UK adults' media literacy

2009 interim report

Research Document

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Contents

Section 1

Executive summary

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

It is an interim report: that is, it reports on one wave of data from spring 2009. Data from autumn 2009 will be amalgamated into it, and a full-year report published in early 2010, which will provide more detailed reporting in a number of areas.

Take-up and media preferences

UK adults have high levels of household take-up of digital television (89%) and the internet (73%), and nine in ten (91%) use mobile phones. Since 2007, household take-up of digital television and the internet and the use of mobile phones have increased significantly. Three in four adults use the internet at home or elsewhere in 2009 (75%), compared to two-thirds (63%) in 2007 and three-fifths (59%) in 2005.

Although there has been an above-average increase in household take-up of the internet among older adults aged 65+ (41%) and those in DE socio-economic groups (51%), these figures are still at a much lower level compared to all UK adults (73%).

The growth in household take-up of the internet since the 2007 survey has meant that the profile of internet users has changed, with more users in older age groups.

Most of those who do not have, and do not intend to get, the internet at home give reasons relating to a lack of interest, as in previous years of this research. While lack of interest is still the most common reason for not intending to get the internet, it is less likely to be mentioned now than in 2007. Reasons relating to cost are more likely to be mentioned than in 2007. Not having a PC/ laptop is also given as a reason by 26% of this group.

While half of all UK adults (51%) say they would miss watching television the most, more adults now nominate using the internet, compared to 2007 (15% vs. 12%). Younger adults, aged 16-24 (39%) and 25-34 (40%), and those in AB socio-economic groups (42%), are less likely to say that they would most miss watching television.

Using the internet

As in previous years, communication is the most commonly mentioned activity carried out on a regular basis[1] by internet users (76%). Compared to 2007, however, fewer internet users are regularly carrying out transactions online (36% vs. 41%) or finding information online for their work / studies (35% vs. 48%). There has been a considerable increase in regular use of the internet for content creation (through social networking sites) (34% vs. 22%) and for entertainment (30% vs. 22%). It is possible that this change in the range of activities can be partly explained by the change in the profile of internet users since 2007.

One in three UK adults who use the internet (29%) say they are watching online or downloading TV programmes or films. Almost all of these are doing so through UK TV broadcasters' websites (such as BBC iPlayer) (27%), with a much smaller proportion watching online or downloading TV programmes or movies from other websites (9%).

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[1] A 'regular basis' refers to an activity carried out at least once a week

Almost twice as many internet users now have a social networking site profile than in 2007 (38% vs. 22%) and there has also been an increase in contributing comments to someone else's blog (26% vs. 19%). Experience of other types of online content creation has not changed since 2007.

Compared to 2007, those with a social networking site profile are more likely to use these sites every day (41% vs. 30%), to have a profile which can be seen only by their friends or family (78% vs. 48%), and to use the sites to communicate with their friends and family (80% vs. 69%).

Understanding, security and concerns

Knowledge of how the BBC is funded has declined since 2007 for BBC TV programmes (75% vs. 80%), BBC radio stations (55% vs. 62%) and the BBC website (36% vs. 41%). Compared to all UK adults, there are consistently lower levels of awareness of the licence fee as the main source of funding among adults aged 16-24, females, and those in DE socio-economic groups.

Compared to 2007, UK adults are more likely to believe that content is regulated across each of television (82% vs. 79%), radio (68% vs. 58%), the internet (38% vs. 26%), mobile phones (25% vs. 20%) and gaming (36% vs. 29%).

More UK adults believe that file sharing through downloading shared copies of copyright music and films should be illegal (42%) than believe it should not be illegal (33%), and 25% are unsure. Young people aged 16-24 are more likely to say that such content should not be illegal (55%).

Internet users appear to be less willing to provide personal information online than was the case in 2007. Those who are more confident using the internet are more likely to say they would be happy to provide personal information online. The types of judgements made about websites before entering personal information have not changed particularly, but there has been an increase in those who say they wouldn't make a judgement before entering personal information.

The proportion of adults mentioning any concerns has decreased since 2007 for each of television, radio, the internet, mobile phones and gaming. For TV, radio, and the internet this takes overall concerns back to 2005 levels. Just over half of adults have concerns about what is on the internet (56%) and just under half have concerns about what is on television (44%). Concern about what is on the internet mostly relates to offensive or illegal content. Concerns about mobile phones (24%), gaming (23%) and radio (9%) are at a lower level.

Learning

When asked about their preferred way of learning about digital technology, half of adults nominate reading the manual / instructions, an increase since 2007 (49% vs. 45%). Despite an increase in the number of those who prefer to go to a class to learn about digital technology (10% vs. 6%), few adults prefer this more formal method of learning.

One in four adults have experience of formal learning about digital technology, which is lower than in 2007 (23% vs. 27%). Experience of formal learning mostly relates to using the internet. Experience of formal learning about digital technology is less likely among those aged 65 and over compared to adults as a whole (17% vs. 23%). As in 2007, one in three UK adults would be interested in learning more about digital technology (30% vs. 31%). Interest in learning more also mostly relates to using the internet.

Section 2

Introduction

2.1 Background

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

Ofcom's definition of media literacy is:

'the ability to use, understand and create media and communications'.

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003. Under Section 14 (6a) of the Act we have a duty to make arrangements for the carrying out of research into the matters mentioned in Section 11 (1).

Ofcom's work to promote media literacy is intended:

- to give people the opportunity and motivation to develop competence and confidence to participate in communications technology and digital society; and

- to inform and empower people to manage their own media activity (both consumption and creation).

This report provides an update to the *Media Literacy Audit – Report on adult media literacy*, published in 2006[2] and again in 2008[3], using fieldwork conducted in 2005 and 2007. In 2009, we have adopted a six-monthly fieldwork schedule, to enable more frequent reporting and the identification of emerging trends. This report is designed to give an accessible overview of media literacy among adults aged 16 and over, and is based on an initial wave of research conducted in spring 2009. Where possible, within the overall sample of adults, demographic analysis is conducted by age, by gender and by household socio-economic group.

A full report will be published in spring 2010 and will be based on two waves of research, with a second wave of interviewing in autumn 2009. In this more detailed report, it will be possible to conduct additional analysis, such as looking at any differences by nation.

Because the findings reported here are based on just one wave of interviewing, conducted in April and May 2009, some responses may be affected by seasonal fluctuations, and where possible, this has been referred to within this report. Seasonality will not be a factor once the consolidated data from both the 2009 waves of research are available.

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[2] http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/medialit_audit/
[3] http://www.ofcom.org.uk/advice/media_literacy/medlitpub/medlitpubrss/ml_adult08/

The key objectives of this research are:

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

- to identify emerging issues and skills gaps that will help to target both Ofcom's and stakeholders' resources for the promotion of media literacy.

Many of the findings from this research will also be used to inform, and act as benchmarks for, the work of the Consortium for the promotion of Digital Participation.

2.2   What we mean by media literacy

In order to monitor media literacy using research we used the following measures to represent some of the key areas of media literacy (see box below).

- Take-up, use and breadth of use of media
- Knowledge of how elements of each media platform are funded
- Knowledge of regulation
- Trust in internet sites
- The extent and levels of concerns about each platform

2.3   Research methodology and analysis

This report draws on research from the first wave of the Media Literacy Tracker 2009 with adults aged 16 and over. Comparisons are made between this research and the Media Literacy Audit surveys, conducted in 2007 and in 2005.

Media Literacy Tracker with adults: 2009

A quantitative survey that involved 812 in-home interviews with adults aged 16 and over from April to May 2009. A second wave of this tracking study will be conducted later in 2009, and will be reported early in 2010.

Media Literacy Audit survey: 2007

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

Media Literacy Audit survey: 2005

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

Significance testing at the 95% confidence level was carried out. This means that where findings are commented on, there is only a 5% or less probability that the difference between the samples is by chance.

Section 3

Take-up and media preferences

This section looks at a range of issues related to UK adults' access to[4], and personal use of, media devices in their households and elsewhere. It looks at the changing profile of internet users[5] as take-up of the internet has increased over time, as well as the reasons given by those who do not have the internet at home. It explores the reasons for using different media and which media device adults would miss the most.

Key findings

- Since 2007, household take-up of digital television (89% vs. 82%) and the internet (73% vs. 62%) and personal use of a mobile phone (91% vs. 85%) have increased significantly. Take-up of the internet and personal use of a mobile phone remain lower for those in DE socio-economic groups (51% internet, 85% mobile phone) and those aged 65+ (41% internet, 68% mobile phone).

