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Section 1

Executive summary

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

This report is the fourth full report since our survey began in 2005. It is therefore able to show trends over time for many of the questions asked. However, statistically significant change is measured against 2009 in order to show how swiftly or not attitudes and behaviour are evolving.

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

Take-up

- Internet take-up has risen for older people aged 55-64 who are now at the UK average (74%), but those aged 65+ are still considerably lower than average in terms of household internet take-up (35% v 74%). Internet take-up in C2 and DE households has also increased, although DE households still have lower than average take-up (54%).

- While the PC or laptop remains the most likely device to be used to go online, there has been a growth in use of alternative devices. Internet users are more likely to use a mobile phone to go online than in 2009 (31% vs. 28%), with this most prevalent among 16-24s (55%). However, just 2% of UK adults use only an alternative device to go online.

- TV remains the most-missed media for UK adults as a whole, although this has decreased – from 50% in 2009 to 44% in 2010. For the first time, adults aged 16-24 mention using a mobile phone (28%) and using the internet (26%) ahead of watching television (23%).

Use of the internet

- Communication remains the most popular type of activity to be undertaken at least weekly among internet users (83%). In terms of individual activities carried out online, those most likely to be undertaken at least once a week are email (79%), social networking (45%), work/studies information (45%) and banking/paying bills (33%).

- Broad use of the internet has increased since 2009 – in 2009 38% of internet users could be classified as broad users, i.e. carrying out 11-18 of 18 types of internet activity. In 2010 this rose to 49%.

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1 The report comprises two waves of fieldwork carried out in spring and autumn 2010. The data across both these waves have been combined to give an overall picture for the year.

2 The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year http://www.ofcom.org.uk/cmr10/.
• Over half of internet users say they have a social networking profile (54%) compared to 44% in 2009. One half of those with a profile (51%) now use it daily compared to 41% in 2009.

• There is variation across the types of online activities carried out weekly by socio-economic group, gender and age. For example, people from DE households are less likely to carry out most of the activities with the exception of social networking, and men are more likely than women to carry out a range of the activities. Older internet users are less likely to carry out most of the activities than other age groups.

• Four in ten (41%) internet users now say they ever watch audio-visual content online, an increase from 32% in 2009. Most of these users say they watch through UK TV broadcasters’ websites (37% vs. 29%) such as BBC iPlayer, with a much smaller proportion doing so from other websites (13% vs. 11%).

• There has been some increase in using the internet for public/civic activities, although internet users are more likely to have government/local council interaction ‘offline’ (71%) than online (65%), especially among older and DE groups. Contacting a local councillor or MP online has risen since 2009 (12% vs. 7%), and is more likely among older people.

• Eight in ten internet users (82%) say that they have saved money in the last six months by using the internet, for example comparing prices online or buying online rather than in the shops. Close to half of all internet users (46%) say they have made ‘significant’ savings by buying something online rather than in the shops.

**Understanding and attitudes across media**

• Compared to 2009, UK adults are more likely to think that content is regulated across each of these key platforms, with the exception of radio: 84% think TV is regulated; 69% radio; 41% internet and 32% mobile phones.

• Unprompted awareness of the main source of funding is higher for television than for radio, and considerably lower for the internet, as was the case in 2009. Unprompted awareness of the main source of funding for the BBC remains higher than for the commercial operators, across television, radio and the internet. Young people aged 16-24 are less knowledgeable compared to older age groups.

• One quarter (26%) of search engine users say that if results have been listed by the search engine then they must be accurate/unbiased. This is an increase from the 2009 figure of 20%. Those in DE households are more likely to answer in this way (38%), as are those that the first started using the internet less than three years ago (36%).

• Attitudes towards online copyright infringement have not changed since 2009. Across all adults, more believe that certain types of downloading of music and films should be illegal (46%) than believe it should be legal (32%), with the remainder (22%) unsure. Adults aged 16-24 are the only age group who are more likely to say that such types of downloading music and films should be legal compared to those who say it should be illegal (51% vs. 36%).

• When asked separately for their levels of trust in news on various platforms, users are more likely to trust news from the radio (64%); then the internet (59%), then TV (54%) and finally newspapers (34%). However, these findings should be considered in the light of other surveys which ask about trust in news in different ways: for example, results
from our Media Tracker\(^3\) data show that when people are asked for their views on which media they would trust most to provide fair and unbiased world news, TV is trusted most by 72%, the internet by 7%, radio by 6% and newspapers by 3%.

- Few UK adults have experience of formal learning about digital technology or are interested in learning more. Compared to 2009, fewer adults are interested in learning more about digital technology (22% vs. 25%).

**Privacy, security and concerns**

- Around four in ten internet users say they would be happy to share photos of their holidays online (37%), while around three in ten internet users say they would be happy to share information about what they are doing (33%). Internet users are least likely to say they would be happy to share information about how they are feeling about work or college (22%). Young people are more at ease about sharing these types of ‘personality’ information online – for example, 61% of 16-24s are happy to share holiday photos, and 44% are happy to share information about how they are feeling about work or college.

- Desirable levels of due caution around issues of online privacy and personal information vary according to the activity, and both ends of spectrum – being happy to give out personal details, and never doing so – can carry dangers and drawbacks. Our proxy measure of due caution is those that say they have ‘some concerns’ but who would nonetheless provide various types of personal or financial information online. Around half of internet users state that they have ‘some concerns’ about providing these types of information – for example, 44% say they would have some concerns about entering their home phone number. This proportion has changed little since 2005.

- That said, there has been some increase over time in people who use the internet saying they use ‘professional’ signs like padlocks etc to decide whether or not to trust a site, with this type of judgment made by just over half before entering any personal details, an increase since 2009 (55% vs. 51%). Four in ten make judgments based on personal instinct (42% vs. 43% in 2009), with relatively few saying they make judgments based on ‘peer’ indications such as recommendations from friends or online reviews (17% vs. 20% in 2009). One in five (20%) of those aged 65+ say they wouldn’t trust any site compared to 6% of the adult online population.

- Few people have open social networking settings - 4% of those with a social networking profile allow their contact details to be seen by anyone, and 10% allow personal information to be seen by anyone. Men are more likely than women to have open profiles for personal information (12% vs. 7%), photographs (14% vs. 5%), and contact details (5% vs. 2%).

- Installing software to control or block access to certain websites (20%) and installing security features (18%), are the main activities people say they are interested in but aren’t confident doing. Women are twice as likely as men to say they are interested but not confident.

- Since 2005 UK adults have become less concerned about the main media platforms they use. Concerns about the internet among users stand at 54% (down from 61% in 2009); TV at 40%; mobile at 24% and gaming at 21%. The top three specific concerns about the

\(^{3}\) ‘Perceptions of, and attitudes towards, television: 2010’ Ofcom PSB Annual Report 2010 annex H [www.ofcom.org.uk](http://www.ofcom.org.uk)
internet are: content unsuitable for children (24%), sexual content / pornography (23%), and identity fraud (14%).

Further analysis

Newer users

- Further analysis of newer internet users (those having gone online less than three years ago) was carried out to see the extent to which they are different from all online users.

- Newer internet users differ from more established users across a range of attitudes and behaviour, ranging from consumption patterns (9.1 hours per week vs. 14.9 hours for more established users), activities (lower frequency of weekly usage with the exception of social networking), confidence (40% say they don’t visit new websites vs. 24% of more established users), security (only 33% say they would use professional signs to verify a website vs. 59%) and knowledge (36% think search engine results pages must be true vs. 24%). It is also of note that there are relatively few differences relating to concerns, or for their appetite for learning.

Narrow users

- Narrow users of the internet are defined as those that carry out 1-6 out of a possible 18 types of online activity. This group accounts for two in ten of all internet users (19%), down from three in ten in 2009 (28%). Older people and those in C2 DE socio-economic groups are more likely to be Narrow users.

- As well as doing less online, Narrow users are less confident users. Around one in five Narrow users rate themselves as very confident in judging whether a website is truthful (19% vs. 45% of all internet users). Three in ten Narrow users describe themselves as very confident overall as an internet user, compared to seven in ten of all users (32% vs. 67%).

- They are also less likely to make a judgement about a website before entering personal details by using ‘professional’ signs like padlocks etc. (39% vs. 55% of all internet users). They are less likely to understand search engine results – four in ten (38%) give the most appropriate response that some of the websites will be accurate or unbiased and some won’t be, compared to 50% of all internet users.

Non-users

- Non-users of the internet are more likely to be older and from DE households. Close to half of non-users are aged 65 and over (46% vs. 7% of users) and the same proportion are in DE socio-economic groups (46% vs. 21% of users). Fifty-seven per cent of non-users are female, compared to 50% of internet users.

- Over six in ten (64%) of those who don’t intend to get the internet at home gave a main reason relating to a lack of interest, with most others giving a main reason relating to cost (23%).

- Emailing, putting photos from a camera onto a computer, and online shopping are the three main activities of interest to non-users, although interest is at a low level even for these (16%, 15% and 13% respectively). These low levels of interest underline that encouraging an appetite for online activity is a key factor in getting people to take up the internet.
Section 2

Introduction

2.1 Background

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003. Under Section 14 (6a) of the Act, we have a duty to make arrangements for the carrying out of research into the matters mentioned in Section 11 (1). Our media literacy research informs three of Ofcom’s strategic priorities: to provide appropriate assurance to audiences on standards; to help communications markets work for consumers; and to contribute and implement public policy as defined by Parliament.

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

Ofcom’s definition of media literacy is:

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

This report is designed to give an accessible overview of media literacy among adults aged 16 and over. Where possible, within the overall sample of adults, demographic analysis is conducted by age, by gender and by household socio-economic group.

The key objectives of this research are:

• to provide a rich picture of the different elements of media literacy across the key platforms of the internet, television, radio, and mobile phones; and

• to identify emerging issues and skills gaps that help to target stakeholders’ resources for the promotion of media literacy.

2.2 Research methodology and analysis

This report draws on research from the two waves of the Media Literacy Tracker 2010 with adults aged 16 and over. Comparisons are made between this research and the Media Literacy Audit surveys conducted in 2005 and in 2007, and the Media Literacy Audit Tracker conducted in 2009. These reports can be found at www.ofcom.org.uk/medialiteracyresearch.

Media Literacy Audit Tracker with adults: 2010

A quantitative survey comprising 2,117 in-home interviews with adults aged 16 and over; with 1,063 interviews conducted from April to May 2010 and 1,054 interviews conducted from September to October 2010.
Media Literacy Audit Tracker with adults: 2009

A quantitative survey comprising 1,824 in-home interviews with adults aged 16 and over; with 812 interviews conducted from April to May 2009 and 1,012 interviews conducted from September to October 2009. The report was published in 2010.

Media Literacy Audit survey: 2007

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

Media Literacy Audit survey: 2005

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

Where possible we have included findings from 2005, 2007, 2009 and 2010. Some questions, however, have not featured in each year that the research has been conducted. Comparisons are generally made between the 2010 and 2009 findings and not the long term trends, as detailed below.

Significance testing

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

Statistically significant findings between 2009 and 2010 are indicated in the figures in the report by circles or arrows. Green arrows indicate a positive difference and red arrows indicate a negative difference. While the reports published in 2010 and 2008 each indicated significant findings across a two-year period (between 2009 and 2007 and between 2007 and 2005 respectively), this report indicates significant findings across one year (between 2010 and 2009).

In addition to reporting on differences over time, we also look at adults in the different age groups and socio-economic groups and compare these to all adults interviewed in 2010 to see if there are any significant differences within these sub-groups. Differences between men and women are also reported on.

Take-up figures

The take-up figures in this report give useful information to contextualise people’s media literacy-related behaviour and attitudes. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year*. 

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* [www.ofcom.org.uk/cmr10](http://www.ofcom.org.uk/cmr10)
Section 3

Take-up and media preferences

This section looks at a range of issues related to UK adults’ access to and personal use of, media devices in their households and elsewhere. It details the different devices used to go online and to listen to radio at home. It explores which media are used regularly, reasons for using different media, and which media devices adults would miss the most. Finally, it looks at how people’s preferences for making contact in different circumstances have changed since 2005.

It examines take-up for a range of demographic groups including by age, gender, and socio-economic group. At the end of this report, in Further Analysis sections 1-3, we focus on particular sub-groups of the online population such as those who make a narrow use of the internet, and those who have started using the internet within the last three years. In Further Analysis section 3 we examine those who are not online in more detail, to show which groups are more likely to be non-users, and their level of interest in being online.

Key findings

- Household take-up of the internet (74%) and personal use of a mobile phone (91%) remain lower for those in DE socio-economic groups (54% internet, 88% mobile phone) and those aged 65 and over (35% internet, 62% mobile phone).

- While the PC or laptop remains the most likely device to be used to go online, there has been a growth in use of alternative devices. Internet users are more likely to use a mobile phone to go online than in 2009 (31% vs. 28%), with this most prevalent among 16-24s (55%). One in ten internet users or fewer go online via a games console, via a portable media player or a tablet computer.

- Almost all of those who use an alternative device (such as a mobile phone) to go online also use a PC/laptop to go online. Just 2% of UK adults use only an alternative device to go online.

- Younger internet users (aged 16-24) stand out as being more likely to use the internet for fun, to relax and to pass the time.

- While most mobile phone users use their phone only for calls or texts in a typical week, most smartphone users (30% of UK adults) also use their phone to take photos, to go online and for email.

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

6 The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year. [http://www.ofcom.org.uk/cmr10/](http://www.ofcom.org.uk/cmr10/).

7 In this report ‘internet users’ are defined as those who say that they use the internet at home or anywhere else.
Key findings (continued)

- UK adults are less likely to say they would miss watching television the most compared to 2009 (44% vs. 50%). Adults aged 16-24 mention using a mobile phone (28%) and using the internet (26%) ahead of watching television (23%) – the first time a group of adults in this survey has named any medium other than TV as their most-missed medium.

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

Looking first at household take-up across a range of media, since 2009 take-up of the internet and of digital video recorders (DVRs) has increased. Access to digital radio at home through the internet or digital television or by a DAB radio has also increased since 2009. Take-up of digital television and personal use of a mobile phone remain at similar levels to those in 2009.

Figure 1: Household take-up of key platforms: 2005, 2007, 2009 and 2010

Three-quarters of adults live in a household with access to the internet; an increase since 2009 (74% vs. 71%). This increase is driven by adults aged 55-64 (73% vs. 60% in 2009) and those in C2 (75% vs. 67%) and DE socio-economic groups (54% vs. 48%).

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8 Access to digital radio at home refers to the ability to listen to digital radio rather than incidence of listening to digital radio. Figure 3 shows the reported levels of UK adults listening to digital radio.

9 It should be noted that not all adults who live in households with the internet actually use it. One in twenty adults (5%) are in households that have internet access through a computer or laptop but say that they do not personally use the internet at home.
It remains the case that take-up of the internet at home is lower among adults aged 65 and over (35% vs. 74% of all adults) and among adults in DE socio-economic groups (54% vs. 74% of all adults).

Around nine in ten adults live in a household with a digital television service, the same proportion as in 2009 (91% vs. 89%). Take-up has increased since 2009 among adults aged 65 and over (81% vs. 76%) and adults in DE socio-economic groups (92% vs. 86%). However, take-up of digital television remains lower among adults aged 65 and over (81% vs. 91% of all adults).

Around one in two adults live in a household with a DVR; an increase since 2009 (45% vs. 35%). This increase is evident in most age groups of adults and in all of the socio-economic groups. There has been an above-average increase in take-up since 2009 among adults aged 35-44 (56% vs. 39%) and those aged 55-64 (46% vs. 31%).

### Figure 2: Take-up of digital television, internet and digital video recorder, by age and socio-economic group: 2005, 2007, 2009 and 2010

Around nine in ten adults use a mobile phone, as in 2009 (both 91%). There has been no increase in use among any of the age groups or socio-economic groups since 2009. Adults aged 65 and over are still less likely to use a mobile phone (62% vs. 91% of all adults) as are adults in DE socio-economic groups (88% vs. 91% of all adults).

Three in ten adults use a smartphone (30%, not asked in 2009). Younger adults aged 16-24 or 25-34 are more likely to be smartphone users (52% and 45% vs. 30%), as are adults in AB socio-economic groups (43% vs. 30%). Older adults aged 55-64 or 65 and over are less likely to be smartphone users (27% and 24% vs. 30%).

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10 The following definition was offered as an explanation of a smartphone. “A smartphone is a phone on which you can easily access emails and download files as well as view websites and generally surf the internet. Popular brands of smartphone include BlackBerry, iPhone and HTC.”
likely to be smartphone users (9% and 2% vs. 30%), as are adults in DE socio-economic groups (21% vs. 30%).

Figure 1 above references the proportion of people able to listen to digital radio. Figure 3 below shows that one in three adults claims to listen to digital radio through a DAB radio, digital television or the internet; as in 2009 (36% vs. 35%). Adults aged 16-24 (42% vs. 33%) and adults in AB socio-economic groups (49% vs. 42%) are more likely to listen to a digital radio than in 2009, with adults in C1 socio-economic groups less likely (33% vs. 39%).

Adults aged 65 and over are still less likely to listen to digital radio (21% vs. 36% of all adults) as are adults in DE socio-economic groups (30% vs. 36% of all adults).

Figure 3: Take up of mobile phone, smartphone, listening to digital radio, by age and socio-economic group: 2005, 2007, 2009 and 2010

3.2 One in twenty internet users access the internet only outside the home

Three-quarters (74%) of adults say they use the internet either at home or elsewhere in 2010, which is similar to the measure in 2009 (73%), and compares to 63% in 2007 and 59% in 2005. Four in ten of all UK adults (41%) use the internet both at home and elsewhere, which is similar to the measure in 2009 (38%). There has also been no change since 2009 in the proportion of UK adults who use the internet only at home (both 29%), or the proportion who use the internet only in other locations (4% vs. 5%).
Figure 4: Where the internet is used by UK adults: 2005, 2007, 2009 and 2010

IN1/ IN6 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all? (Prompted responses, single coded)
Base: All adults aged 16+ (3244 aged 16+ in 2005, 2905 aged 16+ in 2007, 1824 aged 16+ in 2009, 2117 aged 16+ in 2010). Significance testing shows any change between 2009 and 2010
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

3.3 16-24s and those in DE socio-economic groups are more likely to use the internet only outside the home

Figure 4 above shows the changes over time in where the internet is used, if at all, by UK adults. Figure 5 below shows where the internet is used in 2010, across the different demographic groups.

Adults aged 16-24 and those aged 45-54 are more likely than UK adults as a whole to use the internet in other locations but not at home (10% and 8% vs. 4% of all UK adults), as are those in DE socio-economic groups (7% vs. 4% of all UK adults).

Four in ten adults aged 55-64 or in C2 socio-economic groups use the internet only at home, compared to three in ten of all UK adults (38% and 40% vs. 29%).
3.4 Increase in use of mobile phone to get online

In addition to asking adults about their use of the internet through a computer or laptop at home, the 2009 and 2010 surveys established the extent to which adults use alternative devices to go online: a mobile phone (including smartphones); games console or handheld games player, portable media player or tablet computer (this device covered in 2010 only).

Seven in ten UK adults say they go online at home through a PC or laptop, as in 2009 (69% vs. 67%). Three in ten visit websites via a mobile phone; an increase since 2009 (31% vs. 28%). One in ten visit websites via a games console/player (9% vs. 10%), and one in twenty visit websites via a portable media player (6% in 2010 and 2009). One in twenty adults visit websites via a tablet computer (such as an iPad) (5%).

