Ofcom research event: Children and parents: media use and attitudes

10 November 2011
Agenda

3.00 Welcome and introduction: James Thickett, Director of Research and Market Intelligence, Ofcom

3.05 **Children and parents: media use and attitudes**
   Key findings from Ofcom’s recent study, presented by
   – Jane Rumble, Head of Audiences, Media
   – Alison Preston, Senior Research Associate

3.40 Q&A/ discussion

4.00 Break

4.15 Stakeholder research presentations:
Peter Robinson, Dubit – *Online video consumption*
Maurice Wheeler, Digital Outlook – *Facebook is for kids*
Eileen Wattam, University of Salford – *Social networking and children in foster care*
Jon Gower, Kids Industries – *Apps study*

5.30 Drinks reception
A range of subjects...

- Media use
- Concerns and dislikes
- Privacy
- Critical understanding
- Affinity
- Parents’ controls and rules
A range of inputs …
Children and parents: media use and attitudes

Jane Rumble and Alison Preston, Ofcom
Media overview
Older children tend to miss their mobile or the internet more than TV.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>TV (%)</th>
<th>Games (%)</th>
<th>Internet (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 5 - 7</td>
<td>48</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Aged 8 - 11</td>
<td>39</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Aged 12 - 15</td>
<td>28</td>
<td>18</td>
<td></td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
Most children have digital TV, games console and the internet at home

- Digital TV
- Games console
- Internet (via pc)
- Digital Video Recorder

% of households with children

- Digital TV: 80% in 2007, 90% in 2011
- Games console: 80% in 2007, 90% in 2011
- Internet (via pc): 70% in 2007, 80% in 2011
- Digital Video Recorder: 20% in 2007, 30% in 2011

Ofcom Children and Parents Media Literacy Tracker 2011
Most children have a TV in their bedroom

5-7 year olds
8-11 year olds
12-15 year olds

Ofcom Children and Parents Media Literacy Tracker 2011
Nine in ten children watch TV every day

<table>
<thead>
<tr>
<th>Activity</th>
<th>5-7 year olds</th>
<th>8-11 year olds</th>
<th>12-15 year olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watch TV</td>
<td>95</td>
<td>94</td>
<td>95</td>
</tr>
<tr>
<td>Use internet</td>
<td>43</td>
<td>65</td>
<td>58</td>
</tr>
<tr>
<td>Play games</td>
<td>68</td>
<td>58</td>
<td>59</td>
</tr>
<tr>
<td>Watch videos/DVDs</td>
<td>56</td>
<td>56</td>
<td>53</td>
</tr>
<tr>
<td>Use mobile phone</td>
<td>7</td>
<td>33</td>
<td>78</td>
</tr>
<tr>
<td>Listen to radio</td>
<td>20</td>
<td>28</td>
<td>33</td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
Children’s viewing has increased to 17 and a half hours a week.

Average hours of weekly TV viewing, children aged 4-15 (hrs, mins)

BARB
Younger children spend more time watching TV versus older children

Average hours of weekly TV viewing (hrs, mins)

- Children 4-9
  - 2005: 15h 32m
  - 2006: 15h 58m
  - 2007: 16h 52m
  - 2008: 17h
  - 2009: 18h 20m
  - 2010: 18h 20m

- Children 10-15
  - 2005: 15h 32m
  - 2006: 15h 58m
  - 2007: 16h 52m
  - 2008: 17h
  - 2009: 18h 20m
  - 2010: 18h 20m

BARB
Children’s viewing peaks at 20:00

Children aged 4-15 watching television, audience in 000s
Children continue to spend one third of their time watching children’s programming.

Proportion of viewing by children aged 4-15

- **2005**
  - Commercial 'adult' airtime: 51%
  - BBC 'adult' airtime: 18%
  - Total children's airtime: 31%

- **2010**
  - Commercial 'adult' airtime: 52%
  - BBC 'adult' airtime: 16%
  - Total children's airtime: 32%

BARB
Among children with a DVR, 87% of viewing is to live programmes

60% of children’s TV viewing is with their Parents, or other adults
One third of parents express concerns about the content their child watches on TV

% of parents expressing concerns about what their child watches in TV

- **Very/ fairly concerned**
  - Aged 5-7: 26%
  - Aged 8-11: 34%
  - Aged 12-15: 30%

- **Neither/ Don't know**
  - Aged 5-7: 7%
  - Aged 8-11: 8%
  - Aged 12-15: 9%

- **Not very/ not at all concerned**
  - Aged 5-7: 67%
  - Aged 8-11: 58%
  - Aged 12-15: 60%
Violence, sexual content and bad language are the most commonly mentioned concerns among parents.

