use of the internet in Wales is at a similar level to the other nations. In line with the other nations, nine

\(^{16}\) N=47
in ten are confident they can find the information they want when they go online, with one in twenty internet users saying they are not confident.

One in three adults in Wales play electronic games, with an estimated volume of weekly gaming of 5.4 hours.

Since 2005 there has been an increase in those saying they regularly: use a mobile phone and listen to a portable music device or MP3 player. Over the same time period fewer people say they regularly read newspapers/magazines or listen to the radio. When compared to the UK as a whole, adults in Wales are more likely to listen to music on a hi-fi/CD/ tape player, and are less likely to regularly use the internet.

Three in five adults in Wales say that watching television is the media activity they would miss the most, which is higher than the UK as a whole (59% compared to 52%). The percentage who say they would miss television the most has increased since 2005. Fewer adults say they would miss listening to radio or listening to music on a hi-fi/ CD/ tape player.

Simultaneous use of media while watching television or using the internet is lower in Wales than it is in the UK.

- 61% of adults in Wales use another device at the same time as watching television compared with 69% in the UK as a whole; and
- 63% of adults in Wales use another media device while using the internet compared with 74% in the UK as a whole.

People in Wales are more likely to say they are concerned about what is on television (42%) than those in the UK (36%). Concerns about mobiles, gaming and what is on the internet or the radio are similar to the UK. Within Wales, since 2005 there has been an increase in people mentioning a concern about what is on television or the internet, and a decrease in concern about what is on the radio. Half (52%) of all adults in Wales are concerned about what is on the internet and two in five (42%) are concerned about what is on television. One in five (20%) adults in Wales are concerned about mobile phones and a similar proportion (23%) are concerned about gaming. Three percent of adults in Wales are concerned about what is on radio.

Half of all adults in Wales say they tend to trust what they see on television, a higher level than the UK (49% compared to 41%). One in four does not tend to trust what they see on television. Similar to the UK average, two in five internet users in Wales say they tend to trust what they read or see on websites while one in four do not. Across both platforms this is likely to be influenced by the type of content they are consuming while watching television or using the internet.

Three in five internet users (62%) in Wales believe that it doesn’t matter who owns the websites or how they are funded so long as they are good websites, which is higher than the UK (52%). The internet is more likely to be seen as having a role in providing education than providing entertainment. Similarly, internet users are more likely to feel that users should be protected from inappropriate or offensive content than to feel that internet sites should be free to be expressive and creative.

One in four internet users (equivalent to one in eight adults) have a page or profile on a social networking site, similar to the UK as a whole (25% compared with 22% respectively). Base sizes are low\(^{17}\), but there are indications that Facebook is the most commonly used

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\(^{17}\) N=54
site in Wales. Social networkers in Wales do not access social networking sites any more or less frequently than social networkers in the UK in general. Similar to the UK, social networking sites are mostly used for contact with friends or family, with around one in ten users using the sites to talk to people they don’t know.

There are three main preferred methods of learning about digital technology: through friends or family, through trial and error, and by reading the manual. Since 2005, adults in Wales are more likely to say they prefer to learn through friends or family and less likely to say through reading the manual or trial and error. Preferences do not differ from those for the UK as a whole. Few (4%) state a preference for learning through going to a class, similar to the UK (6%).

Summary - Northern Ireland

Fifty-two per cent of adults in Northern Ireland own digital television, a mobile phone and the internet, which is an increase since 2005, and is similar to the UK (53%). Take-up of the platforms individually has increased significantly since 2005, with similar levels to the UK as a whole.

Reasons for not intending to get the internet are more likely to be voluntary than involuntary, and have not changed to any significant extent since 2005. Involuntary reasons primarily relate to issues of affordability.

Although incidence of the internet at home in Northern Ireland is comparable with the UK, internet users in Northern Ireland spend less time on the internet than those in the UK (9.6 hours per week compared with 12.1 hours). The most common uses of the internet are communicating, looking for work or studies information, and conducting transactions such as banking or shopping online. Breadth of use of the internet in Northern Ireland is at a similar level to the other nations, although comparatively fewer people use the internet for communication. In line with the other nations, nine in ten are confident they can find the information they want when they go online, with 8% of internet users not confident.

The incidence of gamers in Northern Ireland is lower than in the UK (23% vs 31%), but the time spent gaming is not significantly different from the UK (3.7 hours per week compared with 4.7 hours).

Since 2005 there has been an increase in the proportion of people saying they regularly use a mobile phone, the internet and listen to a portable music device or MP3 player. There has been a decrease in people regularly reading newspapers/magazines, listening to radio, watching videos/DVDs and listening to music on a hi-fi/CD/tape player. Compared to the UK as a whole, adults in Northern Ireland are less likely to regularly watch videos/DVDs.

Over half of adults in Northern Ireland say that watching television is the media activity they would miss the most, similar to the UK (55% compared to 52%) and an increase since 2005. Fewer adults say they would miss listening to music on a hi-fi/CD/tape player or reading newspapers/magazines.

Around three in four adults in Northern Ireland use another media device while also watching television or using the internet, most commonly talking on a phone. Simultaneous use of media while watching television or using the internet is at similar levels to the UK.

• 71% of adults in Northern Ireland use another media device at the same time as watching television, compared with 69% in the UK as a whole
• 75% of adults in Northern Ireland use another media device while using the internet, compared with 74% in the UK as a whole.

People in Northern Ireland are more likely to mention something they are concerned about on the internet than those in the UK in general. Compared with 2005, concern about what is on the internet and mobile phones has increased, while concern about what is on television and the radio is unchanged.