The increase since 2009 in the use of a mobile phone to visit websites is related to the uptake of smartphones among UK adults. While 31% of all UK adults visit websites via a mobile phone, this rises to 77% among smartphone users.

Younger adults are more likely to use a mobile phone to visit websites – 55% of 16-24s say they do this, and 49% of 25-34s, compared to 31% of all UK adults.
While Figure 6 shows each type of device used to visit websites, Figure 7 divides UK adults into four groups to show the degree of overlap between these types of device: those who only use a PC/laptop at home and do not use an alternative device, those who use a PC/laptop at home and also use an alternative device, those who only use an alternative device that they own and do not use a PC/laptop at home, and those who do not use either type of device to visit websites.

Six in ten (59%) of 16-24 year olds use both a PC/laptop at home and an alternative device to visit websites, compared to 34% of all adults. This is also more likely among 25-34s (53%) and 35-44s (41%) compared to all adults. Adults in AB socio-economic groups are also more likely to use both a PC/laptop at home and an alternative device to visit websites (46% vs. 34% of all adults).

Just 2% of UK adults use only an alternative device to go online, as was the case in 2009. However, this is more likely among those aged 16-24 (5%).
3.5 Increase in self-reported volume of internet use since 2009, with higher volume of use among younger adults, men and AB adults

Adults using the internet at home or elsewhere were asked to estimate how many hours in a typical week they used the internet at each of the places they accessed it. Figure 8 compares the estimated average weekly volume of use of the internet by users in 2005, 2007, 2009 and 2010, and also shows the findings from each of the demographic groups in 2010. 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.12

The estimated weekly volume of use of the internet among users in 2010 has increased since 2009 (14.2 vs. 12.2 hours). This increase since 2009 is evident among 35-44s (14.2 vs. 11.9 hours) and 45-54s (14.5 vs. 11.0 hours) as well as those in AB (18.6 vs. 13.0 hours) and DE socio-economic groups (12.1 vs. 9.6 hours). As shown later in section 4.7, those aged 35-44 and those in AB or DE socio-economic groups are more likely to have a social networking site profile in 2010 than was the case in 2009. It could be speculated that this increase in take-up of a social networking site profile may be contributing to the increase in volume of use of the internet compared to 2009, among these groups.

Internet users aged 16-24 have a higher weekly volume of use in 2010 compared to all internet users (17.2 vs. 14.2 hours). Older internet users aged 55-64 and 65+ have a lower weekly volume of use compared to all internet users (11.1 for 55-64 and 6.7 for 65+ vs. 14.2 hours).

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11 The types of device grouped together and shown in Figure 7 as ‘alternative device’ are a mobile phone (including smartphones), a games console or handheld games player, a portable media player and (in 2010) a tablet computer.

12 This compares to a UKOM/Nielsen figure of 13.5 hours per week spent using an internet-connected PC. This figure is from November 2010, and includes all internet users aged 2+.
Men have a higher estimated weekly volume of use than women (15.6 vs. 12.7 hours), due to a higher volume of use at home (10.2 vs. 8.6 hours) and in the workplace / place of education (4.3 vs. 3.4 hours).

Users in the AB socio-economic groups have a higher volume of use in the workplace / place of education (7.2 vs. 3.8 hours) leading to a higher overall volume of use compared to all users (18.6 vs. 14.2 hours). Adults in the C2 and DE socio-economic groups have a lower overall volume of use compared to all users (9.8 for C2 and 12.1 for DE vs. 14.2 hours), due to lower volumes of use in the workplace / place of education (1.1 for C2 and 0.7 for DE vs. 3.8 hours).

Figure 8: Volume of internet use per week: 2005, 2007, 2009 and 2010, by age, socio-economic group and gender

3.6 Most adults only use their mobile phone for calls or texts in a typical week, but smartphone users make a broader use

Adults who use a mobile phone (91% of all adults) were prompted with a range of activities and were asked to say which they ever do using their phone, and how often they do each activity.\textsuperscript{13}

Figure 9 shows the main activities undertaken using a mobile phone at least once a week. Nine in ten mobile phone users make or receive calls using their mobile phone at least weekly and eight in ten send or receive text messages. Less than half of all mobile phone users undertake any of the other activities that we asked about at least weekly; with three in ten using the phone to take photos and two in ten using the phone to listen to music or to send or receive photo messages.

\textsuperscript{13} These activities do not represent an exhaustive list of all the activities that can potentially be undertaken with a mobile phone, but were chosen as representing the majority of activities for most people.
Since 2009 mobile phone users are more likely to use their phone at least weekly to visit websites (19% vs. 11%) and to visit social networking sites (15% vs. 8%).

Mobile phone users aged 16-24 are more likely than mobile phone users as a whole to undertake each of the activities at least once a week, while older users aged 55-64 and 65+ are less likely.

Figure 9 also shows the activities undertaken using a mobile phone at least weekly by those with a smartphone (33% of mobile phone users, 30% of all adults). Those with a smartphone are more likely than those with any type of mobile phone to use their phone at least weekly to make each of the fifteen types of use shown in Figure 9. The greatest differences in weekly use made by smartphone users compared to all mobile phone users are: visiting websites (53% vs. 19%), sending or receiving email (50% vs. 16%), taking photos (63% vs. 34%), visiting social networking sites (39% vs. 15%), and listening to music (45% vs. 22%).

**Figure 9: Mobile phone activities carried out at least once a week in 2009 and 2010, including smartphone users**

3.7 No change in digital radio listening

All adults were shown a list of ways of listening to radio at home and were asked to say which they ever use. Nearly eight in ten UK adults said they listened to radio at home, which is the same as the 2009 measure (77% vs. 78%).

Since 2009 there has been no change in the proportion of UK adults who say they listen to any type of digital radio (36% vs. 35%); whether via a DAB digital radio set (both 18%), through their digital TV service (18% vs. 17%), or over the internet (10% vs. 9%).
Those aged 65 and over are less likely to listen to digital radio than adults as a whole (21% vs. 36%), with no particular age group more likely to do so. Adults aged 16-24 are, however, more likely to listen to radio over the internet (18% vs. 10%) and adults aged 55-64 are more likely to listen to DAB digital radio (26% vs. 18%). Adults in AB socio-economic groups are more likely to listen to digital radio (49% vs. 36%), while adults in DE socio-economic groups are less likely (30% vs. 36%).

The incidence of listening to any type of digital radio does not vary between men and women (38% vs. 34%). However, men are more likely to listen to DAB digital radio (21% vs. 15%) or over the internet (13% vs. 8%), while women are more likely to listen through a digital television service (20% vs. 16%).

3.8 No overall change in gaming, but increases for mobile phone and online gaming

All adults were shown a list of devices that can be used for gaming and were asked to say which they ever used to play games at home or elsewhere. Adults were also asked whether they ever downloaded games from the internet or played single or multiplayer games over the internet.

Just under half of all adults live in a household with a games player, whether connected to a television or handheld, as was also the case in 2009 (44% vs. 43%). One in three UK adults use any of the devices we asked about for gaming, which is also unchanged since 2009 (34% vs. 36%). Since 2009, there has been an increase in gaming using a mobile phone (9% vs. 6%) and decreases in gaming using a handheld games player (13% vs. 16%) and a further decrease in gaming using a PC / laptop (11% vs. 14%).

One in ten UK adults say they ever download games from the internet (11% vs. 8% in 2009) and a similar proportion ever play single or multiplayer games over the internet (13% vs. 10% in 2009). Both of these measures represent increases since 2009.
Younger adults, aged 16-24, 25-34 and 35-44, are more likely to use any of the devices for gaming (64% for 16-24s, 48% for 25-34s and 42% for 35-44s vs. 34% of all adults), while adults aged 55-64 and those aged 65 and over are less likely (15% for 55-64s and 9% for 65+s vs. 34% of all adults).

The incidence of gaming overall and gaming using each of the particular devices we asked about does not differ by socio-economic group in 2010. Men are more likely than women to use any of the devices for gaming (41% vs. 28%).

Adults who use any of the devices for gaming at home or elsewhere were asked to say how many hours per week they played games. The overall average in 2010 is 5.1 hours per week, which is an increase on the 2009 measure of 4.3 hours per week. In 2010, adults aged 16-24 and those in DE socio-economic groups play for more hours per week compared to all adults (both 6.8 hours vs. 5.1 hours), and men play for more hours per week than women (6.4 vs. 3.2 hours).
Figure 12: Volume of gaming per week: 2007 and 2009, by age, socio-economic group and gender

G5 – Please think about the hours that you spend game playing in a typical week – so both weekdays and at the weekend... How many hours in a typical week would you say you play games? (Unprompted responses, single coded)

Base: All adults aged 16+ who play electronic games (843 in 2007, 616 in 2009, 668 in 2010) Significance testing shows any change between 2009 and 2010, any difference between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

3.9 Increase for the internet as a regular media activity, declines for several other media

One of the core benefits of our media literacy tracker is its ability to show the relative levels of consumption and use of different media, side by side. We ask respondents about a range of possible media activities to find out which, if any, they regularly do. Having asked this question since 2005 we can see whether overall media habits are changing.

Watching television remains the dominant media activity, with no change since 2009 in the proportion of adults stating they regularly watch television (both 95%). Just one activity sees an increase in 2010: using the internet (67% vs. 64%), with this activity increasing at each wave of the survey since 2005.

Four media activities are less likely to be regular activities in 2010 compared to 2009: reading newspapers / magazines (71% vs. 75%), listening to radio (69% vs. 73%), watching videos / DVDs (58% vs. 64%), and listening to music on a hi-fi / CD / tape player (46% vs. 50%).
Figure 13: Regular media activities: 2005, 2007, 2009 and 2010

A1 – Which of the following do you regularly do? (Prompted responses, multi-coded)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

3.10 People use media platforms for a variety of reasons

We are interested to understand the motivations behind people’s use of key media, and how this might differ by demographic group, as well as examining change over time since 2007 when the question was first asked. In particular, it is useful to see how the reasons for using the internet vary according to the age-group of the user.

Users of each of the four key media of television, radio, the internet and mobile phones were shown a list of possible reasons for use, and were asked to say which, if any, applied to them. Figure 14 shows the reasons given by users, with responses ‘stacked’ in order to show the breadth of reasons given and the differences across the four media.

At this all-user level, television is more likely than the other media to be used to relax, to keep up to date with news and to keep up to date with sports. The internet is more likely to be used to find out or learn things and for fun. Mobile phones are more likely to be used for contact with other people.
Figure 14: Reasons for using key media platforms in 2010

T15/ R11/ IN42/ M10 – Which, if any of these are reasons why you watch TV/ listen to radio/ use the internet/ use a mobile phone? (prompted responses, multi-coded)
Base: All adults aged 16+ with any TVs (2075 in 2010), who listen to radio at home (1605 in 2010), who use the internet at home or elsewhere (1489 in 2010), who use a mobile phone (1885 in 2010). Significance testing shows any differences between one platform and all other platforms
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

Figure 15 focuses on the reasons for using the internet in 2007, 2009 and 2010 and across the demographic groups in 2010. It illustrates how younger internet users perceive their use of the internet differently from older age groups, in terms of seeing it as a means of fun, relaxation and a pastime – while older age groups report using it for finding out information.

Internet users aged 16-24 are more likely to say they use the internet for fun (74% vs. 49% of all users), to relax (53% vs. 40%) and to pass the time (52% vs. 36%).

Older people aged 65+ are most likely to focus on the informational element of the internet, and less likely to nominate reasons such as relaxation or pastime, or indeed to keep up to date on the news. While older people differ considerably from all users in their reasons for using the internet, these differences are not so marked when compared to reasons for watching television. For example, older people aged 65+ are as likely as all television viewers to say that they watch to pass the time and are more likely to say they watch to keep up with news.

Men are more likely than women to say they use the internet to relax (45% vs. 35%), or to keep up to date with news (42% vs. 31%) or sports (33% vs. 9%).

Adults in AB socio-economic groups are more likely to say they use the internet to find out or learn things (81% vs. 73%) or to keep up to date with news (48% vs. 37%), while adults in C2 and DE socio-economic groups are less likely to say they use the internet to keep up to date with news (26% and 27% vs. 37%). Those in DE socio-economic groups are also less likely to say they use the internet to find out or learn things (60% vs. 73%), but are more likely to say they use the internet to pass the time (44% vs. 36%).

There has been no change in reasons for using the internet since 2009, and very little change since 2007. Just one of the reasons we asked about has changed since 2007; internet users are less likely to say they use the internet to find out or learn things in 2010 (73% vs. 83% in 2007).
UK Adults’ Media Literacy

3.11 Decrease in watching television as the most-missed media activity

To understand how much importance people attach to various media, we asked them\(^{14}\) to say which single media activity they would miss the most if it was taken away. Among adults as a whole, television is typically given as the medium they would miss the most\(^{15}\). However, compared to 2009, watching television is less likely to be the most-missed media activity (44% vs. 50%), returning to the level found in 2005. Around one in six adults say they would miss using the internet the most\(^{16}\), as in 2009 (17% vs. 15%).

Apart from watching television, no other activities are more likely or less likely to be given as the most-missed media activity across all adults compared to 2009.

\(^{14}\) This question is asked of all UK adults rather than of users of particular media, in order to be able to capture an overall picture. It is therefore possible that an increase in take-up of a medium could see an increase in mentions for this medium as the most-missed media activity.

\(^{15}\) All of those who said they would miss watching television the most said they were referring to using a television set; either to watch something as it is broadcast (91%) or that has been recorded to watch later (9%).

\(^{16}\) Among those who said they would miss using the internet the most, the top three activities mentioned were sending and receiving emails (30%), looking at social networking sites (22%) and finding information for their work/job/studies (13%).
In previous surveys, television has been named as the medium that they would miss the most, by all groups of adults. In 2010, however, adults aged 16-24 mention two other activities ahead of television (23%): using a mobile phone (28% vs. 13% of all adults) and using the internet (26% vs. 17%), as shown below in Figure 17.

By contrast, those aged 65 and over are more likely than adults as a whole to say they would miss watching television the most (63% vs. 44%). Adults aged 65 and over are also more likely to say they would miss listening to radio (15% vs. 10% and reading newspapers / magazines (9% vs. 4%).

There are also some differences in the most-missed media activities of adults in particular socio-economic groups. Adults in AB socio-economic groups are less likely to say they would miss watching television (34% vs. 44% of all UK adults) and more likely to say they would miss using the internet (21% vs. 17%) or listening to radio (14% vs. 10%). Adults in DE socio-economic groups are more likely to say they would miss watching television (56% vs. 44%) and less likely to say they would miss using the internet (11% vs. 17%) or listening to radio (5% vs. 11%).

Men are more likely than women to say they would miss using the internet (19% vs. 15%), while women are more likely to say they would miss watching television (47% vs. 40%) and using a mobile phone (15% vs. 11%).

17 The categories ‘watch television’ or ‘listen to radio’ do not specify the particular platform being used for these activities.
Figure 17: Most-missed media activity in 2010, by age, gender and socio-economic group

3.12 Increase in preference for text messaging and online options to make contact

The final part of this first section looks at how people prefer to make contact in a range of everyday circumstances, e.g. booking a holiday or checking their bank balance. For each scenario, we showed respondents a list of six methods and asked them to say which one they would choose to use to make contact\(^{18}\). The preferred communications methods are shown in Figure 18.

It should be noted that the responses shown are for all UK adults, and not solely those with the available technology, in order to be able to capture an overall picture of preferred communication methods across all adults. People’s preferences for a method of communication depend on what communications devices they have access to. As we have seen, demographic groups vary in the extent to which they have access to various devices. Therefore, older people and those in DE households, for example, may be less likely to say that they would choose to make contact via email/website, as they do not have access to the internet.

Despite nine in ten UK adults having their own mobile phone, the home / landline phone is more likely than a mobile phone to be chosen to make a call in each circumstance. However, two of the four circumstances that we asked in both 2010 and 2009 have seen a shift away from home / landline phone calls and towards other options.

Compared to 2009, UK adults are more likely to prefer to send a text to get in touch with a friend to arrange to meet (34% vs. 29% in 2009), the same proportion as those who would choose to use the home / landline phone - which has declined since 2009 (34% vs. 38%).

\(^{18}\) The communication option ‘Meet in person’ was not available as a choice for ‘Getting in touch with a friend to arrange to meet.’ The question was not asked in 2007.
Figure 18 shows the decline in preferring to get in touch using the home/landline phone since 2005.

Preferences for ways of getting in touch with a friend to arrange to meet vary considerably across the different demographic groups. Adults aged under 45 are more likely to prefer to send a text (62% of 16-24s, 51% of 25-34s and 44% of 35-44s vs. 34% of all adults), while adults aged 55 and over are more likely to prefer to make a call using the home/landline phone (58% of 55-64s and 85% aged 65+ vs. 34% of all adults). Men are more likely to prefer to make a mobile phone call (34% vs. 24%) while women are more likely to prefer to send a text (39% vs. 28%). There are no differences across the socio-economic groups.

Compared to 2009, UK adults are more likely to prefer to check their bank balance online (36% vs. 30%) and less likely to prefer to check their bank balance in person (42% vs. 49%) or by making a home/landline phone call (9% vs. 12%). Younger adults are more likely to prefer to check online (45% of 25-34s and 35-44s vs. 36% of all adults), while the older adults are more likely to prefer to check in person (66% of those aged 65 and over vs. 42% of all adults).

Preferences for booking a holiday have shifted since 2009: away from making a booking in person (32% vs. 36% in 2009) and towards booking by email/online (41% vs. 36%). Booking a holiday online/email is now the most preferred method. UK adults are relatively unlikely to prefer to make contact with their local council online (13% vs. 12% in 2009), and preferences for each method of making contact have not changed since 2009. Adults are still most likely to prefer to contact the local council by making a home/landline phone call (56% vs. 58%).

The 2010 survey asked all adults to say which method they would prefer to use to complete government processes, such as registering for tax credits, renewing a driving licence, car tax or passport, or completing a tax return. The preferred method is to make contact online (35%), followed by in person (27%). Unlike the other four circumstances that we asked about, a sizeable minority (16%) would choose to complete government processes by writing a letter.

19 Checking a bank balance "in person" could mean checking in a branch or at an ATM.
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Figure 18: Preferred communication method for making contact: 2005, 2009 and 2010

NZ2A-D. Please use this list to say which one way you would prefer to make contact for a few different reasons that I’ll read out. (Prompted responses, single coded) *2005 wording was ‘Contacting the local council’.

Base: All adults aged 16+ (3244 in 2005, 1012 in 2009, 2117 in 2010). Significance testing shows any change between 2009 and 2010

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010
Section 4

Using the internet

This section focuses on how people use the internet and how this has changed over time, covering a range of measures and also attitudes towards online functions. It begins by looking at the extent to which internet users say they visit sites that are new to them as an indication of people’s breadth of use of the internet. It then compares what people say they do on the internet over time and across the demographic groups. It focuses on the extent to which the internet is being used to watch television programmes and films, and the types of websites used by those looking for health information. It compares online and offline use of government/local authority services.

It looks in detail at the levels of interest in different internet functions and confidence in undertaking these functions, including those related to safety/security online. It examines how the internet is being used for different types of content creation, and in particular at social networking. Finally, it covers the impact of being online in relation to contact with others and the extent to which internet users feel they have saved money through buying online or comparing prices online.

It should be noted that while trends over time are shown in full where possible or relevant, statistical significance is measured against 2009 data.

Key findings

- Communication remains the most popular type of activity to be undertaken at least weekly. In terms of individual activities carried out online, those most likely to be undertaken at least once a week are email, social networking, work/studies information and banking/paying bills.