- Looking at the overall profile of internet users, a higher share of users in 2009 are older (9% aged 65+ vs. 6% in 2007).

- Three in ten UK adults (27%) visit websites via a mobile phone, and one in ten (9%) do so via a games console. Younger people aged 16-24 are more likely than UK adults as a whole to use the internet on their mobile (50%) or their games console (18%).

- Most of those who do not intend to get internet access at home give reasons relating to a lack of interest (71%). Compared to 2007, there is an increase in reasons relating to cost. Non-ownership of a PC / laptop is also a factor.

- While half of all UK adults (51%) say they would miss watching television the most, more adults now nominate using the internet compared to 2007 (15% vs. 12%). Younger adults, aged 16-24 (39%) and 25-34 (40%), and those in AB socio-economic groups (42%), are less likely to say that they would most miss watching television.


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

Take-up of the key platforms of mobile phone, digital television, the internet and digital video recorders (DVRs) has increased significantly since 2007. Access to digital radio at home through the internet, digital television or a DAB radio has also increased significantly since 2007.

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[4] The terms 'access to' and 'take-up' are used within this report to indicate where a particular device is present in the household. These terms do not imply that the device is necessarily used by the adult. The term 'use' indicates where a device is present in the household that the adult actually makes use of.

[5] In this report 'internet users' are defined as those who use the internet at home or anywhere else.

Figure 1: Household take-up of key platforms: 2005, 2007 and 2009
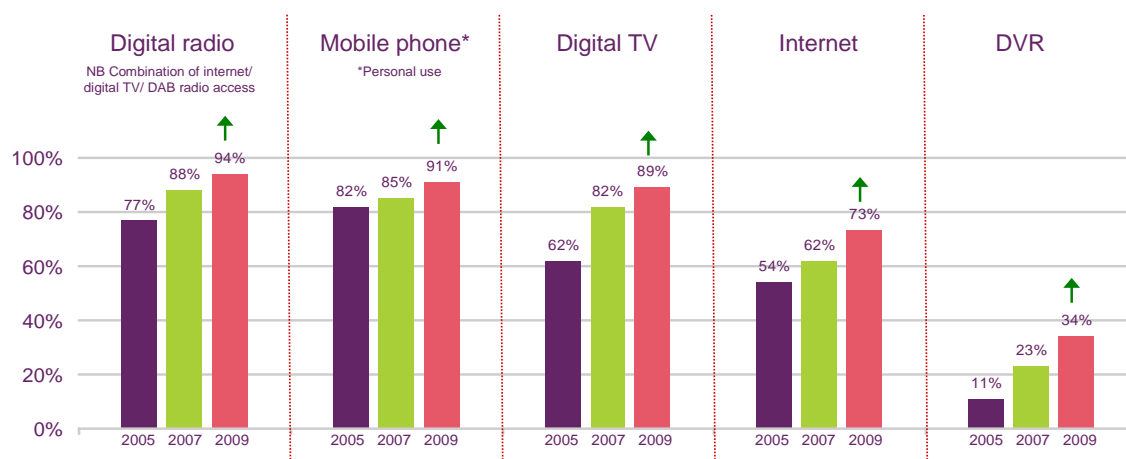
T1/ T2/ R1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ Do you have a recorder for your TV service which can record and store TV programmes onto an internal hard drive, and also pause and rewind live TV?/ In which of these ways do you ever listen to radio in your home?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone?. (Prompted responses, single coded)
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009
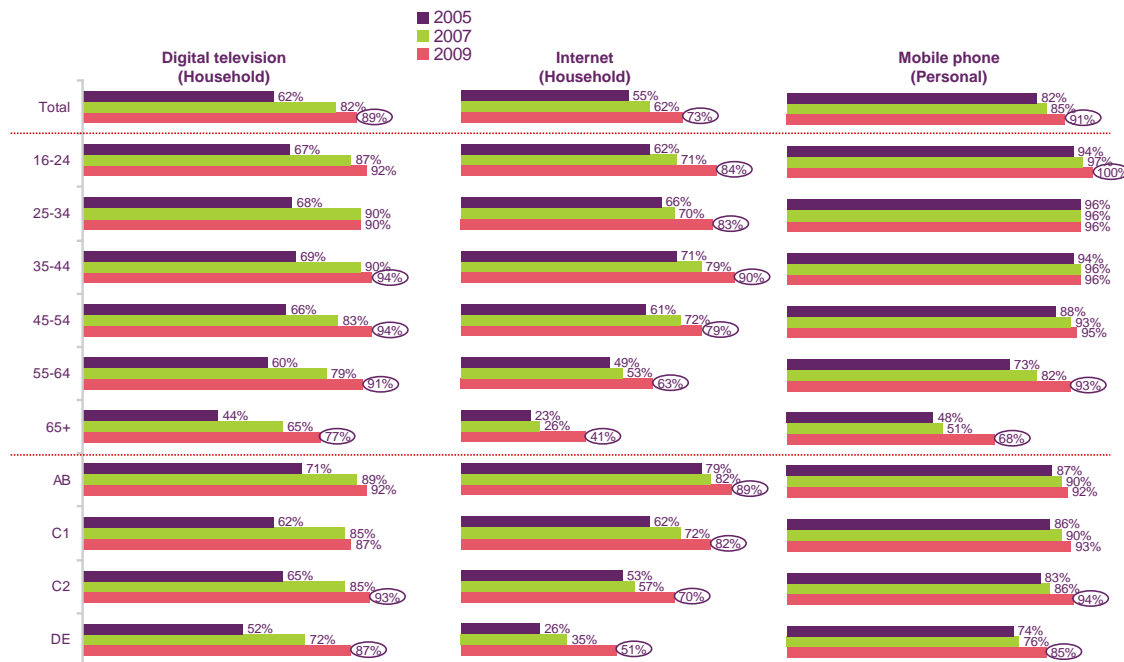Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Around three in four adults live in a household with access to the internet; a significant increase since 2007. This increase is evident in each age group of adults and in all of the socio-economic groups. Across all adults, take-up has increased by eleven percentage points (73% in 2009 vs. 62% in 2007). There appears to have been an above-average increase in take-up since 2007 among adults aged 65+ (41% vs. 26%) and adults in DE socio-economic groups (51% vs. 35%). This change within the overall population of those with the internet at home could partly explain some of the changes in usage patterns, which we will explore later in this report.

It is still the case, however, that take-up of the internet is lower among adults aged 55-64 (63% vs. 73% of all adults) and adults aged 65+ (41% vs. 73% of all adults). Take-up of the internet at home also remains lower among those in DE socio-economic groups (51% vs. 73% of all adults).

Around nine in ten adults live in a household with a digital television service; a significant increase since 2007 (89% vs. 82%). Since 2007, take-up of digital television has increased among all adults aged over 35, with an increase in excess of ten percentage points among adults aged 45 and over. However, take-up of digital television services remains lower among adults aged 65 and over (77% vs. 89% of all adults) compared to all adults. Take-up of digital television has also increased since 2007 among adults in the C2 (93% vs. 85% in 2007) and DE (87% vs. 72% in 2007) socio-economic groups.

Around nine in ten adults use a mobile phone; a significant increase since 2007 (91% vs. 85%). This increase is evident among those aged 16-24 (100% vs. 97% in 2007), those aged 55-64 (93% vs. 82% in 2007) and those aged 65+ (68% vs. 51% in 2007). It is still the case, however, that take-up of a mobile phone is lower among adults aged 65+ (68% vs. 91% of all adults). Use of a mobile phone has also increased significantly since 2007 among adults in the C2 and DE socio-economic groups, but remains lower among adults in DE socio-economic groups (85% vs. 91% of all adults).

Figure 2: Take-up of key platforms, by age and socio-economic group: 2005, 2007 and 2009

T1/ IN1/ M1 – Can any of your TV sets receive additional channels other than BBC, ITV, Channel 4/ S4C and (where available) Channel 5?/ Does anyone in your household have access to the internet at home through a computer or laptop?/ Do you personally use a mobile phone? (Prompted responses, single coded)
Base: All adults aged 16+ (2905 in 2007, 812 in 2009, 106 16-24, 126 25-34, 173 35-44, 140 45-54, 106 55-64, 161 65+, 175 AB, 228 C1, 168 C2, 241 DE). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Figure 3 below shows the profile of the internet users surveyed in 2005, 2007 and 2009, in terms of the proportion of internet users in each of the six age groups and the proportion of internet users in each of the four socio-economic groups. The age and socio-economic group profile of all adults in 2009 is also shown for comparison.