People are more likely to say they are concerned about what is on the internet than on any other platform we discussed. Three in five (59%) of all adults in Northern Ireland are concerned about what is on the internet and one in three (36%) are concerned about what is on television. One in four (23%) adults in Northern Ireland are concerned about mobile phones and a similar proportion (29%) are concerned about gaming. One in twelve (8%) are concerned about what is on the radio.

While one in three adults in Northern Ireland say they tend to trust what they see on television, two in five do not. The extent to which people disagree that they trust what they see on the television is higher than in the UK (41% compared to 31%). Among internet users in Northern Ireland, two in five users say they tend to trust what they read or see on websites while one in three do not. Across both platforms this is likely to be influenced by the type of content they are consuming while watching television or using the internet.

Half of all internet users (46%) in Northern Ireland believe that it doesn't matter who owns the websites or how they are funded so long as there are good websites, which is not significantly different to the UK level (52%). The internet is more likely to be seen as having a role in providing education than in providing entertainment. Similarly, internet users are more likely to feel that users should be protected from inappropriate or offensive content than to feel that internet sites should be free to be expressive and creative.

One in four internet users (equivalent to one in seven adults) have a page or profile on a social networking site, similar to the UK as a whole (26% compared to 22%). Base sizes are low\(^\text{18}\), but there are indications that Bebo is one of the most commonly used social networking sites in Northern Ireland. Social networkers in Northern Ireland do not access social networking sites any more or less frequently than social networkers in the UK as a whole. Similar to the UK, social networking sites are mostly used for contact with friends or family, with around one in five users using the sites to talk to people they don’t know.

Similar to the UK, there are three main preferred methods of learning about digital technology: through friends or family, through trial and error, and by reading the manual. Since 2005, adults in Northern Ireland are more likely to say they prefer to learn through each of these three methods. Few (9%) state a preference for learning through going to a class, and this does not differ from the UK as a whole (6%).

\(^{18}\) N=54
8.1 Ownership of digital television, mobile phone and internet

Figure 82 illustrates the extent to which each of the three media (digital television, the internet and mobile phones) are owned by adults in the UK, and in each nation.

Figure 82: Extent of multiple platform ownership of digital television, mobile phone and internet

While half of all UK adults own a digital television, mobile phone and the internet, this is less common for adults in Scotland and Wales. Ownership of all three platforms has increased since 2005 for the UK as a whole (from 39%), and for England (from 40%), Scotland (from 30%), and Northern Ireland (from 34%).

There are no differences in the incidence of ownership of all three media platforms across the English regions compared to England as a whole.

Figure 83 shows the proportion of adults in the UK, and in each nation, owning each of the three media (digital television, the internet and mobile phones).
Access to digital radio platforms and ownership of a mobile phone does not vary by nation compared to the UK as a whole. Digital television ownership is less common in Northern Ireland, and having the internet at home is less common in Scotland and Wales.

Compared to 2005, the increase in ownership of digital radio platforms, mobile phones and digital television across the UK as a whole is replicated across all the nations. For the internet, there have been significant increases in ownership levels in England (from 57%), in Scotland (from 43%) and in Northern Ireland (from 47%).

Looking specifically at the English regions, ownership of digital radio is less common in the East and West Midlands (81% and 83% respectively) compared to England as a whole (89%). Mobile phone ownership is highest in London (at 91%) and lowest in the East Midlands (80%). Digital television ownership is less common in the East Midlands (75%). Having the internet at home is less common in the North West (55%) and more common in the South East (73%).

8.2 Intentions to get internet access at home

Those who do not currently have access to the internet at home (38% of UK adults) were asked whether they intend to get access at home in the next year. Those who said they did not were asked their reasons why. Reasons for not intending to get internet access have been categorised as either voluntary (not interested/ no need) or involuntary (too expensive/ do not know how to use it/ do not have a computer/ too difficult to use). Figure 84 compares responses across the UK nations.

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19 Digital radio refers to access to digital radio stations through the internet, digital television and DAB radio sets
Figure 84: Home internet intentions

<table>
<thead>
<tr>
<th></th>
<th>Will get</th>
<th>Won’t get - involuntary reasons</th>
<th>Won’t get - voluntary reasons</th>
<th>Unsure</th>
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<tbody>
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<td>24%</td>
<td>42%</td>
<td>19%</td>
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<tr>
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<td>16%</td>
<td>24%</td>
<td>41%</td>
<td>19%</td>
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<tr>
<td>Scotland</td>
<td>11%</td>
<td>27%</td>
<td>43%</td>
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<tr>
<td>Wales</td>
<td>15%</td>
<td>29%</td>
<td>37%</td>
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<tr>
<td>Northern Ireland</td>
<td>16%</td>
<td>19%</td>
<td>44%</td>
<td>21%</td>
</tr>
</tbody>
</table>

There are no differences in intentions to get home internet access across the nations.

Compared to 2005, there has been no change across any of the nations in terms of those stating they will get internet access in the next year or so. In Scotland and Wales, involuntary reasons have increased (from 19% and 17% respectively). There has been no change in home internet intentions since 2005 in Northern Ireland.

Variations do exist across the English regions, but these should be treated with caution given the low base sizes of between 50 and 100 for each of the regions examined. Adults in the East Midlands are the least likely to state that they will get home internet access in the next year or so (8%). Involuntary reasons are less common in the South West (10%), with voluntary reasons less likely in London (28%) and more likely in East of England (55%) and the North East (57%). Adults in London and the East Midlands are the most likely to be unsure about their intentions (38% and 35% respectively compared with 19% in England).