- Compared to 2009, the internet is more likely to be used regularly for most of the activity categories that we asked about; with the greatest increase in regular use for work/studies information (49% vs. 36%), social networking (45% vs. 35%) and news (31% vs. 22%). More internet users now watch television programmes or films online than was the case in 2009 (41% vs. 32%).

- While two-thirds of internet users (65%) say that at some time they have used the internet to find out about or pay for government or local authority services online, a minority say they are interested in undertaking forms of civic participation online such as joining in debates or signing an online petition.

- When asked about a range of online functions, internet users are least confident about installing software to control or block access to certain websites and installing security features. Women are more likely than men to say they are interested but not confident in installing filtering software (23% vs. 12%), and also that they are interested but not confident in installing security features (21% vs. 11%).

20 ‘Regularly’ refers to an activity carried out at least once a week.
Key findings (continued)

- For the first time in this survey, the majority of internet users (54%) say they have a social networking site profile. And among those with a social network profile, there has been an increase in the proportion who say that they visit a social networking site every day – with half (51%) saying they do this.

- Social networking sites are most likely to be used for contact with friends or family, with few using these sites for contact with people they have not met before.

- Half of all internet users say they have increased their contact with friends (53%) or family (50%) who live further away, as a result of using the internet.

- Close to half of all internet users (46%) say they have made significant savings by buying something online rather than in the shops.

4.1 Internet users are more likely to say they visit new websites, compared to 2009

It is important to understand the extent to which people are willing to explore online, as a context for many of their attitudes and behaviours. In order to have a proxy for this willingness to move beyond what is familiar online, we ask whether or not they tend to visit websites that are new to them.

Internet users in 2010 are more likely than in 2009 to say that they visit ‘maybe one or two’ websites they haven’t visited before in most weeks when they use the internet (46% vs. 39%). One quarter (26%) say that they tend to visit only websites that they have visited before, a decrease since 2009 (31%). One in five (21%) say they tend to visit “lots” of websites new to them – a decrease from 27% in 2009.

As in the 2009 survey, users aged 55-64 and 65+ are less likely than all internet users to say that they tend to visit lots of websites they haven’t visited before (15% for 55-64s and 13% for 65+ vs. 21% of all internet users). Men are more likely than women to say they visit lots of new websites they haven’t visited before (24% vs. 18%). Adults in DE socio-economic groups are more likely to say that they only visit websites that they have visited before in most weeks when they use the internet (38% vs. 26%).
4.2 Increase in most categories of use of the internet at least weekly

Another key element of understanding online use is to monitor over time what activities people are undertaking. Adults who use the internet at home or elsewhere were prompted with 26 different internet activities and were asked to say which they ever do, and how often they do each\(^{21}\).

These individual uses have been grouped into nine types of use, to enable comparison. The nine types are:

- **Communication** – relates to activities such as sending or receiving email, using Instant Messaging services or (added in 2010) making or receiving calls over the internet (e.g. Skype).

- **Transactions** – relates to buying or selling things online, banking and paying bills online, downloading software or gambling online.

- **Work / studies information** – relates to finding information online for work or for studies, or (added in 2010) doing an online course to achieve a qualification, looking at job opportunities.

- **Social networking** – relates to using social networking sites (such as Facebook, MySpace, Piczo, Bebo, hi5 or Twitter).

- **Entertainment** – relates to uses such as listening to radio stations online, playing games online, watching online or downloading video clips, TV programmes or films.

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\(^{21}\) These activities in no way represent an exhaustive list of all the potential activities that can be undertaken online, but were chosen as representing the majority of activities for most people.
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downloading or listening online to music, looking at adult-only websites, or (added in 2010) visiting dating websites.

- News - relates to looking at news websites.
- Leisure information – relates to finding information for booking holidays or finding information for leisure time such as cinema and live music.
- Public / civic – relates to finding information online about public services provided by local or national government, or completing government processes online such as registering for tax credits, renewing a driving licence, car tax or passport, completing a tax return, or looking at political, campaign or issues websites.
- Health – relates to finding information about health-related issues (added in 2009; not covered in previous surveys).

Figure 20 shows the proportion of internet users who carry out each of the categories of internet use at least weekly across the surveys conducted in 2007, 2009 and 2010. As in previous years, communications is the most commonly-mentioned activity carried out at least once a week by internet users, and this has increased since 2009 (83% vs. 78%). Seven of the nine categories of internet use see an increase in the proportion of internet users carrying out the activity since 2009, the exceptions being looking for leisure information and health information. The greatest increases by category since 2009 relate to use of the internet at least once a week for work / studies information (49% vs. 36%), for social networking (45% vs. 35%) and for news (31% vs. 22%).

Internet users aged 16-24 are more likely to use the internet at least weekly for work/studies information (60% vs. 49% of all UK internet users), social networking (77% vs. 45%), entertainment (59% vs. 40%) and leisure information (31% vs. 19%). By contrast, internet users aged 65 and over are less likely to use the internet at least weekly for each of the nine types of use, with the exception of health.

Where differences exist across the socio-economic groups it is generally the case that adults in AB socio-economic groups are more likely, and those in DE socio-economic groups are less likely, to use the internet in these ways at least weekly. Those in AB socio-economic groups are more likely to use the internet at least weekly for communication (93% vs. 83%), work/studies information (63% vs. 49%), transactions (53% vs. 43%) and news (41% vs. 31%). Those in DE socio-economic groups are less likely to use the internet at least weekly for the same four types of use: communication (72% vs. 83%), work/studies information (33% vs. 49%), transactions (36% vs. 43%) and news (19% vs. 31%). Users in DE socio-economic groups, however, are more likely to use the internet at least weekly for social networking (53% vs. 45%).

There are differences by gender in the types of internet activities carried out at least once a week. Men are more likely to use the internet at least weekly for transactions (47% vs. 40%), entertainment (47% vs. 32%) and news (36% vs. 26%), while women are more likely to use the internet at least weekly for social networking (49% vs. 41%).

The only difference in the types of internet activities carried out at least once a week in terms of urban and rural responses relates to social networking, where 46% of those in urban

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22 Please note, internet users were asked about additional activities in 2010 (as detailed in the list above) and the response codes to assess frequency of use were amended in the 2010 survey. These changes may have had an impact on the comparability of the findings with previous years.
households say they use social networking at least weekly, compared to 38% of those in rural households.

**Figure 20: Types of internet activities carried out at least once a week: 2007, 2009 and 2010, by age and socio-economic group**

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In addition to this overview of types of activity, it is also useful to see the detail of the different activities that adults carry out on the internet. Figure 21 shows the percentage of all internet users, and those in each age group, who use the internet at least once a week for each of the 26 individual activities. Percentages are also shown for all internet users in 2009.
### Figure 21: Individual internet activities carried out at least once a week in 2009 and 2010: by age

<table>
<thead>
<tr>
<th>Activity</th>
<th>2009 Total</th>
<th>2010 Total</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending / receiving emails</td>
<td>75%</td>
<td>79%</td>
<td>79%</td>
<td>79%</td>
<td>83%</td>
<td>80%</td>
<td>76%</td>
<td>68%</td>
</tr>
<tr>
<td>Looking at social networking sites</td>
<td>35%</td>
<td>45%</td>
<td>77%</td>
<td>61%</td>
<td>44%</td>
<td>27%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Finding information for your work / job / studies</td>
<td>36%</td>
<td>45%</td>
<td>52%</td>
<td>48%</td>
<td>48%</td>
<td>51%</td>
<td>33%</td>
<td>15%</td>
</tr>
<tr>
<td>Banking and paying bills online</td>
<td>26%</td>
<td>33%</td>
<td>28%</td>
<td>35%</td>
<td>37%</td>
<td>41%</td>
<td>32%</td>
<td>18%</td>
</tr>
<tr>
<td>Looking at news websites</td>
<td>22%</td>
<td>31%</td>
<td>29%</td>
<td>32%</td>
<td>39%</td>
<td>33%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Using online chat rooms or Instant Messaging</td>
<td>27%</td>
<td>30%</td>
<td>57%</td>
<td>42%</td>
<td>25%</td>
<td>18%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Listen to or download music online</td>
<td>18%</td>
<td>22%</td>
<td>44%</td>
<td>28%</td>
<td>18%</td>
<td>14%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Watch online or download short video clips</td>
<td>16%</td>
<td>20%</td>
<td>40%</td>
<td>24%</td>
<td>15%</td>
<td>19%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Buying and selling things online</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
<td>19%</td>
<td>20%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Finding information for your leisure time including cinema and live music</td>
<td>14%</td>
<td>17%</td>
<td>29%</td>
<td>19%</td>
<td>15%</td>
<td>13%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Looking at job opportunities</td>
<td>NA</td>
<td>16%</td>
<td>28%</td>
<td>18%</td>
<td>19%</td>
<td>12%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Playing games online</td>
<td>13%</td>
<td>15%</td>
<td>29%</td>
<td>18%</td>
<td>14%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Listening to radio stations online</td>
<td>10%</td>
<td>15%</td>
<td>21%</td>
<td>14%</td>
<td>17%</td>
<td>16%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Watch online or download TV programmes or films</td>
<td>10%</td>
<td>14%</td>
<td>27%</td>
<td>15%</td>
<td>14%</td>
<td>9%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Downloading software</td>
<td>11%</td>
<td>11%</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Maintaining a website / blog</td>
<td>9%</td>
<td>10%</td>
<td>21%</td>
<td>6%</td>
<td>12%</td>
<td>8%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>Finding information about health related issues</td>
<td>7%</td>
<td>9%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Making or receiving calls over the internet (e.g. Skype)</td>
<td>NA</td>
<td>8%</td>
<td>8%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Finding information about public services provided by local or national government</td>
<td>8%</td>
<td>8%</td>
<td>10%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>Finding information for booking holidays</td>
<td>8%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Looking at political / campaign / issues websites</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Doing an online course to achieve a qualification</td>
<td>NA</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Complete government processes online</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>8%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Online gambling</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Looking at adult-only websites</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>1%</td>
<td>2%</td>
<td>*</td>
<td>2%</td>
<td>-</td>
</tr>
<tr>
<td>Visiting dating websites (like match.com, dating Direct or eHarmony etc.)</td>
<td>NA</td>
<td>1%</td>
<td>-</td>
<td>-</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>-</td>
</tr>
</tbody>
</table>

**Base:** All adults aged 16+ who use the internet at home (1,282 aged 16+ in 2009, 1,489 in 2010, 271 aged 16-24, 287 aged 25-34, 338 aged 35-44, 245 aged 45-54, 214 aged 55-64, 134 aged 65+). Significance testing shows any change between 2009 and 2010 and between any age group and all adults aged 16+. Green cells in the table indicate a positive difference, red cells indicate a negative difference.

**Source:** Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

*Less than 0.5%
Figure 22 shows the percentage of all internet users, men and women, and those in each socio-economic group, who use the internet at least once a week for each of the 26 individual activities in 2010. Percentages are also shown for all internet users in 2009.

Figure 22: Individual internet activities carried out at least once a week in 2009 and 2010: by gender and socio-economic group

<table>
<thead>
<tr>
<th>Activity</th>
<th>2009 Total</th>
<th>2010 Total</th>
<th>Male</th>
<th>Female</th>
<th>AB</th>
<th>C1</th>
<th>C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending / receiving emails</td>
<td>75%</td>
<td>79%</td>
<td>81%</td>
<td>77%</td>
<td>92%</td>
<td>82%</td>
<td>69%</td>
<td>63%</td>
</tr>
<tr>
<td>Looking at social networking sites</td>
<td>35%</td>
<td>45%</td>
<td>41%</td>
<td>49%</td>
<td>42%</td>
<td>44%</td>
<td>44%</td>
<td>53%</td>
</tr>
<tr>
<td>Finding information for your work / job / studies</td>
<td>36%</td>
<td>45%</td>
<td>47%</td>
<td>43%</td>
<td>62%</td>
<td>48%</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td>Banking and paying bills online</td>
<td>26%</td>
<td>33%</td>
<td>35%</td>
<td>32%</td>
<td>46%</td>
<td>34%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Looking at news websites</td>
<td>22%</td>
<td>31%</td>
<td>36%</td>
<td>26%</td>
<td>41%</td>
<td>32%</td>
<td>26%</td>
<td>19%</td>
</tr>
<tr>
<td>Using online chat rooms or Instant Messaging</td>
<td>27%</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
<td>28%</td>
<td>29%</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Listen to or download music online</td>
<td>18%</td>
<td>22%</td>
<td>26%</td>
<td>18%</td>
<td>25%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Watch online or download short video clips</td>
<td>16%</td>
<td>20%</td>
<td>27%</td>
<td>14%</td>
<td>23%</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Buying and selling things online</td>
<td>17%</td>
<td>17%</td>
<td>19%</td>
<td>16%</td>
<td>20%</td>
<td>16%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Finding information for your leisure time including cinema and live music</td>
<td>14%</td>
<td>17%</td>
<td>16%</td>
<td>18%</td>
<td>19%</td>
<td>18%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Listening to radio stations online</td>
<td>10%</td>
<td>15%</td>
<td>17%</td>
<td>13%</td>
<td>22%</td>
<td>14%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Watch online or download TV programmes or films</td>
<td>10%</td>
<td>14%</td>
<td>18%</td>
<td>10%</td>
<td>16%</td>
<td>15%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Downloading software</td>
<td>11%</td>
<td>11%</td>
<td>16%</td>
<td>6%</td>
<td>13%</td>
<td>9%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Maintaining a website / blog</td>
<td>9%</td>
<td>10%</td>
<td>11%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Finding information about health related issues</td>
<td>7%</td>
<td>9%</td>
<td>8%</td>
<td>11%</td>
<td>12%</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Making or receiving calls over the internet (e.g. Skype)</td>
<td>NA</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>13%</td>
<td>7%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Finding information about public services provided by local or national government</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Finding information for booking holidays</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Looking at political / campaign / issues websites</td>
<td>4%</td>
<td>6%</td>
<td>7%</td>
<td>4%</td>
<td>8%</td>
<td>6%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Doing an online course to achieve a qualification</td>
<td>NA</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Complete government processes online</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Online gambling</td>
<td>3%</td>
<td>4%</td>
<td>6%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Looking at adult-only websites</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>*</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VIS13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each (Prompted responses, multi-coded)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base: All adults aged 16+ who use the internet at home (1,282 aged 16+, 1,489 in 2010, 752 male, 737 female, 433 AB, 478 C1, 278 C2, 300 DE). Significance testing shows any change between 2009 and 2010, between males and females and between any socio-economic group and all adults aged 16+. Green cells in the table indicate a positive difference, red cells indicate a negative difference.</td>
</tr>
<tr>
<td>Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010</td>
</tr>
<tr>
<td>*=Less than 0.5%</td>
</tr>
</tbody>
</table>
4.3 Increase in use of the internet to watch television programmes or films

Among adults who use the internet at home or elsewhere in 2010 (74% of all UK adults), four in ten say they watch TV programmes or films online; this is higher than the measure in 2009 (41% vs. 32%). Most of these users say they watch through UK TV broadcasters’ websites (37% vs. 29%) such as BBC iPlayer, with a much smaller proportion doing so from other websites (13% vs. 11%).

**Figure 23: Watching television programmes and films online: 2009 and 2010**

Internet users aged 16-24 are more likely to watch TV programmes or films online (54% vs. 41%), and are also more likely to use websites other than UK TV broadcasters’ websites to download or watch online (22% vs. 13%). Internet users aged 55-64 and 65 and over are less likely to watch TV programmes or films online (21% and 20% vs. 41%).

Men are more likely than women to watch television programmes and films online (44% vs. 38%), and are more likely to have used websites other than UK TV broadcasters’ websites to download or watch online (17% vs. 9%).

Internet users in AB socio-economic groups are more likely to watch television programmes and films online (49% vs. 41%), with no other differences across the socio-economic groups.

While 41% of internet users ever watch TV programmes or films online, Figures 21 and 22 show that just 14% do this at least once a week.

4.4 Increase in use of the internet for health information

When asked about the types of information they ever use the internet to find, over half of all internet users (56%) said that they ever use the internet “to find out more about an illness”; which is higher than the measure in 2009 (47%). Three groups of internet users are more likely to look for health information online: women (61%), those in AB socio-economic groups (65%) and those aged 35-44 (64%).
Those who ever use the internet to find out more about an illness were shown a list of options and were asked to say which types of websites they tend to look at for this information. Compared to 2009, use of NHS Direct / NHS 24 websites has decreased (81% vs. 85%), but is still more likely than it was in 2007 (70%). None of the other types of websites that we asked about has seen any changes since 2009.

**Figure 24: Internet information sources used for health information: 2005, 2007, 2009 and 2010**

4.5 **Offline use of government or local authority services is more evident than online use**

All UK adults were asked to think about how often they find out about, or pay for, government or local authority services such as council tax, car tax, passports and so on. Separate questions were asked to establish how often adults find out about or use these services online; via email or by visiting websites, and how often adults find out about or use these services offline by seeing someone in person, making a phone call or writing a letter.

Figure 25 shows the incidence of online and offline use of government or local authority services among all internet users. Just over half (54%) of all UK adults say they ever make online use of government or local authority services, compared to seven in ten (69%) using them offline. Among internet users there is less of a gap between online and offline use (65% and 71%), but offline use remains more likely.

Across the demographic groups, the gap between offline and online use is more evident among adults aged 55 and over and those in DE socio-economic groups. Men are more likely to say they ever make offline use of government or local authority services compared to using them online (71% vs. 63%).
In covering the 26 individual online activities detailed in Figures 21 and 22, internet users were asked about two types of government services available online. Over seven in ten (72%) of internet users say they ever go online to find information about public services provided by local or national government, with just 8% saying they do this at least weekly. This type of use is more likely among those aged 35-44 (80%) and those in AB socio-economic groups (85%), and is less likely among those aged 16-24 (59%) and those in C2 (62%) or DE (58%) socio-economic groups.

Over half (57%) of internet users say they ever go online to complete government processes such as registering for tax credits, renewing a driving licence, car tax or passport or completing a tax return, with just 4% saying they do this at least weekly. This type of use is more likely among those aged 45-54 (65%) and those in AB socio-economic groups (75%), and is less likely among those aged 16-24 (49%) and those in C2 (49%) or DE (41%) socio-economic groups.

While most internet users have experience of these types of online government services, just 12% say they have ever contacted a local councillor or MP online. Experience of signing an online petition is more likely; accounting for 23% of all internet users. Adults in DE socio-economic groups are less likely, compared to all adults, to have signed an online petition (15% vs. 23%), while adults in AB socio-economic groups are more likely (35% vs. 23%). Similarly, adults in DE socio-economic groups are less likely to have ever contacted a local councillor or MP online (7% vs. 12%), while adults in AB socio-economic groups are more likely (22% vs. 12%).
4.6 Increase in confidence for most internet functions, but confidence remains lower for using controls and security features

Those who use the internet at home or elsewhere (74% of all UK adults) were shown descriptions of 13 varied functions associated with the internet, PCs or laptops. A wide range of functions was covered, in order to assess which types of activity internet users were interested in undertaking and which of these they may lack confidence in doing. This gap in confidence is of particular interest as it demonstrates the areas in which people may have media literacy skills needs. The functions that we asked about were:

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

Figure 26 splits all internet users into one of three groups for each of the functions: those who are not interested, those who are interested and can do it with confidence, and those who are interested but cannot do it with confidence. This gap in confidence shown on the left of Figure 26 is of particular interest in assessing media literacy, and has been used to rank the order for the 13 functions.