There has been an increase over time in the proportion of internet users aged 65 and over and those in the DE socio-economic groups. While 6% of all internet users were aged 65 or over in 2007, in 2009 this rose to 9% of all internet users. Since 2005 there has been an increase in the proportion of internet users from DE socio-economic groups, from 14% in 2005 to 20% in 2009. Internet users in DE socio-economic groups are significantly more likely to be aged 16-34 compared to internet users as a whole (53% vs. 39%).
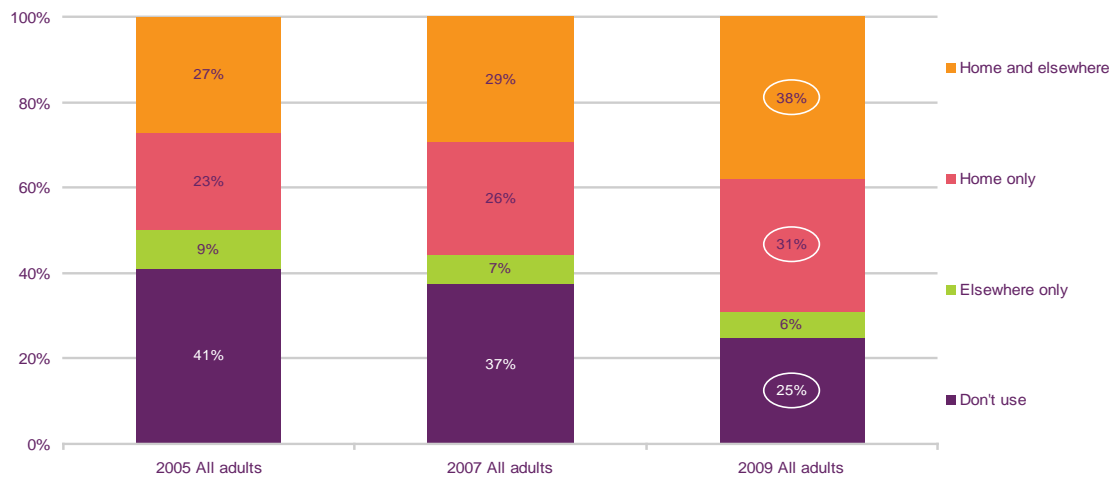
Figure 3: Age and socio-economic group profile of internet users: 2005, 2007 and 2009
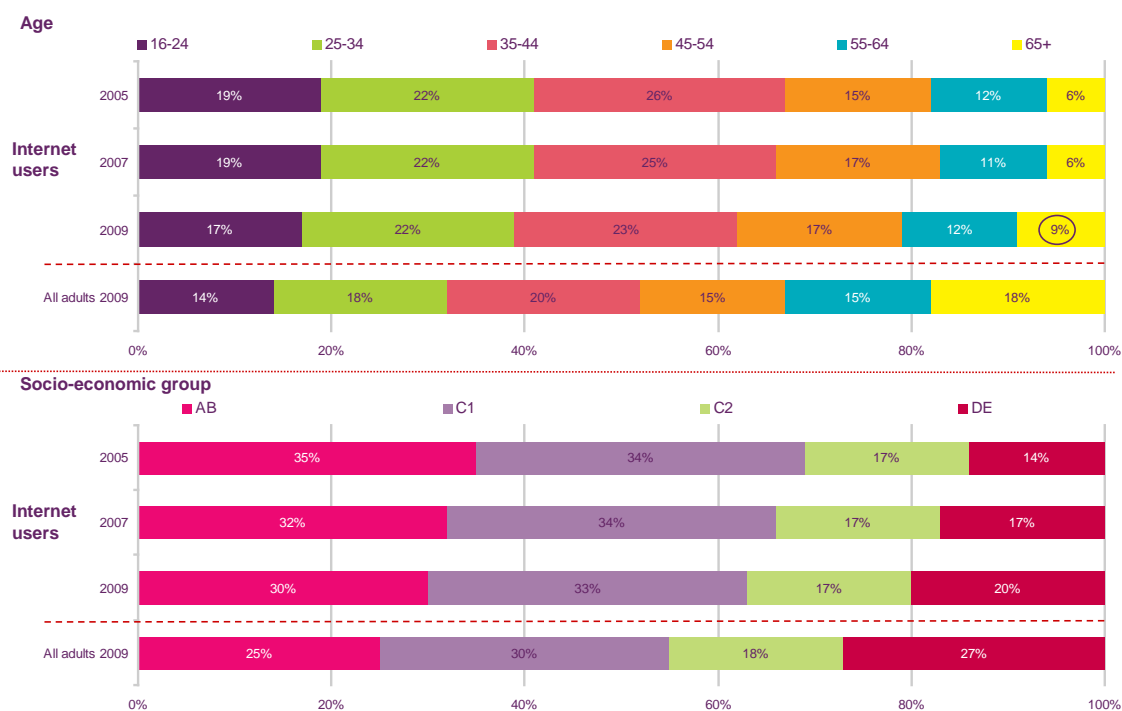
IN1/ IN6 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all? (prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or anywhere else (1746 in 2005, 1723 in 2007, 580 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

3.2   Increase in internet users, both at home and elsewhere

Three in four adults use the internet at home or elsewhere in 2009 (75%), compared to two-thirds (63%) in 2007 and three-fifths (59%) in 2005. Four in ten of all UK adults (38%) use the internet both at home and elsewhere, compared to three in ten (29%) in 2007. There has also been an increase in the proportion of UK adults who use the internet only at home (31% vs. 26%), but no change in the proportion who use the internet only in other locations (6% vs. 7%).

Figure 4: Where the internet is used by UK adults: 2005, 2007 and 2009

IN1/ IN6 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all? (prompted responses, single coded)
Base: All adults aged 16+ (3244 aged 16+ in 2005, 2905 aged 16+ in 2007, 812 aged 16+ in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

3.3 Adults aged over 65 and those in DE socio-economic groups remain more likely to be non-users of the internet

One in four UK adults (25%) do not use the internet at home or elsewhere in 2009, and this is more common among older adults: accounting for four in ten aged 55-64 (39%) and six in ten aged 65 and over (61%). Non-users of the internet form a higher proportion of adults in DE socio-economic groups (44%) than in other socio-economic groups or in the adult population as a whole.

Adults aged over 65 and adults in DE socio-economic groups also stand out from the rest of the UK adult population, as a minority use the internet at home.

While four in ten of all UK adults (38%) use the internet both at home and elsewhere in 2009, this is more common among those aged 16-24 (60%), those aged 25-34 (51%), and those in the socio-economic groups AB (56%) and C1 (49%). While three in ten of all UK adults (31%) use the internet only at home, this is more common among those aged 35-44 (41%) and those in C2 socio-economic groups (41%).

The only people more likely than UK adults as a whole to use the internet in other locations but not at home are those in the DE socio-economic group (11% vs. 6% of all UK adults).