8.3 Estimated volume of weekly internet use

Adults using the internet at home or elsewhere were asked to estimate how many hours in a typical week they use the internet at home, in their workplace or place of education, and anywhere else. Figure 85 compares the estimated average weekly volume of use of the internet across the nations. Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.
Adults’ weekly home internet use in Northern Ireland is lower than for the UK as a whole. There are no other differences across the nations.

Compared to 2005, weekly internet use at home has increased among adults in England (from 6.4 hours). Weekly internet use in the workplace/ place of education has decreased for Northern Ireland (from 4.3 hours).

Across the English regions, the volume of weekly internet use at home is lower in Yorkshire and Humberside, and the volume of workplace/ place of education use is lower in the North East.
8.4 Breadth of use of the internet

All adults who use the internet (regardless of where this is) were prompted with a list of 18 possible uses of the internet and were asked to say, for each one, whether this is something they do, and how often they use the internet to do it.

The 18 possible uses have been grouped into eight categories, in order to assess breadth of use of the internet. By breadth of use we mean the extent to which the internet is used for a variety of purposes. The following list describes the categories:

- communication - relating to uses such as sending or receiving email, using online chat rooms or instant messaging (IM);
- work/studies information - relating to finding information online for work or for studies;
- transactions - relating to banking, paying bills or buying things online;
- news - relating to looking at news websites;
- creativity - relating to looking at social networking sites (such as MySpace, Bebo, and Facebook), maintaining a website or weblog;
- entertainment - relating to listening to radio, playing games online or looking at adult-only websites;
- leisure information - relating to finding information for leisure time including cinema and live music or information for booking a holiday; and
- public/civic - relating to finding out about public services or looking at political/campaign/issues websites.

Figure 86 shows the proportion of all internet users and those in each of the nations who use the internet for each of these activities at least once a week. The averages of the original 18 possible uses are also shown.
Across the nations, internet users in Northern Ireland are less likely than those in the UK as a whole to use the internet at least once a week for the purposes of communication. They are, however, more likely to use the internet for leisure information. Internet users in Wales are more likely to use the internet at least once a week for public/civic purposes.

When looking across the English regions, compared to England as a whole, the differences can be summarised as follows:

- adults in London are more likely to use the internet at least weekly for work/studies information (60%) and are less likely to use it for transactions (30%);
- adults in the North West are less likely to use the internet for news (14%);
- adults in the East of England are more likely to use the internet for creative purposes (32%) with adults in the West Midlands less likely (22%); and
- adults in Yorkshire & Humberside are less likely to use the internet at least weekly for entertainment (13%)

8.5 Estimated volume of weekly gaming

Adults were asked to estimate how many hours they spend gaming in a typical week. Figure 87 compares the estimated average weekly hours spent gaming overall, across nations. Because these estimates are self-reported it is likely that a degree of under- and over-reporting will be present, and the estimates shown should be taken as indicative only.
Hours spent gaming per week do not vary significantly across the nations. Across the English regions, the hours per week spent gaming is lower in the East of England (at 2.8 hours per week).

### 8.6 Regular and most missed media activities

All adults were asked to choose from a list of nine media activities which they do almost every day, and then which one of these they would miss doing the most. Figure 88 shows the findings from the first of these two questions.
Differences by nation are summarised below:

- adults in Scotland are less likely to regularly use a mobile phone or the internet, and are more likely to listen to music on a hi-fi/CD or tape player;

- adults in Wales are more likely to regularly watch television or listen to music on a hi-fi/CD or tape player, and are less likely to use the internet; and

- adults in Northern Ireland are less likely to watch videos/DVDs.

Compared to 2005, a higher proportion of adults in England named the following three media as ones they use regularly: mobile phone (from 74% to 77%), the internet (from 52% to 58%) and listening to a portable media device or MP3 player (from 19% to 26%). Four media are named by a lower proportion of adults in England than in 2005: reading newspapers/magazines (from 78% to 73%), listening to the radio (from 78% to 68%), watching videos/DVDs (from 67% to 63%), listening to music on hi-fi/CD/tape player (from 72% to 55%).

Compared to 2005, two media have been named by a higher proportion of adults in Scotland as ones they use regularly: mobile phone (from 64% to 73%) and listening to a portable media device or MP3 player (from 15% to 23%). Only one media device has been named by a lower proportion of adults in Scotland: reading newspapers/magazines (from 82% to 75%).

Compared to 2005, a higher proportion of adults in Wales regularly use a mobile phone (up from 72% to 80%) or listen to a portable media device or MP3 player (from 14% to 21%), while a lower proportion read newspapers/magazines (from 80% to 74%) or listen to the radio (from 77% to 72%).

Compared to 2005, a higher proportion of adults in Northern Ireland regularly use a mobile phone (from 70% to 76%), use the internet (from 39% to 54%) or listen to an MP3 player (from 14% to 23%). A lower proportion of adults in Northern Ireland regularly read magazines/newspapers (from 89% to 77%), listen to the radio (from 88% to 72%), or listen to music on a hi-fi/CD/tape player (from 67% to 52%).
Across the English regions, differences compared to England as a whole are summarised below:

- adults in London are more likely to regularly use a mobile phone regularly (86%);
- adults in the East of England are more likely to regularly listen to music on a hi-fi/CD or tape player (62%);
- adults in the East Midlands are less likely to read newspapers/magazines (65%) or listen to a portable music device/MP3 player (16%);
- adults in the West Midlands are more likely to read newspapers/magazines (83%) or to watch videos/DVDs (74%);
- adults in Yorkshire & Humberside are less likely to watch television (93%), listen to the radio (59%), or watch videos/DVDs (54%); and
- adults in the North West are more likely to watch television regularly (100%) and less likely to regularly use the internet (50%).

Figure 89 shows the most missed media activity.