Two particular functions have confidence gaps at a higher level than others: installing software to control or block access to certain websites (20%) and installing security features (18%). In addition to those who are not confident in installing security features, another 18% of internet users say they are not interested in this function. In total therefore, close to two in five (36%) internet users either lack confidence or are not interested in installing security features, both of which could indicate media literacy skills needs.

Since 2009 a higher proportion of internet users say they are interested in and confident in undertaking ten of the 13 functions. This increase in confidence has led to a decline in the confidence gap for seven of the functions since 2009.
Women are more likely than men to say they are interested but not confident in installing filtering software (23% vs. 12%), and also that they are interested but not confident in installing security features (21% vs. 11%).

Across all internet users, three in ten (28%) say they are not interested in installing software to control or block access to certain websites. Older adults aged 55-64 (43% vs. 28%) and aged 65 and over (45% vs. 28%) are more likely to say they are not interested, as are adults in DE socio-economic groups (35% vs. 28%), with no difference by gender. Those who do not have any children aged under 16 at home are more likely to say they are not interested in this function, compared to those with any children at home (33% vs. 20%).

As mentioned earlier, two in ten internet users (18%) say they are not interested in installing security features (such as a firewall, anti-spyware or antivirus software). Adults aged 65 and over are more likely to say they are not interested (28% vs.18%), as are those in DE socio-economic groups (30% vs. 18%), and women (21% vs. 15%).

The three functions which internet users are least likely to be interested in can broadly be categorised as active civic participation; a minority are interested in or confident using the internet to join in debates online (31%), to contact a local political official (33%) or to sign an online petition (39%). The majority of interest users are, however, interested in / confident in using the internet to find out information from local government (72%) or to complete government processes (69%).
4.7 Increase in creative activities driven by social networking and uploading content

As forms of content creation develop, with some activities maturing and some just emerging, it is important to monitor the extent to which internet users are involved with, and interested in, various elements of activity. We ask internet users about their interest in, and experience of, a variety of online activities, including uploading content onto a website, creating web pages, social networking profiles or blogs, and contributing to existing sites or blogs.

Seven in ten internet users have experience of any of the seven content creation activities that we ask about; an increase since 2009 (67% vs. 62%). There has been an increase in experience of three activities: setting up a social networking site profile (54% vs. 44%), uploading photos to a website (53% vs. 49%) and making a short video and uploading it to a website (17% vs. 11%). Across all internet users in 2010, the majority have now set up a social networking site profile (54%).

There tends to be a consistent pattern in responses by age across most of these activities. Broadly speaking, those aged 16-24 are more likely to have undertaken the activity, with those aged 45 and over less likely to have undertaken the activity. Moreover, those aged 45 and over are more likely than all UK adults to state they are not interested in undertaking the activity. Men are more likely to have set up their own website (24% vs. 12%), made a short video and uploaded it to a website (23% vs. 12%), set up a weblog / blog (14% vs. 10%), or contributed to a collaborative website such as Wikipedia (15% vs. 7%). In 2009, women were more likely than men to have set up a social networking profile, but this difference is not evident in 2010.
Adults in AB socio-economic groups are more likely than all internet users to have set up their own website (25% vs. 18%) or contributed to a collaborative website such as Wikipedia (16% vs. 11%).

The groups most likely to have experience of any of the seven content creation activities that we asked about are those aged 16-24 or 25-34 (93% or 78% vs. 67%).

As mentioned above, the majority of all adult internet users have their own social networking site profile (54% vs. 44% in 2009). Figure 28 shows the proportion of internet users with a social networking site profile in 2007, 2009 and 2010. In 2010, the majority of all internet users aged under 45, men, women, and each of the socio-economic groups, have a social networking site profile. In 2007, the 16-24 group was the only one in which the majority had a profile.

The growth in social networking site profiles since 2009 is greatest among adults aged 35-44 (58% vs. 40%) and 55-64s (27% vs. 11%), and adults in AB (54% vs. 40%) and DE socio-economic groups (58% vs. 46%).

**Figure 28: Set up own social networking site profile: 2007, 2009 and 2010, by age, gender and socio-economic group**

<table>
<thead>
<tr>
<th>Age</th>
<th>AB</th>
<th>C1</th>
<th>C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td>51%</td>
<td>48%</td>
<td>51%</td>
<td>56%</td>
</tr>
<tr>
<td>25-34</td>
<td>52%</td>
<td>49%</td>
<td>52%</td>
<td>56%</td>
</tr>
<tr>
<td>35-44</td>
<td>53%</td>
<td>50%</td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td>45-54</td>
<td>51%</td>
<td>49%</td>
<td>51%</td>
<td>56%</td>
</tr>
<tr>
<td>55-64</td>
<td>49%</td>
<td>47%</td>
<td>51%</td>
<td>56%</td>
</tr>
<tr>
<td>65+</td>
<td>47%</td>
<td>45%</td>
<td>51%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Age: 16-24, 25-34, 35-44, 45-54, 55-64, 65+
Gender: Male, Female
Socio-economic group: AB, C1, C2, DE

Among those with a social networking site profile, there has been an increase since 2009 in the percentage saying they visit a social networking site every day (51% vs. 41%). Nine in ten (91%) with a social networking site profile say they visit at least once a week, as in 2009 (92%).
Social networking site users aged 16-24 are more likely to visit any social networking sites every day (68% vs. 51%). The frequency of visiting social networking sites (whether daily or weekly) does not vary by gender or socio-economic group.

4.9 Little change in social networking site use since 2009

Adults with a social networking site profile were shown a list of activities and were asked to say which, if any, they used social networking sites for. As in 2009, most social networking site users regularly talk to friends or family they see a lot (75% vs. 78%) or talk to friends or family they rarely see (both 75%). Compared to 2009, there is little change across the different uses that we asked about, with fewer site users talking to people who are friends of friends (25% vs. 32%), but no other significant changes.
Social networking site users aged 16-24 are more likely to use the sites to talk to friends or family they see a lot (87% vs. 75%), to listen to music or find out about bands (34% vs. 18%) and to talk to people they don’t know (15% vs. 9%). Two types of use are more likely among men than among women: listening to music or finding out about bands (23% vs. 14%) and talking to people they don’t know (11% vs. 6%). Social networking site use does not vary to any extent across the socio-economic groups.

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

Social networking is a key form of keeping in touch with friends and family. However, we also ask more general questions about whether internet users feel that being online has improved their levels of contact with people. Around half of all internet users say that using the internet has increased the contact they have with friends (53%) or family (50%) who live further away. Increased contact with friends who live nearby (26%) or family (18%) is at a lower level. There are no statistically significant changes since 2009.

Just over a quarter of internet users say they have increased contact with people with whom they share personal interests and hobbies, which is an increase on the 2009 measure (27% vs. 22%). Similarly, 17% of internet users say they have increased contact with people with different interests and hobbies, which is also an increase on the 2009 measure (11%).

Figure 31: Claimed impact of using the internet on the volume of contact with others: 2009 and 2010

Increased contact with friends or family who live further away, or with family who live nearby, does not vary by gender, age or socio-economic group. However, those aged 16-24 are more likely to say that the internet has increased their contact with friends who live nearby (39% vs. 26%); people who share their interests and hobbies (34% vs. 27%); and people with different interests and hobbies (27% vs. 17%). Men are more likely than women to say...
that the internet has increased their contact with people who share their interests and hobbies (30% vs. 23%).

4.11 While most internet users say they have saved money through buying or comparing prices online, this is less likely for users aged 65 and over

The final part of this section looks at another possible benefit of the internet: the extent to which it enables users to save money. Adults who use the internet at home or elsewhere were prompted with five internet activities and were asked to say whether they had saved money by doing any of these activities in the last six months. Those who have not done the activity are shown on the far right of Figure 32 in yellow. Where savings had been made, the internet users were asked to use a scale to describe how significant the savings were. Figure 31 summarises the incidence of savings being made by internet users in the past six months and the significance of the savings made for each of the five activities, from both the 2009 and 2010 surveys.

Eight in ten internet users felt they had saved money across any of the five activities, as in 2009 (82% vs. 81%), with at least half of all internet users saying they had saved money either through buying something online rather than in the shops (63%), by comparing prices online (62%) or booking travel online (48%). Close to half of internet users said they had made significant savings by comparing prices online (47%) or buying something online rather than in the shops (46%).

Figure 32: Extent to which savings have been made by internet users in the past six months: 2009 and 2010

Savings are less likely to have been made by users aged 65 and over (69% vs. 82%). Those in AB socio-economic groups are more likely to have made savings (88% vs. 82%), but this does not vary by gender.
Section 5

Understanding and attitudes across media

So far in this report we have focused on people’s habits in relation to their media and particularly their internet consumption. We now turn to their attitudes and levels of understanding about these media. It is increasingly important to document and monitor these elements, given the increasing range of online activities in particular, in order to know whether people have the necessary information to make informed decisions about their media use. We continue to monitor levels of understanding and attitudes to traditional media such as TV, radio and the press, in order to provide useful context for the extent to which the newer media forms such as the internet, mobile phones and games are understood.

This section looks at:

- awareness of the main sources of funding for TV programmes, radio stations and websites (and specifically the main source of funding for BBC content and commercial operators for each of these media);

- perceptions of regulation across different communications platforms, awareness of the television watershed and perceptions of whether product placement is currently allowed in UK television programmes;

- search engine users’ knowledge of what appears on results pages, levels of trust in the news content provided by different media, as well as trust in social networking site content; and

- opinions of online copyright infringement.

This section also provides a picture of attitudes towards the internet and television, along with self-rated confidence as an internet user. Finally, it looks at adults’ preferred methods of learning about digital technology, as well as their experience of, and interest in, learning.

Key findings

- Unprompted awareness of the main source of funding is higher for television than for radio, and considerably lower for the internet, as was the case in 2009. Unprompted awareness of the main source of funding for the BBC remains higher than for the commercial operators, across television, radio and the internet. Young people aged 16-24 are less knowledgeable compared to older age groups.

- UK adults are more likely than in 2009 to believe that content is regulated (in terms of what can be broadcast / shown / written) across each of television (84% vs. 80%), the internet (41% vs. 37%), mobile phones (32% vs. 23%) and gaming (42% vs. 36%). UK adults are also now more likely to believe that content on broadcasters’ websites is regulated (38% vs. 33%).

- One quarter (26%) of search engine users say that if results have been listed by the search engine then they must be accurate/ unbiased. This is an increase from the 2009 figure of 20%. Those in DE households are more likely to answer in this way (38%), as are those that the first started using the internet less than three years ago (36%).
Key findings (continued)

- Four in ten UK adults (40%) believe that product placement is currently allowed in UK-made television programmes, with most of the remainder (38%) unsure.

- Attitudes towards online copyright infringement have not changed since 2009. Across all adults, more believe that certain types of downloading of music and films should be illegal (46%) than believe it should be legal (32%), with the remainder (22%) unsure. Adults aged 16-24 are the only age group who are more likely to say that such types of downloading music and films should be legal compared to those who say it should be illegal (51% vs. 36%).

- While more internet users describe themselves as very confident across a number of aspects of use, less than half say they are very confident in judging whether a website is truthful.

- Few UK adults have experience of formal learning about digital technology or are interested in learning more. Compared to 2009, fewer adults are interested in learning more about digital technology (22% vs. 25%). Compared to 2009, fewer adults said they prefer to learn by asking friends and family (40% vs. 48%).

5.1 Awareness of how radio and websites are funded has increased

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

Unprompted awareness of the main source of funding is higher for television than for radio, and considerably lower for the internet, as was the case in 2009. Unprompted awareness of the main source of funding for the BBC remains higher than for the commercial operators, across television, radio and the internet.

Awareness of the licence fee as the main source of funding has not changed since 2009 for BBC television programmes (78% vs. 80% in 2009), but has increased for BBC radio stations (65% vs. 62%) and the BBC website (50% vs. 44%).

The proportion of adults aware of the main source of funding for television programmes on ITV, Channel 4 and Five has not changed since 2009 (70% vs. 71%). Awareness of the main source of funding for the commercial radio stations has increased (62% vs. 57%), as has awareness for search engine websites such as Google (31% vs. 28%). Half (51%) of all adults could not say how search engine websites are funded, as in 2009 (53%).
Those aged 16-24, women, and those in DE socio-economic groups show consistently lower levels of awareness of the licence fee as the main source of funding for BBC television programmes, radio stations and website, as in previous media literacy surveys. Awareness of funding is higher among adults aged 16-24, who finished their education aged 21 or over, than among all adults aged 16-24 for BBC television programmes (71% vs. 56%), commercial television programmes (73% vs. 50%) and search engine websites (44% vs. 22%).

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

Adults were asked to say whether content is regulated across each of television, radio, the internet, mobile phone and gaming. Compared to 2009, UK adults are more likely to think that content is regulated across each of these key platforms, with the exception of radio. Figure 34 shows a steady increase in belief since 2007 that content is regulated for each of the five platforms. Among internet users, there has been no significant change in the proportion believing that internet content is regulated (46% vs. 43%).

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The following definition was offered as an explanation of a regulator. "A regulator is often called a 'watchdog' – it sets rules or guidelines about content. People can also complain to the regulator if they feel something was inappropriate - perhaps because it was offensive, harmful, inaccurate or unfair."
Younger adults aged 16-24 and those in DE socio-economic groups are less likely to think that television and radio content is regulated. Belief that television programmes are regulated is lower among 16-24s (67% vs. 84% of all adults) and those in DE socio-economic groups (77% vs. 84%). For both television and radio, adults are more likely to say they are unsure whether content is regulated than to say that content is not regulated. Awareness that television is regulated is higher among those aged 16-24 who were aged 21 or over at the time they finished their education, compared to all adults aged 16-24 (89% vs. 67%).

5.3 Increase in belief that types of online content are regulated

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

Compared to 2009, adults are more likely to think that programmes or clips of programmes shown on broadcasters’ websites (such as the BBC website or the ITV website) are regulated (38% vs. 33%). Two in ten adults believe that content on sites like YouTube is regulated, as in 2009 (22% vs. 23%). More than four in ten of all UK adults (44%) are unsure whether any of the types of online content we asked about are regulated.
Those who use the internet are more likely than all adults to believe that online content is regulated: whether on broadcasters’ websites (47%) or on sites such as YouTube (27%). As with all UK adults, internet users are more likely than in 2009 to believe that broadcaster-website content is regulated (47% vs. 41%), with no change for YouTube content (27% vs. 28%).

**Figure 35: Belief that online content is regulated: 2007, 2009 and 2010**

5.4 *Nine in ten adults are aware that there is a television watershed*

Adults were asked to think about whether there is a time of day on the main television channels after which programmes that would be considered unsuitable for children can be broadcast. Nine in ten (91%) UK adults are aware that there is a television watershed, with eight in ten (79%) able to correctly say that the watershed is 9pm. Both measures are unchanged since 2009 (92% and 79%).

Those aged 45-54 (86% vs. 79%) and those in AB socio-economic groups (84% vs. 79%) are more likely to be aware of the 9pm watershed, while those aged 16-24 (72% vs. 79%) and those in DE socio-economic groups (71% vs. 79%) are less likely. Interestingly, awareness of the 9pm watershed does not differ between those who do and do not have children aged under 16 in the household.
Figure 36: Perceptions of the television watershed: 2005, 2007, 2009 and 2010

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes - 9pm</th>
<th>Yes - other time</th>
<th>Yes - unsure of time</th>
<th>No</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>81%</td>
<td></td>
<td>7%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>2007</td>
<td>78%</td>
<td></td>
<td>9%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>2009</td>
<td>79%</td>
<td></td>
<td>10%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>2010</td>
<td>79%</td>
<td></td>
<td>9%</td>
<td>3%</td>
<td>7%</td>
</tr>
</tbody>
</table>

T11 – Please think about the types of TV programmes that would be considered unsuitable for children. Is there a time of day after which these programmes can be broadcast on the main TV channels? What time is this?


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

5.5 Four in ten adults believe that product placement is currently allowed in UK television programmes

We took the opportunity to benchmark UK adults’ understanding of product placement, ahead of the introduction of product placement in television programmes made for UK audiences on 28 February 2011. At the time of the fieldwork (April to May and September to October 2010), product placement was not permitted for television programmes made in the UK.\(^{25}\)

Adults were asked whether they believed that companies were currently allowed to pay for their products to be used or featured in TV programmes that are made in the UK. There was no majority opinion: four in ten adults (40%) believed that product placement was allowed, two in ten (22%) believed it was not allowed and four in ten (38%) were unsure.

Those aged 65 and over are more likely to be unsure whether product placement is allowed (50% vs. 38%), as are women (41% vs. 34%) and adults in the C2 socio-economic group (47% vs. 38%). The only group of UK adults more likely to believe that product placement is allowed is those aged 55-64 (52% vs. 40%).

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\(^{25}\) Product placement in television programmes imported from other countries was allowed prior to the change in February 2011. While our question about product placement specified TV programmes that are made in the UK, there could be some confusion with imported TV programmes.
5.6 Half of those who use search engines do not understand search engine results pages

Search engines are now an ubiquitous part of the online experience. It is therefore important to know the extent to which people trust the sites that are listed in the results pages. Users of search engines (94% of all internet users) were asked to say which of the following statements was closest to their own opinion:

- ‘I think that if they have been listed by the search engine, these websites will have accurate and unbiased information.’

- ‘I think that some of the websites in the list will be accurate or unbiased and some won’t be.’

- ‘I don’t really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of.’

In 2010, half (50%) of those who use search engines respond that some of the websites returned will be accurate or unbiased while others will not be, in other words a response that shows critical understanding.

A quarter (26%) of search engine users say that if results are listed by the search engine then the websites must be accurate/unbiased. This is an increase on the 2009 figure of 20%. For example, Google Search was used by 21.1 million UK home users in November 2010, according to UKOM/Nielsen.

26 The question was asked of a broader sample in 2010 than in 2009, so comparisons with the 2009 findings should be treated with some caution. In 2009 and at the first wave of the 2010 survey this question was asked of all adults who mostly used search engines to look for information on the internet. At the second wave of the 2010 survey this question was asked of those who ever used search engines.
search engine results (38% vs. 50%), and are more likely to believe that search engine results will have accurate or unbiased information (38% vs. 26%). No particular age group, gender or socio-economic group is more likely to understand search engine results pages through believing that some websites will be accurate or unbiased and some won’t be.

**Figure 38: Search engine user attitudes towards the accuracy or bias of the websites returned by a search**

Given that the group of users who understand search engine results are arguably showing increased levels of critical understanding of the internet, we wanted to see whether this group has different attitudes and behaviour to the UK online population in other areas. While there are some differences to the overall online population, the differences for the most part are relatively small.

In terms of their media habits, they are more likely than all internet users to make use of the internet both at home and elsewhere (63% vs. 55%) and to use the internet for more hours per week on average (15.7 vs. 14.2 hours). Close to half of those who understand search engines first used the internet ten years ago or more (48% vs. 42%).

This group is neither more nor less likely than all internet users to say that they trust what they read or see on news websites or on social networking sites. They are, however, more likely to be aware of the main source of funding both for search engine websites (51% vs. 39%) and the BBC website (68% vs. 58%)28.