**Figure 5: Where the internet is used by UK adults in 2009: by age, gender and socio-economic group**
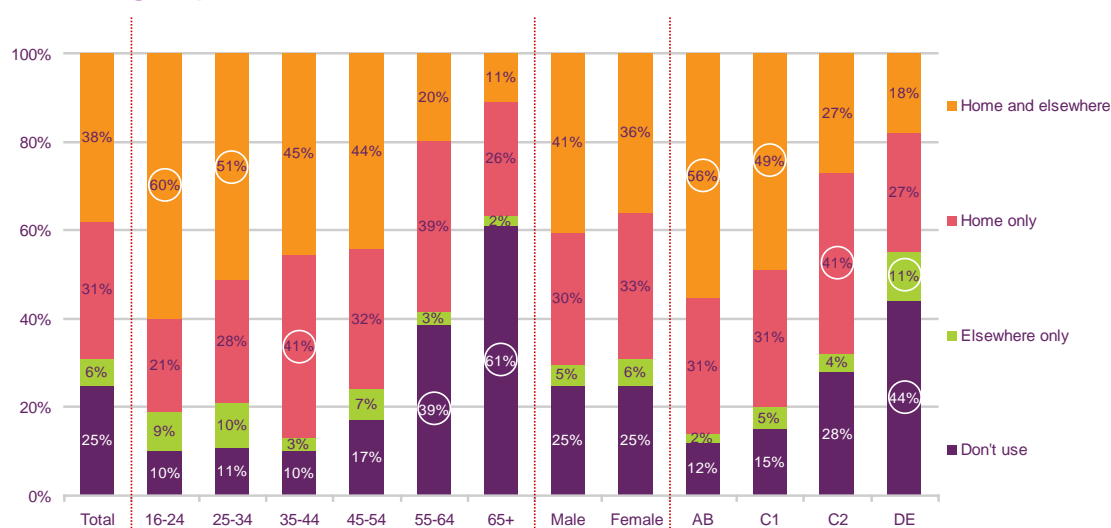
IN1/ IN6 – Do you or does anyone in your household have access to the internet at home through a computer or laptop? And do you use the internet at home?/ Do you ever access the internet anywhere other than in your home at all? (prompted responses, single coded)
Base: All adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+, 388 male, 424 female, 175 AB, 228 C1, 168 C2, 241 DE). Significance testing shows any difference between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

3.4   Few adults use any alternative devices to get online

In addition to asking adults about their use of the internet through a computer or laptop at home, the 2009 survey established the extent to which adults use alternative devices.

While seven in ten UK adults (69%) use the internet at home through a PC or laptop, three in ten (27%) visit websites via a mobile phone, one in ten (9%) visit websites via a games console, and less than one in ten (6%) visit websites via a portable media player. The youngest adults, aged 16-24, are more likely than UK adults as a whole to visit websites using a mobile phone (50% vs. 27% of all adults) or a games console (18% vs. 9% of all adults). Almost all of those using these alternative devices to visit websites also use a PC or laptop to visit websites.

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**Figure 6: Devices used to visit internet websites in 2009, by age**
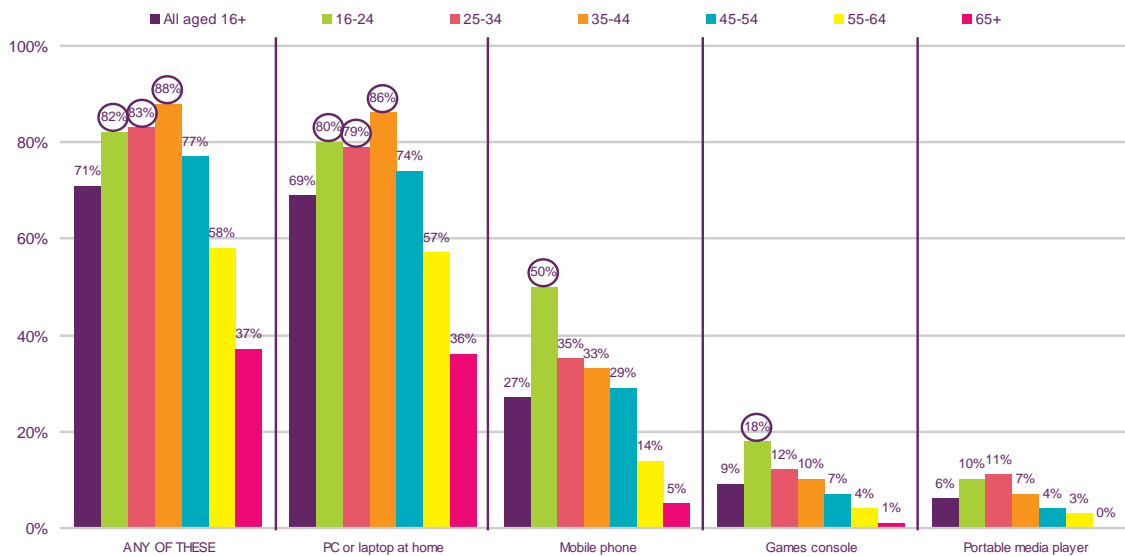
IN1/ IN2 – Do you or does anyone in your household have access to the internet at home through a laptop or computer? And do you personally use the internet at home?/ Do you own and use any of the items shown on this card to visit internet websites? (prompted responses, single coded)
Base: All adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+).
Significance testing shows any difference between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

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

Six in ten of all adults who do not currently have the internet at home say they do not intend to get internet access at home in the next 12 months. Those who do not intend to get internet access were asked to say why, without any prompting, and were allowed to nominate as many different reasons as applied to them. Figure 7 shows a summary of the reasons given by those who do not intend to get internet access in the next 12 months.

Most give reasons relating to a lack of interest, as in previous years, although this is slightly less likely than in 2007. There is an increase in the number who do not intend to get internet access due to reasons relating to cost compared to 2007. In 2009 some 26% of people without the internet gave reasons relating to ownership/ availability. We will cover this issue in more detail in our main report in spring 2010, when more data, based on two waves of research from 2009, will allow us to make comparisons across the different demographic groups.

Figure 7: Reasons for not intending to get home internet access in the next 12 months: 2005, 2007 and 2009[6]
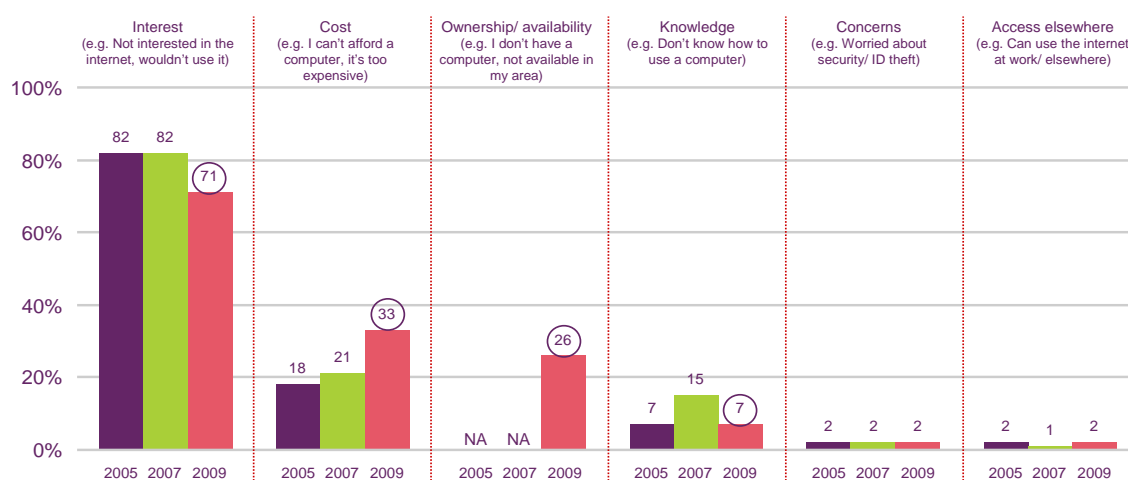
IN19 – Can you tell me what your reasons are for not getting internet access at home? (Unprompted responses, multi-coded)
Base: All adults aged 16+ who do not intend to get internet access at home (930 in 2005, 743 in 2007, 172 in 2009). Significance testing shows any change between 2007 and 2009. Percentages may add to more than 100% as respondents can nominate more than one reason.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

3.6   People use media platforms for a variety of reasons

Adults living in a household with a television, those who listen to the radio at home, those who use the internet at home or elsewhere and those who use a mobile phone were shown a list of possible reasons for using each of these media, and were asked to say which, if any, applied to them. Reasons for using each of these four media from the 2009 survey are shown in Figure 8, with responses 'stacked' in order to show the breadth of reasons given and the differences across media.

The most popular reasons, both for watching television and for listening to radio, are to relax and to keep up to date with news. The most popular reasons for using the internet are to find out or learn things, and for contact with other people. The single most popular reason for using a mobile phone is for contact with other people.

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[6] The questionnaires used in the 2005 and 2007 surveys did not include non-ownership of equipment as a possible category for the responses people gave about why they did not intend to get access to the internet at home. The number of categories was extended in the 2009 survey.

