# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreword</td>
<td>1</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>2</td>
</tr>
<tr>
<td>1 Introduction</td>
<td>7</td>
</tr>
<tr>
<td>2 Overview of media literacy</td>
<td>10</td>
</tr>
<tr>
<td>3 Television</td>
<td>20</td>
</tr>
<tr>
<td>4 Radio</td>
<td>27</td>
</tr>
<tr>
<td>5 Internet</td>
<td>31</td>
</tr>
<tr>
<td>6 Mobile phones</td>
<td>41</td>
</tr>
<tr>
<td>7 News</td>
<td>49</td>
</tr>
<tr>
<td>8 Attitudes and preferences</td>
<td>56</td>
</tr>
<tr>
<td>9 Looking forward</td>
<td>66</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annex</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Research methodology</td>
<td>67</td>
</tr>
<tr>
<td>2 Technical appendix</td>
<td>68</td>
</tr>
</tbody>
</table>
Foreword

This report presents the results of detailed research undertaken by Ofcom to assess the extent of media literacy in the UK nations and English regions.

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

Ofcom also wishes to ensure that there is better understanding of the similarities and differences between the nations and regions of the UK. To this end, this supplementary report focuses on the extent of media literacy in the nations and regions.

A separate Ofcom report, *The Communications Market: Nations and Regions* examines availability, take-up and consumption of communications services across the UK.

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

The research programme as a whole examines the views and experiences of different groups within the UK. Other supplementary reports include those on older people, minority ethnic groups, children, and disabled people. Our main report on adult media literacy is available at [www.ofcom.org.uk/advice/media_literacy](http://www.ofcom.org.uk/advice/media_literacy).

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

David Currie
Chairman, Ofcom

Philip Graf
Deputy Chair, Ofcom
Chair, Ofcom Content Board
Executive Summary

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

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

Ofcom has carried out an audit of media literacy across the UK and in March 2006 published its first report, which details the audit’s findings across all UK adults. That report, Ofcom’s Media Literacy Audit: report on adult media literacy, is available at www.ofcom.org.uk/advice/media_literacy.

This report focuses on results across the nations and English regions. Its purpose is to provide stakeholders with a range of information about levels of media literacy across the UK. It should be read in tandem with The Communications Market: Nations and Regions, published alongside this report, which examines availability, take-up and consumption of communications services across the UK.

Our audit provides detailed examination of the media habits and opinions of people living in the different nations of the UK, supplemented with indicative findings for the English regions.

There are a variety of different responses across the nations and regions in relation to different aspects of media literacy. That said, there are also a variety of possible demographic explanations for many of these differences, as set out in the Introduction. It is not the purpose of this audit to assign exact causal explanations of the particular responses of each nation, but rather to set out what these responses are as a comparative benchmark.

The audit as a whole looks at how UK adults and children access, understand and create communications, with Ofcom’s particular focus being on electronic communications. In this context, our media literacy definition of access is much wider than availability or take-up of the platforms. Rather, it focuses upon interest, awareness, usage and competence relating to each platform. Understanding relates to how content (such as television and radio programmes, internet websites, or mobile video and text services) is created, funded and regulated. Issues of availability and take-up are covered comprehensively in The Communications Market: Nations and Regions.

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

Our key findings are:

Across the nations and regions

- Respondents in Scotland watch more television than the other nations of the UK (24.3 hours), and those in Northern Ireland the least (19.3 hours). Self-reported hours of radio listening are fairly constant across the UK with the exception of Northern Ireland where workplace/education listening is minimal compared to other nations. Across the UK, the
average number of hours per week that internet users are online is 9.9 hours. People in London use the internet most frequently (13.5 hours). Mobile phone owners in Northern Ireland send more texts than the average for the UK (38 and 28 respectively), and those in London make more mobile phone calls (28 compared to 20).

- Users in Scotland report higher levels of confidence about using digital TV than the UK average. Those in Wales are more confident about using the internet, and those in Northern Ireland are more confident using mobile phones.

- Knowledge about the various types of content control varies across nations. Awareness of the television watershed is lower in Northern Ireland. Confidence in blocking computer viruses or email spam is greater in Scotland. Awareness of age verification systems on mobile phones is higher in Northern Ireland.

- People in England have the highest levels of knowledge of industry funding and regulation, and those in Wales and Northern Ireland among the lowest. People in South West England are also less likely to know about the various types of regulation and funding.

- General levels of concern about all four platforms are lower in Scotland than for the UK as a whole. Concerns about mobile phones are highest in England. Respondents in Northern Ireland are also less likely to say they are concerned about the internet. Respondents in London are more likely to be concerned about radio and the internet.

- People in Scotland and Northern Ireland are more likely to use newspapers to keep up with the news compared to the UK as a whole. Radio is more likely to be used by those in Northern Ireland, and less likely by those in Wales. Radio is also more commonly used in London.

- People in Northern Ireland are less likely than the UK average to trust television news, and are more likely than the UK average to trust newspapers, as are people in the West Midlands. People in the South West are more likely to distrust TV news. Local and regional commercial radio stations are more likely to be trusted by people in Northern Ireland than elsewhere. People in Scotland and Northern Ireland are less likely to trust the BBC website than UK adults as a whole. Levels of trust for weekly local or regional papers are much higher in Northern Ireland than elsewhere. Those in Scotland and Northern Ireland are less likely to trust ‘broadsheets’.

- People in Scotland and Northern Ireland are less likely to say they have learned about various types of media (16% compared to 22% for the UK as a whole). Appetite for learning more is lowest in Wales and Scotland, and highest in London and the West Midlands.

**English regions**

- Take-up of platforms and devices is highest in London and the South East. Interest in digital features of the four platforms is higher in London, the South East and the West Midlands. That said, people in the South East are less confident about being able to carry out various tasks on digital TV and the internet than the UK average.

- People in London and the South East watch less television than elsewhere. Knowledge of funding and regulation of TV is lower is the South West, and higher in the West Midlands. Those in the East Midlands make most use of interactive TV services.
• People in the South West and East England appear to listen to more radio than elsewhere in the UK. Knowledge of radio funding and regulation is higher in the South East and in the West Midlands, and lower in the South West and East Midlands. People in London are more concerned than elsewhere in the UK about what is broadcast on radio. People in the South East are more likely to interact with radio.

• Internet users in London have the highest weekly usage, and use it more than other parts of the UK for accessing news and weblogs. People in the West Midlands, London and the South East show higher awareness of how search engines and the BBC website is funded, and confidence in using content controls. Concerns are higher in the South East.

• Mobile phone owners in London are more likely than the rest of the UK except Northern Ireland to have got their mobiles for texting, for keeping in touch, and for work. People in London and the East Midlands make broader use of their mobiles than the UK average. Those in London make most calls per week than elsewhere in the UK. Mobile phone users in the West Midlands are more likely to make more calls. Those in London and the West Midlands are more likely to be concerned about affordability issues relating to mobile phones than other parts of the UK except for Northern Ireland.

• People in London are more likely to use three or more news sources, and those in the South West least likely, compared to the UK as a whole. People in the South West are more likely to distrust TV news outlets in general.

Scotland

• Self-reported take-up of mobile, digital TV, and access to digital radio services are the same as the average for the UK. Internet penetration is lower. People in Scotland are less interested in the features of mobile and the internet than the UK average.

• People in Scotland watch more television than in other nations of the UK, are more likely to interact with TV, and have higher levels of confidence about using various TV features.

• People in Scotland listen to the radio for similar amounts of time each week as the UK average. They are somewhat less aware of how radio is regulated. Levels of concern about what is on the radio are particularly low.

• Weekly hours of internet use are the same as the UK average, although knowledge of internet controls and confidence about carrying out internet tasks is slightly higher. Awareness of how search engines and the BBC website are funded is the same as the UK average. Internet users in Scotland are more likely to say they download music, videos or software on a weekly basis than other parts of the UK.

• Mobile phone owners in Scotland are least likely to say they got their mobile for texting, although they make around the same number of calls and texts as the average for the UK.

• People in Scotland are less trusting of ‘broadsheet’ newspapers than other nations apart from Northern Ireland.

• People in Scotland are more likely than the UK average to agree that TV viewers and radio listeners should be protected from inappropriate or offensive content (despite the fact that those in Scotland are less likely to express concerns about these issues). In terms of appetite and experience for learning more about the media, they are somewhat less likely either to be interested or have experience than the UK average.
Wales

- Self-reported take-up of mobiles and the internet in Wales is lower than for the UK average; self-reported access to digital radio services is at similar levels; and take-up of digital TV is significantly higher. Volume of use of all four platforms is broadly the same as the UK average, however people in Wales appear to be less interested than the UK average in the digital features of digital radio, the internet and mobile.

- People in Wales are more likely to say they got digital TV for the quality of the picture than the UK average. Levels of interactivity with television are lower than average. Knowledge of TV regulation and controls is average.

- People in Wales are less aware of radio funding and regulation than the UK average. Levels of general concern are low, in keeping with the UK average.

- Internet users in Wales are significantly happier to give out personal details online than the other nations. While confidence in using the internet for various prompted tasks is higher than for the other nations, there is lower awareness of how search engines and the BBC website are funded.

- Mobile phone owners in Wales are more likely to say they got a mobile phone for emergencies and for texting than the UK average. They make a similar use of their mobiles as the UK average, but are less likely to know about age-verification. General concerns about mobile phones are lower than the UK average.

- People in Wales use fewer sources of news than the other nations. Overall, they are more likely to say they distrust newspapers than the UK average. They are more likely to trust BBC News 24, and appear more likely to trust the other UK-based 24-hour news channels.

Northern Ireland

- Take-up of the four main platforms, and of a range of other media devices, is lower in Northern Ireland than the UK average. That said, interest in the digital features of the platforms is at average levels with the exception of digital radio which is lower. Volume of use is low for TV and radio, but higher for the internet and for mobile texting, and breadth of use of both the internet and mobile is higher than the UK average.

- People in Northern Ireland are more likely than the UK average to get digital TV because of particular channels, the quality of the picture, and because they need a new TV set or are aware of digital switchover (DSO). People in Northern Ireland watch less television than across the UK with the exception of London and the South East. They have lower awareness of types of TV funding and regulation.

- People in Northern Ireland are less likely to say they listen to radio in their workplace or place of education. They are less aware of radio regulation, although they have higher than average levels of knowledge about how BBC radio is funded.

- Internet users in Northern Ireland use the internet for about the same amount of time per week as the UK average, but make a broader use of it. They have lower levels of awareness of how search engines and the BBC website are funded.

- People in Northern Ireland are more likely to say they got their mobile phones for texting, keeping in touch with family and friends, and for work, than in other parts of the UK except for London. They send the greatest numbers of texts, and make a broader use of
their mobile phone. They have higher levels of awareness about age-verification controls. They are more likely to be concerned about affordability issues relating to mobile phones than other parts of the UK except for the West Midlands and London.

- People in Northern Ireland use a larger number of news sources than in other parts of the UK. They are more likely than the UK average to trust the press at an overall level, and more likely than the UK average to distrust TV news. Specifically, they are more likely to trust local/regional radio news, and less likely to trust other types of radio news. They are more likely to trust the weekly local press, and less likely to trust ‘broadsheets’.

- People in Northern Ireland are more likely to spend all or almost all their leisure time at home compared to other parts of the UK. They are more likely to say they regularly read newspapers/ magazines or listen to radio than the UK average. They are less likely to agree that content across all four platforms should be free to be expressive and creative compared to the UK as a whole. They are also less likely to have learned about media through classes and training than the UK average.
Section 1

Introduction

1.1 Focus of report

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

Ofcom also wishes to ensure that there is better understanding of the similarities and differences between the nations and regions of the UK in relation to usage of and attitudes towards media. To this end, this supplementary report focuses on the extent of media literacy in the nations and regions.

It provides stakeholders across the UK with a deeper understanding of the similarities and differences between the nations and indicatively between the regions of England. The English regions reported on are the nine English Regional Authorities.

A separate Ofcom report, *The Communications Market: Nations and Regions*, examines availability, take-up and consumption of communications services across the UK.