Types of concern regarding child’s pre-watershed viewing:

- 20% violence
- 17% sexually explicit content
- 17% bad language
- 9% unsuitable content for younger people
- 7% generally unsuitable content of a sexual nature
- 6% overtly sexual performances
- 5% nakedness
- 5% unsuitable content aired too early

Ofcom pre-watershed TV ad-hoc research 2011
Soaps, films, reality programmes and music videos were the top types of programme causing concern.

Types of concern regarding child’s pre-watershed viewing

- Films: 14%
- Soaps: 14%
- Reality programmes: 12%
- Music videos: 7%
- Drama: 7%
- Children’s programmes: 4%
- Talent shows: 4%

Ofcom pre-watershed TV ad-hoc research 2011
Most parents (77%) think the watershed is at the right time, with 12% saying its too early and 10% too late.

Most parents say it is ‘mainly the responsibility of parents’ (40%) or ‘broadcasters and parents equally’ (55%) to make sure children don’t see unsuitable content.
Most parents have rules about their children’s TV viewing

% of parents with rules about child’s TV viewing

- 5-7: 91%
- 8-11: 89%
- 12-15: 67%

Ofcom Children and Parents Media Literacy Tracker 2011
Use of parental TV controls has increased over time across each age group

% of parents with TV controls set

Ofcom Children and Parents Media Literacy Tracker 2011
YouTube clips are more popular than catch up services

<table>
<thead>
<tr>
<th>Watch videos made by the public, e.g. on YouTube</th>
<th>Watch music videos</th>
<th>Watch clips or whole TV programmes</th>
</tr>
</thead>
<tbody>
<tr>
<td>68%</td>
<td>51%</td>
<td>39%</td>
</tr>
<tr>
<td>38%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>8-11</td>
<td>12-15</td>
<td>8-11</td>
</tr>
<tr>
<td>12-15</td>
<td></td>
<td>12-15</td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
Less than one fifth of parents have PIN set for catch up services

- PIN set on all websites child uses for watching TV
- PIN set on some of the websites child uses for watching TV
- PIN not set on any
- Don't know if set up
- Not aware of guidance labels on programmes

10% 7% 41% 11% 30%

Ofcom Children and Parents Media Literacy Tracker 2011
Summary

• Most children have access to a wide range of media technology in the home.

• Home internet take-up and use has increased year-on-year.

• However, traditional TV viewing has not only survived but shown an increase over time.

• Most of children’s viewing is to live scheduled TV on a TV set before 9pm.

• A minority of parents express concern about the TV their children watch.

• However, use of TV access controls has increased.

• While some children are using catch-up services online, few parents have PIN controls set.
the internet
Uses any of these devices to access the internet at home

- PC/laptop: 65, 85, 93
- Games console/player (fixed or portable): 8, 19, 23
- Mobile phone: 2, 9, 29

5 - 7: 66, 87, 96
8 - 11: 5 - 7: 65
12 - 15: 5 - 7: 8, 19, 23

Growth in use of devices to access internet

Ofcom Children and Parents Media Literacy Tracker 2011
1/3 of 5-15s say they “mostly” use the internet on their own
### Top five weekly online activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>5-15</th>
<th>6-7</th>
<th>8-11</th>
<th>12-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>School work/homework</td>
<td>63%</td>
<td>32%</td>
<td>66%</td>
<td>75%</td>
</tr>
<tr>
<td>Playing games online</td>
<td>47%</td>
<td>42%</td>
<td>51%</td>
<td>46%</td>
</tr>
<tr>
<td>General surfing/browsing</td>
<td>41%</td>
<td>11%</td>
<td>37%</td>
<td>61%</td>
</tr>
<tr>
<td>Social networking websites</td>
<td>38%</td>
<td>2%</td>
<td>21%</td>
<td>72%</td>
</tr>
<tr>
<td>Downloading or playing music</td>
<td>27%</td>
<td>6%</td>
<td>20%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
## Top 10 activities, March 2011 (Nielsen data)