Figure 8: Reasons for using key media platforms in 2009
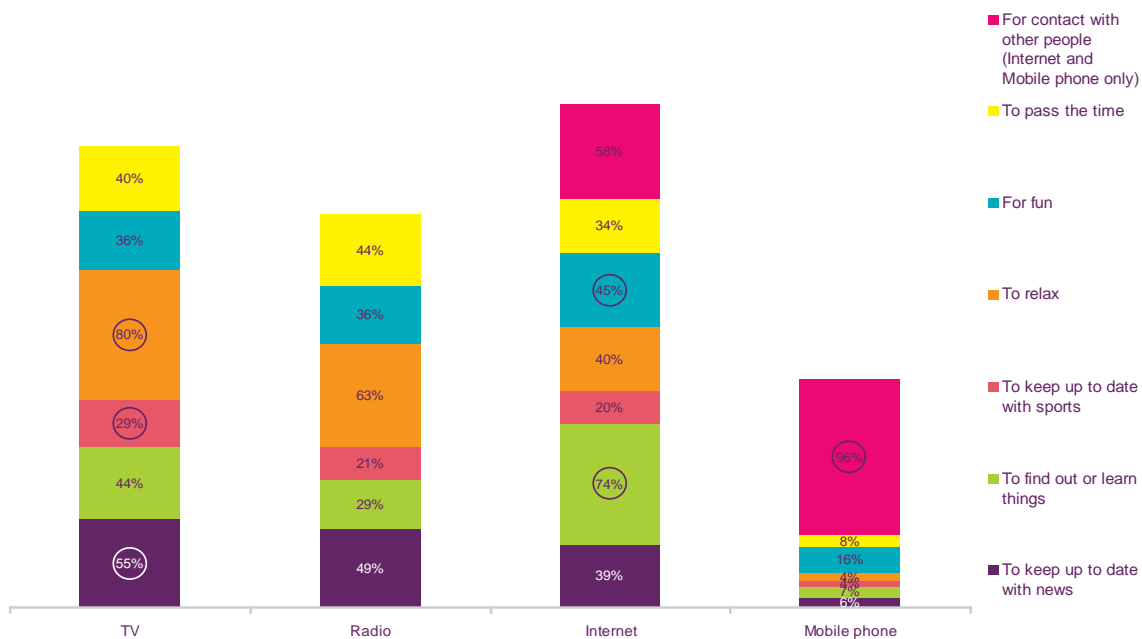
T15/ R11/ IN42/ M10 – Which, if any of these are reasons why you watch TV/ listen to radio/ use the internet/ use a mobile phone? (prompted responses, multi-coded)
Base: All adults aged 16+ with any TVs (804 in 2009), who listen to radio at home (602 in 2009), who use the internet at home or elsewhere (580 in 2009), who use a mobile phone (723 in 2009). Significance testing shows any differences between one platform and all other platforms
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

For each of television, radio, the internet and mobile phones, younger adults are more likely than adults as a whole to say they use media for fun and to pass the time. Males are more likely than females to say they use each of the four key media to keep up to date with sports, and males are also more likely than females to use radio and the internet to keep up to date with news.

Figure 9 shows the reasons for using the internet across the demographic groups in 2009. Younger adults, aged 16-34, differ from the adult population as a whole in 2009 in their reasons for using the internet: they are more likely to say they use the internet for contact with other people (65% vs. 58%), for fun (59% vs. 45%), to relax (48% vs. 40%), or to pass the time (43% vs. 34%), and less likely to say they use the internet to find out or learn things (62% vs. 74%). Adults aged 45-54 are more likely than adults as a whole to say they use the internet to find out or learn things (89% vs. 74%), while the oldest adults, aged 55 and over, are less likely than adults as a whole to say they use the internet for contact with other people (46% vs. 58%), for fun (27% vs. 45%), to relax (25% vs. 40%), or to keep up to date with sports (12% vs. 20%).

The only differences measured between males and females in 2009 are that males are more likely than females to say they use the internet to keep up to date with news (49% vs. 30%) or with sports (35% vs. 6%) and to pass the time (39% vs. 30%).

There are relatively few differences between the reasons for using the internet across the socio-economic groups in 2009, but adults in AB socio-economic groups are more likely than adults as a whole to say they use the internet to keep up to date with news (52% vs. 39%) and less likely to say they use the internet to relax (29% vs. 40%) or for fun (35% vs. 45%). Adults in DE socio-economic groups are less likely than adults as a whole to say they use the internet to find out or learn things (57% vs. 74%) or to keep up to date with news (24% vs. 39%).
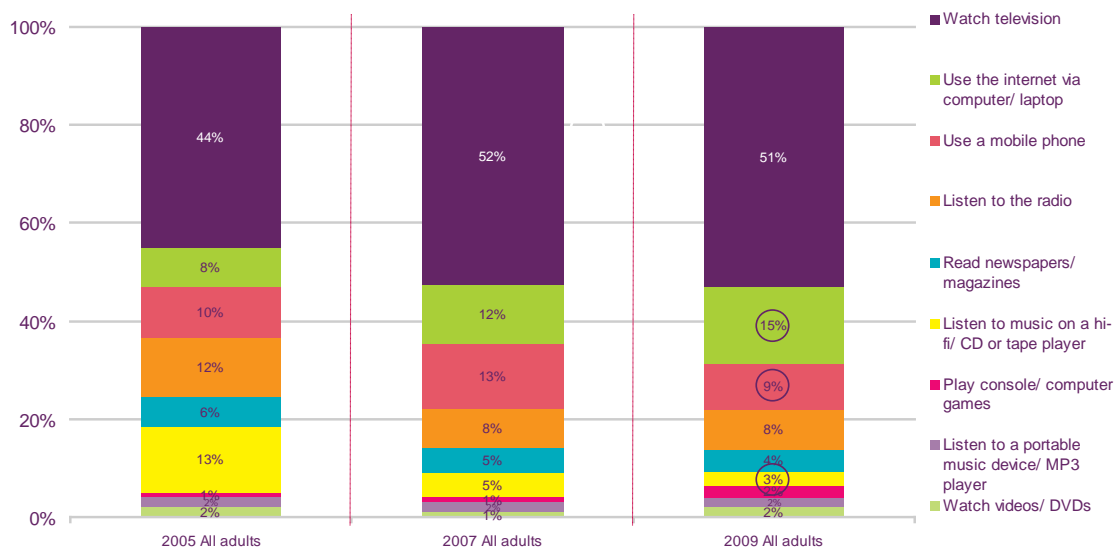
Figure 9: Reasons for using the internet in 2009, by age, gender and socio-economic group

IN42 – Which, if any of these are reasons why you use the internet? (prompted responses, multi-coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (580 aged 16+ in 2009, 197 aged 16-34, 149 aged 35-44, 111 aged 45-54, 123 aged 55+, 273 male, 307 female, 150 AB, 187 C1, 115 C2, 128 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+. * Due to low base sizes 16-24s and 25-34s are shown as one group, and 55-64 and 65+ are shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

3.7   Increase in the internet as the most-missed media activity

To understand how much importance people attach to various media, we asked them to say which single media activity they would miss the most if it were taken away. Among adults as a whole, television is typically given as the medium they would miss the most (one in two say this). Compared to 2007, adults are more likely to say they would most miss using the internet (15% vs. 12%), less likely to say they would miss using a mobile phone (9% vs. 13%) and less likely to say they would miss listening to music on a hi-fi/ CD or tape player (3% vs. 5%).

Figure 10: Most-missed media activity[7]: 2005, 2007 and 2009

While adults in all demographic groups (age, gender, socio-economic group) are most likely to say that television is the medium they would miss the most, there are some key differences within the overall population of adults in 2009. Younger adults aged 16-34 are significantly less likely than adults as a whole (40% vs. 51%) to mention television. The youngest adults, aged 16-24, are more likely than adults as a whole to say they would most miss using a mobile phone (24% vs. 9%), while adults aged 55-64 and 65+ are less likely to say they would miss using a mobile phone (2% and 3% vs. 9% of all adults). The oldest adults, aged 65 and over, are more likely than adults as a whole to say they would miss listening to radio (15% vs. 8%) or reading newspapers or magazines (8% vs. 4%), and less likely to say they would miss using the internet (8% vs. 15%).

There are also some differences in the most-missed media activities of adults in specific socio-economic groups, compared to the adult population as a whole in 2009. Adults in AB socio-economic groups are less likely than adults as a whole to say they would miss watching television (42% vs. 51%) and more likely to say they would miss listening to radio (14% vs. 8%). Adults in DE socio-economic groups are more likely than adults as a whole to say they would miss using a mobile phone (15% vs. 9%) or listening to an MP3 player (4% vs. 2%), and less likely to say they would miss using the internet (10% vs. 15%).