It is important to state from the outset that the nations and regions of the UK vary according to various socio-economic and demographic measures. *The Communications Market: Nations and Regions* provides details of these differences. Some of the key points are summarised here, and these go some way to explain differences in response between the nations and regions:

<table>
<thead>
<tr>
<th>Age</th>
<th>Northern Ireland and London youngest average (35 and 34); SW and Wales older average (41 and 40)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Socio-economic group</td>
<td>Higher proportion of C2DEs in North; higher proportion of ABC1s in South, particularly for London and SE</td>
</tr>
<tr>
<td>Average weekly income</td>
<td>Lowest for Northern Ireland, NE and Wales; highest for London and SE</td>
</tr>
<tr>
<td>Rural location</td>
<td>12% UK average; 35% in Northern Ireland; 22% in Wales; 23% in SW</td>
</tr>
</tbody>
</table>

1.2 The definition of media literacy

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

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

---

1 The nine English Regional Authorities are East England (EE), East Midlands (EM), London, North East (NE), North West (NW), South East (SE), South West (SW), West Midlands (WM), Yorkshire & Humberside (Y&H).
The purpose of the audit as a whole is to begin to track the media literacy of the UK population (both adults and children). To do this, we needed to translate our definition into quantifiable elements and so have used the following as proxies for some of the key areas of media literacy. It is important to note that our definition of ‘access’ is much wider than simple availability or take-up of the platforms. Rather, it focuses upon interest, awareness, usage and competence.

‘ACCESS’

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

‘UNDERSTANDING’

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

‘CREATING’

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

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

More discussion of the ambit of the audit, plus detailed findings for UK adults as a whole as well as key findings for various sub-groups within the UK population, can be found in Ofcom’s Media Literacy Audit: report on adult media literacy, available at www.ofcom.org.uk/advice/media_literacy.

---

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

Across the whole study, over 3,200 adults (aged 16+) were interviewed; 1,816 in England, 437 in Scotland, 495 in Wales, and 496 in Northern Ireland. The study was conducted for Ofcom by the research agency saville rossiter-base, and fieldwork took place from 8 June to 5 August 2005.

Full details of the research methodology can be found at Annexes 1 and 2, and also in our main report Media Literacy Audit: report on adult media literacy. Copies of the survey are available from our website at [www.ofcom.org.uk/advice/media_literacy](http://www.ofcom.org.uk/advice/media_literacy).

Significance testing at the 99% confidence level was carried out on the results reported here. Where findings are reported as ‘significant’, this is what is being referred to.

1.4 Structure of report

This report focuses on media literacy amongst those living in the four UK nations. Differences across the nine English Regional Authorities are also indicated where possible.

Section 2 provides an overview of the core elements of media literacy across each of the four main platforms – television, radio, the internet, and mobile phones. It places these elements within a wider, scene-setting context of take-up of the platforms across the UK.

Sections 3 – 6 examine each platform in turn, providing further insights into the extent of media literacy for each.

Section 7 focuses on the topic of trust in news sources, as news is a key illustration of how people evaluate content (such as programmes or internet sites) across platforms.

Finally, section 8 provides details about people's overall attitudes towards and preferences for key media platforms, and also indicates learning and educational preferences.

1.5 Further publications

This core report provides the media literacy audit findings for adults living in the four UK nations. A series of further reports are published separately focusing on:

a) All UK adults
b) Children
c) Older people aged 65 and over
d) Disabled people aged under 65
e) Minority ethnic groups
Section 2

Overview of media literacy

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

Summary

Respondents across the UK are more interested in the features of digital TV than they are in the features of the other platforms. There are few variations across the nations in this respect.

Levels of interest in relation to the other platforms vary somewhat by nation, with people in Wales less likely to be interested in them. Interest is also lower than the UK average for the internet and for mobile phones in Scotland, and for digital radio in Northern Ireland. Those in London, the South East and the West Midlands tend to have greater levels of interest than those in other English regions.

Respondents in Scotland watch more TV than people in the other nations, and those in Northern Ireland watch less.

Across the UK, the average number of hours per week that internet users are online is 9.9 hours. People in London use it most frequently (13.5 hours).

People in Northern Ireland are more likely to text frequently (an average of 38 texts per week per owner compared to a UK average of 28), and mobile phone owners in London make more calls (28) than the average for the UK as a whole (20).

Concerns about all four platforms are lower in Scotland than for the UK as a whole. Concerns about mobile phones are higher in England. Respondents are also less concerned in Northern Ireland about the internet. Respondents in London are more likely to be concerned about radio and the internet.

Users in Northern Ireland make a greater breadth of use of their mobiles and of the internet than in the UK as a whole. The same is true for users in London.

Users in Scotland report higher levels of confidence about using digital TV than the UK average. Those in Wales are more confident about using the internet, and those in Northern Ireland are more confident using mobile phones.

Knowledge about the various types of content control varies across nations. Awareness of the television watershed is lower in Northern Ireland. Confidence in blocking computer viruses or email spam is greater in Scotland. Awareness of age verification systems on mobile phones is higher in Northern Ireland.

Levels of knowledge about industry funding and regulation also vary across the nations. People in England have the highest levels of knowledge, and those in Wales and Northern Ireland among the lowest. People in South West England are also less likely to know about the various types of regulation and funding.
Respondents in Northern Ireland are less likely than the UK average to trust TV news outlets, and more likely than the UK average to trust newspapers, as are those in the West Midlands.

Levels of internet content creation are low overall, and lowest for those in Scotland and Northern Ireland.

2.1 Ownership of media devices at home

As a context to our investigation of media literacy, we wanted to build a picture of the levels of uptake of the range of other media devices currently available. All adults were prompted with a list of media devices and were asked to say which they have in their household. Figure 1 below shows the responses in ranked order according to the proportion of all adults owning each device\(^3\).

**Figure 1** Media devices UK adults have at home\(^4\)

Ownership of many of the ‘newer’ digital devices shown in Figure 1 varies across the UK nations. Adults in Wales are significantly\(^5\) less likely to have a CD player in their household than UK adults as a whole, but significantly more likely to have a digital camcorder. Adults in Scotland are significantly less likely to have a VCR and a digital camera. Adults in Northern Ireland differ most from UK adults as a whole in terms of the media devices they have at home, being significantly less likely to have a CD player, digital camera, games console, digital camcorder and DVD recorder.

For the English regions, ownership levels are typically higher for those in London and the South East.

\(^3\) The PVR figure is higher than industry estimates. This is often the case when asking respondents about PVRs, as there is likely to be some confusion with premium subscription Sky packages.

\(^4\) Base: All UK adults (3,244). Questions A8A-J, prompted responses, multi-coded (fieldwork conducted June – August 2005).

\(^5\) In statistical terms, at the 99% level of confidence.
2.2 Overview of media literacy by platform

Interest and awareness

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

Figure 2 summarises interest in features for each of the UK nations, with the overall UK measure shown in the first column for each of the four platforms.

**Figure 2** Interest in features amongst all adults, as a % of maximum potential

<table>
<thead>
<tr>
<th>Platform</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital TV</td>
<td>59%</td>
<td>59%</td>
<td>56%</td>
<td>57%</td>
</tr>
<tr>
<td><strong>UK 59%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Radio</td>
<td>48%</td>
<td>46%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td><strong>UK 47%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet</td>
<td>49%</td>
<td>40%</td>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>UK 48%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile phone</td>
<td>48%</td>
<td>41%</td>
<td>40%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>UK 47%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

‘Interest in (digital) features’

For the UK overall and for each of the nations, respondents were most interested in the features of digital TV (in addition to those features already available on analogue TV), with around three-fifths of the features of interest to all adults. Interest in the digital features of the other three platforms is considerably lower, at around half of the maximum potential across all UK adults. Interest in digital TV features does not differ to any statistically significant extent across the nations, but adults in Wales have significantly lower levels of interest in digital features for each of the other three platforms.

Interest in digital features is also lower for the internet and mobile phones for adults in Scotland, and for digital radio for adults in Northern Ireland.

Across the English regions, interest in digital features tends to be higher for those in London, the South East and the West Midlands.

For each of the platforms, the features of more interest are those which have been established for longer and which are integral to the use of the platform. For example, ‘a crystal clear picture’ is of interest to adults (81% of all UK adults) than ‘channels where you

---

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

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

---
can buy things directly through your TV’ (46%). In other words, people appear to be most interested in that which is already familiar to them.

Figure 3 summarises awareness of the digital features of interest for each of the UK nations, with the overall UK measure shown in the first column for each of the four platforms.

Figure 3 Awareness of features of interest amongst all adults, as a % of maximum potential

<table>
<thead>
<tr>
<th>Platform</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital TV</td>
<td>89%</td>
<td>92%</td>
<td>90%</td>
<td>81%</td>
</tr>
<tr>
<td>Digital Radio</td>
<td>78%</td>
<td>81%</td>
<td>84%</td>
<td>69%</td>
</tr>
<tr>
<td>Internet</td>
<td>91%</td>
<td>92%</td>
<td>93%</td>
<td>78%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>93%</td>
<td>94%</td>
<td>94%</td>
<td>87%</td>
</tr>
</tbody>
</table>

‘Awareness of (digital) features of interest’

Figure 3 shows that amongst those adults who are interested in the digital features of each platform, awareness of those features is generally very high. Awareness is rather lower for digital radio features, however. Awareness and interest are closely linked.

Adults in Northern Ireland are significantly less likely to be aware of the digital features of interest to them for each of the four platforms. The only other statistically significant difference across the nations is that adults in Wales who are interested in digital radio are significantly more likely to be aware of the features of digital radio than those in the other three nations.

None of the English regions differs significantly from the overall UK measures in terms of awareness of digital features of interest.

Usage, concern and competence

The next set of media literacy elements relate to usage, concern and competence (see Figures 4-8). The elements relating to volume of use and level of concern include both analogue as well as digital TV and radio platforms.

---

8 Those interested in a feature for a given platform were asked to state whether they were already aware of this platform feature (questions T14, R14, I23, M17). The index measure is the proportion of features of interest that were already known to adults.
We asked respondents how often they watched, used or listened to the main media platforms. Across each of the four UK nations, TV sees the highest (self-reported) volume of usage for each of the four platforms. Adults in Scotland spend significantly more time watching TV per week than the UK average, whilst those in Northern Ireland spend significantly less time watching TV.

The (self-reported) volumes shown for radio and the internet take usage outside the home into consideration, and show the second and third highest volumes of usage respectively following TV. Adults in Northern Ireland say they listen to radio for fewer hours per week compared to the all UK measure\(^9\). The measures for internet use do not vary to any statistically significant extent across the UK nations, but are significantly higher for adults living in London.

The volume of mobile phone use is assessed in terms of calls made and texts sent by owners per week. For each of the nations, mobile phone owners show a higher volume of texts than calls, with adults in Northern Ireland sending significantly more texts per week compared to the all UK measure. Mobile phone owners in London make significantly more mobile phone calls than the UK average.

\(^9\) This trend is different to the finding from the radio industry currency RAJAR, which reports slightly higher levels of listening in Northern Ireland comparative to the UK as a whole (see *The Communications Market: Nations and Regions*). RAJAR figures overall are also significantly higher than the self-reported figures from the audit – an average of 24.1 hours per week compared to 15.2. This difference is to be expected given the difference in methodology, with RAJAR being based on diaries.
**Figure 5**  
Level of concern amongst all adults, as a % of maximum potential

<table>
<thead>
<tr>
<th>Platform</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV UK 27%</td>
<td>28%</td>
<td>21%</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Radio UK 6%</td>
<td>6%</td>
<td>2%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Internet UK 38%</td>
<td>39%</td>
<td>33%</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Mobile phone UK 23%</td>
<td>24%</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
</tr>
</tbody>
</table>

‘Level of concern’ 10

Levels of concern are:
- negligible for radio;
- around one quarter of the maximum potential for mobile phone and TV;
- highest for the internet at two-fifths of the maximum potential.

Whilst concern about TV and the internet mostly relates to content, this is much less likely for mobile phones, where concern tends to relate to health issues (resulting from usage of the phones or from mobile phone masts) or risks to society’s standards and values.

Adults in Scotland have significantly lower levels of concern regarding each of the four platforms. Adults in Northern Ireland have significantly lower levels of concern regarding the internet and mobile phones. Adults in Wales are significantly less likely to be concerned about mobile phones.

Across the English regions, adults in London are significantly more likely to be concerned about radio and the internet, and those in the South East are significantly more likely to be concerned about the internet.