**Figure 89: Media activity adults would miss the most**

Compared to the measure for the UK as a whole, it is more common for adults in Scotland to state they would miss television the most (57%) and less common for them to state they would miss listening to the radio the most (4%). Adults in Wales are more likely to miss the television (59%) and less likely to miss using a mobile phone (9%) or the internet (8%). Adults in Northern Ireland are less likely to miss using the internet (7%).

Compared to 2005, a higher proportion of adults in England would miss television (from 44% to 51%), a mobile phone (from 10% to 14%), or the internet (from 8% to 12%). A lower proportion of adults in England would miss listening to the radio (from 13% to 8%) and
listening to music on a hi-fi/CD/tape player (from 13% to 5%). A higher proportion of adults in Scotland would miss television (from 48% to 57%) or the internet (from 6% to 11%). A lower proportion in Scotland would miss listening to the radio (from 8% to 4%) or listening to music on a hi-fi/CD/tape player (from 14% to 4%). An equal proportion of adults in Wales would miss television the most (59%), whereas a lower proportion would miss listening to music on a hi-fi/CD/tape player (from 10% to 6%). For Northern Ireland, a lower proportion say they would miss listening to music on a hi-fi/CD/tape player (from 9% to 4%) or reading newspapers/magazines (from 7% to 4%).

Looking at the English regions, compared to the measures for England as a whole, adults in London would be more likely to miss using a mobile phone (20%) or the internet (18%) and less likely to miss television (41%). It is more common for adults in the South East to miss reading newspapers/magazines (9%), for those in the South West to miss listening to a portable music device or MP3 player (4%) and for those in the East of England to miss listening to music on a hi-fi/CD or tape player (9%). Adults in the West Midlands are more likely to miss watching television (65%) and less likely to miss using a mobile phone (6%). Adults in the North East are less likely to miss using a mobile phone (8%) and more likely to miss reading newspapers/magazine (8%). Adults in the North West are more likely to miss television (65%) and less likely to miss using the internet (5%).

8.7 Using other media while also watching television

All adults with a television in the household (99% of all UK adults) were prompted with a list of six other media activities and were asked whether they ever watch television and do any of these other activities at the same time. Figure 90 shows the proportion of adults in each nation who watch television and carry out each of the other media activities at the same time, either most times or sometimes when they watch television.
Those in Scotland are more likely to use their mobile phone, to talk on their landline phone or to listen to the radio, at the same time as watching television. However, adults in Wales are less likely to use a mobile phone, talk on a landline phone, or to use the internet at the same time as watching television. Adults in Northern Ireland are less likely to use the internet or play computer games on a games console while watching television.

Comparing the English regions to England as a whole, those in London are more likely to use their mobile phone (66%), talk on their landline phone (65%), or listen to music on CD, an MP3 player or through a PC (19%) at the same time as watching television. Those in the West Midlands are more likely to talk on their landline phone (58%) or to play games on a games console (13%) while watching television.

The following regions are all less likely to use certain other media while watching television. Adults in the South West are less likely to use their mobile phone (39%) or to talk on their landline/home phone (36%). Those in the East Midlands are less likely to use a mobile phone (42%), a landline/home phone (40%), or to use the internet (18%) while watching television. Adults in Yorkshire & Humberside are less likely to talk on their landline phone (38%) as are those in the North West (40%). Those in the North East are less likely to use the internet (16%) while watching television.

### 8.8 Using other media while using the internet

All adults who use the internet at home (62% of all UK adults) were prompted with a list of six other media activities and were asked whether they ever use the internet and do any of these other activities at the same time. Figure 91 shows the proportion of adults in each nation who use the internet and carry out each of the other media activities at the same time, either most times or sometimes when they use the internet.
Adults in Scotland who use the internet at home are more likely to use their mobile phone while online (66%) or to talk on their home phone/landline (64%). Adults in Wales are less likely to do either of these activities while using the internet, at 41% and 38% respectively.

Across the English regions, using other media while using the internet is more common in London, the South East and the West Midlands and less common in the South West, the East Midlands, Yorkshire & Humberside and the North East. These differences are summarised below:

- It is more common for adults in London to use their mobile phone (65%) while using the internet, to use their landline/home phone (67%) or to listen to music on a CD/MP3 player/computer (44%).

- For those in the South East, the data indicates it is more common for them to also be playing computer games on a games console while they are online (22%)\(^{20}\).

- Those in the West Midlands who use the internet at home are more likely to use their mobile phone at the same time (63%)\(^{21}\).

- Adults in the South West are less likely to talk on their landline or home phone (37%) while using the internet.

- It is less common for those in the East Midlands to use a mobile phone (36%), to use their landline phone (31%), to listen to music on a CD/MP3 player/computer (19%), or to play computer games on a games console (3%) while using the internet.

- Although there are low base sizes, the data indicated those in Yorkshire & Humberside are less likely to talk on a landline phone (32%) or to listen to a radio station (15%) at the same time as using the internet.

\(^{20}\) Indicative due to low base size of fewer than 100 interviews

\(^{21}\) Indicative due to low base size of fewer than 100 interviews
8.9 Confidence using the internet

Adults who use the internet at home or elsewhere were asked how confident they felt (on a scale of very confident to not at all confident) in finding the content or information they want when they use the internet. Figure 92 shows responses for each nation and the UK as a whole.

Figure 92: Confidence in finding content online

Most people are confident they can find the information they want online. There are no differences in the proportion of internet users in each nation or across the English regions stating they are confident in finding the content or information they want.

8.10 Concerns about media

Adults were asked to mention, without prompting, any concerns they have about what is on television, the internet and radio and any concerns about mobile phones and gaming.
Across all of the nations people are most likely to mention a concern about the internet or television. In general people in Scotland mention fewer concerns than the other nations, while people in Northern Ireland are more likely to mention a concern about mobile phones or gaming.