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[7] The categories 'watch television' or 'listen to the radio' do not specify the particular platform being used for these activities. Future waves of the research will clarify which platform or device is being referred to by respondents.

Figure 11: Most-missed media activity, by age and socio-economic group: 2009
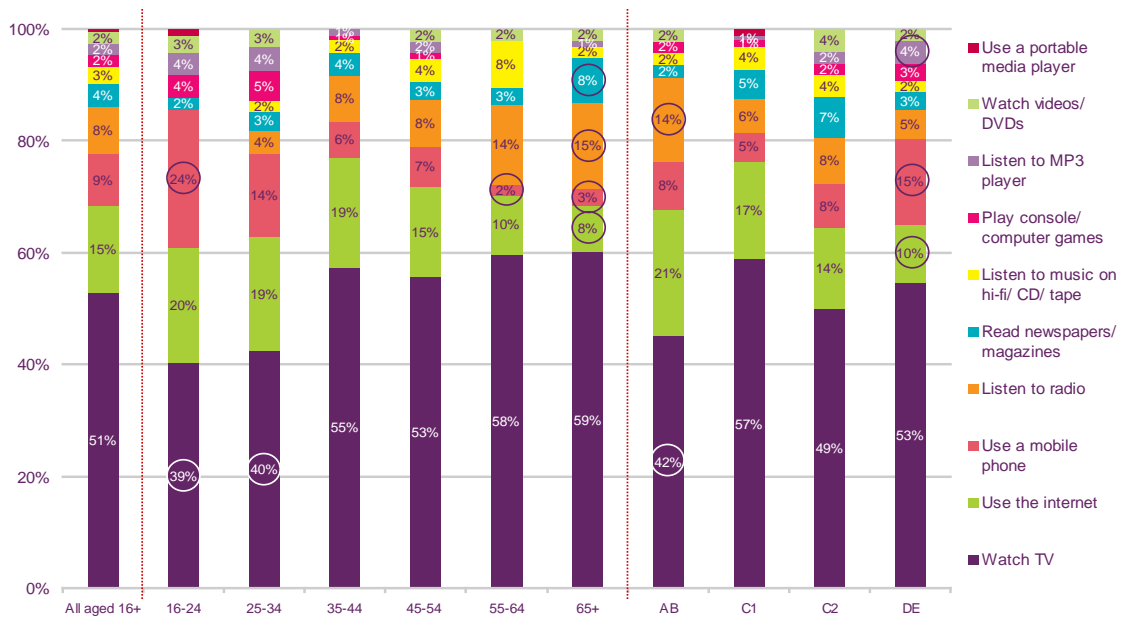
A2 – Which one of these would you miss doing the most? (Prompted responses, single coded)
Base: All adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+, 175 AB, 228 C1, 168 C2, 241 DE). Significance testing shows any differences between any age group and all adults aged 16+, between any socio-economic group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Using the internet

This section reports on a variety of ways in which the internet can be used. It looks at the breadth of regular online activities and how these differ across demographic groups, and then focuses on the types of websites used by those looking for health information and the extent to which the internet is being used to watch television programmes and films. Finally, it examines how the internet is being used for social networking.

Key findings

- Compared to 2007, the internet is more likely to be used regularly[8] for content creation (through social networking sites) (34% vs. 22%) and for entertainment (30% vs. 22%). These activities are most likely to be undertaken by internet users aged 16-34.

- Compared to 2007, fewer internet users are regularly carrying out transactions online (36% vs. 41%) or finding information online for their work/ studies (35% vs. 48%). It is possible that this change in the range of activities is partly a result of the change in the profile of internet users since 2007.

- One in four internet users (27%) say they watch or download programmes from UK TV broadcasters' websites.

- Almost twice as many internet users have a social networking site profile compared to 2007, accounting for four in ten of all users (38% vs. 22%).

4.1 Communication remains the most common activity on the internet, with some changes in what the internet is used for regularly

Adults who use the internet at home or elsewhere were prompted with a range of internet activities and were asked to say which they ever do, and how often they do each.[9]

These uses were grouped into nine types of use, in order to assess breadth of use of the internet. The categories are:

- Communication – relates to activities such as sending or receiving email or using Instant Messaging services.

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

- Work/ studies information – relates to finding information online for work or for studies

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[8] 'Regularly' refers to an activity carried out at least once a week.
[9] These activities in no way represent an exhaustive list of all the potential activities that can be undertaken online, but were chosen as representing the majority of activities for most people.

- Content creation – relates to using social networking sites (such as Facebook, MySpace, Piczo, Bebo, hi5 or Twitter) or maintaining a website or blog.

- Entertainment – relates to uses such as listening to radio stations online, playing games online, watching online or downloading video clips, TV programmes or films, downloading or listening online to music, or looking at adult-only websites.

- News - relates to looking at news websites.

- Leisure information – relates to finding information for booking holidays or finding information for leisure time such as cinema and live music.

- Public / civic – relates to finding information online about public services provided by local or national government, or completing government processes online such as registering for tax credits, renewing a driving licence, car tax, or passport, or completing a tax return, or looking at political, campaign or issues websites.

- Health – relates to finding information about health-related issues (new in 2009; not covered in previous surveys).

As in 2007, communication is the most commonly mentioned activity carried out at least once a week by internet users (76% in both 2009 and 2007). Compared to 2007, fewer internet users say that they use the internet at least once a week for transactions (36% vs. 41%) and for work/ studies information (35% vs. 48%). Two types of activities see an increase in weekly use compared to 2007: content creation (34% vs. 22%) and entertainment (30% vs. 22%). It is possible that some of these changes in the extent to which some types of online activity are carried out are a result of the change in the profile of internet users, as mentioned earlier in this report. We will look at this issue in more detail in the final report, to be published in spring 2010.
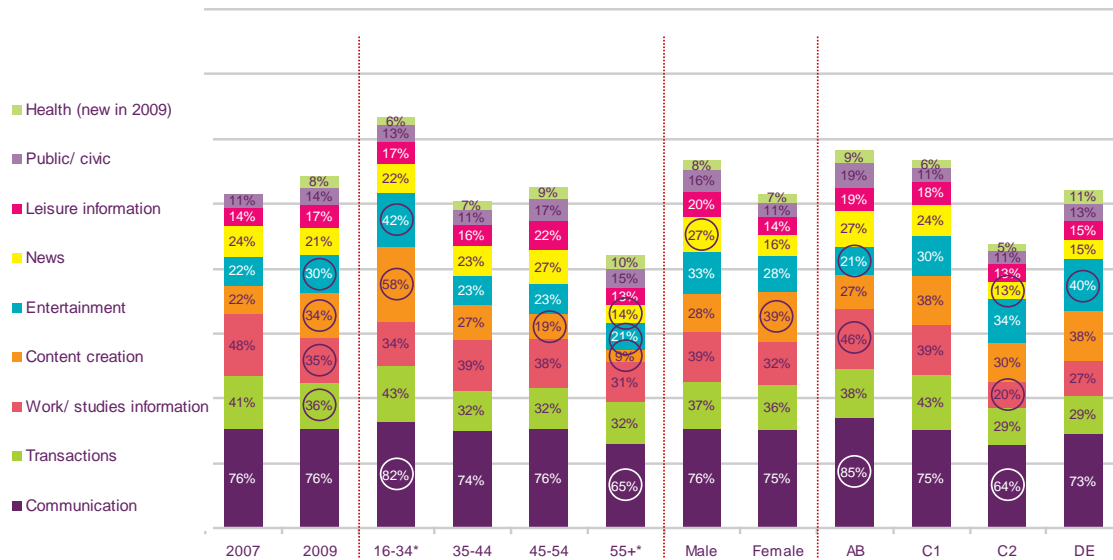
Across the eight categories of internet use covered in both surveys (i.e. excluding health), overall breadth of use of the internet is at a similar level in 2009 as in 2007. Among internet users in 2009, younger internet users make a broader use of the internet compared to older users, males make a broader use than females, and those in AB and C1 socio-economic groups make a broader use than those in C2 and DE socio-economic groups.

Younger internet users, aged 16-34, are more likely than adults as a whole to use the internet at least weekly for communication (82% vs. 76%), content creation (58% vs. 34%) and for entertainment (42% vs. 30%). By contrast, older internet users, aged 55 and over, are less likely than adults as a whole to use the internet at least weekly for each of these three types of activity.