People in Scotland are also more likely to disagree with the statement ‘I am concerned about the personal information and details that companies or the government may hold about me’ – with 22% disagreeing compared to 14% of the UK as a whole. They are also more likely to agree with the statement ‘I find most people to be friendly and helpful’ – 91% compared to 82% for the UK as a whole (81% in England, 85% in Wales, and 74% in Northern Ireland).

Lower levels of agreement in Northern Ireland are partly explained by far higher levels of ‘don’t know’, rather than active disagreement. People in London, the South East and the East Midlands appear less likely to agree with the statement.

---

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

Figure 6  Breadth of use amongst all adults, as a % of maximum potential

<table>
<thead>
<tr>
<th></th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 18%</td>
<td>18%</td>
<td>20%</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 16%</td>
<td>16%</td>
<td>14%</td>
<td>15%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Across all adult owners, breadth of usage for the internet is around one-fifth of the maximum potential\(^\text{12}\), with breadth of usage for mobile phones at a very similar level.

Internet and mobile phone users in Northern Ireland differ from the UK as a whole through having a greater breadth of use for both platforms, by making more types of uses in a typical week. The same is true for users in London.

‘Competence (with digital tasks)’

Figure 7  Competence with digital features amongst owners, as a % of maximum potential\(^\text{14}\)

<table>
<thead>
<tr>
<th></th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital TV</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 75%</td>
<td>74%</td>
<td>81%</td>
<td>75%</td>
<td>78%</td>
</tr>
<tr>
<td>Internet</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 76%</td>
<td>75%</td>
<td>80%</td>
<td>82%</td>
<td>73%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 88%</td>
<td>88%</td>
<td>88%</td>
<td>90%</td>
<td>91%</td>
</tr>
</tbody>
</table>

\(^{11}\) Measures for breadth of usage are available for internet and mobile phone owners, who were prompted with an extensive list of possible uses and were asked to state the frequency with which they used the internet or their mobile phone for each.

\(^{12}\) The maximum potential being weekly use of all possible uses.

\(^{13}\) All in households with TV, multi-channel TV, internet and who owned mobile phones were prompted with a series of tasks and were asked to say for each whether the task was of interest to them and, if so, whether it was something they could do with confidence (questions T15, T17, R15, I24, M18). The index measure is based on a count of all tasks of interest which owners said they can do with confidence. It should be noted that these measures of competence are based on tasks which are of stated interest to users of each platform. No competence measures are shown for digital radio as these were mostly specific to DAB radio sets, whereas the majority listening to digital radio services at present are doing so through their digital TV set or the internet. It should also be taken into consideration that the tasks used to assess mobile phone competence (for example ‘send a text message’ and ‘store a new contact on your mobile phone’) are considerably more straightforward (and everyday) than the tasks used to assess digital TV or internet competence.

\(^{14}\) Digital features not applicable to non-DAB owners, hence digital radio not reported here.
Figure 7 shows relatively high levels of self-rated competence for tasks relating to digital TV and the internet amongst owners interested in the tasks, with competence for tasks related to mobile phones at higher levels. (For this index measure we excluded those who said they weren’t interested in carrying out the task. More detail on the extent of lack of interest is included in the platform-specific sections below).

Owners in Scotland show significantly higher levels of competence relating to digital TV, with owners in Wales showing significantly higher levels relating to the internet. Across the English regions, levels of competence are significantly lower for the South East relating to both digital TV and the internet.

‘Knowledge of content controls’ 15

Figure 8 Knowledge of content controls amongst owners, as a % of maximum potential16

<table>
<thead>
<tr>
<th>Platform</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital TV</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 81% Aware watershed</td>
<td>82%</td>
<td>79%</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>Internet</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 57% Judgement of website security/ can block viruses/ spam</td>
<td>57%</td>
<td>63%</td>
<td>56%</td>
<td>51%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK 17% Aware age verification/ pre-installed filters</td>
<td>17%</td>
<td>14%</td>
<td>10%</td>
<td>20%</td>
</tr>
</tbody>
</table>

As shown in Figure 8, four-fifths of all adults are aware of the 9 pm watershed (before which certain types of programme content, unsuitable for children, may not be shown). Awareness amongst adults in Northern Ireland is significantly lower, at 75%.

For the internet, the measure is related to the extent that internet users say they carry out various checks or say they are confident about blocking computer viruses or email spam. According to this index measure, three in five of all internet users say they can control content. This measure is significantly higher for those in Scotland.

By contrast, just one in five mobile phone owners demonstrates knowledge of the content controls available on the most recent mobile phones. This measure is significantly higher amongst mobile phone owners in London.

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

16 Not applicable to digital radio services.
Understanding and creation

Figures 9 - 11 show the elements of media literacy relating to understanding and creation, not all of which are applicable to each of the platforms. The elements relating to industry funding and regulation, and trust in news outlets, report on TV and radio generically rather than just their digital platforms.

Figure 9 Knowledge of industry funding/ regulation

<table>
<thead>
<tr>
<th></th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TV</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>UK 80%</strong></td>
<td>81%</td>
<td>77%</td>
<td>76%</td>
<td>69%</td>
</tr>
<tr>
<td><strong>Radio</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>UK 58%</strong></td>
<td>60%</td>
<td>52%</td>
<td>45%</td>
<td>48%</td>
</tr>
<tr>
<td><strong>Internet</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>UK 34%</strong></td>
<td>37%</td>
<td>29%</td>
<td>26%</td>
<td>24%</td>
</tr>
</tbody>
</table>

‘Knowledge of industry funding/regulation’

Knowledge of how TV is funded, and whether or not it is regulated, is fairly high, at an index level of 80% across all UK adults. This measure is significantly lower, however, amongst adults in Wales and Northern Ireland, and also South West England.

Levels of knowledge about radio industry funding and regulation are not as high, with an overall index measure of 58% for all UK adults. This measure is significantly lower for adults in Wales, Scotland and Northern Ireland, and also South West England.

Awareness of how internet search-engines and the BBC website are funded is relatively low, at one-third of all adults. This measure is significantly lower for adults in Wales, Scotland and Northern Ireland, and also South West England.

‘Trust in news outlets’

Trust was assessed in respect of particular news outlets for each of TV, radio and the internet. Trust in types of newspapers has been shown in Figure 10 for comparison.

It should be noted that these overall index measures of trust exclude those who did not express an opinion about the particular news outlet.

---

17 There are no applicable measures of understanding and creation in relation to mobile phones to report on in this section.

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

19 All adults were asked to use a five point scale to indicate the extent to which they would trust or distrust particular TV, radio, internet and press news outlets (question Z8). An index measure for each of the four types of media was calculated based on all giving a rating for each outlet from the list. For example, those giving a rating for two of the three news websites of which one was a ‘would trust’ rating and one was a ‘would not trust’ rating would have an index measure of 50% for extent of trust and 50% for extent of distrust.
Across the four platforms examined, trust in radio and TV news outlets is highest, at over three quarters of the maximum potential[20]. The measure for internet news websites is rather lower, at around two-thirds of the maximum potential.

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

Across the UK nations, adults in Northern Ireland are significantly less likely than the UK average to trust TV news and significantly more likely than the UK average to trust newspapers, as are those in the West Midlands, whilst those in the East Midlands are significantly less likely to trust newspapers. All other measures do not differ to any statistically significant extent from the all UK adult measures.

‘Creating content’ 21

As shown in Figure 11, the measures relating to content creation are internet- and PC-based. Current levels of content creation across all UK adults with internet access are low, at just over one-tenth of the maximum potential.

Across the UK nations, levels are significantly below the UK average amongst those with internet access in Scotland and Northern Ireland, and North West England. Those with internet access in London show significantly higher levels of content creation.

---

20 The maximum potential being a ‘would trust’ rating for all news outlets rated.
21 Three measures have been used to create the index measure – those with internet access who say they have their own website, their own web-log, and who can edit and organise photos on a computer for viewing with confidence (questions I14, I24). The index measure is an average across these three.
Section 3

Television

This section examines television in depth, taking the core elements of media literacy and comparing the UK nations and regions with the UK average. We asked questions about TV generally as well as focusing on the digital platform.

Summary

Take-up of digital television is higher in Wales than in other nations of the UK.

People in Northern Ireland are more likely to say they have acquired digital TV for particular channels or coverage, and also because of the prospect of digital switchover. They are also more likely to cite the quality of the picture, as do people in Wales. People in the West Midlands are more likely to have acquired digital TV for more channels.

Respondents in Scotland watch more television than the other nations of the UK (24.3 hours), and those in Northern Ireland the least out of the four nations (19.3 hours). Within England, those in London and the South East watch the least TV, and those in the South West, West Midlands and East England watch more than the average.

Respondents in Northern Ireland, and in London, are less likely to be aware of the 9pm watershed. Knowledge that TV is regulated is less common in Northern Ireland, Scotland and London than elsewhere in the UK – although a majority of these people are still aware that it is regulated.

People in Scotland have lower levels of concern about what is on television. Those in Northern Ireland are more concerned about levels of quality than are the other nations.

Interactivity appears to be less common for those in Wales and in Northern Ireland than the other nations.

3.1 Take-up of digital TV

According to figures from The Communications Market: Nations and Regions, nearly two thirds (65%) of all UK adults say they have digital TV at home. These ownership levels for each of the UK nations are also shown below, with significantly higher levels of ownership in Wales and significantly lower levels in Northern Ireland, compared to the all UK measure\(^\text{22}\).

---

\(^{22}\) These figures are broadly similar to those from the media literacy survey: UK 62%; England 63%; Wales 68%; Scotland 59%; and Northern Ireland 48%. The slight differences can be attributed to error margins and timing of fieldwork.
Figure 12  Take-up of digital TV

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults</td>
<td>65%</td>
</tr>
<tr>
<td>England</td>
<td>66%</td>
</tr>
<tr>
<td>Scotland</td>
<td>60%</td>
</tr>
<tr>
<td>Wales</td>
<td>72%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>53%</td>
</tr>
</tbody>
</table>

Source: The Communications Market: Nations and Regions

3.2 Reasons for having digital TV

Respondents to our media literacy survey with digital TV were asked to nominate (without prompting) their reasons for getting a digital TV service at home. Figure 13 below compares the reasons given by all UK adults with digital TV and those in each of the four nations.

Figure 13  Reasons for having digital TV

There are some key differences across the nations, although additional channels are the key reason for getting digital TV for each. Those with digital TV in Northern Ireland say they are more likely to have acquired digital TV for particular channels or coverage, for the quality of picture and through needing a new TV set/ seeing the change to digital TV as being inevitable due to the digital switchover (DSO).

Those with digital TV in Wales are also significantly more likely to have acquired digital TV for the quality of picture, but this is mentioned by significantly fewer digital TV owners in Scotland.

---

23 All adults with digital TV (1,998). Question T10, spontaneous responses, multi-coded.
24 The particular responses shown in Figure 13 under ‘more channels’ are ‘to get more TV channels’, ‘not enough choice in the main four/ five channels’, and ‘more programmes/ more variety’. The particular responses under ‘particular channels/ coverage’ are ‘to get the extra BBC channels’, ‘for the football’, ‘for the (other) sports coverage’, ‘to get CBeebies/ children’s channels’, and ‘for the news’. These two overall groups of responses (‘more channels’ and ‘particular channels/ coverage’ have been added together and are shown under ‘any channel mention’.)
Across the English regions, those in the West Midlands are significantly more likely to have acquired digital TV for more channels, with other responses not differing to any statistically significant extent from the all UK measures.

### 3.3 Volume of TV viewing

Figure 14 shows levels of self-reported TV viewing for the three main types of weekly viewing for all adults with a TV at home, and those in each of the four nations.

**Figure 14 Volume of TV viewing per week**

Across all UK adults the average (self-reported) weekly live TV viewing stands at 19.4 hours, plus 2.2 hours time-shifted, and an average of 3.2 hours watching videos or DVDs (2.1 videos or DVDs watched, multiplied by an estimated 1.5 hours each).

This provides an estimate of 21.6 hours of live or time-shifted TV viewing per week on average for all UK adults, with this figure rising to 24.3 hours for adults in Scotland and falling to 19.3 hours for adults in Northern Ireland.