After asking for unprompted concerns people were then asked to indicate, using a scale, to say how concerned they are about what is on television.

Figure 94 shows the proportion of all adults stating they are concerned about what is on television; either very or fairly concerned. Responses are shown for each of the nations.
The overall level of concern (either very or fairly) about what is on television is higher in Wales (42%) and lower in Scotland (24%) compared to the UK as a whole. Compared to 2005, overall levels of concern have increased in Wales (from 34%), but have not changed to any significant extent for the other nations.

Regionally, adults in London (54%) are more likely to be concerned than adults in England as a whole, with those in the North West less likely to be concerned (27%).

Figure 95 shows the proportion of all adults stating they are concerned about what is on radio; either very, or fairly, concerned.
Concerns about radio are low across all nations, with adults in Scotland less likely to be concerned about what is on the radio, compared to all UK adults.

Compared to 2005, adults in Wales are less likely to be concerned about what is on the radio (from 7%).

Adults in London are more likely to be concerned about what is on the radio (13%) compared to the measure for England as a whole.

Figure 96 shows the proportion of all adults stating they are concerned about what is on the internet; either very or fairly concerned.
At an overall level (very/fairly concerned) adults in Northern Ireland are more likely to be concerned about what is on the internet (59%) than all UK adults, with adults in Scotland (47%) being less concerned overall. Adults in Wales (25%) and Northern Ireland (29%) are more likely to be very concerned (19% in the UK).

Compared to 2005, overall levels of concern have increased for England (from 49%), for Wales (from 44%), and for Northern Ireland (from 36%). While at an overall level there has been no change in concerns about the internet among adults in Scotland, they are now more likely than in 2005 to state that they are very concerned about the internet (from 12%).

Across the English regions, adults in London are more likely to be concerned (63%) with adults in the East of England (46%), and the North West (45%) less likely to be concerned. Adults in West Midlands and the North East (both at 24%) are more likely to be very concerned.

Figure 97 shows the proportion of all adults stating they are concerned about mobile phones; either very or fairly concerned. Responses are shown for each of the nations.
Adults in Scotland are less likely to be concerned about mobile phones compared to those in the UK overall.

Compared to 2005, the only change across the nations is among adults in Northern Ireland, where overall concerns are higher in 2007 than they were in 2005 (from 13% to 23%).

Across the English regions, adults in London are more likely to be concerned (36%) compared to England as a whole.

Figure 98 shows the proportion of all adults stating they are concerned about gaming; either very or fairly concerned.
Overall, adults in Northern Ireland are more likely to be very or fairly concerned about gaming (29%), with lower levels of concern among adults in Scotland (14%) compared to the overall UK measure (23%).

It is not possible to make comparisons between 2005 and 2007 for this measure, as questions about gaming were not covered in the 2005 Media Literacy Audit.

There are no differences in levels of concern about gaming across the English regions, compared to England overall.

8.11 Trust of content by media platform

Adults with any televisions in the household were asked to indicate the extent to which they agree or disagree with the statement *When I watch TV, I tend to trust what I see*. Figure 99 shows responses from all adults with any televisions in the household, as well as by nation.
Adults in Wales (49%) are more likely than all UK adults (41%) to agree that they *tend to trust what they see on the television*, while adults in Northern Ireland are more likely to disagree (41%).

Across the English regions, agreement is more common among those in the North West (57%) and less common in London (32%).

Adults who use the internet (either at home or elsewhere) were asked to indicate the extent to which they agree or disagree with the statement *When I visit websites, I tend to trust what I read or see*. Figure 100 shows responses from all adults who use the internet, as well as by nation.

**Figure 100: Trust in online content**

<table>
<thead>
<tr>
<th>Country</th>
<th>Agree</th>
<th>Neither/Don't know</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>42%</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>England</td>
<td>42%</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>Scotland</td>
<td>38%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Wales</td>
<td>40%</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>35%</td>
<td>29%</td>
<td>33%</td>
</tr>
</tbody>
</table>

**IN49A – When I visit websites, I tend to trust what I read or see**
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 in UK, 1034 in England, 207 in Scotland, 235 in Wales, 247 in Northern Ireland)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to December 2007
Levels of agreement or disagreement with the statement do not vary by nation.

Across the English regions, overall agreement is higher among those in the North West (59%), and disagreement is higher for those in the South West (33%), South East and East Midlands (both 32%).

### 8.12 Attitudes about website funding

Figure 101 shows responses from those who use the internet to the statement: *As long as the internet provides good websites it doesn’t really matter who owns the websites or how they’re funded.*

**Figure 101: Attitudes about website funding**

<table>
<thead>
<tr>
<th>Region</th>
<th>Agree</th>
<th>Neither/Don’t know</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>52%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>England</td>
<td>51%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Scotland</td>
<td>57%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Wales</td>
<td>62%</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>46%</td>
<td>27%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Agreement with this statement is higher for internet users in Wales compared to those in the UK as a whole.

Across the English regions, internet users in Yorkshire & Humberside are more likely to agree with the statement (65%).

### 8.13 Attitudes about gaming

Adults were asked to indicate the extent to which they agree or disagree with three statements about gaming and responses are shown in Figure 102. The statements are shown in rank order of agreement across all adults.
Agreement that \textit{violent games can affect people’s behaviour outside the game} is lower for people in Scotland (56%), because a higher proportion neither agree nor disagree, or are unsure (35%). There are no variations in the overall levels of disagreement with this statement.

Across the English regions, agreement is lower among adults in the East of England (59%) and in the West Midlands (57%).