There are relatively few differences in the types of use made by males and females, but males are more likely than females to use the internet at least weekly for news (27% vs. 16%), while females are more likely than males to use the internet at least weekly for content creation (39% vs. 28%).

Internet users in AB socio-economic groups are more likely than adults as a whole to use the internet at least weekly for communication (85% vs. 76%) and for work/ studies information (46% vs. 35%), but less likely to use the internet at least weekly for entertainment (21% vs. 30%). Those in DE socio-economic groups are more likely than adults as a whole to use the internet at least weekly for entertainment (40% vs. 30%). Internet users in the C2 socio-economic group appear to make a narrower use of the internet, and are less likely than adults as a whole to use the internet at least weekly for communication (64% vs. 76%), work/ studies information (20% vs. 35%) and news (13% vs. 21%).

Figure 12: Internet activities carried out at least once a week: 2007 and 2009, by age, gender and socio-economic group

Legend:
- Health (new in 2009)
- Public/ civic
- Leisure information
- News
- Entertainment
- Content creation
- Work/ studies information
- Transactions
- Communication

| Category	2007	2009	16-34*	35-44	45-54	55+*	Male	Female	AB	C1	C2	DE
Health (new in 2009)		8%	6%	7%	9%	10%	8%	7%	9%	6%	5%	11%
Public/ civic	11%	14%	13%	11%	17%	15%	16%	11%	19%	11%	11%	13%
Leisure information	14%	17%	17%	16%	22%	13%	20%	14%	19%	18%	13%	15%
News	24%	21%	22%	23%	27%	14%	27%	16%	27%	24%	13%	15%
Entertainment	22%	30%	42%	23%	23%	21%	33%	28%	21%	30%	34%	40%
Content creation	22%	34%	58%	23%	19%	9%	28%	39%	27%	38%	20%	38%
Work/ studies information	48%	35%	34%	27%	38%	31%	39%	32%	46%	39%	30%	27%
Transactions	41%	36%	43%	32%	32%	32%	37%	36%	38%	43%	29%	29%
Communication	76%	76%	82%	74%	76%	65%	76%	75%	85%	75%	64%	73%

IN13/14 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (prompted responses, multi-coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 in 2007, 580 in 2009, 197 aged 16-34,149 aged 35-44, 111 aged 45-54, 123 aged 55+, 273 Male, 307 Female 150 AB, 187 C1, 115 C2, 128 DE). Significance testing shows any change between 2007 and 2009, between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+. * Due to low base sizes 16-24s and 25-34s are shown as one group, and 55-64 and 65+ are shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.2 Indications of a shift towards NHS websites for health information

When asked about the types of information they ever use the internet to find, half of all internet users (48%) said that they ever use the internet 'to find out more about an illness'; which is higher than the measures from 2007 (42%) and 2005 (41%). Two groups of internet users are more likely to look for health information online: females (53%) and those in AB socio-economic groups (54%).

Those who ever use the internet to find out more about an illness were shown a list of options and were asked to say which types of websites they tend to look at for this information. Compared to 2007, use of NHS Direct/ NHS 24 websites has increased (83% vs. 70%) while use of websites from support groups for particular illnesses/ conditions has decreased (28% vs. 37%). This increase in use of NHS websites could be related to the change in the profile of internet users compared to 2007, as reported earlier. Relatively few people looking for this type of health information say that they use the other types of websites that we asked about.

Figure 13: Internet information sources used for health information: 2005, 2007 and 2009
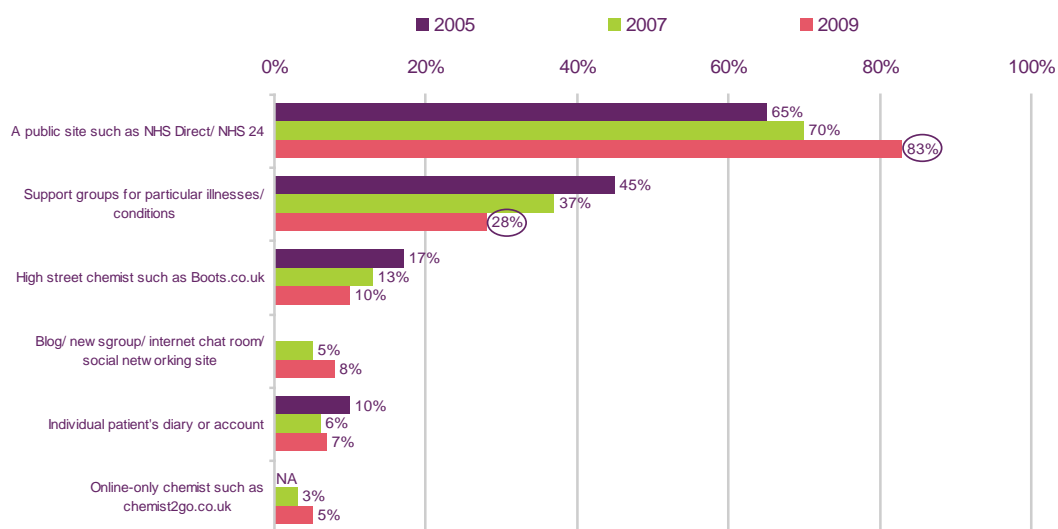

IN22 – Which of the following types of websites do you tend to look at to find out more about an illness? (prompted responses, multi-coded)
Base: Adults aged 16+ who use the internet to find out more about an illness (523 in 2005, 691 in 2007, 266 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.3 One in three UK adults are watching television programmes or films over the internet

Among UK adults who use the internet at home or elsewhere in 2009 (75% of all UK adults), three in ten (29%) are watching online, or downloading, TV programmes or films. Almost all of these are doing so through UK TV broadcasters' websites, such as BBC iPlayer (27%), with a much smaller proportion doing so from other websites (9%).

Younger adults aged 16-24 and 25-34 are more likely than all adult internet users to download or watch TV programmes or films online (40% and 43% vs. 29%), and stand out as being much more likely to have used websites other than UK TV broadcasters' websites to download or watch online (18% vs. 9%). By contrast, downloading or watching TV programmes or films online is relatively uncommon among internet users aged 55 and over (11% vs. 29%).

Figure 14: Watching television programmes and films online, by age
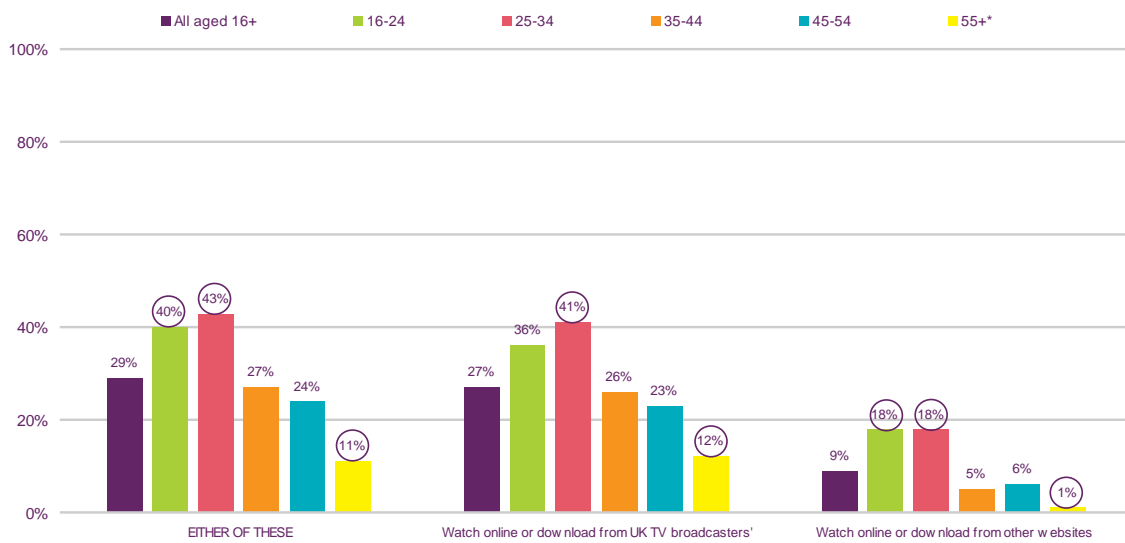
IN15 – Do you watch TV programmes or movies in any of the following ways? (prompted responses, multi-coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (580 aged 16+, 92 aged 16-24, 105 aged 25-34, 149 aged 35-44, 111 aged 45-54, 123 aged 55+). Significance testing shows any difference between any age group and all adults aged 16+. * Due to low base sizes those aged 55-64 and 65+ are shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.4 Two in five adult internet users have set up a social networking site profile

In order to understand the extent to which the internet is being used for content creation, we asked internet users about their interest and experience of a variety of online activities. The activities that we asked about included uploading content onto a website, creating web pages, profiles or blogs, and contributing to existing sites or blogs.