We also examined who were most likely to be heavy TV viewers. We defined heavy TV users as watching 35 or more hours of TV (live or time-shifted) per week. This group accounts for 15% of all UK adults and adults in England, 20% of all adults in Wales and Scotland, and 9% of adults in Northern Ireland.

Adults in Wales and Scotland are significantly more likely to be heavy TV viewers, whilst the reverse is true for those in Northern Ireland. People in London are also significantly less likely to be heavy TV viewers.

---

25 Three questions were asked to assess the volume of TV viewing: hours per week watching TV as it is broadcast (shown in Figure 34 as 'live TV'), hours per week watching recorded TV programmes previously shown live ('recorded TV'), and the number of pre-recorded DVDs or videos watched per week (with this number multiplied by 1.5 to estimate the number of hours per week).

26 Base: All adults with a TV at home (3197). Questions TSA-C, prompted responses, single coded.

27 This figure is lower than the official BARB television viewing figure for 2004 (27.7 hours for adults aged 16+), although this discrepancy is to be expected given the difference in methodologies and the likelihood of self-reported estimates being lower.
3.4 Monthly spend

Amongst those with cable or satellite TV, the average self-reported monthly spend on the TV service received is £33 across all adults. The table below indicates the monthly spend across the UK nations.

<table>
<thead>
<tr>
<th>Average monthly spend on TV service</th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults</td>
</tr>
<tr>
<td>England</td>
</tr>
<tr>
<td>Scotland</td>
</tr>
<tr>
<td>Wales</td>
</tr>
<tr>
<td>Northern Ireland</td>
</tr>
</tbody>
</table>

3.5 Competence with TV tasks

We wanted to understand more about the levels and types of skill people have in using the functions available on their television. All adults with a TV at home (99% of all adults) were prompted with a series of ‘tasks’ associated with television, and were asked for each one to choose from a list of possible responses to indicate if each task was of interest to them, and, if so, whether it was a task they could do with confidence. Those with digital TV were also presented with a series of digital TV-specific tasks and taken through the same options.28

We have analysed these results in two ways – the first, reported in the overview in Section 2, excludes those who say they aren’t interested in the task. This is so that our overall index measure, useful as a comparison across platforms, focuses on those people who actually would wish to use the function.

Self-reported competence with both analogue and digital TV tasks is generally high, with those who are confident outweighing those who are interested in the task but cannot do it with confidence for various reasons.

The overall index measures for competence with a range of analogue and digital TV tasks are:

<table>
<thead>
<tr>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>75%</td>
<td>74%</td>
<td>81%</td>
<td>75%</td>
<td>78%</td>
</tr>
</tbody>
</table>

However, it is also useful to examine the extent to which people are not interested in these tasks, and therefore the findings below include those who express no interest alongside those who do.

Figure 15 below summarises the responses for one of the digital TV tasks: ‘Set up a menu of your favourite channels rather than looking through all the channels’.

28 Questions T15 and T17.
Figure 15  Competence with setting up a digital TV channel menu

<table>
<thead>
<tr>
<th></th>
<th>Can do with confidence</th>
<th>Interested, can't do with confidence</th>
<th>Not interested/ no need</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>50%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>England</td>
<td>50%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Scotland</td>
<td>54%</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>Wales</td>
<td>39%</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>57%</td>
<td>25%</td>
<td>18%</td>
</tr>
</tbody>
</table>

People in Northern Ireland are more likely to say they are confident about carrying out this task, while those in Wales are least likely, due in large part to a lack of interest or perceived need.

3.6 Awareness of TV regulation, channel funding and watershed

Compared to the other media platforms, TV stands out as generating the highest levels of awareness of regulation and channel funding, and also of the content control afforded by the 9pm watershed. Figure 16 below compares levels of awareness relating to TV regulation, channel funding and the watershed.

Figure 16  Awareness of TV regulation, channel funding and watershed

<table>
<thead>
<tr>
<th></th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of 9pm watershed</td>
<td>81%</td>
<td>82%</td>
<td>79%</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>Aware that TV is regulated</td>
<td>81%</td>
<td>83%</td>
<td>76%</td>
<td>77%</td>
<td>56%</td>
</tr>
<tr>
<td>Aware of how commercial channels are mainly funded</td>
<td>76%</td>
<td>77%</td>
<td>76%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>Aware of how BBC TV is mainly funded</td>
<td>84%</td>
<td>84%</td>
<td>83%</td>
<td>82%</td>
<td>86%</td>
</tr>
</tbody>
</table>

Compared to all UK adults, adults in Northern Ireland are significantly less aware of the 9pm watershed (75% compared to 81%), and awareness of the watershed is also significantly lower for those in London. Awareness of TV regulation is significantly lower amongst adults in Northern Ireland, in Scotland and in London.

29 Base: All with digital TV (1,998), Question T17D, prompted responses, single coded.
30 The question asked respondents for ‘the main method’ of funding for the BBC, ITV, Channel 4 and Five.
31 Base: All UK adults (3,244). Questions T20, T23 and T25, spontaneous responses, single coded.
Awareness of commercial TV and BBC TV funding does not vary significantly across the UK nations, but is significantly higher amongst adults in the West Midlands and significantly lower amongst adults in the South West of England.

3.7 Concerns about what is on TV

Close to half (46%) of all UK adults say they have any concerns ‘about what is on TV’. Nominations are dominated by content concerns, as indicated in Figure 17, which shows the proportion of all UK adults and those in each nation nominating any concerns, along with the top areas of concern mentioned.

Figure 17 Concerns about what is on TV

Adults in Scotland are significantly less likely to nominate any concerns regarding TV, with those in Northern Ireland being significantly more likely to nominate concerns regarding poor quality content on TV.

One in twelve (8%) adults claims to be ‘very concerned’ about television, but this measure is significantly lower for those in Scotland and Northern Ireland, at 4%.

---

32 Base: All UK adults (3,244). Question T21, spontaneous responses, multi-coded.
3.8 Interaction and personalisation

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

Amongst those with a television at home and either internet access, a mobile phone or digital TV (90% of all UK adults), one in three (34%) have interacted having seen something on television using a mobile phone (to send a text message), the internet (to send and e-mail or visit a website) or the interactive button on their TV remote control.

This measure of interaction is significantly lower for those in Wales (23%) and Northern Ireland (22%). The comparable measures for England and Scotland are 36% and 29% respectively. Across the English regions, those in the East Midlands are significantly more likely to have interacted with TV in this way.
Section 4

Radio

This section examines both analogue and digital radio services, taking the core elements of media literacy and comparing responses between the nations and regions and all UK adults.

Summary

Claimed penetration of digital radio services is relatively low across the UK when compared to other platforms and to the actual access to such services via the internet or digital TV.

Self-reported hours of listening are fairly constant across the UK with the exception of Northern Ireland where workplace/education listening is minimal compared to other nations.

Awareness of radio regulation and types of station funding differ across the UK: a majority of those in England are knowledgeable about the regulation of radio and also how national commercial stations are mainly funded, but only a minority are aware in the devolved nations. Turning to awareness of BBC radio funding, those in Northern Ireland are most knowledgeable.

Concerns about radio are low. People in Scotland are least likely to be concerned, and those in London more likely.

People in Northern Ireland with the relevant technologies are less likely to have interacted with radio by sending a text or an email or visiting a website.

Claimed digital radio penetration is variable. According to our Media Literacy survey, some 44% of all UK adults are aware they have access to digital radio at home. Claimed ownership levels for the UK nations are shown below, with significantly lower levels of claimed ownership in Northern Ireland, compared to the all UK measure 33.

<table>
<thead>
<tr>
<th>Digital radio</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults</td>
<td>44%</td>
</tr>
<tr>
<td>England</td>
<td>44%</td>
</tr>
<tr>
<td>Scotland</td>
<td>44%</td>
</tr>
<tr>
<td>Wales</td>
<td>39%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>30%</td>
</tr>
</tbody>
</table>

33 Figures from The Communications Market: Nations and Regions are somewhat lower than these figures, due to differences in question-wording: UK 32%; England 33%; Wales 28%; Scotland 30%; Northern Ireland 21%.
4.1 Volume of radio listening per week

The volume of (self-reported) radio listening per week is broken down into hours per week listening at home, in the car, when out and about using a personal radio or a mobile phone (shown in Figure 18 as ‘out & about’), and at work/ school/ college. Figure 18 shows these volumes of weekly listening for all adults, and adults in each of the UK nations.

Figure 18 Volume of radio listening per week

Across all UK adults the average (self-reported) weekly radio listening at home stands at 8.6 hours, plus 6.6 hours elsewhere. This provides an overall estimate of 15.2 hours listening per week on average. The volume of radio listening in England, Wales and Scotland does not differ from this overall average, but adults in Northern Ireland are more likely to listen less, at 12.1 hours per week on average. Much of this difference is due to respondents in Northern Ireland saying they spend less time listening to radio in the workplace/ place of education.

We also looked at those who can be categorised as ‘heavy’ radio listeners, defined as those listening to 33 or more hours of radio (in any location) per week. This group accounts for 14% of all UK adults. Adults in England, Wales and Scotland do not differ significantly from this measure, but those in Northern Ireland are significantly less likely to be heavy radio listeners, at 6% of all adults in Northern Ireland.

4.2 Awareness of radio regulation and station funding

Radio is second to TV in terms of people’s levels of awareness of regulation and how national commercial stations are mainly funded. Figure 19 below compares levels of awareness for the elements relating to radio regulation and funding.

Whilst a majority of all UK adults (59%) are aware that radio is regulated in terms of what can be broadcast, this overall proportion is dominated by responses from those in England. Awareness of radio regulation accounts for a minority in Wales, Scotland and Northern Ireland, with the measure for each nation significantly below the UK measure.

---

34 Base: All UK adults (3,244). Questions RSA-E, prompted responses, single coded.
35 This trend is different to the finding from the radio industry currency RAJAR, which reports slightly higher levels of listening in Northern Ireland comparative to the UK as a whole (see The Communications Market: Nations and Regions). RAJAR figures overall are also significantly higher than the self-reported figures from the audit – an average of 24.1 hours per week compared to 15.2. This difference is to be expected given the difference in methodology, with RAJAR being based on diaries.
Just over half (52%) of all UK adults are aware of the main method of funding for national commercial radio stations, but this measure is significantly lower for those in Wales and in Northern Ireland. Awareness of BBC radio funding is higher, at around two-thirds of adults (65%), with significantly higher levels of awareness for those in Northern Ireland.

For the English regions, awareness of radio funding is significantly higher amongst those in the South East and the West Midlands, and lower amongst those in the South West and East Midlands.

**Figure 19  Awareness of radio regulation and funding**

<table>
<thead>
<tr>
<th></th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware that radio is</td>
<td>59%</td>
<td>63%</td>
<td>44%</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>regulated</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aware of how national</td>
<td>52%</td>
<td>53%</td>
<td>50%</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>commercial stations are</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mainly funded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aware of how BBC radio</td>
<td>65%</td>
<td>66%</td>
<td>63%</td>
<td>62%</td>
<td>75%</td>
</tr>
<tr>
<td>is mainly funded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 4.3 Concerns about what is on radio

Concerns about radio are low. Just one in ten (9%) adults says they have any concerns ‘about what is on radio’. Nominations, whilst low, mostly relate to content in terms of bad language (whether spoken or song lyrics) and poor quality content (in terms of advertising breaks, and content being ratings-driven). Figure 20 shows the proportion of all UK adults and those in each nation nominating any concerns, along with the top areas of concern mentioned.

**Figure 20  Concerns about what is on radio**

---

36 Base: All UK adults (3,244). Questions R17 and R21, spontaneous responses, single coded.
37 Base: All UK adults (3,244). Question R19, spontaneous responses, multi-coded.
Adults in Scotland are significantly less likely to nominate any concerns regarding radio, whilst those in London are significantly more likely.

4.4 Interacting with radio

Finally, we wanted to assess the extent of interactivity taking place with radio content.

Amongst those who listen to the radio at all and either have internet access at home or a mobile phone (79% of all UK adults), around one in seven (15%) overall have interacted having heard something on radio using a mobile phone (to send a text message) or the internet (to send and e-mail or visit a website).