Those who understand search engines are neither more nor less likely to have any concerns about privacy in terms of sharing personal information online (such as information about what they are doing or how they are feeling, or sharing photos online) or concerns about security in terms of entering personal details such as address details, card details or phone numbers online. This group is, however, more likely to make any type of judgement about a website before entering personal details (84% vs. 75%); in particular: professional signs

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28 See sections 5.1, 6.8 and 6.9 for reporting on all internet users for these issues
(62% vs. 55%) or personal instinct (53% vs. 42%). These users are also more likely to say they regularly make any of the checks we asked about when visiting a website they haven’t been to before (85% vs. 77%)\(^{29}\).

5.7 The majority of users trust news output from radio, TV and news websites, with no change since 2009

In order to understand the trust placed in different media, we asked users of certain media\(^{30}\) to use a scale to indicate the extent to which they trust the news output that they see, hear or read through television / radio / news websites / newspapers\(^{31}\).

News from radio is the most likely to be trusted by users; with 64% agreeing that they tend to trust what they hear. Newspapers are the least likely of the four media to be trusted; with the lowest level of agreement that users tend to trust what they read (34%). News websites are the second most likely to be trusted by users (59%), followed by TV news (54%).

Responses from users do differ, however, in terms of the level of disagreement that the news output is trusted. Disagreement among users is at a higher level for TV news (26% than for radio (18%) or news websites (17%).

There are some differences within groups of users regarding TV news, news websites and newspapers. Television news is more likely to be trusted by adults in DE socio-economic groups (60% vs. 54%). News websites are more likely to be trusted by 16-24s (65% vs. 59%) and by men (63% vs. 56%). Newspapers are more likely to be trusted by 16-24s (45% vs. 34%), with adults in AB socio-economic groups more likely to disagree for this medium (52% vs. 46%).

\(^{29}\) See sections 6.2, 6.3, 6.4 and 6.7 for reporting on all internet users for these issues

\(^{30}\) Questions were asked of adults with any televisions in the home, those who listen to radio at home, those who use the internet at home or elsewhere and who were able to respond to the question regarding news websites (93% of internet users) and those who were able to respond to the question regarding newspapers (99% of all adults). Those who use the internet but do not visit news websites were given the option to not respond to this question.

\(^{31}\) Figure 39 compares the overall responses from users of each of the four media. The questions regarding trust in news were asked about each type of media as a whole, and not specific TV channels, radio stations, news websites or newspapers. As a result, it is not possible to say which specific news sources within each media the users are considering when they respond to these questions. It is also important to note that these questions were not grouped together in the survey, so that respondents were not actively comparing the different media. These points may help to explain why these findings differ from those of our Media Tracker, reported in Ofcom’s PSB Annual Report at www.ofcom.org.uk/marketresearch.
5.8 Trust in social networking site content has increased

We also wanted to understand what people think of content on other sites, and the extent to which they trust it. Internet users were asked to use the same scale to indicate the extent to which they trust what they see when they visit social networking sites. Figure 40 shows the extent of agreement with each of these statements among all internet users able to respond\(^{32}\) (70% of all internet users).

Among those able to respond, 36% agree that they trust what they read or see when they visit social networking sites, which is an increase on the 2009 measure (32%). Adults aged 16-24 are more likely to agree that they trust what they read or see on social networking sites (48% vs. 36% of all users), but responses do not vary by gender or socio-economic group.

\(^{32}\) Those who use the internet but do not visit social networking sites were given the option to not respond to this question.
5.9 Younger adults are most likely to say that downloading shared copies of copyright music and films without the permission of the rights holder should be legal

When asked whether downloading shared copies of copyright music and films without the permission of the rights holder should be illegal, more adults believe that it should be illegal (46%) than believe it should be legal (32%), with the remainder (22%) unsure. Attitudes towards file-sharing have not changed since 2009.

Adults aged 16-24 are the only age group who are more likely to say that downloading music and films in this way should be legal, compared to those who say it should be illegal (51% vs. 36%). Those aged 65 and over are more likely than all adults to say they don’t know (41% vs. 22%). Women are also more likely than men to say they don’t know (25% vs. 19%).

Those in AB socio-economic groups are more likely than adults as a whole to say that downloading music and films in this way should be illegal (57% vs. 46%), while those in DE socio-economic groups are less likely (39% vs. 46%).

IN41C – Here are some things people sometimes say about using the internet. Whether you use the internet or not can you please tell me to what extent you agree or disagree with each statement using the scale on this card. (Prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere and respond regarding social networking websites (839 in 2009, 1010 in 2010, 257 aged 16-24, 246 aged 25-34, 246 aged 35-44, 126 aged 45-54, 135 aged 55+, 483 male, 527 female, 270 AB, 329 C1, 192 C2, 219 DE). Significance testing shows any change between 2009 and 2010, between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010
5.10 Both television and the internet are seen as influential and providing useful learning

We are keen to compare responses to opinions about content on TV and on the internet. Those with any televisions in the home (98% of all adults) and those who use the internet at home or elsewhere (74% of all adults) were prompted with a series of statements about television and the internet and were asked to use a scale to say whether they agreed or disagreed with each statement. Figure 42 shows responses from the 2010 survey from those with a television and from those who use the internet.

Nine in ten agree that they have learned useful things from both television (88%) and the internet (91%). Most users agree that these media are influential in shaping public opinion about political and other important issues: 86% for television and 76% for the internet. Television is therefore more likely than the internet to be rated as influential by users. The majority of users also agree that it doesn’t matter who owns the channels / websites or how they are funded, so long as the content is good: six in ten for both television (64%) and the internet (58%).

Within the overall population of those with any televisions in the home, those in DE socio-economic groups are more likely to agree that it doesn’t matter who owns the channels or how they are funded so long as the content is good (69% vs. 64%), while those in AB socio-economic groups are more likely to disagree (29% vs. 20%). Responses do not vary by age or gender.

Within the overall population of internet users, those aged 16-24 are more likely to agree that it doesn’t matter who owns websites or how they are funded so long as the content is good (67% vs. 58%), and this is also true for men (61% vs. 55%). Responses do not vary by socio-economic group.
5.11 Increase in confidence among internet users

As context to these elements of knowledge and attitude, we ask internet users to rate their levels of confidence across a range of aspects of using the internet, and at an overall level as an internet user.

Internet users are more confident in 2010 than they were in 2009 in terms of finding what they want on the internet (80% very confident vs. 71% in 2009), using the internet to do creative things (52% vs. 47%) and judging whether a website is truthful (45% vs. 38%). Across each of these aspects of using the internet, more internet users say they are confident than say they are not confident. However, it is still the case that a significant minority of internet users say they are not confident using the internet to do creative things (21%) or judging whether a website is truthful (12%)33.

Younger users aged 16-24 are more likely to say they are very confident in judging whether a website is truthful (58% vs. 45% for all). Older users aged 65 and over are more likely to say they are not confident (24% vs. 12% for all), as are women (14% vs. 9%), and users in DE socio-economic groups (17% vs. 12%).

Overall confidence as an internet user has also increased since 2009, with seven in ten users describing themselves as very confident (67% vs. 60%) and fewer than one in twenty describing themselves as not confident (3% vs. 6%). In 2010, younger users aged 16-24 are more likely than all internet users to say they are very confident users (84% vs. 67% for all), as are adults in AB socio-economic groups (76% vs. 67%), and men (72% vs. 62%). Older users aged 65 and over are more likely than all internet users to describe themselves as not confident (10% vs. 3%), but this measure does not vary across the socio-economic groups or by gender.

33 The measure of 12% is a sum of the two ‘not confident’ responses (with 8% and 3% adding to 12% due to rounding).
UK Adults’ Media Literacy

Figure 43: Confidence as an internet user: 2007, 2009 and 2010

5.12 Two in ten adults have experience of formal learning about digital technology

Across all UK adults, one in five (19%) say they have experience of ‘formal learning’, through classes or training, about any of the aspects of digital technology that we asked about. Experience of formal learning about digital technology remains at much the same level as found in 2009 (19% vs. 21%). The only type of learning experienced by more than one in ten adults relates to how to use the internet (13% vs. 15%). One in ten adults say they have learned about using the internet safely, as in 2009 (both 7%)34.

34 This question was added in 2009.
Figure 44: Experience of formal learning about digital technology: 2005, 2007, 2009 and 2010

Adults aged 16-24 are more likely to have any experience of formal learning about digital technology (38% vs. 19%), specifically about how to use the internet (23% vs. 13%), using the internet safely (18% vs. 7%), creating a website (15% vs. 5%), editing digital pictures or digital video (11% vs. 5%), and sending photos using a mobile phone (5% vs. 2%). Those aged 55-64 and those aged 65 and over are less likely to have experience of formal learning about digital technology compared to adults as a whole (13% and 8% vs. 19%).

Experience of learning about digital technology does not differ between men and women, and is less likely among adults in C2 socio-economic groups (15% vs. 19%).

5.13 A minority of adults are interested in learning more about digital technology, with a decrease in interest since 2009

Across all UK adults, a minority say they would be interested in learning more about any of the aspects of digital technology that we asked about. Levels of interest in learning more about digital technology at an overall level have decreased since 2009 (22% vs. 25%), due in part to lower levels of interest in learning about using the internet safely (4% vs. 7%), and despite an increase in interest in learning about how programmes are made (4% vs. 2%) and how the media are funded (3% vs. 1%).
Those aged 65 and over are less likely to be interested in learning more about digital technology (14% vs. 22%), while those aged 16-24 are more likely (30% vs. 22%).

The overall proportion interested in learning about digital technology does not differ by gender or across the socio-economic groups.

5.14 **Adults are most likely to prefer to learn about digital technology through reading a manual, with fewer interested in learning through friends or family**

Adults were shown a list of ways of learning about digital technology and were asked to say which they preferred. In 2007 and 2009, the most preferred method of learning was through family and friends, followed by reading the manual and then trial and error. In 2010, adults were most likely to state a preference for learning through reading a manual (47% vs. 45%), with a decline in preference for learning through friends or family since 2009 (40% vs. 48%). As in previous surveys, few adults say they would prefer to learn by attending a class (7% vs. 9%).
In 2010, there are a number of differences between demographic groups in relation to their preferred ways of learning about digital technology. Those aged 55-64 and those 65 and over are more likely to say they prefer to learn through friends and family (52% and 51% vs. 40%), as are women (48% vs. 31%).

Men are more likely to prefer to learn through reading the manual (52% vs. 42%), as are adults in AB socio-economic groups (53% vs. 47%), while those aged 65 and over are less likely (38% vs. 47%). No particular age group is more likely to say they prefer to learn in this way.

Younger adults aged 16-24 and aged 35-44 are more likely to say they prefer to learn through trial and error (50% and 48% vs. 42%), as are men (48% vs. 36%), while adults aged 65 and over are less likely (21% vs. 42%).

No particular group stands out as being more likely to prefer to learn through attending a class, but those aged 25-34 are less likely (3% vs. 7%).

Adults aged 65 and over and are more likely to say they do not have a preferred way of learning about digital technology (13% vs. 6%), while those aged 16-24 are less likely to give this response (2% vs. 6%).
Section 6

Privacy, security and concerns

This section provides evidence in an area of key interest for Ofcom and its stakeholders – namely, the extent to which people are comfortable providing information online.

We look at the extent to which internet users are happy to share personal information and personal details online and the types of judgements made before entering these types of details.

We show the types of checks that internet users make when visiting a website for the first time, and whether internet users believe that those who buy online put their privacy at risk.

We examine the extent to which social networking sites users allow others to see information that may be on their profile, and internet users’ attitudes toward agreement to contact from third parties as a result of filling out an online form with their personal details.

Finally, we examine people’s levels of concern and their attitudes to different platforms. We look at attitudes towards protecting users from inappropriate or offensive content, and the extent to which adults have concerns about the main communications platforms. We outline the key types of concerns that people have, and how these have changed over time.

Key findings

• Around four in ten internet users say they would be happy to share photos of their holidays online (37%), while around three in ten internet users say they would be happy to share information about what they are doing (33%). Internet users are least likely to say they would be happy to share information about how they are feeling about work or college (22%).

• Young people are more at ease about sharing these types of ‘personality’ information online – for example, 61% of 16-24s are happy to share holiday photos, and 44% are happy to share information about how they are feeling about work or college.

• Desirable levels of due caution around issues of online privacy and personal information vary according to the activity, and both ends of spectrum – being happy to give out personal details, and never doing so – can carry dangers and drawbacks. Our proxy measure of due caution is those that say they have ‘some concerns’ but who would nonetheless provide various types of personal or financial information online. Around half of internet users state that they have ‘some concerns’ about providing these types of information – for example, 44% say they would have some concerns about entering their home phone number. This proportion has changed little since 2005.

• There has been some increase over time in people who use the internet saying they use ‘professional’ signs like padlocks etc to decide whether or not to trust a site, with this type of judgment made by just over half before entering any personal details, an increase since 2009 (55% vs. 51%). One in five (20%) of those aged 65+ say they wouldn’t trust any site compared to 6% of the adult online population.

Continued...
Key findings (continued)

- Few people have open social networking settings - 4% of those with a social networking profile allow their contact details to be seen by anyone, and 10% allow personal information to be seen by anyone. Men are more likely than women to have open profiles for personal information (12% vs. 7%), photographs (14% vs. 5%), and contact details (5% vs. 2%).

- Installing software to control or block access to certain websites (20%) and installing security features (18%), are the main activities people say they are interested in but aren't confident doing. Women are twice as likely as men to say they are interested but not confident.

- Since 2005 UK adults have become less concerned about the main media platforms they use. Concerns about the internet among users stand at 54% (down from 61% in 2009); TV at 40%; mobile at 24% and gaming at 21%. The top three specific concerns about the internet are: content unsuitable for children (24%), sexual content / pornography (23%), and identity fraud (14%).

6.1 Younger internet users are more likely to be happy to share ‘personality’ information online

The development of blogs, personal websites and social networking in particular has meant that people are increasingly able to give out information about themselves online. It is important to monitor the extent to which people are comfortable about doing this, and the types of information they feel it is acceptable or not acceptable to give out. In order to understand the extent to which internet users have privacy concerns in relation to their personal information, we asked them about their attitudes to sharing types of ‘personality’ information through social networking sites, blogs or their own web pages. Figure 47 shows the extent of privacy concerns about the five types of information among all internet users in 2010.

Around four in ten internet users say they would be happy to share photos online, whether from their holidays (37%) or an evening out (35%), while around three in ten internet users say they would be happy to share information about what they are doing (33%) or how they are feeling in general (30%). Internet users are least likely to say they would be happy to share information about how they are feeling about work or college (22%).

As Figure 47 shows, there is a strong relationship between privacy concerns and the age of the internet user, with users aged under 35 more likely to say they would be happy to share each type of information, and users aged 45 and over more likely to say they would never share this information.

This relationship with age is also seen in the incidence of having a social networking site profile, as shown in Figure 28. Such sites are often used to share photos or information about the profile holder. If we look at the responses from those with a social networking site profile rather than from all internet users, there are fewer differences across the age groups. Those aged 16-24, however, are more likely than all with a social networking site profile to say they would be happy to share each type of information online.

Across all internet users, attitudes to sharing information online do not vary between men and women or, for the most part, by socio-economic group. However, internet users in DE socio-economic groups are more likely to say they would be happy to share photos from an
evening out (43% vs. 35%) and less likely to say they would never share information about how they are feeling in general (41% vs. 49%).

Figure 47: Information prepared to share online, by age

6.2 A minority of internet users are happy to share personal details online

As well as these types of ‘personality’ information, it is also useful to know people’s views on various types of personal contact or transactional information and their degree of comfort in sharing it online. Since 2005 we have asked internet users to consider six types of personal contact/transactional information and tell us how they would feel about entering these details online. Internet users’ attitudes to providing personal details online are mostly unchanged since 2009; with a minority saying they would be happy to provide each type of information, around half saying they would have some concerns, and the remainder saying they would never provide each type of information.
While attitudes to providing personal details have changed little since 2009, if we look back to the 2005 findings we see that for four of the six types of information we see a decline in the proportion of internet users who are happy to provide that information: personal email address (41% vs. 54% in 2005), home address details (30% vs. 36%), mobile phone number (28% vs. 34%) and home phone number (24% vs. 30%). There is no consistent pattern across the other possible responses for these types of information; with a shift towards users saying they have some concerns about providing personal email addresses and mobile phone numbers, a shift towards users saying they would never provide their home phone number, and a mix of responses for providing home address details.

As in 2009, the information that internet users are most likely to be happy to provide is their email address (41% vs. 44% in 2009), with a similar proportion of users saying they would have some concerns about providing their email address (44% vs. 43%). In 2010, the information that internet users are least likely to provide is their home phone number; with a higher proportion saying they would never do this, compared to 2009 (30% vs. 25%).

Within the population of internet users in 2010, internet users aged 65 and over and those in DE socio-economic groups are more likely than all internet users to say they would never provide each of the six types of personal information we asked about. Women are more likely than men to say they would never provide their home phone number or mobile phone number. These differences across the demographic groups were also evident in the 2009 survey.

Across the six types of personal information, four in ten internet users say that there is at least one that they would never provide, which is higher than the measure in 2009 (42% vs.
38%). This overall measure is higher among users aged 65 and over (60%), women (46%) and those in DE socio-economic groups (54%).

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

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

Responses have been grouped into three broad types of checks:

- ‘professional’ signs (such as a padlock);
- personal instinct (such as a known company name, a professional appearance); and
- peer signs (such as an online review or a recommendation from a friend).

Figure 49 shows that, as in 2009, internet users are most likely to make judgements about websites based on professional signs, with this type of judgement made by just over half before entering any personal details, an increase since 2009 (55% vs. 51%). Four in ten make judgements based on personal instinct (42% vs. 43% in 2009), with relatively few making judgements based on peer reviews (17% vs. 20% in 2009). Both of these measures are unchanged since 2009.

The number of internet users who say they would not make any kind of judgement of a website before entering personal details has also not changed since 2009 (14% vs. 12%).

Figure 49: Judgements made about a website before entering personal details online: 2005, 2007, 2009 and 2010

Internet users aged 65 and over are less likely to say they would make judgements based on professional signs (41% vs. 55%) or personal instinct (33% vs. 42%), and more likely to say they would not trust any site (20% vs. 6%). No particular age group is more likely to make any of the types of judgements, and responses do not vary between men and women. Adults
in AB socio-economic groups are more likely to make judgements based on professional signs (65% vs. 55%), or personal instinct (49% vs. 42%), and less likely to say that they would not trust any site (3% vs. 6%). The reverse is true for adults in DE socio-economic groups, who are less likely to make judgements based on professional signs (42% vs. 55%), or personal instinct (33% vs. 42%), and more likely to say that they would not trust any site (10% vs. 6%).

6.4 Most users make some kind of check when visiting a website for the first time

Internet users who ever visit websites that are new to them (94% of all internet users) were shown a list of possible checks and were asked to say which, if any, they regularly do. As shown in Figure 50, 77% of internet users who ever visit new websites make any of the checks that we asked about.

Figure 50: Regular checks made when visiting new websites in 2010

Across the demographic groups, checks are less likely to be regularly made by internet users aged 55 and over (71% vs. 77%) and those in DE socio-economic groups (69% vs. 77%).

6.5 Most users agree that people who buy things online put their privacy at risk

Internet users were asked to use a scale to indicate whether they agreed or disagreed with a series of statements about the internet. Six in ten internet users agreed with the statement “People who buy things online put their privacy at risk”, as was also the case in 2009 (59% vs. 60%).