Adults in Wales (60%) are more likely than those in the UK as a whole (50%) to agree that violence in games can have more impact on people’s behaviour than violence on television or in films. Agreement is lower among adults in Scotland, because a high proportion state that they neither agree nor disagree, or are unsure (44%). As do those in Northern Ireland (47%). Across the English regions, those in the North West are more likely to agree (59%) compared to all adults in England.

Adults in Wales are more likely to agree that the skills you need to play games are useful in everyday life. Those in Northern Ireland are less likely to agree (29% compared with 33% for the UK average). Across the English regions, agreement is higher among those in the North West, with higher levels of disagreement among those in the North East (40%) and the South East (38%).

\textbf{8.14 The role of the internet}

All internet users (63% of all adults) were prompted with a series of statements about the internet and were asked to indicate the extent to which they agreed or disagreed with each one.

Figure 103 shows the proportion of adults who use the internet and either strongly or slightly agree with each of the statements:

\begin{itemize}
  \item \textit{The main role of the internet should be to provide entertainment}; and
  \item \textit{The main role of the internet should be to inform and educate people}.
\end{itemize}
Internet users in Scotland (67%) and Wales (61%) are more likely than users in the UK (52%) as a whole to agree that the main role of the internet is to provide entertainment. Across the English regions, internet users in the West Midlands are more likely to agree that the main role of the internet is to provide entertainment (62%).

At the same time internet users in Scotland (91%) and Wales (87%) are also more likely to agree that the main role of the internet is to inform and educate people, than the UK in general (79%). There are no variations in overall levels of agreement across the English regions.

### 8.15 Attitudes towards the internet

Figure 104 shows the proportion of adults who use the internet and either strongly or slightly agree with the statements:

- *Internet sites must be free to be expressive and creative;* and
- *Internet users must be protected from seeing inappropriate or offensive content.*
Agreement that internet sites must be free to be expressive and creative is higher among internet users in Scotland (76%), and lower for those in Northern Ireland (50%).

Responses across the English regions do not vary from those for England as a whole.

Adults who use the internet in Scotland (91%) are also more likely to agree that internet users must be protected from seeing inappropriate or offensive content. Responses across the English regions do not vary from those for England as a whole.
8.16 Social networking sites

As shown in Figure 105 one in five (22%) adults who use the internet at all have experience of setting up their own page or profile on a site like Piczo, Bebo, hi5, Facebook or MySpace. This is equivalent to 13% of all adults aged 16 and over.

Figure 105: Proportion of internet users who have a profile on a social networking site

Those with experience of setting up a social networking site profile were asked which sites they have a page or profile on. Figure 106 shows the proportion of internet users within each nation with a page or profile on one site, more than one site profile, or with no social networking site profile.
Internet users in Scotland are more likely to have a social networking site page or profile than the measure for the UK as a whole. Comparing the English regions, having a social networking site profile is more common among those in the East of England (28%) and less common among those in the West Midlands (9%).

The following looks briefly at how online social networkers in the nations are using social networking sites. It is important to note that this data is indicative only due to base sizes of around 50 people only, and therefore statistical comparisons cannot be made.

Figure 107 shows the social networking sites used by those with a profile. Incidences for the three most popular social networking sites among UK adults are shown.

Figure 107: Social networking sites that users have a page or profile on

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

* Includes people who do not have a current profile
A higher proportion of social networkers in Scotland and Northern Ireland use Bebo than use Facebook. Those in Northern Ireland are also less likely to use MySpace.

It is not possible to see how the results vary by English region, because of the low base sizes.

Those with a current profile on a social networking site were asked how often they visit any of these types of sites, and responses are summarised in Figure 108.

**Figure 108: Frequency of users visiting social networking sites**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every day</td>
<td>30%</td>
<td>30%</td>
<td>33%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>Every other day</td>
<td>20%</td>
<td>20%</td>
<td>21%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>A couple of times a week</td>
<td>17%</td>
<td>16%</td>
<td>17%</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Once a week</td>
<td>13%</td>
<td>11%</td>
<td>25%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Less often</td>
<td>20%</td>
<td>22%</td>
<td>4%</td>
<td>15%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Adults in Scotland who have a social networking profile are frequent social networking site visitors with 96% visiting at least weekly. Eighty five percent of social networkers in Wales visit these sites at least once a week and around three quarters in England and Northern Ireland do the same.

All adults with a social networking site profile were asked whether their profile can be seen by other people, and if so, who can see it.
Low base sizes prevent any statistical comparison between the nations. However Figure 109 indicates that there is a fairly even split between the social networkers who say their profile is open for others to see it versus those saying their profile is set so that only their friends are allowed to see it.

Those with a social networking site profile were prompted with a list of types of use and were asked which they regularly use social networking sites for.

Social networking site users in Scotland are more likely to talk to friends/family they see a lot and to talk to people that they don't know.
8.17 Learning about digital technology

All adults were prompted with a list of five options and were asked to say how they prefer to learn about using services and products such as digital television and radio, the internet and mobile phones. Figure 111 compares responses to this question across the nations.

**Figure 111: Preference for learning about digital technology**

Adults in Wales are less likely to prefer to learn about using such services or products by reading the manual, through trial and error or finding out from a store or supplier, and are more likely to say they are not interested in any of these ways, compared to UK adults as a whole. Adults in Northern Ireland are also more likely to say they are not interested in any of these ways of learning. Adults in Scotland are more likely to prefer to learn through trial and error/experimenting on their own and are less likely to prefer to go to a class.