This measure of interaction does not differ to any significant extent for those in each of the UK nations. Across the English regions, those in the South East are significantly more likely to have interacted with radio in this way.
Section 5

Internet

This section examines respondents’ access to, usage of and opinions about the internet, taking each of the core elements of media literacy and comparing responses across the UK nations.

Summary

Reasons for acquiring internet access at home are varied across the UK. Information content is a reason given by nearly half of those in England, but fewer in the nations. Those in Scotland are least likely to say that communication was a reason for purchase, or transactions.

Hours of use per week do not vary much by nation, although users in London have the highest weekly usage, and use it more than other parts of the UK for accessing news and weblogs.

Those in Northern Ireland are most likely to make a broad use of the internet, and are more likely to say they use it weekly or more for communication, leisure information, and maintaining websites or blogs. Those in Scotland are more likely to download music, software or video on a weekly basis than other nations.

People in Wales are less likely to be aware how search engine websites and the BBC website are mainly funded. People in the West Midlands, London and the South East show higher awareness.

People in Wales are more likely to say they are happy to enter personal details on the internet – 26% of internet users in Wales say they are happy to enter all the types of personal detail asked about, compared to 17% of internet users across the UK as a whole.

Levels of concern about the internet are fairly high across the nations, with internet users in Wales more likely to be concerned about risks to society or standards, and those in Northern Ireland less likely to be concerned by offensive content.

Content creativity is not extensive, especially for those in Scotland and Northern Ireland. That said, those in Northern Ireland are more likely to say they maintain (i.e. including contribution to third party sites as well as having one’s own) websites or weblogs than those in the other nations. People in London are also more likely to do this.
According to figures from *The Communications Market: Nations and Regions*, 57% of all UK adults say they have the internet at home. The ownership levels for each of the UK nations are shown below, with lower levels of ownership in Wales, Scotland and Northern Ireland compared to the all UK measure.  

<table>
<thead>
<tr>
<th>Internet at home</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults</td>
<td>57%</td>
</tr>
<tr>
<td>England</td>
<td>59%</td>
</tr>
<tr>
<td>Scotland</td>
<td>51%</td>
</tr>
<tr>
<td>Wales</td>
<td>49%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>48%</td>
</tr>
</tbody>
</table>

5.1 Reasons for acquiring internet access

Respondents to the media literacy survey with internet access at home were asked to nominate (without prompting) their reasons for acquiring access. Figure 21 below shows the aggregated reasons given by those with internet access, both overall and for each of the UK nations.

Close to half (46%) of all with home internet access say they acquired it for the information content, but this is significantly less common outside England. Whilst over one quarter (28%) with the internet at home say they acquired it to be able to communicate, this is significantly less common for those in Scotland, who are also significantly less likely to say they acquired internet access for the entertainment content or to make transactions (through shopping/banking/booking). Those in Wales with internet access are the most likely to say this was to

---

38 These figures are slightly different from the figures from the media literacy audit survey. The equivalent figures from the media literacy survey are: UK 54%; England 57%; Wales 52%; Scotland 43%; and Northern Ireland 47%. Both surveys show that England has higher internet penetration than the other nations. The apparently lower penetration figure in Scotland compared to Wales and Northern Ireland is within the error margin of the media literacy survey.

39 Base: All with the internet at home (1,613). Question I16, spontaneous responses, multi-coded.
keep up with technology. Whilst not statistically significant, it appears that those in Wales and Northern Ireland are more likely to have acquired internet access following a recommendation from friends or family members.

Across the English regions, those in London with internet access are significantly more likely to have acquired the internet for communication and for children in the household.

5.2 Volume of internet use

We wanted to document where people access the internet. Three questions were asked to assess the volume of using the internet in different locations: hours per week used at home, at work / school / college, and anywhere else, as Figure 22 shows:

Figure 22 Volume of internet use per week\(^{40}\)

Across all UK adults the average (self-reported) weekly use of the internet stands at 9.9 hours across all locations, with this average very broadly split two-thirds at home and one-third anywhere else. Across the UK nations the volume of internet use does not differ to a statistically significant extent, but those in London have a significantly higher volume of weekly use.

Heavy internet users were defined as those using the internet for 15 hours or more per week at any location. This group accounts for 12% of all UK adults, and again does not differ to a statistically significant extent across the UK nations. Amongst those in London, however, a significantly higher proportion of adults are heavy internet users.

5.3 Monthly spend

Amongst those with the internet at home, the average (self-reported) monthly spend on the internet service received is £19 across all adults with home access, and does not vary to a statistically significant extent across the UK nations. Similarly, the average spend for the English regions does not differ from the all UK measure.

<table>
<thead>
<tr>
<th>Monthly spend on internet service</th>
<th>All UK adults</th>
<th>England</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>£19</td>
<td>£19</td>
</tr>
</tbody>
</table>

\(^{40}\) Base: Those who use the internet at all (1,746). Questions I10A-C, prompted responses, single coded.
5.4 Breadth of use of the internet

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

All adults using the internet at all were prompted with 24 possible uses and were asked to say for each whether they used the internet for this, and how often. The long list of types of use have been grouped into the eight broad types for ease of comparison, and are shown in Figure 23 below. Each band indicates the proportion of internet users making each type of use at least weekly, with these bands stacked on top of each other to give an indication of breadth of use amongst the different types of internet users.

By nation, internet users in Northern Ireland make the broadest use of the internet, in terms of making more of the groups of uses shown in Figure 23. Three particular uses are made by a significantly higher proportion of internet users in Northern Ireland compared to the UK average: communication, leisure information and creativity, defined here as ‘maintaining a website or weblog’.

Across the English regions, internet users in London also stand out in terms of making a significantly broader use of the internet, in particular for communication, leisure information, news, public/ civic activities and creativity.

The uses shown in Figure 23 under ‘Communication’ are ‘Sending & receiving e-mails’, ‘Using on-line chat rooms’, ‘Using Instant Messaging/ MSN Messenger/ AOL Messenger etc.’. The uses shown under ‘Work/ studies information’ are ‘Finding information for your work/ job/ your studies/ homework’. The uses shown under ‘Leisure information’ are ‘Following latest scores/ sports results as they happen’, ‘Finding information for your leisure time or holidays’, ‘Finding information about cinema/ theatre/ live music’. The uses shown under ‘Transactions’ are ‘Making bookings – travel, accommodation, concert tickets etc.’, ‘Shopping’, ‘Banking and paying bills’, ‘Gambling’, ‘Buying and selling on auction sites – eBay, QXL, etc.’, ‘Renting DVDs’. The uses shown under ‘Entertainment’ are ‘Gaming’, ‘Downloading music/ videos/ software’, ‘Listening to radio stations’, ‘Looking at adult-only websites’. The uses shown under ‘News’ are ‘Looking at local/ regional/ national/ international news’. The uses shown under ‘Public/ civic’ are ‘Finding out about public services’, ‘Looking at political/ campaign/ issues websites’, ‘Looking at local community websites’. The uses shown under ‘Creativity’ are ‘Maintaining a website or weblog/ blog’.

Base: Those who use the internet at all (1,746). Question I11, prompted responses, single coded.
Turning to the individual uses of the internet rather than the grouped areas, a similar picture emerges. Figure 24 below shows the top 10 individual uses made using the internet on at least a weekly basis for all internet users.

**Figure 24**  Top 10 weekly uses made of the internet by all-UK users

- **Sending/ receiving e-mails**: 70% UK, 76% England, 76% Scotland, 82% Wales, 76% Northern Ireland
- **Finding information for work/ studies**: 34% UK, 34% England, 36% Scotland, 34% Wales, 22% Northern Ireland
- **Finding information for leisure/ holidays**: 57% UK, 57% England, 56% Scotland, 57% Wales, 57% Northern Ireland
- **Banking & paying bills**: 12% UK, 12% England, 13% Scotland, 12% Wales, 13% Northern Ireland
- **Using Instant Messaging**: 60% UK, 60% England, 41% Scotland, 47% Wales, 39% Northern Ireland
- **Looking at news**: 41% UK, 41% England, 39% Scotland, 41% Wales, 39% Northern Ireland
- **Finding information about sports**: 45% UK, 45% England, 43% Scotland, 45% Wales, 45% Northern Ireland
- **Finding information about cinema/ theatre/ live music**: 16% UK, 16% England, 16% Scotland, 17% Wales, 16% Northern Ireland
- **Downloading music/ videos/ software**: 37% UK, 37% England, 37% Scotland, 37% Wales, 37% Northern Ireland
- **Shopping**: 27% UK, 27% England, 27% Scotland, 27% Wales, 27% Northern Ireland

### 5.5 Competence with internet tasks

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

We have analysed these results in two ways – the first, reported in the overview in Section 2, excludes those who say they aren’t interested in the task. This is so that our overall index measure, useful as a comparison across platforms, focuses on those people who actually would wish to use the functionality.

Competence with internet tasks is generally high, with those who are competent outweighing those who are interested in the task but cannot do it with confidence for various reasons.

The overall index measures for competence with a range of internet tasks are:

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>76%</td>
<td>75%</td>
<td>80%</td>
<td>82%</td>
<td>73%</td>
</tr>
</tbody>
</table>

43 Base: All adults who use the internet (1,746). Question I11, prompted responses, single coded.

44 Question I24.
However, it is also useful to examine the extent to which internet users are not interested in these tasks, and therefore the findings below include those who express no interest alongside those who do.

Figure 25 below summarises the responses for one key internet task, the ability to ‘block e-mail spam/ unwanted e-mail messages’. Users in Northern Ireland are significantly more likely to respond that they are not interested or have no need for this.

5.6 Awareness of internet funding and content controls

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

Figure 26 sets out these results based on those adults who have internet access at home.

---

45 Base: All with the internet at home (1613). Question I24, prompted responses, single coded.
Figure 26  Awareness of internet funding and content controls

<table>
<thead>
<tr>
<th></th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of how search engine websites are mainly funded</td>
<td>37%</td>
<td>38%</td>
<td>33%</td>
<td>22%</td>
<td>28%</td>
</tr>
<tr>
<td>Aware of how BBC website is mainly funded</td>
<td>56%</td>
<td>57%</td>
<td>56%</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>Interested and confident in ability to block viruses/ spam</td>
<td>58%</td>
<td>58%</td>
<td>66%</td>
<td>61%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Whilst two in five (37%) UK adults with the internet at home know the main way of funding for search engine websites\(^{47}\), this is significantly less common amongst those in Wales.

Over half of UK adults with the internet at home (56%) know the main way the BBC website is funded, with this again being significantly less common amongst adults in Wales with internet access.

Interest in and ability to block viruses and unwanted e-mail messages accounts for three in five (58%) of those with the internet at home. As mentioned previously, users in Northern Ireland are more likely than UK internet users as a whole to say this is not of interest to them.

Across the English regions, awareness of internet funding and content controls is higher in the East Midlands and West Midlands. Awareness of internet funding is also high in the South East.

5.7 Security and the internet

In order to find out how comfortable internet users felt about the security of the internet in terms of personal details, those adults who use the internet at home were prompted with six types of personal details they could be asked to disclose when using the internet, and asked how likely they were to provide these details. Figure 27 below focuses on the proportion of internet users (overall and across the UK nations) who said they would be ‘happy to’ enter each of the personal details on the internet, the remaining internet users responding either that they had some concerns or would never enter these details on the internet\(^{48}\).

\(^{46}\) Base: All adults (3,244), *All with the internet at home (1,613). Questions I24, I31, spontaneous responses, single coded.

\(^{47}\) In response to the question ‘How do you think search engine websites such as Google or Ask Jeeves are funded?’ the ‘correct’ responses were judged to be ‘advertising on the website’ and ‘advertisers pay when users click through to their website’.

\(^{48}\) See Media Literacy Audit: Report on adult media literacy for more information on the extent to which people said they had some concerns or would not give out these details.
A significantly higher proportion of internet users in Wales would be happy to enter their credit card details on the internet. Summing all the responses shown in Figure 27 we find that 17% of internet users would be happy to enter all of these details. This measure is again significantly higher for those in Wales, at 26% of internet users.

5.8 Concerns about what is on the internet

As noted earlier, concerns about the internet are the highest of all the platforms analysed for all UK adults, and this is more apparent amongst those with access to the internet at home.

The concern index in Section 2 was composed of a variety of different measures of concern, and focused on all adult responses. This section examines the measures separately, and focuses on those with internet access.