<table>
<thead>
<tr>
<th>Coverage %</th>
<th>5-7s</th>
<th>8-11s</th>
<th>12-15s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google</td>
<td>72</td>
<td>82</td>
<td>81</td>
</tr>
<tr>
<td>BBC</td>
<td>55</td>
<td>56</td>
<td>69</td>
</tr>
<tr>
<td>MSN/Windows Live/Bing</td>
<td>44</td>
<td>53</td>
<td>62</td>
</tr>
<tr>
<td>Facebook</td>
<td>40</td>
<td>46</td>
<td>52</td>
</tr>
<tr>
<td>YouTube</td>
<td>28</td>
<td>43</td>
<td>37</td>
</tr>
<tr>
<td>Yahoo</td>
<td>26</td>
<td>37</td>
<td>36</td>
</tr>
<tr>
<td>eBay</td>
<td>21</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>Disney Online</td>
<td>20</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Amazon</td>
<td>17</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Microsoft</td>
<td>16</td>
<td>23</td>
<td>24</td>
</tr>
</tbody>
</table>

UKOM/Nielsen data March 2011 home panel BRANDS only
Social networking appears to have plateau-ed

Children who use the internet at home with an active social networking site profile

<table>
<thead>
<tr>
<th>Year</th>
<th>5-7</th>
<th>8-11</th>
<th>12-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>5%</td>
<td>21%</td>
<td>68%</td>
</tr>
<tr>
<td>2010</td>
<td>3%</td>
<td>27%</td>
<td>79%</td>
</tr>
<tr>
<td>2011</td>
<td>21%</td>
<td>28%</td>
<td>75%</td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
Most children say their profile can only be seen by friends

- **Aged 8-11**
  - Can only be seen by my friends and no one else: 79%
  - Can only be seen by my friends and their friends: 13%
  - Can be seen by anyone: 4%
  - Can't be seen: 3%

- **Aged 12-15**
  - Can only be seen by my friends and no one else: 69%
  - Can only be seen by my friends and their friends: 22%
  - Can be seen by anyone: 5%
  - Can't be seen: 2%

Ofcom Children and Parents Media Literacy Tracker 2011
Children remain relatively unadventurous

- Don't know
- Visit lots of websites that you haven't visited before
- Visit maybe one or two websites that you haven't visited before
- Only visit websites that you've visited before

<table>
<thead>
<tr>
<th></th>
<th>8-15</th>
<th>8-11</th>
<th>12-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>62%</td>
<td>67%</td>
<td>57%</td>
</tr>
<tr>
<td>2011</td>
<td>59%</td>
<td>68%</td>
<td>51%</td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
I think that if they have been listed by the search engine the information on that website must be truthful.

I think that some of the websites in the list will show truthful information and some will show untruthful information.

I don't really think about whether or not they have truthful information, I just use the sites I like the look of.

Don't know.
What do children dislike about being online?

- Too many adverts
- Websites that take too long to load
- Things people have written about me on their profile/web page

Either seeing things that are too old for me OR things that make me feel sad, frightened or embarrassed.

Ofcom Children and Parents Media Literacy Tracker 2011
Over 1/3 of all 12-15s know someone who has had gossip spread about them online/via mobile

<table>
<thead>
<tr>
<th>Event</th>
<th>Percentage</th>
<th>Happened to me</th>
<th>Happened to someone I know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gossip being spread about someone online or through a text message</td>
<td>36%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Embarrassing pictures being posted of someone online or sent to other people against their wishes</td>
<td>18%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>Another person pretending to be them online</td>
<td>15%</td>
<td>6%</td>
<td>13%</td>
</tr>
<tr>
<td>Another person using their password to get at their information</td>
<td>13%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Someone being picked on by other players in online games</td>
<td>8%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Seeing something of a sexual nature online or on a mobile phone</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Someone being cheated out of money online</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>ANY OF THESE</td>
<td>46%</td>
<td>20%</td>
<td></td>
</tr>
</tbody>
</table>

Ofcom Children and Parents Media Literacy Tracker 2011
A quarter of 12-15s say they know someone who has been bullied online

- Aged 8-11:
  - 10% Happened to someone I know
  - 5% Happened to me

- Aged 12-15:
  - 25% Happened to someone I know
  - 7% Happened to me
Around one quarter of parents of 5-15s have concerns about various online activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Aged 5-15</th>
<th>Aged 12-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child giving out personal details to inappropriate people</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Child downloading viruses</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Cyberbullying</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Who the child may be in contact with online</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td>The content on the websites the child visits</td>
<td>23%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Increasing use of parental rules for 5-7s and 12-15s