Compared to other measures from this survey, there is very little variation in the responses from internet users by age, gender or socio-economic group. Internet users in AB socio-economic groups are more likely to disagree that “People who buy things online put their privacy at risk” (26% vs. 21%), but no single group is more likely to agree.
Figure 51: Agreement with statement: “People who buy things online put their privacy at risk”: 2009, 2010, by age, gender and socio-economic group

As detailed earlier in section 4.2, four in ten (43%) of all internet users use the internet for transactions at least weekly. Among those who frequently use the internet for transactions, agreement with the statement “People who buy things online put their privacy at risk” is more likely than disagreement (52% agree vs. 26% disagree).

Those internet users who agree with the statement “People who buy things online put their privacy at risk” do not differ from all internet users in terms of whether they would make any judgements before entering personal details, or in the types of judgements they would make.

6.6 Most internet users say they always opt out of third-party contact

We asked all internet users to think about situations when they register with a website or fill out an online form with their personal details and are asked whether they want to opt in or opt out of receiving information from “other ‘carefully selected’ third-party companies”. Internet users were asked to choose from four options to say which is closest to what they usually do in these situations.

Six in ten (61%) internet users say they always opt out of receiving information from third party companies and one quarter (24%) say they decide on a case-by-case basis. Very few (1%) say they always opt in to receiving information from third-party companies. The remaining internet users say they either don’t think about this or don’t pay attention to this part of the page (5%) or are unable to answer the question (8%).

This question was added at the second wave of the 2010 survey, and so the number of interviews available for analysis is limited. Across the demographic groups there is very little variation in the responses to this question, but adults in DE socio-economic groups are more likely to say they don’t know (14% vs. 8%).
Figure 52: Actions taken regarding opting in or opting out of third-party contact

6.7 Few with a social networking site profile say that information on their profile can be seen by anyone

Those with a social networking site profile (54% of all internet users) were prompted with three types of information that may feature on a profile, and were asked to refer to a list of options to say who could see these types of information, or, that this information was not featured on their profile.

For each of the three types of information, as shown in Figure 53, around one in ten or fewer with a social networking site profile said this information could be “seen by anyone”. In the majority of cases for each type of information, those with a social networking site profile responded that the information could only be “seen by my friends”.

A minority of those with a social networking site profile responded that the information could be “seen by my friends plus friends of friends”, and this is more likely than the information being available to be “seen by anyone” in each case. However across all internet users, 10% allow personal information (such as their relationship status, date or birth, home town, and so on) to be seen by anyone, 9% allow anyone to see photographs and 4% allow anyone to see their contact details. A further 15% allow friends of friends to see personal information, 18% allow them to see photos and 10% allow friends of friends to see contact information.
**Figure 53: Level of privacy for information shown on social networking site profiles, by age**

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<thead>
<tr>
<th></th>
<th>All 16+</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45+</th>
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<tbody>
<tr>
<td><strong>Seen by anyone</strong></td>
<td>10%</td>
<td>13%</td>
<td>10%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Seen by friends plus friends of friends</strong></td>
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<td>32%</td>
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<td>32%</td>
<td>24%</td>
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<td>50%</td>
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<td>1%</td>
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<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Men are more likely than women to respond that each type of information can be “seen by anyone”; although the incidence is still relatively low for personal information (12% vs. 7%), photographs (14% vs. 5%), and contact details (5% vs. 2%). Responses do not vary by socio-economic group.

### 6.8 Most platform users believe that people should be protected from inappropriate or offensive content

As context for understanding more about the levels of concern people have about media, we ask about the extent to which they feel it is necessary for there to be protection against inappropriate or offensive content. Figure 54 shows the overall levels of agreement and disagreement among users of each of the four main platforms since the 2005 survey.

The majority of users of each platform feel that users should be protected from inappropriate or offensive content, as in previous surveys, with no change in agreement or disagreement since 2009, or indeed since 2005. While a small minority of platform users disagree, this response is more likely in relation to television content (13%) than internet content (7%).

Across the demographic groups the extent of agreement or disagreement regarding protection from inappropriate or offensive content is relatively consistent for each of the platforms. Women are more likely than men to agree that internet users should be protected (87% vs. 80%), but no particular age group or socio-economic group is more likely to agree or disagree.
An important area to monitor over time is the extent to which users of media have concerns about them, and which types of concern they might have. We asked users if they had any concerns about what is on television, radio, the internet, mobile phones and gaming. Figure 55 compares the overall mentions of any concerns, for each of the key platforms, in 2005, 2007, 2009 and 2010.

Just over half of all internet users (54%) say they have any concerns about what is on the internet, compared to four in ten of those in a TV household (40%) saying this about television content. The proportion of users mentioning any concerns has decreased since 2009 both for the internet and for gaming, following a decline in any concerns for all platforms in the 2009 survey.
6.10 Concerns over offensive/illegal content remain most likely to be mentioned by internet users

Just over half of all internet users told us that they had concerns about what is on the internet; a decline since 2009 (54% vs. 61%). These concerns relate mainly to offensive/illegal content, and this type of concern has also declined since 2009 (40% vs. 45%). Other concerns mentioned relate to security/fraud (21% vs. 23%) or to ‘a risk to others or to society as a whole’ (both 18%). The top three specific\textsuperscript{35} concerns about the internet, mentioned by adult internet users, are: content unsuitable for children (24%), sexual content/pornography (23%), and identity fraud (14%).

Internet users aged 45-54 and those aged 65 and over are more likely than all adult internet users to have concerns about the internet (65% and 66% vs. 54%), while users aged 16-24 are less likely (34% vs. 54%). Women are more likely than men to have any concerns about the internet (62% vs. 46%), but the incidence of concerns does not differ across the socio-economic groups.

\textsuperscript{35} These specific (unprompted) concerns are then placed into the categories described.
When asked if they have any concerns about what is on television, four in ten adults with TVs in the household said they had any concerns, as was also the case in 2009 (40% vs. 39%). These concerns related mainly to offensive content, although this category has declined since 2009 (22% vs. 25%), and to poor quality content or repeats, which has increased since 2009 (24% vs. 21%). The top three specific concerns about television mentioned by adults with TVs in the household are: bad language / swearing (11%), violence (10%) and too many repeats (9%).

Adults aged 65 and over with TVs in the household are more likely to have concerns about television (60% vs. 40%), while those aged 16-24 are less likely (19% vs. 40%). Unlike concerns about the internet, women are no more likely than men to have any concerns about television (41% vs. 38%). Women are, however, more likely to have concerns that relate to offensive content (26% vs. 17%). Concerns about television are more likely among adults in AB socio-economic groups (47% vs. 40%) and less likely among adults in DE socio-economic groups (34% vs. 40%).
When asked if they had any concerns about mobile phones, one quarter of all adults who personally use a mobile phone said they had concerns, as was also the case in 2009 (24% vs. 26%). No single category of concern dominates, with broadly equal mentions of concerns which could be categorised as relating to: risks to others or to society as a whole, although these have declined since 2009 (8% vs. 11%), health concerns (10% vs. 9%), and concerns relating to affordability, which have also declined since 2009 (6% vs. 8%).

The top two specific concerns about mobile phones, mentioned by adults who use a mobile phone, are: health concerns about using a handset (8%) and health concerns about mobile signal masts (5%). Adults aged 35-44 are more likely to have any concerns about mobile phones (30% vs. 24%), while adults aged 16-24 are less likely (15% vs. 24%). Concerns about mobile phones are more likely among women compared to men (27% vs. 20%), but do not differ across the socio-economic groups.
When asked if they had any concerns about gaming, two in ten adults who ever play games electronically said they did, which is a decline since 2009 (21% vs. 25%). These concerns relate mainly to offensive content (16% vs. 18%). The top three specific concerns about gaming, mentioned by adults who play games electronically, are: violent content (10%), content unsuitable for children (9%) and bad language (5%).

Adults aged 16-24 are less likely to have any concerns about gaming (11% vs. 21%), with no particular age group more likely to have any concerns. As with the internet and mobile phones, women are more likely than men to have concerns about gaming (26% vs. 18%).

**Figure 59: Concerns about gaming among users: 2009 and 2010**

G6 – Can you tell me if you have any concerns about gaming? (Spontaneous responses, multi-coded)


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

When asked if they had any concerns about what is on the radio, one in ten adults who listen to radio at home said that they had, as in 2009 (9% vs. 11%). No single type of concern dominates, with broadly equal mentions of concerns that could be categorised as relating to offensive content, although these have declined since 2009 (3% vs. 6%), poor quality content or repeats (3% vs. 4%) and concerns relating to advertising or sponsorship (2% vs. 3%). The top two specific concerns about radio mentioned by adults are: bad language / swearing (2%) and too many advertising breaks or poor quality programmes (2%).

Radio listeners aged 45-54 are more likely to have concerns about radio (14% vs. 9%), which is mostly due to a higher incidence of concerns relating to quality of content / repeats (6% vs. 3%). Concerns about radio do not differ between men and women or across the socio-economic groups.
Further analysis - 1

Newer users of the internet

This section looks in detail at newer users of the internet: those who say they first started using the internet less than three years ago. While this group makes up a small proportion of internet users – around one in ten – it is useful to understand the ways in which newer users compare to more established users across the different aspects of media use and attitudes:

• the incidence of newer users within the overall population of internet users and a comparison of the demographic profiles of newer and more established users;

• how the internet is used by newer users in terms of volume, location, types of use made, experience of visiting sites that are new to them and making any checks on new sites;

• newer users’ confidence in using the internet and undertaking particular functions, their understanding of funding and regulation and their experience of and interest in learning about digital media; and

• the extent of any security and privacy concerns, any judgements made before entering personal details online and any concerns about internet content.

Key findings

• Further analysis of newer internet users (those having gone online less than three years ago) was carried out to see the extent to which they are different from all online users.

• Newer internet users differ from more established users across a range of attitudes and behaviour, ranging from

  • Consumption patterns (9.1 hours per week vs. 14.9 hours for more established users);

  • Activities (lower frequency of weekly usage with the exception of social networking);

  • Confidence (40% say they don’t visit new websites vs. 24% of more established users);

  • Security (33% say they would use professional signs to verify a website vs. 59% of more established users); and

  • Knowledge (36% think search engine results pages must be true vs. 24%).

• It is also of note that there are relatively few differences relating to concerns, or for their appetite for learning.
1.1 Adults from DE households are more likely to be newer users

Newer users are defined as those who first started using the internet up to three years ago, with those who first started using the internet three or more years ago defined as more established users. Across all UK adult internet users, one in ten are newer users (10%). Figure 60 shows the incidence of newer users across each of the demographic groups within the overall population of internet users.

The only demographic group more likely to be newer users is adults in DE socio-economic groups. Two in ten users in DE socio-economic groups are newer users, compared to one in ten of all UK adult users (18% vs. 10%). No particular age group or gender is more likely to be comprised of newer users, but those aged 45-54 are less likely (5% vs. 10%).

Figure 60: When first used the internet, by age, gender and socio-economic group

1.2 Newer users are less likely to be ‘middle aged’ and much more likely to be in DE socio-economic groups

Having looked at the incidence of newer users within the population of internet users, Figure 61 looks within the population of newer (labelled <3 years) and more established users (labelled 3+ years) and makes a side-by-side comparison of the age and socio-economic group profile of each group of users. The age and socio-economic group profile of all adults in the UK population in 2010 is also shown for comparison.

Newer users of the internet are more likely than established users to be either in the 25-34 age group (32% vs. 23%) or the group aged 65 and over (13% vs. 6%).

While four in ten newer users are in the ‘middle aged’ category (35 to 64 years old), this ‘middle aged’ group accounts for over half of the more established users (39% vs. 54%). As a result, newer users differ from more established users through being less likely to be in this ‘middle aged’ category and more likely to be either under 35 (48% newer vs. 40% more established) or 65 and over (13% vs. 6%).

36 These all-adults profiles are based on the survey data, and are within the margins of error for 2001 Census profile data.
Four in ten newer users are in DE socio-economic groups: twice as many as within the population of more established users (38% vs. 19%). One in ten newer users are in AB socio-economic groups: one-third as many as within the population of more established users (11% vs. 33%).

**Figure 61: Age and socio-economic group profile of internet users: newer and established users in 2010**

1.3 **Newer users have a lower overall volume of use and are less likely to make most types of uses, except social networking**

Newer users have a lower estimated weekly volume of use compared to established users (9.1 vs. 14.9 hours). This difference is due to a lower volume of use both at home (7.6 vs. 9.7 hours) and in the workplace / place of education (0.8 vs. 4.3 hours).
Two-thirds of newer users only use the internet at home and not anywhere else, compared to just over one-third of more established users (66% vs. 35%). Just two in ten newer users use the internet at home and elsewhere, whereas this applies to the majority of established users (22% vs. 60%). While around one in ten newer users only use the internet outside the home, this is higher than the incidence among more established users (12% vs. 5%).

As detailed in section 4.2, internet users were prompted with 26 different internet activities and were asked to say which they ever do, and how often they do each activity. These individual uses have been grouped into the nine types of use shown in Figure 63, which compares the extent to which each type of use is made at least weekly by newer and more established users. Newer users of the internet are less likely than more established users to carry out seven of the nine categories of internet use at least weekly. Two types of use stand out as being much less likely to be undertaken by newer users at least weekly: transactions (19% vs. 46%) and work / studies information (27% vs. 53%).

Interestingly, however, newer users are as likely as more established users to use the internet at least weekly for social networking\textsuperscript{37} (42% vs. 46%).

\textsuperscript{37} There are insufficient interviews with newer users with a social networking site profile to look at these particular newer users in more detail.
Figure 63: Types of internet activities carried out at least once a week: newer and more established users

IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1489), started using under 3 years ago (158), 3+ years ago (1276). Significance testing shows any differences between newer and more established internet users.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

Figure 64 shows the percentage of newer and more established users who use the internet at least once a week for each of the 26 individual activities.
**UK Adults’ Media Literacy**

### Figure 64: Individual internet activities carried out at least once a week: by newer and more established users

<table>
<thead>
<tr>
<th>Activity</th>
<th>2010 Total</th>
<th>Under 3 years</th>
<th>3+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending / receiving emails</td>
<td>79%</td>
<td>58%</td>
<td>82%</td>
</tr>
<tr>
<td>Looking at social networking sites</td>
<td>45%</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>Finding information for your work / job / studies</td>
<td>45%</td>
<td>23%</td>
<td>48%</td>
</tr>
<tr>
<td>Banking and paying bills online</td>
<td>33%</td>
<td>13%</td>
<td>36%</td>
</tr>
<tr>
<td>Looking at news websites</td>
<td>31%</td>
<td>18%</td>
<td>33%</td>
</tr>
<tr>
<td>Using online chat rooms or Instant Messaging</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Listen to or download music online</td>
<td>22%</td>
<td>9%</td>
<td>24%</td>
</tr>
<tr>
<td>Watch online or download short video clips</td>
<td>20%</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>Buying and selling things online</td>
<td>17%</td>
<td>7%</td>
<td>19%</td>
</tr>
<tr>
<td>Finding information for your leisure time including cinema and live music</td>
<td>17%</td>
<td>6%</td>
<td>18%</td>
</tr>
<tr>
<td>Looking at job opportunities</td>
<td>16%</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Playing games online</td>
<td>15%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Listening to radio stations online</td>
<td>15%</td>
<td>4%</td>
<td>17%</td>
</tr>
<tr>
<td>Watch online or download TV programmes or films</td>
<td>14%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>Downloading software</td>
<td>11%</td>
<td>1%</td>
<td>12%</td>
</tr>
<tr>
<td>Maintaining a website / blog</td>
<td>10%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Finding information about health-related issues</td>
<td>9%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Making or receiving calls over the internet (e.g. Skype)</td>
<td>8%</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>Finding information about public services provided by local or national government</td>
<td>8%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Finding information for booking holidays</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Looking at political / campaign / issues websites</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Doing an online course to achieve a qualification</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Complete government processes online</td>
<td>4%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Online gambling</td>
<td>4%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Looking at adult-only websites</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Visiting dating websites (like match.com, dating Direct or eHarmony etc.)</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

---

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

- Base: All adults aged 16+ who use the internet at home (1,489), started using under 3 years ago (158), 3+ years ago (1276).
- Significance testing shows any differences between newer and more established users. Green cells in the table indicate a positive difference, red cells indicate a negative difference.
- Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

*Less than 0.5%

**1.4 Newer users are more likely to only visit sites they've used before and less likely to regularly make any checks when visiting new websites**

In most weeks when the internet is used, newer users are more likely than established users to say that they only visit websites they have visited before (40% vs. 24%) and less likely to say they visit lots of websites they haven’t visited before (12% vs. 22%).
Figure 65: Visits to websites not visited before in most weeks when the internet is used: newer and more established users

When prompted with a list of possible checks and asked to say which, if any, they regularly do, newer users are less likely to say they make any of these checks when visiting a website they haven’t been to before (64% vs. 79%).

1.5 Newer users are less likely to have saved money by going online

Newer users are less likely to have saved money by undertaking each of the five online activities shown in Figure 66, compared to more established users. Those who have not done the activity are shown on the far right of Figure 66 in yellow. Six in ten newer users have saved money across any of the five activities, compared to nine in ten more established users (61% vs. 85%).

Less than half of all newer users have saved money through buying online rather than in the shops (45% vs. 66%) or by comparing prices online (40% vs. 66%), whereas the majority of more established users have saved money in these ways. Similarly, while a quarter of newer users have saved money by booking travel online, this applies to half of the more established users (25% vs. 51%).
1.6 Newer users are less confident and less interested in most internet functions

Figure 67 shows the ratings of confidence across the different aspects of using the internet, given by newer users and more established users. For each aspect, newer users are less likely to describe themselves as very confident and more likely to describe themselves as not confident (whether not very or not at all confident).

Less than half of newer users rate themselves as very confident in using the internet to do creative things (22% vs. 56%) or judging whether a website is truthful (28% vs. 48%). Just four in ten newer users describe themselves as very confident overall as an internet user, compared to seven in ten more established users (37% vs. 71%).
Figure 67: Confidence as an internet user in 2010: newer and more established users

<table>
<thead>
<tr>
<th>Function</th>
<th>&lt;3 years</th>
<th>3+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Very confident</strong></td>
<td><strong>67%</strong></td>
<td><strong>56%</strong></td>
</tr>
<tr>
<td><strong>Fairly confident</strong></td>
<td><strong>24%</strong></td>
<td><strong>17%</strong></td>
</tr>
<tr>
<td><strong>Neither/nor</strong></td>
<td><strong>8%</strong></td>
<td><strong>16%</strong></td>
</tr>
<tr>
<td><strong>Not very confident</strong></td>
<td><strong>6%</strong></td>
<td><strong>28%</strong></td>
</tr>
<tr>
<td><strong>Not at all confident</strong></td>
<td><strong>3%</strong></td>
<td><strong>8%</strong></td>
</tr>
<tr>
<td><strong>Don't know</strong></td>
<td><strong>1%</strong></td>
<td><strong>3%</strong></td>
</tr>
</tbody>
</table>

Figure 68 shows the degree of interest in, and confidence in doing 13 varied internet functions, among newer users and more established internet users. Newer users are more likely than established users to say that they are not interested in the function, for 12 of the 13 functions; the exception is to “join in debates online or give your opinion on social or political issues”.

Newer users are also more likely to say they are interested but not confident for 11 of the 13 functions. For the two tasks where newer users do not show a bigger confidence gap, they show a higher ‘not interested’ response instead. Three functions stand out as having confidence gaps at a higher level among newer users compared to more established users: installing security features (28% vs. 17%), installing software to control or block access to certain websites (28% vs. 20%), and transferring photos from a digital camera or mobile phone to a computer (23% vs. 10%). In addition to the 32% of newer users who are not confident in installing security features, another 32% of newer users say they are not interested in this function. In total therefore, two in three newer users (66%) either lack confidence or are not interested in installing security features, both of which could indicate media literacy skills needs.