We asked our respondents whether they had any concerns about the internet, and what these were. Nominations are dominated by content concerns, as indicated in Figure 28, which shows the proportion of those nominating any concerns, along with the top areas of concern mentioned.

---

49 Base: All UK adults who use the internet at home (1,613). Questions I37A-F, prompted responses, single coded.
Over two-thirds (70%) of those with access to the internet at home nominate any concerns about ‘what it in the internet’. This measure does not differ significantly by UK nation, but those with access in Northern Ireland are significantly less likely to nominate concerns relating to offensive content, whilst those with access in Wales are significantly more likely to nominate concerns relating to risk to society/standards/values.

One in five (17%) of all UK adults claim to be ‘very concerned’ about the internet, but this is significantly less common amongst adults in Scotland (12%) and Northern Ireland (13%).

### 5.9 Creativity

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

Levels of creativity are not significant at present, with the extent of creativity at 13% of the potential maximum\(^{51}\) for all UK adults. This is based on three measures: having own website, having own weblog, and ability to edit and organise photos on a computer for viewing.

Creativity is significantly less evident for adults in Scotland and Northern Ireland; at levels of 10% of the potential maximum for each of these nations. Levels are, however, significantly higher amongst adults in London.

Figure 29 below details the elements that make up the index of creativity, for the UK overall and for the UK nations.

---

<table>
<thead>
<tr>
<th>ANY NOMINATIONS</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk to society/standards/values</td>
<td>36%</td>
<td>35%</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Risk to personal privacy</td>
<td>29%</td>
<td>28%</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>Risk to finances/device</td>
<td>25%</td>
<td>25%</td>
<td>28%</td>
<td>31%</td>
</tr>
</tbody>
</table>

\(^{50}\) Base: All adults who use the internet at home (1,468). Question I32, spontaneous responses, multi-coded.

\(^{51}\) The potential maximum being those who have their own website and their own weblog and edit/organise photos on a computer for viewing.
Figure 29  Elements of creativity\textsuperscript{52}

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have own website</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Have own weblog</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Can edit &amp; organise photos on a computer for viewing</td>
<td>58%</td>
<td>58%</td>
<td>59%</td>
<td>65%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Elsewhere in the audit, all internet users were asked whether they maintained a website or weblog / blog. Overall, 7% of internet users claim to do this at least weekly, and the discrepancy between this figure and the lower figure claiming to have their own weblog suggests that the former represents those who contribute to weblogs. Maintaining a weblog is significantly more common amongst internet users in Northern Ireland (at 14%) and also those in London.

\textsuperscript{52} Base: All UK adults with internet access aged 16+ (1,613). Question I32, spontaneous responses, multi-coded.
Section 6

Mobile phones

This section examines respondents’ usage of and opinions about mobile phones, taking each of the core elements of media literacy and comparing responses between UK adults as a whole and those in the nations and regions.

Summary

Mobile phone owners in Wales are more likely to say they got a phone for emergency use and for keeping in touch with friends and family. People in Northern Ireland are also more likely to say they acquired a phone to keep in touch with friends and family, and also for texting, for work and when travelling. These reasons are also more common in London.

Mobile phone owners in Northern Ireland make more texts than the average for the UK (38 and 28 respectively), and those in London make more calls (28 compared to 20).

Mobile phone owners in Northern Ireland make the broadest use of their phones compared to other nations, as do those in London. Mobile phone owners in the West Midlands are more likely to use their phones to make calls than the UK average.

Mobile phone owners in Wales and Northern Ireland are less likely to be concerned by health issues relating to mobile phones. People in Northern Ireland, the West Midlands and London are more likely to nominate concerns about affordability.

People in Northern Ireland, and the East and West Midlands, are more likely to be aware of types of mobile phone content control.

According to figures from *The Communications Market: Nations and Regions*, 80% of all UK adults say they have a mobile phone. The ownership levels for each of the UK nations are shown below, with significantly lower levels of mobile ownership for Wales and Northern Ireland compared to the all UK measure\(^{53}\).

<table>
<thead>
<tr>
<th>Mobile phone</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All UK adults</td>
<td>80%</td>
</tr>
<tr>
<td>England</td>
<td>81%</td>
</tr>
<tr>
<td>Scotland</td>
<td>77%</td>
</tr>
<tr>
<td>Wales</td>
<td>73%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>70%</td>
</tr>
</tbody>
</table>

\(^{53}\) These figures are slightly different from the figures from the media literacy audit survey. The equivalent figures from the media literacy survey are: UK 82%; England 83%; Wales 78%; Scotland 77%; and Northern Ireland 75%. Both surveys show that England has higher mobile phone penetration than the other nations. Differences between surveys can be attributed to fieldwork period and error margins.
6.1 Reasons for acquiring a mobile phone

Those with a mobile phone were asked to nominate (without prompting) their reasons for getting a mobile phone. Figure 30 below compares the reasons given by all UK adults with a mobile phone and those in each of the four nations.

**Figure 30 Reasons for acquiring a mobile phone**

Across all mobile phone owners, very similar proportions say they acquired the phone for emergencies as acquired the phone to keep in touch with friends and family. Mobile phone owners in Wales are significantly more likely to say they acquired the phone for emergency use, but are also significantly more likely to have acquired the phone for texting. Mobile phone owners in Scotland differ in terms of being significantly less likely to have acquired the phone for texting or for contact when travelling/ on holidays.

Mobile phone users in Northern Ireland differ most from the overall UK picture, being significantly more likely to have acquired the phone to keep in touch with friends and family, for texting, for work and when travelling. Mobile phone owners in London give similar reasons to those in Northern Ireland. These similar reasons are likely to be in part a result of the lower age-profile of people in London and Northern Ireland compared to other parts of the UK.

6.2 Volume of mobile phone use

Two questions were asked to assess the volume of mobile phone use: the number of calls made per week and the number of text messages sent per week. Figure 31 shows these two volumes of weekly use for all adults with a mobile phone and those in each of the nations.
Across all mobile phone users, the average (self-reported) weekly volume of calls made stands at 20, plus 28 text messages sent per week. None of the UK nations differs in statistically significant terms from the UK average in terms of the number of calls made per week, but mobile phone owners in Northern Ireland send a significantly higher number of texts per week, at 38. Mobile phone users in London make a significantly higher number of calls per week with their mobile phone (28).

We looked in more detail at those who are using their mobiles most. Two definitions are required: heavy callers and heavy texters. Heavy callers were defined as those making over 30 calls per week. This group accounts for 13% of all UK adults, and does not differ significantly across the UK nations.

Heavy texters have been defined as those sending over 35 texts per week. This group accounts for 19% of all UK adults, and is significantly higher for adults in Northern Ireland, at 24%.

### 6.3 Monthly spend

Amongst all those with a mobile phone, the average monthly spend is £22. The table below indicates the monthly spend across the UK nations, and shows that none of the nations differ to a statistically significant extent from the average monthly spend. Average spend amongst mobile phone owners in London is, however, significantly higher than average.

<table>
<thead>
<tr>
<th></th>
<th>Monthly spend on mobile phone service</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>£22</td>
</tr>
<tr>
<td>England</td>
<td>£22</td>
</tr>
<tr>
<td>Scotland</td>
<td>£22</td>
</tr>
<tr>
<td>Wales</td>
<td>£20</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>£20</td>
</tr>
</tbody>
</table>

---

**Figure 31 Volume of mobile phone use per week**

Across all mobile phone users, the average (self-reported) weekly volume of calls made stands at 20, plus 28 text messages sent per week. None of the UK nations differs in statistically significant terms from the UK average in terms of the number of calls made per week, but mobile phone owners in Northern Ireland send a significantly higher number of texts per week, at 38. Mobile phone users in London make a significantly higher number of calls per week with their mobile phone (28).

**Base:** All UK adults with a mobile phone (2,550). Questions M8 and M9, prompted responses, single coded.
6.4 Breadth of use of mobile phones

In order to find out more about the types of activity people carry out on their mobiles, all adults with a mobile phone were prompted with 22 possible uses and were asked to say for each whether they used their mobile phone for this, and how often. The long list of types of use have been grouped into the six broad types shown in Figure 32 below. Each band indicates the proportion of mobile phone owners overall and in each nation making each type of use at least weekly, with these bands stacked on top of each other to indicate the breadth of use amongst users.

Figure 32 Key types of use made of mobile phones at least weekly

Mobile phone owners in Northern Ireland make the broadest use of mobile phones, in terms of making more of the groups of uses shown in Figure 32. Two types of use are made by a significantly higher proportion of mobile phone users in Northern Ireland compared to the UK average: information and advanced communication.

Compared to the breadth of use of the internet, use of mobile phones is relatively narrow, with a minority of mobile phone owners making any of the uses beyond basic communication.

Across the English regions, mobile phone owners in London and to a lesser extent the East Midlands stand out in terms of making a broader use of mobile phones.

Figure 33 below shows the top five individual uses made using mobile phones on at least a weekly basis for all with a mobile phone.

---

56 Base: All UK adults with a mobile phone (2,550). Questions M10, prompted responses, single coded.
As Figure 33 shows, a minority of mobile phone owners use their phone on a weekly basis for anything other than to make calls or send text messages. Mobile phone owners in Northern Ireland are significantly more likely to send text messages in a typical week compared to the UK average.

Across the English regions, mobile phone owners in West Midlands are significantly more likely to use their phone to make calls in a typical week compared to the UK average.

6.5 Competence with mobile phone tasks

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

We have analysed these results in two ways – the first, reported in the overview in Section 2, excludes those who say they aren’t interested in the task. This is so that our overall index measure, useful as a comparison across platforms, focuses on those people who actually would wish to use the function.

Competence with mobile tasks is extremely high, with those who are competent outweighing those who are interested in the task but cannot do it with confidence for various reasons. These high level of competence are in part an outcome of the fact that the tasks are mostly related to the core functions of the mobile phone.

The overall index measures for competence with a range of mobile tasks are:

57 Base: All UK adults with a mobile phone (2,550). Question M10, prompted responses, single coded.
58 Question M18.
However, it is also useful to examine the extent to which mobile users are not interested in these tasks, and therefore the findings below include those who express no interest alongside those who do. For mobile tasks, the majority of tasks elicit very low levels of disinterest, with the exception of ‘accessing mobile operator’s internet sites from your phone’, which elicits much higher ‘not interested/no need’ nominations (at 40%).

Figure 34 below summarises the responses for one mobile phone task: ‘Lock your phone so it doesn’t dial numbers by mistake’. This task is reasonably typical in that none of the UK nations differs significantly from the all UK measure in terms of saying they can do the task with confidence.

6.6 Concerns about mobile phones

Compared to other media platforms, concerns about mobile phones are relatively low. Two-fifths of all adults (42%) with a mobile phone say they have any concerns ‘about mobile phones’. The three main areas of concern relate to health, a risk to society/standards/values, and affordability, as indicated in Figure 35.

---

59 Base: All adults with a mobile phone (2,550). Question M18, prompted responses, single coded.
Mobile phone owners in Wales and Northern Ireland are significantly less likely to nominate health concerns, with those in Scotland and Northern Ireland significantly less likely to nominate concerns relating to a risk to society/ standards/ values (for example, intrusion, paedophiles contacting children, mis-use of camera phones).

By contrast, mobile phone owners in Northern Ireland are significantly more likely to nominate affordability concerns, as are mobile phone users in London and West Midlands.

Five per cent of all adults claim to be ‘very concerned’ about mobile phones, and this measure does not differ to any statistically significant extent across the UK nations or English regions.

6.7 Content controls

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

Amongst 3G owners, levels of awareness are higher – some 30% know of age verification systems, 16% about filtering, and 39% are aware of either.

Figure 36 below shows responses from all mobile phone users and those in each of the UK nations.

---

60 Base: All adults with a mobile phone (2,550). Question M20, spontaneous responses, multi-coded.
61 It is of note that concerns about affordability do not appear to be linked to income levels – while people in Northern Ireland have average incomes lower than the UK as a whole, those in London have higher than average incomes.
Figure 36  
**Awareness of mobile phone content controls**

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of age verification</td>
<td>13%</td>
<td>14%</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Aware of filtering</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>Aware of either</td>
<td>17%</td>
<td>17%</td>
<td>14%</td>
<td>10%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Awareness of mobile phone content controls is significantly lower amongst mobile phone owners in Wales, with significantly higher awareness of pre-installed mobile phone filters amongst mobile phone owners in Northern Ireland.