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 - 15</td>
<td>78</td>
<td>82</td>
</tr>
<tr>
<td>5 - 7</td>
<td>80</td>
<td>89</td>
</tr>
<tr>
<td>8 - 11</td>
<td>89</td>
<td>88</td>
</tr>
<tr>
<td>12 - 15</td>
<td>66</td>
<td>72</td>
</tr>
</tbody>
</table>
And increased use of “supervision” rules too
However, the use of controls/filters is a mixed picture
<table>
<thead>
<tr>
<th>Reason</th>
<th>5 - 7</th>
<th>8 - 11</th>
<th>12 - 15</th>
<th>5 - 7</th>
<th>8 - 11</th>
<th>12 - 15</th>
<th>5 - 7</th>
<th>8 - 11</th>
<th>12 - 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trust child to be sensible/responsible</td>
<td>64%</td>
<td>33%</td>
<td>8%</td>
<td>49%</td>
<td>50%</td>
<td>16%</td>
<td>23%</td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td>Child is always supervised</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child too young for this to be a problem</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNAWARE HOW (Did not know was possible/Don’t know how to do this)</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Reasons why controls are not set vary by age of child.
Six in ten parents have some form of “mechanical” control in place

- Internet controls/ filtering software loaded
- Safe search settings on search engine websites
- YouTube Safety Mode enabled
- PIN/ Password set on broadcasters' websites

- Aged 5-15
- Aged 5-7
- Aged 8-11
- Aged 12-15

Ofcom Children and Parents Media Literacy Tracker 2011
One quarter of parents use all 3 types of tools – while one in five use just talk or none.
Parents of 5-15s appear to be largely comfortable with their child’s online safety ...

- 83% say they have spoken to their child about staying safe online
- 82% say they trust their child to use the internet safely
- 82% feel they know enough about keeping their child safe online
- 49% agree their child knows more about the internet than they do

Ofcom Children and Parents Media Literacy Tracker 2011
Two in five 12-15s have a smartphone

Total mobile phone ownership

- Child has a smartphone
- Child has another type of phone

52% 8% 48% 87%

5-15 31% 20% 5-7 5% 8-11 36% 12% 12-15 46% 41%

Ofcom Children and Parents Media Literacy Tracker 2011
## Weekly use of mobiles and smartphones by 12-15s

<table>
<thead>
<tr>
<th>Activity</th>
<th>Ofcom Children and Parents Media Literacy Tracker 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send/receive texts</td>
<td>85%</td>
</tr>
<tr>
<td>Make/receive calls</td>
<td>73%</td>
</tr>
<tr>
<td>Listen to music</td>
<td>51%</td>
</tr>
<tr>
<td>Take photos</td>
<td>44%</td>
</tr>
<tr>
<td>Play games (loaded on phone)</td>
<td>30%</td>
</tr>
<tr>
<td>Visit social networking sites</td>
<td>17%</td>
</tr>
<tr>
<td>Take videos</td>
<td>17%</td>
</tr>
<tr>
<td>Visit websites</td>
<td>16%</td>
</tr>
<tr>
<td>Send/receive photos</td>
<td>19%</td>
</tr>
<tr>
<td>Use IM applications</td>
<td>15%</td>
</tr>
</tbody>
</table>

**All 12-15s with a mobile phone**

**All 12-15s with a Smartphone**
What sorts of levels of concern do parents have about their child’s use of the mobile?

<table>
<thead>
<tr>
<th></th>
<th>Aged 8-11</th>
<th>Aged 12-15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child giving out their personal details to inappropriate people</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>Being bullied via calls, texts, emails to their mobile</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>Who they are in contact with via the mobile</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>What they see or read on their mobile phone</td>
<td>13%</td>
<td>19%</td>
</tr>
</tbody>
</table>
Two thirds of parents of 12-15s with a mobile say they have rules in place

66% of parents of 12-15s with a mobile say they have any rules in place

31% of parents of 12-15s with a mobile say that internet has been limited (33% among smartphone users)

10% of parents of 12-15s with a mobile say they regularly check what they are doing with the phone
Summary of findings

- Children’s internet access is increasing – across devices
- Knowledge levels in areas for critical understanding have not increased over time
- Relatively low levels of incidence of negative experiences
- Parental concerns relatively low (and decreasing in some areas)
- But some signs of increased parental engagement
Questions?

report materials available at

www.ofcom.org.uk/medialiteracyresearch

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