Across the 13 functions, while four in ten more established users (37%) say they are not confident in at least one of the functions, this applies to the majority of newer users (58%).
Figure 68: Confidence and interest in internet functions: newer and more established users

<table>
<thead>
<tr>
<th>Task</th>
<th>Newer Users</th>
<th>Established Users</th>
<th>Total Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Install software on a computer which can control or block access to certain websites</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Install security features like a firewall, anti-spy or antivirus software</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Transfer photos from a digital camera or mobile phone to a computer</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Sign an online petition</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Complete government processes online (e.g., register for tax credits, renew driving licence, car tax or passport, complete tax return)</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Contact your local MP, Assembly Member, MSP or local councillor or online</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Listen to radio over a computer</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Join in debates online or give your opinions on social or political issues</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Do my banking over the internet</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Find out information from your local government or local council such as health services, recycling, local libraries</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Buy things over the internet</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Find out about local services such as cinemas and restaurants</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
<tr>
<td>Use e-mail to contact friends and relatives</td>
<td>&lt;3</td>
<td>3+</td>
<td>&lt;3+</td>
</tr>
</tbody>
</table>

1.7 Newer users are less likely to understand funding and regulation of the internet, and search engine results pages

Newer users are less likely to understand internet funding and regulation.

When asked to say, without prompting, what they believed to be the main source of funding for the BBC website and for search engine websites, newer users are more likely than more established users to say they don’t know. Half of newer users could not say how the BBC website is funded (48% vs. 31%) and over half could not say how search engine websites such as Google are funded (56% vs. 38%).

Newer users are less likely than more established users to say that the internet is not regulated in terms of what can be shown and written (21% vs. 30%).

Adults who ever use search engines (85% of newer users, 96% of more established users) were asked to say which of the following statements was closest to their own opinion:

- “I think that if they have been listed by the search engine, these websites will have accurate and unbiased information.”
- “I think that some of the websites in the list will be accurate or unbiased and some won’t be.”
- “I don’t really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of.”
As shown in Figure 69, newer users are more likely than established users to say that search engine results pages will have accurate and unbiased information (36% vs. 24%). As such, newer users could be said to be more likely to trust search engine results instead of critically evaluating the results.

**Figure 69: Search engine user attitudes towards the accuracy or bias of the websites returned by a search: newer and more established users**

<table>
<thead>
<tr>
<th>All users &lt; 3 years</th>
<th>3+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of</td>
<td>18%</td>
</tr>
<tr>
<td>I think that some websites will be accurate or unbiased and some won't be</td>
<td>43%</td>
</tr>
<tr>
<td>I think that if they have been listed by the search engine, these websites will have accurate and unbiased information</td>
<td>36%</td>
</tr>
<tr>
<td>Don't know</td>
<td>7%</td>
</tr>
</tbody>
</table>

NIN 46 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded).

Base: All adults aged 16+ who ever use search engines (1090 aged 16+, 100 first used <3 years ago, 962 first used 3+ years ago). Significance testing shows any differences between newer and more established internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

### 1.8 Newer users and more established users have a similar experience of, and interest in learning about, digital media

Unlike other measures, there are few differences between newer and more established users of the internet when looking at their experience of and interest in learning about digital media.

Around a quarter of newer users have any experience of learning about digital media, as with more established users (26% vs. 24%). Around a quarter of newer users say they would be interested in learning more about any of the aspects of digital technology that we asked about, as with more established users (26% vs. 25%). Newer users are, however, more likely to say they would be interested in learning about how to use the internet (12% vs. 4%).

In terms of preferred ways to learn about digital media, newer users are less likely to say they would prefer to learn through trial and error (28% vs. 49%) and are more likely to say they do not have a preferred way of learning (10% vs. 3%).

### 1.9 Newer users are much more likely to have security concerns about entering personal details but are similar to established users regarding privacy concerns about sharing personal information

Figure 70 compares the responses from newer and more established users in terms of the extent to which they would have any security concerns about providing six types of personal information online, perhaps when making an online payment or registering online. In each case, newer users are more likely than more established users to say they would never
provide that information online and less likely to say they would be happy to provide this information.

As shown earlier, in Figure 63, newer users are less likely than more established users to use the internet for transactions at least weekly (19% vs. 46%), which could account for some of the differences shown in Figure 70 - newer users may be more likely to have concerns because they lack experience with transacting online, or they may be less likely to transact online because they have these concerns. If we focus only on those who do ever use the internet for transactions, however, these differences between newer and more established users are still evident. Newer users are consistently more likely to say they would never provide each type of information; for example, 32% state they would never pay by entering credit card details (vs. 13%) and 23% would never enter a personal email address (vs. 8%).

Figure 70: Personal details prepared to enter online: newer and more established users in 2010

<table>
<thead>
<tr>
<th></th>
<th>&lt;3 years</th>
<th>3+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering your personal email address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Happy to do this</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Have some concerns</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Would never do this</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Not applicable/ I don’t</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Entering your home address details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Happy to do this</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Have some concerns</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Would never do this</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Not applicable/ I don’t</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Paying by entering your credit card details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Happy to do this</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Have some concerns</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Would never do this</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Not applicable/ I don’t</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Entering your mobile phone number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Happy to do this</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Have some concerns</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Would never do this</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Not applicable/ I don’t</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Entering your home phone number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Happy to do this</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Have some concerns</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Would never do this</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Not applicable/ I don’t</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Paying by entering your debit card details</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Happy to do this</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Have some concerns</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>Would never do this</td>
<td>46%</td>
<td>11%</td>
</tr>
<tr>
<td>Not applicable/ I don’t</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>21%</td>
<td>15%</td>
</tr>
</tbody>
</table>

IN36A-F – I’m going to read out some types of information you could be asked to enter when you’re on the internet, and for each one I’d like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1489 in 2010), those who understand search engines results (552), those who first started using the internet under 3 years ago (159), 3+ years ago (1276). Significance testing shows any difference between those who understand search engines results and all internet users, any difference between those first using the internet less than 3 years ago and those first using 3+ years ago

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

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

Responses have been grouped into three broad types of checks:

- ‘professional’ signs (such as a padlock);
- personal instinct (such as a known company name, a professional appearance); and
- peer signs (such as an online review or a recommendation from a friend)
Figure 71 shows that newer users are more likely to say they would not trust any site (13% vs. 4%) and are also more likely to say that they would not make a judgement (23% vs. 13%). As a result, newer users are less likely to say they would make a judgement based on either professional signs (33% vs. 59%) or based on personal instinct (30% vs. 43%).

**Figure 71: Judgements made about a website before entering personal details online: newer and more established users**

<table>
<thead>
<tr>
<th>Professional signs (e.g. Padlock, system messages)</th>
<th>Personal instinct (e.g. Company I’ve heard of looks professional)</th>
<th>Peer signs (e.g. Peer review, recommendation from friends)</th>
<th>Would not trust any site</th>
<th>Would not make a judgement</th>
</tr>
</thead>
<tbody>
<tr>
<td>33% &lt;3 years 3+ years</td>
<td>12% &lt;3 years 3+ years</td>
<td>13% &lt;3 years 3+ years</td>
<td>18% &lt;3 years 3+ years</td>
<td>4% &lt;3 years 3+ years</td>
</tr>
<tr>
<td>30% &lt;3 years 3+ years</td>
<td>43%</td>
<td>13%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>18% &lt;3 years 3+ years</td>
<td>12%</td>
<td>13%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>13% &lt;3 years 3+ years</td>
<td>13%</td>
<td>4%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>59% &lt;3 years 3+ years</td>
<td>59%</td>
<td>59%</td>
<td>59%</td>
<td>59%</td>
</tr>
</tbody>
</table>

IN37 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (158 first used the internet under 3 years ago, 1276 first used the internet 3 or more years ago). Significance testing shows any differences between newer and more established users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

In addition to asking internet users how they would feel about entering personal details online, the 2010 survey asked about any privacy concerns that internet users may have about sharing types of information online through social networking sites, blogs or their own web pages. Figure 72 shows the extent of privacy concerns about sharing five types of information through social networking sites, blogs or their own web pages.

While there are differences in the responses from newer and more established users regarding privacy concerns, these are not as stark as those relating to security concerns (shown in Figure 70). Newer users are as likely as more established users to say they would be happy to share information about what they are doing (32% vs. 33%) and about how they are feeling about work or college (19% vs. 23%). Newer users are, however, more likely to say they would never share photos from their holidays (55% vs. 39%) or from an evening out (55% vs. 40%) or information about how they are feeling in general (58% vs. 48%).
Figure 72: ‘Personality’ information prepared to share online: newer and more established users

Figure 73 compares the trust placed in different media by newer and more established users among those who were able to respond to the question regarding news websites and those who were able to respond to the question regarding social networking sites.

Trust in news websites does not differ between newer and more established users. However, newer users are more likely to say they trust what they read or see on social networking sites (49% vs. 35%).

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1.10 Newer users are more likely to trust what they read or see on social networking sites

Those who use the internet but do not visit news websites or who do not visit social networking sites were given the option to not respond to these questions.
1.11 Length of internet experience does not appear to relate to concerns about the internet

Unlike other measures relating to the internet, there does not appear to be a relationship between length of internet experience and having any concerns about what is on the internet. Newer users are neither more nor less likely than more established users to say they have any concerns (48% vs. 55%) or to name any particular types of concerns about what is on the internet.
Further analysis - 2

Narrow users of the internet

This section looks in detail at Narrow users of the internet; those who make the fewest different types of online uses. The definition of Narrow users is detailed below.

This section looks at the incidence of Narrow users within the overall population of internet users and how this has changed since 2009. It looks in detail at how the internet is used by Narrow users, in terms of volume, location, types of use made, experience of visiting sites that are new to them and making any checks of new sites.

We assess Narrow users’ confidence in using the internet and undertaking particular functions, their understanding of funding and regulation and their experience of and interest in learning about digital media.

Finally we look at the extent of any security and privacy concerns they have, the types of judgements made before entering personal details online and any concerns about internet content.

Key findings

- Narrow users of the internet are defined as those that carry out 1-6 out of a possible 18 types of online activity. This group accounts for two in ten of all internet users (19%), down from three in ten in 2009 (28%). Older people and those in C2 DE socio-economic groups are more likely to be Narrow users.

- As well as doing less online, Narrow users are less confident users. Around one in five Narrow users rate themselves as very confident in judging whether a website is truthful (19% vs. 45% of all internet users). Three in ten Narrow users describe themselves as very confident overall as an internet user, compared to seven in ten of all users (32% vs. 67%).

- They are also less likely to make a judgement about a website before entering personal details by using ‘professional’ signs like padlocks etc. (39% vs. 55% of all internet users). They are less likely to understand search engine results – four in ten (38%) give the most appropriate response that some of the websites will be accurate or unbiased and some won't be, compared to 50% of all internet users.
Since 2009 there has been a decline in the incidence of Narrow users

In order to assess the breadth of use of the internet, the 26 individual internet activities referenced in section 4.2 were grouped into 18 types of online usage ever made by internet users. Internet users have been categorised into Narrow, Medium and Broad users of the internet depending on how many of these 18 types of use they ever make. This division into Narrow, Medium and Broad users was first undertaken following the 2009 survey and was achieved by equally dividing the frequency counts for the 18 categories of use into the three ‘breadth of use’ groups. Narrow users were defined as those ever carrying out 1-6 of the 18 types of online usage, Medium users were defined as those ever carrying out 7-10 types, and Broad users were defined as those ever carrying out 11-18 types. These definitions have been carried forward for the 2010 survey, with the additional four individual internet activities each allocated to one of the 18 types of online usage.

Figure 74 compares the incidence of Narrow, Medium and Broad users in 2009 and 2010, across the different demographic groups from the 2010 survey plus newer and more established internet users.

There has been a decline in Narrow users, now accounting for two in ten of all internet users (19% vs. 28%). This decrease is matched by an increase in the incidence of Broad users since 2009; now accounting for half of all internet users (49% vs. 38%).

Across the demographic groups in the 2010 survey, older users aged 55-64 and 65 and over are more likely to be Narrow users (34% for 55-64s and 52% for 65+ vs. 19%) and younger users aged 16-24 and 25-34 are more likely than all internet users to be Broad users (64% for 16-24 and 62% for 25-34 vs. 49%). Men and women are equally likely to be Narrow users (19% vs. 20%), but men are more likely to be Broad users (54% vs. 44%) and women are more likely to be Medium users (35% vs. 27%). Adults in C2 and DE socio-economic groups are more likely to be Narrow users (26% for C2 and 29% for DE vs. 19%), while adults in AB socio-economic groups are more likely to be Broad users (60% vs. 49%).

Newer users of the internet (first using the internet in the last three years) are more likely to be Narrow users (50% vs. 16%) and less likely to be Broad users, compared to more established internet users (20% vs. 52%).

39 Information (personal) – finding information for booking holidays or for leisure time, looking at news or adult-only websites or (added in 2010) visiting dating websites / Email – sending and receiving emails / Buying and selling – buying and selling things online / Government sites – completing government processes online (e.g. tax credits, driving licence, car tax, passport, tax return) or finding information about public services provided by local or national government / Information (work / college / school) – finding information for work / job / studies or (added in 2010) doing an online course to achieve a qualification, looking at job opportunities / Health – finding information about health related issues / Banking / paying bills – banking and paying bills online / Social networking sites – looking at social networking sites such as Facebook, MySpace, Piczo, Bebo, hi5 or Twitter / Downloading software / Communications – using online chat rooms or Instant Messaging or (added in 2010) making or receiving calls over the internet (e.g. Skype) / Watching video clips / webcasts – watching online or downloading short video clips such as music videos or comedy clips / Music – listening to or downloading music online / Watching TV content – watching online or downloading TV programmes or films / Radio – listening to radio stations online / Civic involvement – looking at political or campaign or issues websites / Games – playing games online / Uploading / adding content to the internet – maintaining a website or blog / weblog / Online gambling

40 The response codes to assess frequency of use were amended in the 2010 survey. This change along with the additional activities covered may have had some impact on the comparability of the findings with previous years.
Across all internet users in 2010, Narrow users are more likely to be older, in C2DE socio-economic groups and newer users, while Broad users are more likely to be younger, male, in AB socio-economic groups and more established users.

**Figure 74: Breadth of use of the internet: 2009 and 2010, by age, gender and socio-economic group**

Just three of the 18 categories of internet use are ever undertaken by around half or more Narrow users, compared to 12 categories by all internet users: Information (personal) (77% vs. 94%), email (73% vs. 92%) and buying and selling (49% vs. 81%). Narrow users are considerably less likely to ever use websites in the categories of banking/paying bills (20% vs. 63%) or social networking sites (21% vs. 60%).

**2.2 Narrow users have a lower overall volume of use and are more likely to use the internet only at home or only outside the home**

Both Narrow and Medium users of the internet have a lower estimated weekly volume of use (5.4 for Narrow and 11.4 for Medium vs. 14.2 hours). Narrow users have a lower volume of use at home (4.1 vs. 9.4 hours), in the workplace/place of education (0.9 vs. 3.8 hours) and anywhere else (0.3 vs. 0.9 hours). Adults who are Broad users have a higher estimated weekly volume of use (19.7 vs. 14.2 hours) and have higher volumes for each of the three possible access places.
Seven in ten Narrow users use the internet only at home and not anywhere else, compared to four in ten across all internet users (68% vs. 39%). Just two in ten Narrow users use the internet both at home and elsewhere, whereas this applies to the majority of all internet users (16% vs. 55%). While around to two in ten Narrow users use the internet only outside the home, this is much higher than the incidence among all users (16% vs. 6%).

As detailed earlier, we have defined Narrow users as those who make just 1-6 of the 18 possible types of online usage. By defining them in this way, it is possible that Narrow users may ‘cluster’ through matching the broader population for just a small number of types of use. However, Narrow users are less likely to undertake each of the 18 different types of use that we asked about. Whereas newer users (detailed in Annex 1) match more established users in their use of social networking, Narrow users do not match the broader population of internet users for any type of use.

2.3 Narrow users are more likely to only visit sites they’ve used before and less likely to regularly make any checks when visiting new websites

In most weeks when the internet is used, Narrow users are more likely to say that they only visit websites they have visited before (46% vs. 26%) and less likely to say they visit lots of websites they haven’t visited before (10% vs. 21%).
When prompted with a list of possible checks and asked to say which, if any, they regularly make, Narrow users are less likely to say they make any of these checks when visiting a website they haven’t been to before (58% vs. 77%).

2.4 Newer users are less likely to have saved money by going online

Narrow users are less likely to have saved money by undertaking each of the five online activities shown in Figure 77, compared to all internet users. Six in ten Narrow users say they have saved money across any of the five activities, compared to eight in ten across all internet users (61% vs. 82%). Those who have not done the activity are shown on the far right of Figure 77 in yellow.

Less than half of all Narrow users say they have saved money through buying online rather than in the shops (37% vs. 63%) or by comparing prices online (38% vs. 62%), whereas most internet users have saved money in these ways. Similarly, while two in ten Narrow users have saved money by booking travel online, this applies to around half of all users (22% vs. 48%).
Figure 77: Extent to which savings have been made by internet users in the last six months: Narrow users

<table>
<thead>
<tr>
<th>Activity</th>
<th>All users</th>
<th>Narrow users</th>
<th>SAVED AT ALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buying something online rather than in the shops</td>
<td>26%</td>
<td>11%</td>
<td>63%</td>
</tr>
<tr>
<td>Comparing prices online</td>
<td>27%</td>
<td>12%</td>
<td>62%</td>
</tr>
<tr>
<td>Booking travel online</td>
<td>19%</td>
<td>8%</td>
<td>48%</td>
</tr>
<tr>
<td>Using a price comparison website</td>
<td>18%</td>
<td>7%</td>
<td>46%</td>
</tr>
<tr>
<td>Using vouchers from websites or emails giving money of at shops or other places</td>
<td>9%</td>
<td>3%</td>
<td>26%</td>
</tr>
</tbody>
</table>

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

Base: All who use the internet at home or elsewhere (1489), Narrow users (313). Significance testing shows any differences between Narrow users and all internet users.

Source: Ofcom research, fieldwork carried out by Saville Rossiter Base in September to October 2010

2.5 Narrow users are less confident users and less interested in most internet functions

Figure 78 shows the ratings of confidence across the different aspects of using the internet, as given by Narrow users and all internet users. For each aspect, Narrow users are less likely to describe themselves as very confident and more likely to describe themselves as not confident.

Less than one in five Narrow users rate themselves as very confident in using the internet to do creative things (13% vs. 52%) or judging whether a website is truthful (19% vs. 45%). Just three in ten Narrow users describe themselves as very confident overall as an internet user, compared to seven in ten of all users (32% vs. 67%).
Figure 78: Confidence as an internet user in 2010: Narrow users

Figure 79 shows the degree of interest and confidence in 13 internet functions among Narrow users and all internet users. Narrow users are more likely than all internet users to say that they are not interested in each of the 13 functions. Overall, just five functions were of interest to most Narrow users, compared to ten functions of interest to most internet users. While each function is less likely to be of interest, the function with the greatest difference in levels of interest between Narrow users and all users is banking over the internet (33% vs. 68%).

Narrow users are more likely to say they are interested but not confident for five of the 13 functions; most notably transferring photos from a digital camera or mobile phone to a computer (22% vs. 12%).
2.6 Narrow users are less likely to understand funding and regulation of the internet and search engine results pages

Narrow users appear to have less understanding of the internet in terms of their knowledge of funding and regulation.