Compared to 2005, it is more common for adults in England to say they would prefer to learn about using such products by asking friends or family (from 42% to 47%), and less common to say they would go to a class (from 9% to 7%). Adults in Scotland are more likely to say they would ask friends/family (from 40% to 53%), read the manual (from 35% to 43%), learn through trial and error (from 32% to 51%), or learn through a supplier or store (from 4% to 14%). Adults in Wales are more likely to say they would ask friends or family (from 36% to 47%). Adults in Northern Ireland are more likely to say they would ask friends/family (from 27% to 47%), through trial and error (from 31% to 39%), or through a class (from 3% to 9%).

Across the English regions, the differences compared to England as a whole are summarised below:

- Adults in London are more likely to ask friends or family (55%), or read the manual (62%), and less likely to learn through trial and error (32%).

- Those in the South West are more likely to prefer to learn through trial and error (48%) and less likely to find out through a supplier (7%).

- Adults in the East Midlands are less likely to prefer to learn through reading the manual (36%) or through trial and error (23%).
• Adults in Yorkshire and Humberside are more likely to prefer to learn in a class (11%).

• Those in the North East are more likely to prefer to learn by reading the manual (54%), while those in the North West are less likely to prefer this option (36%).
Annex 1

Research methodologies

1.1 Adult Media Literacy Audit

This quantitative survey was conducted face-to-face in homes.

Sampling

A sample frame was constructed using postcode geography to reflect the required sample. Sample points were selected with probability proportional to size to ensure a representative sample (allowing over-sampling of Scotland, Wales and Northern Ireland where appropriate). Within each selected sample point, interviewers were issued with a locating address and instructed to work within a set postcode sector. When interviewing, they followed a random route starting at their given address.

Fieldwork dates

Fieldwork was conducted between October and December 2007.

Sample sizes

The final unweighted sample sizes achieved were as follows:

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>3244</td>
<td>2905</td>
</tr>
<tr>
<td>16-24 years</td>
<td>530</td>
<td>413</td>
</tr>
<tr>
<td>25-34 years</td>
<td>604</td>
<td>473</td>
</tr>
<tr>
<td>35-44 years</td>
<td>659</td>
<td>661</td>
</tr>
<tr>
<td>45-54 years</td>
<td>515</td>
<td>489</td>
</tr>
<tr>
<td>55-64 years</td>
<td>412</td>
<td>341</td>
</tr>
<tr>
<td>65+ years</td>
<td>511</td>
<td>522</td>
</tr>
</tbody>
</table>

Data weighting

The data were weighted back to the correct proportions (to remove the effect of the oversampling). The following matrix was used for the weighting:

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender – Male 15+</td>
<td>47.9%</td>
<td></td>
</tr>
<tr>
<td>Gender – Female 15+</td>
<td>52.1%</td>
<td></td>
</tr>
<tr>
<td>Age - 15-34</td>
<td></td>
<td>32.7%</td>
</tr>
<tr>
<td>Age - 35-54</td>
<td></td>
<td>34.5%</td>
</tr>
<tr>
<td>Age - 55+</td>
<td></td>
<td>32.7%</td>
</tr>
<tr>
<td>Social Grade - AB</td>
<td></td>
<td>25.2%</td>
</tr>
<tr>
<td>Social Grade - C1</td>
<td></td>
<td>29.3%</td>
</tr>
<tr>
<td>Social Grade - C2</td>
<td></td>
<td>18.3%</td>
</tr>
<tr>
<td>Social Grade - DE</td>
<td></td>
<td>27.1%</td>
</tr>
</tbody>
</table>
1.2 Ofcom Communications Tracking Survey

This quantitative survey was conducted face-to-face in homes on a continuous basis.

Sampling

The sample is adults 15+ and is reflective of the profile of the UK population by sex, age, socio-economic group, region, employment status, cabled/non-cabled areas, rural/urban areas and levels of deprivation.

Fieldwork dates

Fieldwork is continuous and is reported quarterly. Q3 fieldwork was conducted between July and September and Q4 fieldwork was conducted between October and December 2007.

Sample sizes

The final unweighted sample sizes achieved were as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2235</td>
<td>2149</td>
</tr>
<tr>
<td>16-24 years</td>
<td>264</td>
<td>277</td>
</tr>
<tr>
<td>25-44 years</td>
<td>748</td>
<td>696</td>
</tr>
<tr>
<td>45-64 years</td>
<td>683</td>
<td>668</td>
</tr>
<tr>
<td>65+ years</td>
<td>532</td>
<td>499</td>
</tr>
</tbody>
</table>

Data weighting

The data were weighted back to the correct proportions (to remove the effect of the oversampling). The following matrix was used for the weighting:

<table>
<thead>
<tr>
<th>Category</th>
<th>Q3</th>
<th>Q4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender - Male 15+</td>
<td>48.0%</td>
<td></td>
</tr>
<tr>
<td>Gender - Female 15+</td>
<td>52.0%</td>
<td></td>
</tr>
<tr>
<td>Age - 15-34</td>
<td></td>
<td>32.6%</td>
</tr>
<tr>
<td>Age - 35-54</td>
<td></td>
<td>34.5%</td>
</tr>
<tr>
<td>Age - 55+</td>
<td></td>
<td>32.5%</td>
</tr>
<tr>
<td>Social Grade - AB</td>
<td></td>
<td>24.8%</td>
</tr>
<tr>
<td>Social Grade - C1</td>
<td></td>
<td>29.5%</td>
</tr>
<tr>
<td>Category</td>
<td>Percentage</td>
<td></td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------</td>
<td></td>
</tr>
<tr>
<td>Social Grade - C2</td>
<td>18.3%</td>
<td></td>
</tr>
<tr>
<td>Social Grade - DE</td>
<td>27.5%</td>
<td></td>
</tr>
<tr>
<td>Working Status - working</td>
<td>56.6%</td>
<td></td>
</tr>
<tr>
<td>Working Status - not working</td>
<td>43.4%</td>
<td></td>
</tr>
<tr>
<td>Region - London</td>
<td>12.2%</td>
<td></td>
</tr>
<tr>
<td>Region - South East/East</td>
<td>22.6%</td>
<td></td>
</tr>
<tr>
<td>Region - South West</td>
<td>8.5%</td>
<td></td>
</tr>
<tr>
<td>Region - Midlands</td>
<td>15.9%</td>
<td></td>
</tr>
<tr>
<td>Region - North East</td>
<td>12.8%</td>
<td></td>
</tr>
<tr>
<td>Region - North West</td>
<td>11.4%</td>
<td></td>
</tr>
<tr>
<td>Region - Scotland</td>
<td>8.7%</td>
<td></td>
</tr>
<tr>
<td>Region - Wales</td>
<td>5.0%</td>
<td></td>
</tr>
<tr>
<td>Region - Northern Ireland</td>
<td>2.8%</td>
<td></td>
</tr>
</tbody>
</table>
Annex 2

Glossary

AB  See socio-economic group

Blog  is short for weblog. A weblog is a journal (or newsletter) that is frequently updated and intended for general public consumption.

Broadband  A service or connection which is capable of supporting always-on services which provide the end-user with high data transfer speeds.

C1  See socio-economic group

C2  See socio-economic group

Chatrooms  A site on the internet where a number of users can communicate in real time (typically, a site dedicated to a particular topic).

DAB (Digital Audio Broadcasting)  A set of internationally accepted standards for the technology by which terrestrial Digital Radio multiplex services are broadcast in the UK.

DVR (Digital Video Recorder)  also known as a PVR (Personal Video Recorder).

Digital  binary coded representation of a waveform, as opposed to analogue, which is the direct representation of a waveform.

Digital television  In the UK, this refers to the provision or receipt of television services other than the main five channels (BBC One, BBC Two, ITV1, Channel 4/S4C, Five) plus local analogue services. 'Digital homes' comprise all those with digital terrestrial television, satellite television, digital cable or analogue cable, or television over broadband. Also used as a noun to refer to a channel only available on digital platforms (or analogue cable).

FM radio  Type of modulation produced by varying the frequency of a radio carrier in response to the signal to be transmitted. This is the type of modulation used by broadcasters in part of the VHF (Very High Frequency) band, known as VHF Band 2.

File sharing services  The practice of making files available for other users to download over the internet. Usually file sharing follows the peer-to-peer (P2P) model, where the files are stored on and served by personal computers of the users.

Happy slapping  A fad in which an unsuspecting victim is attacked while an accomplice records the assault (often with a camera phone).

ICT  Information and communications technology

IM (Instant Messaging)  Service that alerts users when friends or colleagues are on line and allows them to communicate with each other in real time through private online chat areas.

Internet  A global network of networks, using a common set of standards (e.g. the Internet Protocol), accessed by users with a computer via a service provider.
**Involuntary non-ownership** Where potential consumers are without access to a service but not through choice

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

**MP3** (MPEG-1 Audio Layer-3) is a standard technology and format for compressing a sound sequence into a very small file (about one-twelfth the size of the original file) while preserving the original level of sound quality when it is played.

**MMS** (Multimedia Messaging Service) The next generation of mobile messaging services, adding photos, pictures and audio to text messages.

**Profile** The personal homepage on a social networking site, usually including information about a user, photos, and their friend list. Profiles form the basis of social networking sites.

**Phishing** a type of online fraud that attempts to deceive users to disclose sensitive personal information such as a password or credit card number. The deception typically takes the form of “spoofed” emails from well known banks, trusted online retailers and credit card companies. The message in the email trick users into visiting a malicious web site, where the user divulges the sensitive personal information.

**PSB** Public Service Broadcasting

**Pop-ups** Pop-up ads or popups are a form of online advertising on the World Wide Web intended to attract web traffic or capture email addresses

**SMS** Short messaging service

**Socio-economic group** (SEG) A social classification system, classifying the population into social grades, usually on the basis of Market Research Society occupational groupings (MRS 1991). The groups are defined as follows;

A. Professionals such as doctors, solicitors or dentists, chartered people like architects; fully qualified people with a large degree of responsibility such as senior civil servants, senior business executives and high ranking grades within the armed forces. Retired people, previously grade A, and their widows.

B. People with very senior jobs such as university lecturers, heads of local government departments, middle management in business organisations, bank managers, police inspectors, and upper grades in the armed forces.

C1. All others doing non-manual jobs, including nurses, technicians, pharmacists, salesmen, publicans, clerical workers, police sergeants and middle ranks of the armed forces.

C2. Skilled manual workers, foremen, manual workers with special qualifications such as lorry drivers, security officers and lower grades of the armed forces.

D. Semi-skilled and unskilled manual workers, including labourers and those serving apprenticeships. Machine minders, farm labourers, lab assistants and postmen.
E. Those on the lowest levels of subsistence including all those dependent upon the state long-term. Casual workers, and those without a regular income.

**Social Networking Site (SNS)** A site which allows users to create a personal page or profile and construct and display a social network of their online contacts.

**Spam** Unsolicited "junk" e-mail sent to large numbers of people to promote products or services.

**UGC** User-generated content

**Voluntary non-ownership** Where potential consumers are without access to services, primarily due to a perceived lack of need for a service or satisfaction with using alternative methods.

**Wiki** Software that allows registered users, or anyone, to collaboratively create, edit, link, and organize the content of a website, usually for reference material.