Amongst the English regions, awareness of mobile phone content controls is significantly higher amongst mobile phone owners in East and West Midlands, and significantly lower amongst mobile phone owners in North East, North West and Yorkshire/Humberside.

---

62 Base: All adults with a mobile phone (2,550). Question M12, spontaneous responses, multi-coded.
Section 7

News

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

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

Summary

Almost all adults use TV for news, and those in the West Midlands are particularly likely to do so.

People in Scotland and Northern Ireland are more likely to use newspapers to keep up with the news compared to the UK as a whole. Radio is more likely to be used by those in Northern Ireland, and less likely to be used by those in Wales. Radio is also more commonly used in London.

People in Wales use fewer media sources for news than the average – 31% of those in Wales use three or more media sources, lower than the UK average of 43%. In contrast, those in Northern Ireland are far more likely to use more media sources, with 61% using three or more.

People in Northern Ireland are less likely than the UK average to trust television news, and are more likely than the UK average to trust newspapers, as are those in the West Midlands. People in the South West are more likely to distrust TV news.

Local and regional commercial radio stations are more likely to be trusted by people in Northern Ireland than elsewhere.

People in Scotland and Northern Ireland are less likely to trust the BBC website than UK adults as a whole.

Levels of trust for weekly local or regional papers are far higher in Northern Ireland than elsewhere. Those in Scotland and Northern Ireland are less likely to trust ‘broadsheet’ newspapers than the UK average.

7.1 Sources used for news

All adults were prompted with a list of news sources and were asked to state which they use to keep up with national news, and which one of those sources they use the most for national news. Figure 37 shows the sources used at all for national news across all adults and those in each of the UK nations, while Figure 38 shows the sources used most for national news.
Across the UK, almost all adults use TV for news, and this measure does not differ across the UK nations. Across the English regions, those in the West Midlands are significantly more likely to use TV for news.

As indicated in Figure 37, there are some statistically significant differences across the UK nations in terms of the types and variety of media used to keep up with national news. Whilst just over two-thirds of adults use newspapers to keep up with national news, this is more common amongst adults in Scotland and Northern Ireland. Radio is used by around two in five adults, with this being used by a significantly higher proportion of adults in Northern Ireland and a lower proportion of adults in Wales. Radio is also more commonly used for news in London.

Adults in Wales use fewer sources of news. As already mentioned, radio is less likely to be used by those in Wales, but this also applies to magazines and Teletext. Around one-third (31%) of adults in Wales use three or more media sources for news, significantly lower than the UK average of 43%.

By contrast, adults in Northern Ireland use more sources of news. As already mentioned, newspapers and radio are more likely to be used by those in Northern Ireland, and these adults are also significantly more likely to use magazines, Teletext and mobile news alerts than UK adults as a whole. Around three in five (61%) adults in Northern Ireland use three or more media sources for news, significantly higher than the UK average of 43%.

Across the English regions, adults in London stand out in terms of significantly higher use of radio, the internet and magazines for national news. Those in West Midlands are significantly more likely to use TV and Teletext compared to all UK adults.

---

63 Base: All UK adults (3,244). Question Z6, prompted responses, multi-coded.
There are relatively few differences across the UK nations regarding the news source that is used the most by adults. TV dominates as being the source used the most by two-thirds of all adults. This measure does not vary significantly across the UK nations, but is significantly higher for those in West Midlands.

Adults in Northern Ireland are more likely to name magazines as the source used the most for news, although the actual proportion is very small.

Very few adults claim to use the internet most for national news, but this is significantly more common amongst those in London.

### 7.2 Summary of extent of trust in news outlets

Figure 39 shows the index measures for the extent of trust and extent of distrust for the four media types, based on those giving ratings for any of the titles from an illustrative list within each media type.

---

64 Base: All UK adults (3,244). Question Z7, prompted responses, single coded.
65 All adults were prompted with a list detailing particular TV, radio, internet and press news ‘titles’ in order to assess trust in news outlets. The titles were chosen to be as widely available as possible and to illustrate a range of titles for each of the four types of media. Adults were asked to use a five point scale to indicate the extent to which they would trust or distrust each news outlet. An index measure for each of the four types of media was calculated based on all giving a rating for each outlet from the list. For example, those giving a rating for two of the three news websites of which one was a ‘would trust’ rating and one was a ‘would not trust’ rating would have an index measure of 50% for extent of trust and 50% for extent of distrust. Don’t know responses were excluded.
There are few statistically significant differences across the UK nations in terms of the extent of trust and distrust for news as a proportion of the maximum potential by the four media types shown in Figure 39.

That said, adults in Northern Ireland are significantly less likely to trust TV news, and significantly more likely to trust newspapers than is the case for UK adults as a whole. By contrast, adults in Wales are significantly more likely to distrust newspapers than the UK average.

Across the English regions, adults in the South West are significantly more likely to distrust TV news outlets. In terms of trust in newspapers, adults in the West Midlands show a significantly higher degree of trust whilst those in the East Midlands show a significantly higher degree of distrust.

7.3 Detail of levels of trust in news outlets

This section looks in more depth at the individual news media outlets. Figures 40-43 below show the proportion of UK adults and those in each of the four UK nations stating that they trust each of the particular TV, radio, and internet news 'titles' used to assess trust in news outlets, starting with TV in Figure 40 below. Press outlets are summarised into categories.

It is important to note that the residual proportion for each of the news outlets in Figures 40-43 does not solely indicate distrust for each outlet. Respondents could also indicate that they neither trusted nor distrusted a given outlet, or that they did not know the outlet and so could not assign a rating.

---

**Figure 39  Extent of trust for news by media type**

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Northern Ireland</th>
<th>Scotland</th>
<th>Wales</th>
<th>England</th>
<th>All Adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV news</td>
<td>72%</td>
<td>77%</td>
<td>72%</td>
<td>78%</td>
<td>76%</td>
</tr>
<tr>
<td>Radio</td>
<td>72%</td>
<td>77%</td>
<td>72%</td>
<td>78%</td>
<td>76%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>61%</td>
<td>61%</td>
<td>61%</td>
<td>61%</td>
<td>64%</td>
</tr>
<tr>
<td>Websites</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>Papers</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
</tr>
</tbody>
</table>

---

*66 Base: All UK adults (3,244). Index measures used. Question Z8, prompted responses, single coded.*

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

**Figure 40 Trust in TV news outlets**

<table>
<thead>
<tr>
<th>Media Outlet</th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC TV News</td>
<td>77%</td>
<td>73%</td>
<td>76%</td>
<td>59%</td>
<td>76%</td>
</tr>
<tr>
<td>ITV News</td>
<td>69%</td>
<td>70%</td>
<td>71%</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Channel 4 News</td>
<td>66%</td>
<td>61%</td>
<td>71%</td>
<td>69%</td>
<td>67%</td>
</tr>
<tr>
<td>BBC News 24</td>
<td>64%</td>
<td>64%</td>
<td>68%</td>
<td>68%</td>
<td>69%</td>
</tr>
<tr>
<td>ITV News Channel</td>
<td>60%</td>
<td>63%</td>
<td>61%</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>Five News</td>
<td>62%</td>
<td>62%</td>
<td>65%</td>
<td>63%</td>
<td>60%</td>
</tr>
<tr>
<td>Sky News</td>
<td>61%</td>
<td>62%</td>
<td>61%</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>Teletext</td>
<td>65%</td>
<td>62%</td>
<td>61%</td>
<td>61%</td>
<td>60%</td>
</tr>
<tr>
<td>Fox News</td>
<td>63%</td>
<td>64%</td>
<td>67%</td>
<td>62%</td>
<td>59%</td>
</tr>
<tr>
<td>Al Jazeera</td>
<td>60%</td>
<td>59%</td>
<td>59%</td>
<td>62%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Adults in Northern Ireland are the most likely to differ from UK adults as a whole in terms of their rating of trust in TV news outlets. A statistically significant lower proportion of adults in Northern Ireland assign a ‘would trust’ rating for BBC TV News, BBC News 24, ITV News Channel, Five News, Sky News, and Teletext.

Adults in Scotland are significantly less likely to trust BBC News 24, Sky News, Teletext, and Al Jazeera. By contrast, adults in Wales are significantly more likely to trust BBC News 24.

Across the English regions there are few instances of significantly higher levels of trust, but these all relate to adults in the West Midlands. Adults in the South West are significantly less likely to trust the majority of the TV news outlets listed.

---

68 Base: All UK adults (3,244). Question Z8, prompted responses, single coded.
Similarly to TV news outlets, adults in Northern Ireland are significantly less likely to trust most of the radio news outlets shown in Figure 42; BBC Radio 4, BBC World Service and Virgin Radio all attract significantly lower ratings for 'would trust'. Conversely, adults in Northern Ireland are significantly more likely to trust local/ regional commercial stations for news than UK adults as a whole.

Adults in Scotland are also significantly less likely to trust BBC Radio 4, but do not differ from the all-UK measures for the other radio news outlets.

Across the English regions, adults in London and the West Midlands are significantly more likely to trust the radio news outlets listed, with those in the South East less likely.

Adults in Scotland and Northern Ireland are significantly less likely to trust the BBC website and MSN News than UK adults as a whole, but responses regarding Yahoo News do not differ from the all UK average.

---

**Figure 41**  Trust in radio news outlets

<table>
<thead>
<tr>
<th>Radio News Outlet</th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 4</td>
<td>69%</td>
<td>74%</td>
<td>75%</td>
<td>65%</td>
<td>75%</td>
</tr>
<tr>
<td>BBC World Service</td>
<td>68%</td>
<td>73%</td>
<td>75%</td>
<td>67%</td>
<td>77%</td>
</tr>
<tr>
<td>Local/ regional commercial stations</td>
<td>69%</td>
<td>76%</td>
<td>77%</td>
<td>69%</td>
<td>79%</td>
</tr>
<tr>
<td>Virgin Radio</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
</tr>
</tbody>
</table>

---

**Figure 42**  Trust in news websites

<table>
<thead>
<tr>
<th>News Website</th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>bbc.co.uk</td>
<td>37%</td>
<td>33%</td>
<td>39%</td>
<td>37%</td>
<td>39%</td>
</tr>
<tr>
<td>Yahoo News</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>MSN News</td>
<td>17%</td>
<td>19%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
</tbody>
</table>

---

**Figure 43**  Trust in newspapers

<table>
<thead>
<tr>
<th>Newspaper Type</th>
<th>All UK</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily newspaper</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Weekly newspaper</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>'Broadsheet' newspapers</td>
<td>42%</td>
<td>42%</td>
<td>42%</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>'Tabloid' newspapers</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
</tr>
</tbody>
</table>

---

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

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

71 Base: All UK adults (3,244). Question Z8, prompted responses, single coded.
Again adults in Northern Ireland and Scotland differ from the UK average in terms of the extent of trust in newspapers for news. Adults in Northern Ireland are significantly less likely to trust ‘broadsheet’ newspapers and significantly more likely to trust a weekly regional/local newspaper. Those in Scotland are also significantly less likely to trust ‘broadsheet’ newspapers and also significantly less likely to trust a weekly regional/local newspaper.

Levels of trust in daily local/regional newspapers and ‘tabloid’ newspapers do not differ from the UK average.
Section 8

Attitudes and preferences

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

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

Summary

People in Scotland appear to be less likely than the UK average to say they regularly listen to the radio or use their mobile phone. People in Northern Ireland are more likely to say they read newspapers or magazines, and listen to the radio. Those in London are more likely to listen to a portable music device.

People in Northern Ireland are more likely than across the UK as a whole to say they would miss their mobile phones most. Those in the South East are more likely to say they would miss listening to the radio, and using the internet.

People in Northern Ireland are more likely to say that they spend all or almost all of their leisure time at home (24% compared to 17% across all UK adults).

People in Northern Ireland are less likely to agree that platform content should be free to be expressive and creative, although this is driven largely by ‘neutral’ responses than active disagreement. Those in Scotland are rather more likely to agree that people should be protected from inappropriate or offensive TV and radio content (despite those in Scotland being less concerned about content on these platforms than the other nations).