When asked to say, without prompting, what they believed to be the main source of funding for the BBC website and for search engine websites, Narrow users are more likely than all internet users to say they don’t know. Four in ten Narrow users could not say how the BBC website is funded (41% vs. 33%) and over half could not say how search engine websites such as Google are funded (56% vs. 41%).

Narrow users are also more likely to be unsure whether or not the internet is not regulated in terms of what can be shown and written (34% vs. 25%).

Adults who ever use search engines (87% of Narrow users, 94% of all users) were asked to say which of the following statements was closest to their own opinion:

- “I think that if they have been listed by the search engine, these websites will have accurate and unbiased information.”

- “I think that some of the websites in the list will be accurate or unbiased and some won’t be.”

- “I don’t really think about whether or not they have accurate or unbiased information, I just use the sites I like the look of.”
As shown in Figure 80, Narrow users are more likely to be unsure which of the three options applies (14% vs. 7%) and less likely to understand search engine results through giving the most appropriate response that some of the websites will be accurate or unbiased and some won’t be (38% vs. 50%).

Figure 80: Search engine user attitudes towards the accuracy or bias of the websites returned by a search: Narrow, Medium and Broad users

2.7 Narrow users are similar to all users in their experience of and interest in learning about digital media

Unlike other measures, there are few differences between Narrow users and all users of the internet when looking at their experience of, and interest in learning about, digital media.

Around a quarter of Narrow users have any experience of learning about digital media, as with all users (22% vs. 24%). About a quarter of Narrow users say they would be interested in learning more about any of the aspects of digital technology that we asked about, as with all users (23% vs. 25%).

In terms of preferred ways to learn about digital media, Narrow users are more likely to say they prefer to learn through friends and family (51% vs. 36%) and less likely to say they would prefer to learn through trial and error (39% vs. 47%).

2.8 Narrow users are much more likely have security and privacy concerns about sharing personal information

Figure 81 compares the responses of users in each of the breadth of use categories, and of all internet users, in terms of the extent to which they would have any security concerns about providing six types of personal information online, perhaps when making an online payment or registering online. In each case, Narrow users are more likely than all internet users to say they would never provide that information online, and less likely to say they would be happy to provide this information.
Just one in ten Narrow users say they use the internet at least weekly for transactions – whether banking, paying bills, buying or selling online compared to four in ten of all internet users (14% vs. 43%). This difference in experience of transacting online could account for some of the differences shown in Figure 81; Narrow users may be more likely to have concerns because they lack experience with transacting online, or they may be less likely to transact online because they have these concerns.

However, if we focus solely on those who do ever use the internet for transactions, the differences between Narrow users and all internet users are still evident. Narrow users are consistently more likely to say they would never provide each type of information; for example, 32% say they would never pay by entering credit card details (vs. 15%) while 24% would never enter a personal email address (vs. 10%).

Figure 81: Personal details prepared to enter online: Narrow, Medium and Broad users

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

Responses have been grouped into three broad types of checks:

- ‘professional’ signs (such as a padlock);
- personal instinct (such as a known company name, a professional appearance); and
- peer signs (such as an online review or a recommendation from a friend)
Figure 82 shows that Narrow users are more likely to say they would not trust any site (14% vs. 6%) and less likely to make each of the three types of judgements, whether professional signs (39% vs. 55%), personal instinct (31% vs. 42%) or peer signs (11% vs. 17%). Narrow users are not, however, more likely to say they would not make a judgement (17% vs. 14%).

**Figure 82: Judgements made about a website before entering personal details online: Narrow, Medium and Broad users**

<table>
<thead>
<tr>
<th></th>
<th>Narrow Med.</th>
<th>Broad</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional signs</td>
<td>55%</td>
<td>39%</td>
<td>63%</td>
</tr>
<tr>
<td>Personal instinct</td>
<td>42%</td>
<td>31%</td>
<td>43%</td>
</tr>
<tr>
<td>Peer signs</td>
<td>17%</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>Would not trust any site</td>
<td>14%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Would not make a judgement</td>
<td>14%</td>
<td>17%</td>
<td>12%</td>
</tr>
</tbody>
</table>

IN37 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1489 aged 16+, 313 Narrow, 461 Medium, 695 Broad ). Significance testing shows any change between any breadth of use category and all internet users

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

In addition to asking internet users how they would feel about entering personal details online, the 2010 survey asked about any privacy concerns that internet users may have about sharing types of ‘personality’ information online through social networking sites, blogs or their own web pages. Figure 83 shows the extent of privacy concerns about sharing five types of information through social networking sites, blogs or their own web pages.

Narrow users are consistently more likely to say they would never share each type of ‘personality’ information online and less likely to say they would be happy to do so. As mentioned previously, Narrow users are considerably less likely than all internet users to go online for social networking (21% vs. 60%), where this type of information is often shared with others online.41

41 We do not have sufficient interviews with Narrow users with a social networking site profile to look at the responses from this sub-group of Narrow users in more detail.
Figure 83: ‘Personality’ information prepared to share online: Narrow, Medium and Broad users

<table>
<thead>
<tr>
<th>Information</th>
<th>Happy to do this</th>
<th>Have some concerns about doing this</th>
<th>Would never do this</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photos from your holidays</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All 16+</td>
<td>41%</td>
<td>21%</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Narrow</td>
<td>43%</td>
<td>20%</td>
<td>22%</td>
<td>35%</td>
</tr>
<tr>
<td>Medium</td>
<td>38%</td>
<td>27%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Broad</td>
<td>40%</td>
<td>20%</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Photos from an evening out</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All 16+</td>
<td>40%</td>
<td>23%</td>
<td>20%</td>
<td>37%</td>
</tr>
<tr>
<td>Narrow</td>
<td>39%</td>
<td>23%</td>
<td>21%</td>
<td>37%</td>
</tr>
<tr>
<td>Medium</td>
<td>41%</td>
<td>23%</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Broad</td>
<td>42%</td>
<td>23%</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Information about what you are doing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All 16+</td>
<td>41%</td>
<td>22%</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Narrow</td>
<td>41%</td>
<td>21%</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Medium</td>
<td>42%</td>
<td>23%</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>Broad</td>
<td>42%</td>
<td>23%</td>
<td>22%</td>
<td>33%</td>
</tr>
<tr>
<td>Information about how you are feeling in general</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All 16+</td>
<td>41%</td>
<td>21%</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Narrow</td>
<td>41%</td>
<td>22%</td>
<td>23%</td>
<td>34%</td>
</tr>
<tr>
<td>Medium</td>
<td>43%</td>
<td>20%</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td>Broad</td>
<td>43%</td>
<td>21%</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Information about how you are feeling about work or college</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All 16+</td>
<td>42%</td>
<td>22%</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Narrow</td>
<td>42%</td>
<td>21%</td>
<td>23%</td>
<td>33%</td>
</tr>
<tr>
<td>Medium</td>
<td>44%</td>
<td>21%</td>
<td>22%</td>
<td>33%</td>
</tr>
<tr>
<td>Broad</td>
<td>43%</td>
<td>22%</td>
<td>21%</td>
<td>34%</td>
</tr>
</tbody>
</table>

NIN35D/E/A/B/C – I’m going to read out some types of information that people can show on the internet, and for each one I would like you to say how you would feel about putting this information online in terms of any privacy concerns. (Prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1489 aged 16+, 313 Narrow, 461 Medium, 695 Broad users). Significance testing shows any difference between any breadth of use category and all adults aged 16+.
Source: Ofcom research, fieldwork carried out by Saville Rossiter Base in April to May and September to October 2010

2.9 Narrow users are less likely to trust what they read or see on news websites

Figure 84 compares the trust placed in different media by Narrow users and by all internet users among those who were able to respond to the question regarding news websites and those who were able to respond to the question regarding social networking sites. A substantial proportion of Narrow users did not respond with an opinion on news websites (19%), and particularly on social networking sites (60%), which we interpret to mean that they do not visit these types of websites. Figure 84 therefore does not reflect the opinions of all Narrow users, only those who were able to respond.

Narrow users are less likely to say they trust what they read or see on news websites (51% vs. 59%), but trust in social networking sites does not differ between Narrow users and all users (37% vs. 36%).

42 Those who use the internet but do not visit news websites or who do not visit social networking sites were given the option to not respond to these questions.
2.10 Breadth of use of the internet does not appear to relate to concerns about the internet

Unlike other measures relating to the internet, there does not appear to be a relationship between breadth of use and having any concerns about what is on the internet. Narrow users are neither more nor less likely than all internet users to say they have any concerns (53% vs. 54%) or to name any particular types of concerns about what is on the internet.
Further analysis - 3

Non-users of the internet

This section looks in detail at non-users of the internet: those who do not use the internet at home or anywhere else. It looks at the incidence of non-users within the UK adult population, over time and also across the different demographic groups. It also makes comparisons between the demographic profiles of internet users and non-users in 2010. We look at the extent to which non-users have made a proxy use of the internet in the past year. Finally, the reasons given by those who do not have and do not intend to get access to the internet at home are assessed, as well as the extent to which non-users are interested in particular internet functions.

Key findings

- Non-users of the internet are more likely to be older and from DE households. Close to half of non-users are aged 65 and over (46% vs. 7% of users) and the same proportion are in DE socio-economic groups (46% vs. 21% of users). Fifty-seven per cent of non-users are female, compared to 50% of internet users.

- Over six in ten (64%) of those who don’t intend to get the internet at home gave a main reason relating to a lack of interest, with most others giving a main reason relating to cost (23%).

- Emailing, putting photos from a camera onto a computer, and online shopping are the three main activities of interest to non-users, although interest is at a low level even for these (16%, 15% and 13% respectively).

3.11 Two in ten UK adults do not have the internet at home and do not intend to get access in the next 12 months

Figure 85 compares the overall extent of internet take-up and intentions to get access at home across all adults from each of the media literacy surveys and also shows the findings from 2010 across each age group and each socio-economic group.

As already reported, take-up of the internet at home has increased since 2009 (74% vs. 71%)43. Across all UK adults in 2010, two in ten do not have and do not intend to get access to the internet at home, as was also the case in 2009 (19% vs. 21%).

Those aged 65 and over are less likely to have access (35% vs. 74% of all adults) and more likely to say they do not intend to get access (61% vs. 19%). Adults in DE socio-economic groups are less likely to have access (54% vs. 74% of all adults) and more likely to say they are likely to get access in the next 12 months (5% vs. 3%), or are unsure if they will get access (7% vs. 4%) or do not intend to get access (33% vs. 19%).

Across all UK adults, 5% have access but do not use the internet at home. While a small minority, this is more likely among those aged 55-64 (11%) or 65+ (8%), and is also more likely among women than men (6% vs. 4%).

43 The take-up figures collected for this report give useful contextual information to understand better the behavioural and opinion-based findings about media literacy. Official all-UK Ofcom take-up figures based on a larger survey can be found in the annual CMR (Communications Market Report) published in August each year [http://www.ofcom.org.uk/cmr10/].
Figure 85: Internet take-up and intentions: 2005, 2007, 2009 and 2010, by age and socio-economic group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Internet Connection at Home</th>
<th>Likely to Get in Next 12 Months</th>
<th>Don’t Know if Will Get</th>
<th>Don’t Intend to Get</th>
</tr>
</thead>
<tbody>
<tr>
<td>All adults 2005</td>
<td>54%</td>
<td>4%</td>
<td>2%</td>
<td>38%</td>
</tr>
<tr>
<td>All adults 2007</td>
<td>65%</td>
<td>7%</td>
<td>2%</td>
<td>20%</td>
</tr>
<tr>
<td>All adults 2009</td>
<td>71%</td>
<td>6%</td>
<td>4%</td>
<td>19%</td>
</tr>
<tr>
<td>All adults 2010</td>
<td>79%</td>
<td>4%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>16-24</td>
<td>63%</td>
<td>6%</td>
<td>2%</td>
<td>26%</td>
</tr>
<tr>
<td>25-34</td>
<td>64%</td>
<td>7%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>35-44</td>
<td>64%</td>
<td>6%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>45-54</td>
<td>72%</td>
<td>6%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>55-64</td>
<td>74%</td>
<td>6%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>65+</td>
<td>75%</td>
<td>6%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>AB</td>
<td>54%</td>
<td>7%</td>
<td>2%</td>
<td>38%</td>
</tr>
<tr>
<td>C1</td>
<td>75%</td>
<td>6%</td>
<td>2%</td>
<td>18%</td>
</tr>
<tr>
<td>C2</td>
<td>75%</td>
<td>6%</td>
<td>2%</td>
<td>18%</td>
</tr>
<tr>
<td>DE</td>
<td>74%</td>
<td>6%</td>
<td>2%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: Ofcom research, fieldwork carried out by Saville Rossiter -Base in April to May and September to October 2010

3.12 Close to half of non-users are aged 65 and over or in DE socio-economic groups

Figure 86 contrasts the age, socio-economic group and gender profile of users and non-users (in any location) of the internet.

The key differences in profile are that close to one in two non-users of the internet are aged 65 and over (46% vs. 7% of users) and close to one in two non-users are in DE socio-economic groups (46% vs. 21% of users). Fifty-seven per cent of non-users are female, compared to 50% of internet users.
**Figure 86: Demographic profile of all UK adults, users and non-users of the internet 2010**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>All UK adults aged 16 and over</th>
<th>Users of the internet</th>
<th>Non-users of the internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 16-24</td>
<td>14%</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>Aged 25-34</td>
<td>19%</td>
<td>23%</td>
<td>7%</td>
</tr>
<tr>
<td>Aged 35-44</td>
<td>21%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>Aged 45-54</td>
<td>14%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Aged 55-64</td>
<td>16%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>Aged 65 and over</td>
<td>17%</td>
<td>7%</td>
<td>46%</td>
</tr>
<tr>
<td>Total population</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Socio-economic group</th>
<th>Users of the internet</th>
<th>Non-users of the internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>C1</td>
<td>29%</td>
<td>31%</td>
</tr>
<tr>
<td>C2</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>DE</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Total population</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Users of the internet</th>
<th>Non-users of the internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>48%</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>52%</td>
<td>50%</td>
</tr>
</tbody>
</table>

3.13 Two in ten non-users have asked someone else to use the internet on their behalf

We asked non-users of the internet whether they had asked someone else to send an email, get information from the internet or make a purchase from the internet on their behalf in the past year. Two in ten non-users have made a proxy use of the internet in this way, as was also the case in 2009 (21% vs. 19%). As shown in Figure 87, proxy use of the internet is more likely among women, but does not vary between users aged under 55 and those aged 55 and over, between the socio-economic groups or between those who are very confident in their general literacy and all other adults.

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44 Because the population of non-users is older than the general adult population, we can only make age comparisons within the non-user base for those aged under 55 and those aged 55 and over.
Figure 87: Proxy use of the internet in the past year among non-users: 2009 and 2010

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

Twenty-six per cent of all UK adults do not have the internet at home. Seven in ten of all adults who do not currently have the internet at home say they do not intend to get the internet at home in the next 12 months (73%). Those who do not intend to get the internet at home were asked to say why, without any prompting, and were allowed to nominate as many different reasons as applied to them. Figure 88 shows a summary of the reasons given by those who do not intend to get the internet at home in the next 12 months.

Most give reasons relating to a lack of interest, as in previous years, and this is more likely than in the 2009 survey (78% vs. 72%), which had shown a decline in this response since 2007. The next most likely reasons for not intending to get internet access relate to cost (35% vs. 31%), followed by reasons relating to ownership / availability (26% vs. 23%); typically that they do not have a computer (24%), with some saying that they do not have a landline telephone (3%). Those who do not intend to get the internet at home are more likely to give reasons that relate to knowledge compared to 2009 (17% vs. 11%); typically that they don’t know how to use a computer (15%).

The incidence of nominating ‘cost’ as a reason for not getting internet access at home may exclude a proportion of respondents who did not feel comfortable nominating this particular reason. Those stating ‘a lack of interest’ as a possible reason could be masking those that are not intending to get the internet at home for various underlying reasons such as a lack of experience or a lack of confidence regarding the internet or a combination of such factors.

It is worth nothing that as take-up of the internet has increased over time, the demographic make-up of the non-user population has changed. Comparisons of the reasons given by non-users over time will therefore reflect this change.

In the 2010 survey, adults were also asked to give their main reason for not getting internet access at home. As shown in Figure 88, over six in ten (64%) gave a main reason relating to a lack of interest, with most others giving a main reason relating to cost (23%).
In 2010, a total of 478 interviews were conducted with UK adults who say that they do not intend to get the internet at home in the next 12 months. Comparisons across the different demographic groups can be made between those aged under 65 and those aged 65 and over, between those in ABC1 and C2DE socio-economic groups, and between men and women.

Adults aged 65 and over are more likely than those aged under 65 to give reasons relating to a lack of interest (86% vs. 68%), while those aged under 65 are more likely to give reasons relating to cost (50% vs. 17%).

Adults in ABC1 socio-economic groups are more likely than those in C2DE socio-economic groups to give reasons relating to a lack of interest (83% vs. 75%), while those in C2DE socio-economic groups are more likely to give reasons relating to cost (41% vs. 22%) or ownership/availability (29% vs. 18%).

Reasons for not intending to get the internet at home do not differ between men and women in 2010.

### 3.15 Decline in overall interest in internet functions among non-users

Figure 89 shows the degree of interest in 13 internet functions among non-users of the internet in 2010 and also in 2009.

Emailing, putting photos from a camera onto a computer, and online shopping are the three main activities of interest to non-users, although interest is at a low level even for these (16%, 15% and 13% respectively).

Function by function, there is very little difference in the responses from non-users in 2009 and 2010. Just one function sees a change since 2009: a decline in interest in installing

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45 The questionnaires used in the 2005 and 2007 surveys did not include non-ownership of equipment as a possible category for the responses people gave about why they did not intend to get access to the internet at home. The number of categories was extended in the 2009 survey.
software on a computer to control or block access to certain websites (6% vs. 12% in 2009). However, looking across all 13 functions, two in ten non-users in 2010 say they are interested in any of the 13 functions, which is a decline on the 2009 measure of three in ten (22% vs. 30%).

In 2010 this overall measure of interest in any function is higher among non-users aged under 55 than among those aged 55 and over (35% vs. 16%), but does not differ by gender or socio-economic group.

**Figure 89: Interest in internet functions among non-users: 2009 and 2010**

<table>
<thead>
<tr>
<th>Function</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use e-mail to contact friends and relatives</td>
<td>78%</td>
<td>76%</td>
</tr>
<tr>
<td>Transfer photos from a digital camera or mobile phone to a computer</td>
<td>78%</td>
<td>78%</td>
</tr>
<tr>
<td>Buy things over the internet</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Find out about local services such as cinemas and restaurants</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Find out information from your local government or local council</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Install security features like a firewall, anti-spy or antivirus software</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Complete government processes online (e.g., register for tax credits, renew driving licence, car tax or passport, complete tax return)</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Listen to radio over a computer</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Install software on a computer which can control or block access to certain websites</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Do my banking over the internet</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Contact your local MP, Assembly Member, MSP or local councillor online</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Join in debates online or give your opinions on social or political issues</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Sign an online petition</td>
<td>76%</td>
<td>79%</td>
</tr>
</tbody>
</table>

IN9A-M – I’m going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one please say which of the options on the card applies to you. (Prompted responses, single coded)

Base: Adults aged 16+ who do not use the internet at home or elsewhere (542 in 2009, 628 in 2010)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010