People in Scotland are more likely to say they prefer to learn about digital technologies from family and friends, whereas those in Northern Ireland are less likely to nominate this type of learning. Indeed those in Northern Ireland are more likely to say they have no interest in learning (22% compared to 10% for the UK as a whole).

People in Scotland and Northern Ireland are less likely to say they have learned about various types of media (16% compared to 22% for the UK as a whole). Appetite for learning more is lowest in Wales and Scotland, and highest in London and the West Midlands.
8.1 Media usage and attachment

A key theme for the media literacy audit is to understand media platforms in relation to each other, to see how the balance of usage is currently constituted and be in a position to track how this may change over time. All adults were asked to choose from a list of nine media activities to indicate which they regularly do\(^{72}\), and which of these they would miss doing the most. Figure 44 shows which activities are carried out regularly, and Figure 45 shows which activities would be missed the most.

**Figure 44  Regular media activities amongst all adults\(^{73}\)**

Adults in Scotland are significantly less likely to say they regularly listen to radio or use a mobile phone. Adults in Northern Ireland are significantly more likely to say they regularly read newspapers/ magazines or listen to radio. People in Scotland and Northern Ireland are less likely to say they regularly use the internet.

Across the English regions, those in London are significantly more likely to say they regularly use the internet via a computer or listen to a portable music device (possibly at the expense of listening to music on a hi-fi, as this activity is significantly less likely to be named by those in London). Those in the West Midlands are significantly more likely to say they regularly use a mobile phone or watch videos/ DVDs. Those in the South East are significantly less likely to say they play console/ computer games.

---

72 ‘Regularly do’ being defined by respondents themselves.

73 Base: All UK adults (3,244). Question A4, prompted responses, multi-coded.
There is just one difference across the UK nations in terms of the activity that respondents say they would miss most - a significantly higher proportion of adults in Northern Ireland nominate using a mobile phone.

Across the English regions those in the South East are significantly more likely to name listening to radio and using the internet, those in Eastern England are significantly more likely to name listening to music on a hi-fi, and those in London are significantly more likely to name listening to music on a portable music device.

### 8.2 Amount of leisure time spent at home

Opportunities to use many of the various media devices and platforms features in the audit will clearly be impacted by the amount of time spent at home. Figure 46 below indicates the proportion of all adults, and those in each of the UK nations who spend all or nearly all of their leisure time at home.
Adults in Northern Ireland are significantly more likely to say they spend all or most of their leisure time at home compared to all UK adults.

8.3 Attitudes towards new technology

Respondents were prompted with four statements regarding attitudes towards new technology and were asked the extent to which they agreed or disagreed with each of them. Figure 47 below shows the proportion of adults overall and in each nation who agreed with each of the four statements.

Figure 47 Attitudes towards technology (% agree)

Across all adults what emerges is a mixed, somewhat contradictory picture – people are both cautious about technology, yet also say they embrace it. Adults in Northern Ireland differ significantly from UK adults as a whole in their responses to each of the four statements shown in Figure 47, being both less cautious but also less interested.

Adults in Wales and Northern Ireland are significantly less likely to say they prefer to wait for new technology to become cheaper and better, and also less likely to say that people rely too much on technology nowadays.

Adults in Scotland and Northern Ireland are significantly less likely to say they’re interested in new technology and try to keep up with technology.

This ambivalence amongst adults as a whole is manifest in the context of people’s views about whether the media platforms under discussion should be free to publish what content they like, and whether protection should exist. Figures 48 and 49 detail the level of agreement to these questions.

---

76 Base: All UK adults (3,244). Questions A1A-E, prompted responses, single coded.
Responses for TV and radio are similar, with a clear majority of adults responding that these platforms must be free to be creative and expressive. For internet and mobile phone content this is still the most common opinion, but around one-third of adults neither agree nor disagree.

For each of the platforms, adults in Northern Ireland are significantly less likely to agree that the platform content should be free to be expressive and creative. This is due to a higher proportion with neutral attitudes to these issues, however, rather than a higher proportion disagreeing. The same is true for adults in Wales and Scotland regarding mobile phone content.

Across the English regions, adults in the West Midlands are significantly more likely to agree that content should be free to be expressive and creative relating to the internet and mobile phones. Adults in the East Midlands agree regarding radio content, but are significantly more likely to disagree regarding internet and mobile phone content.
As shown in Figure 49, responses for each of the platforms are more uniform regarding whether users should be protected from inappropriate or offensive content than is the case for whether platforms should be free to be expressive and creative. Around three quarters of adults feel that users should be protected, with just one in ten or fewer disagreeing.

Adults in Scotland are significantly more likely to agree that TV viewers and radio listeners should be protected. Adults in Northern Ireland are significantly less likely to agree that internet and mobile phone users should be protected, but again this is due to higher levels of neutral responses rather than higher levels of disagreement regarding user protection.

Compared to the responses regarding content being free to be expressive and creative, there are relatively few significant differences across the English regions. Adults in the South East are significantly more likely to disagree that radio listeners should be protected and adults in London are significantly more likely to disagree that internet users should be protected.

We also asked respondents for their levels of agreement with the statement ‘as long as TV/radio provides good programmes it doesn’t matter who owns the channels/stations or how they’re funded’. Responses are shown in Figure 50.

---

78 Base: All adults (3,244) T27, R25, I42, M26.
A majority of adults in each of the four UK nations agree with the statement that the ownership and funding of TV and radio is immaterial if the content is good. However, one in five overall disagrees with it. Adults in Northern Ireland are significantly less likely to disagree with both statements, with adults in Scotland significantly less likely to disagree with the statements regarding radio.

Across the English regions, adults in London and West Midlands are more likely to disagree with these statements, in other words these adults are more likely to feel that ownership and funding do matter.
8.4 Media education and training

We asked people to agree or disagree with a series of statements about their knowledge of digital TV, mobile and the internet, and their interest in learning more. Figure 51 illustrates the proportion of adults agreeing with each of the statements.

Figure 51 Attitudes to television, radio, the internet and mobile phones

Adults in Northern Ireland differ significantly from UK adults as a whole regarding a number of these attitude statements, being less likely to agree that they like these services to be simple and straightforward, less likely to agree that they don’t get the most out of the service that they have and more likely to agree that they’re happy for someone else in the household to take charge.

Across all adults one in five agrees they would like to learn more but don’t know where to go, with a similar proportion saying they don’t get a chance to learn about the technologies because someone else in the household takes charge of them.

We also asked for people’s preferred methods of learning about ‘digital television and radio, the internet and mobile phones’. They were prompted with five ways to choose from. Figure 52 shows the responses for each of the five ways of learning overall and for each of the UK nations.

---

81 Choosing as many of the five ways as applied to them.
As shown in Figure 52, reading the manual/ instructions is the most popular across all adults, but this method is significantly less popular amongst adults in Scotland. The next most popular method of learning is through friends and family, but this method is significantly less popular amongst adults in Northern Ireland.

Around one in twelve (8%) adults prefers to learn in a class or group, but this is significantly less popular amongst adults in Wales and Northern Ireland.

The proportion claiming they have no interest in learning about digital services and products is significantly higher for adults in Scotland and Northern Ireland.

Across the English regions, adults in London and the West Midlands are significantly more likely to say they prefer to learn through reading the manual/ instructions.

We further explored the prospect of training and education about the media by asking whether people had learnt about a variety of different media topics, ranging from skills to more creative applications, as well as some traditional ‘media studies’ topics such as how TV programmes are made. The results for UK adults and those in each nation are shown in Figure 53.

---

82 Base: All UK adults (3,244). Question Z4, prompted responses, multi-coded.
As shown in Figure 53, just over one in five (22%) adults say they have learned about any of the elements of the media they were prompted with. This proportion is largely accounted for by those who have experience of learning about using the internet (17% of all adults).

Across the nations, adults in Scotland and Northern Ireland are significantly less likely to have experience of learning about media. Across the English regions, adults in London are significantly more likely to have this learning experience.

One-third (32%) of all adults states an interest in learning more about any of the elements of the media they were prompted with, with most interest shown in learning about using the internet (14% of all adults) and creating a website (10% of all adults).

Interest in learning more about these media is significantly lower amongst adults in Wales and Scotland. Across the English regions, adults in London and the West Midlands are significantly more likely to say they are interested in learning more about media.

---

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

The key conclusions from this supplementary report on people across the nations and regions can be distilled into a small number of inter-related themes:

- Media literacy varies across the nations and regions of the UK, as does overall appetite for digital media and for learning. That said, differences are, with some exceptions, not large.

- For some elements of media literacy, differences can be largely explained by socio-economic and demographic differences between the nations – for example in relation to usage of mobile and the internet, age is a significant factor.

- For other elements including levels of concern, and levels of trust, differences are more likely to be an outcome of the particular cultural and geopolitical aspects of the nations and regions.

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

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

This audit provides a significant first step in benchmarking a number of these key elements of media literacy, for both Ofcom and its stakeholders to digest and build upon.
Annex 1

Research methodology

‘Core’ interviews with adults

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

Interviews with adults with visual or hearing difficulties

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

Interviews with adults in low income households

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

Interviews with adults

The data reported in this document has been weighted to match the profile for each of the four UK nations in respect of age, gender, working status and social economic grade. The boost interviews conducted have been corrected ahead of this weighting in order not to skew the overall profiles. Figure 54 below shows the breakdown of the 3,244 interviews conducted across the UK for this study overall.

Figure 54 Number of interviews conducted within each nation

<table>
<thead>
<tr>
<th>Nation</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>1,816</td>
</tr>
<tr>
<td>Scotland</td>
<td>437</td>
</tr>
<tr>
<td>Wales</td>
<td>495</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>496</td>
</tr>
</tbody>
</table>

The questionnaire is available at [www.ofcom.org.uk/advice/media_literacy](http://www.ofcom.org.uk/advice/media_literacy).
Annex 2

Technical appendix

Sample design

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

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

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

Figure 55 Classification of urbanity indicators

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

**Weighting**

The ‘boost’ interviews detailed previously were weighted back to their natural incidence in a pre-weighting stage. All data was subsequently weighted to the profile for each of the four UK nations using target rim weights for age, gender, socio-economic group, working status and region. The weighting figures are from the 2001 Census data, and are shown in Figure 56 below.

**Figure 56  Weighting profiles for UK nations and regions**

<table>
<thead>
<tr>
<th>Figures are based on household (except socio-economic group which is based on those 16-64)</th>
<th>UK</th>
<th>England</th>
<th>Wales</th>
<th>Scotland</th>
<th>Northern Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender – Male 15+</td>
<td>48%</td>
<td>48%</td>
<td>48%</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Gender – Female 15+</td>
<td>52%</td>
<td>52%</td>
<td>52%</td>
<td>53%</td>
<td>52%</td>
</tr>
<tr>
<td>Age – 15-34</td>
<td>33%</td>
<td>33%</td>
<td>31%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Age – 35-54</td>
<td>35%</td>
<td>35%</td>
<td>34%</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Age – 55+</td>
<td>33%</td>
<td>33%</td>
<td>35%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Socio-economic group - AB</td>
<td>24%</td>
<td>26%</td>
<td>21%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Socio-economic group – C1</td>
<td>30%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>Socio-economic group – C2</td>
<td>18%</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Socio-economic group - DE</td>
<td>27%</td>
<td>26%</td>
<td>31%</td>
<td>34%</td>
<td>30%</td>
</tr>
<tr>
<td>Working Status – working</td>
<td>57%</td>
<td>57%</td>
<td>51%</td>
<td>55%</td>
<td>51%</td>
</tr>
<tr>
<td>Working Status – not working</td>
<td>43%</td>
<td>43%</td>
<td>49%</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Region - London</td>
<td>12%</td>
<td>15%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – South East</td>
<td>14%</td>
<td>16%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – South West</td>
<td>8%</td>
<td>10%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – Midlands/East</td>
<td>25%</td>
<td>30%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – North East</td>
<td>13%</td>
<td>15%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – North West</td>
<td>11%</td>
<td>14%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region - Scotland</td>
<td>9%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region - Wales</td>
<td>5%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Region – Northern Ireland</td>
<td>3%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

In addition to these target weights detailed above, additional weighting was applied for the interviews conducted in Northern Ireland in order to match data from the Ofcom Residential Communications Survey for ownership of the internet at home.