Three in five adults (60%) have experience of any of the nine content creation activities that we asked about. Two additional online activities were included in the 2009 survey: signing an online petition (20% have done this) and contacting a local councillor or MP online (7% have done this). Excluding these two activities, there appears to have been an increase in undertaking content creation activities online compared to 2007 (58% in 2009 vs. 51% in 2007).

As was the case in 2007, the most commonly undertaken content creation activity is uploading photos to a website, undertaken by two in five adult internet users (43% in both 2009 and 2007). Since 2007, however, there has been a significant increase in two activities: setting up a social networking site profile (38% vs. 21%) and contributing comments to someone else's blog (26% vs. 19%). The proportion of internet users with a social networking site profile has almost doubled since 2007.

None of the other content creation activities that we asked about were more likely to be undertaken by internet users in 2009 than in 2007. Indeed, three types of activity show higher volumes of internet users who say they are not interested in the activity, compared to 2007: uploading photos to a website (44% vs. 39%), setting up a website (71% vs. 67%), and making a short video and uploading it to a website (81% vs. 77%).

Figure 15: Experience of, and interest in, content creation: 2007 and 2009
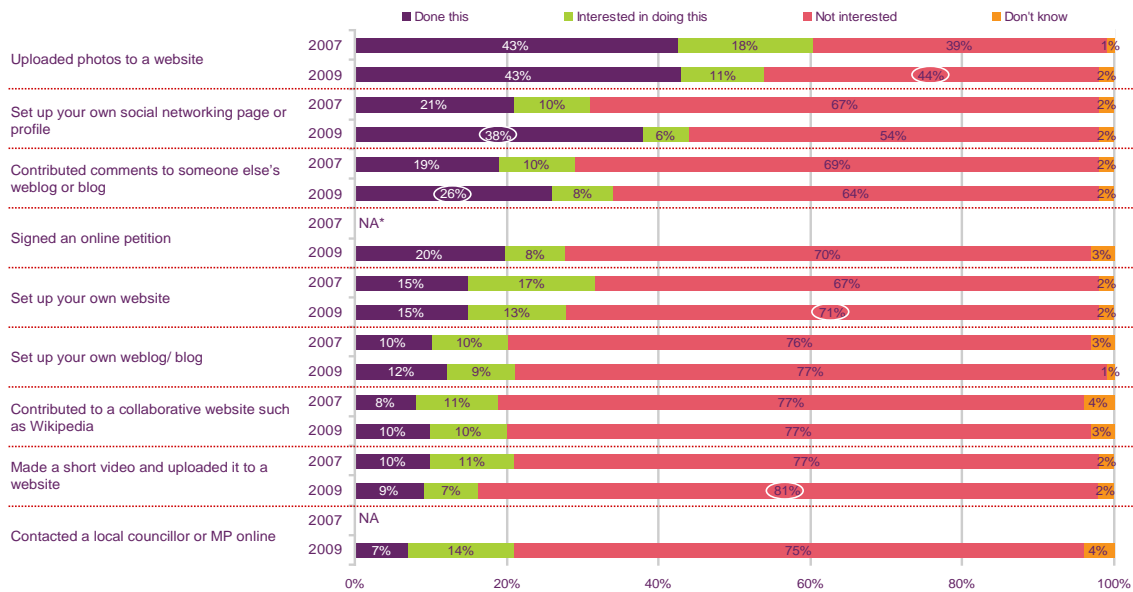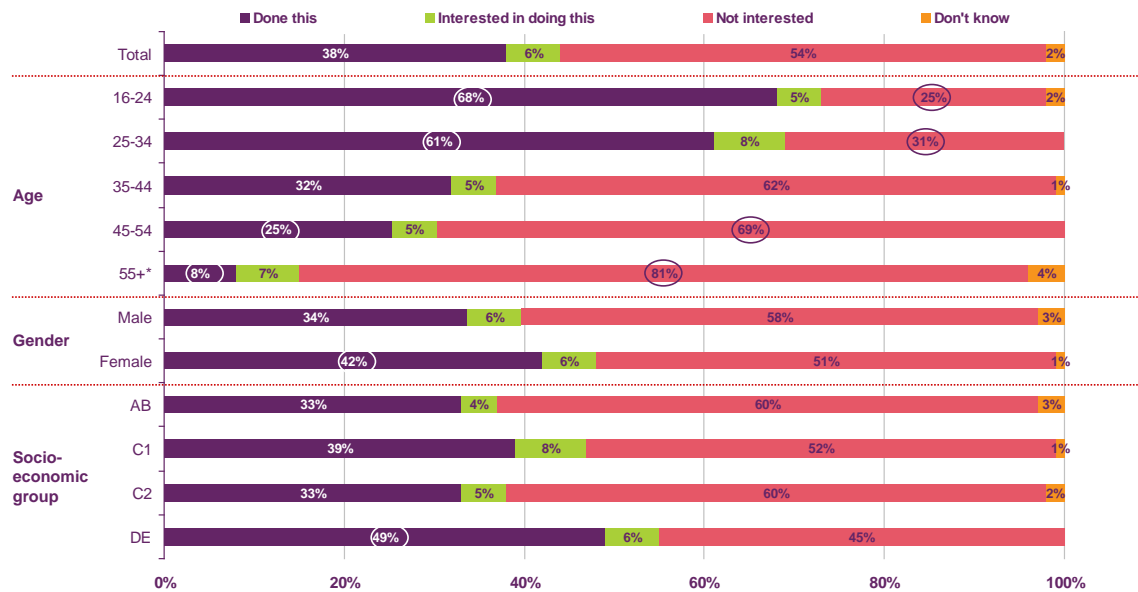

IN23A-I – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested. (prompted responses, single coded)
Base: All who use the internet at home or elsewhere (1723 in 2007, 580 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.5 The majority of internet users aged 16-34 have a social networking site profile

While four in ten (38%) of all adult internet users have set up a social networking site page or profile, there are some key differences within the overall population of internet users. Internet users aged under 35 are significantly more likely to have a social networking site profile; with seven in ten 16-24s (68%) and six in ten 25-34s (61%) having a profile compared to four in ten (38%) of all internet users. Just one in ten internet users aged 55 and over (8%) have a social networking site profile, and those aged 45-54 are also less likely than all adult internet users (25%) to have a profile.

Females are more likely than males to have a social networking site profile (42% vs. 34%), and adults in DE socio-economic groups are more likely than the overall adult population to one (49% vs. 38%). As mentioned earlier, internet users in DE socio-economic groups are significantly more likely to be aged 16-35, compared to internet users as a whole (53% vs. 39%). This higher incidence of social networking site profiles is likely to be a result of the younger profile of internet users in DE socio-economic groups.

Figure 16: Experience of, and interest in, setting up own social networking site profile: 2009, by age, gender and socio-economic group

IN23A – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested. (prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 in 2007, 580 in 2009, 92 aged 16-24, 105 aged 25-34, 149 aged 35-44, 111 aged 45-54, 123 aged 55+, 273 male, 307 female, 150 AB, 187 C1, 115 C2, 128 DE). Significance testing shows any difference between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+. * Due to low base sizes those aged 55-64 and 65+ have been shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.6 Growth in social networking site profiles since 2007 is most evident among 25-34s and DE socio-economic groups

As mentioned previously, the proportion of adult internet users with their own social networking site profile has almost doubled since 2007 (38% vs. 22%). Figure 17 shows the proportion of internet users with a social networking site profile in 2007, and from the interim data for 2009. All demographic groups have seen a significant increase in the experience of setting up a social networking site profile since 2007, with the exception of adults aged 55 and over (8% vs. 6%).

The growth in social networking site profiles is greatest among adults aged 25-34 (61% vs. 28%), females (42% vs. 22%), and those in DE socio-economic groups (49% vs. 20%).

Figure 17: Set up own social networking site profile: 2007 and 2009, by age, gender and socio-economic group
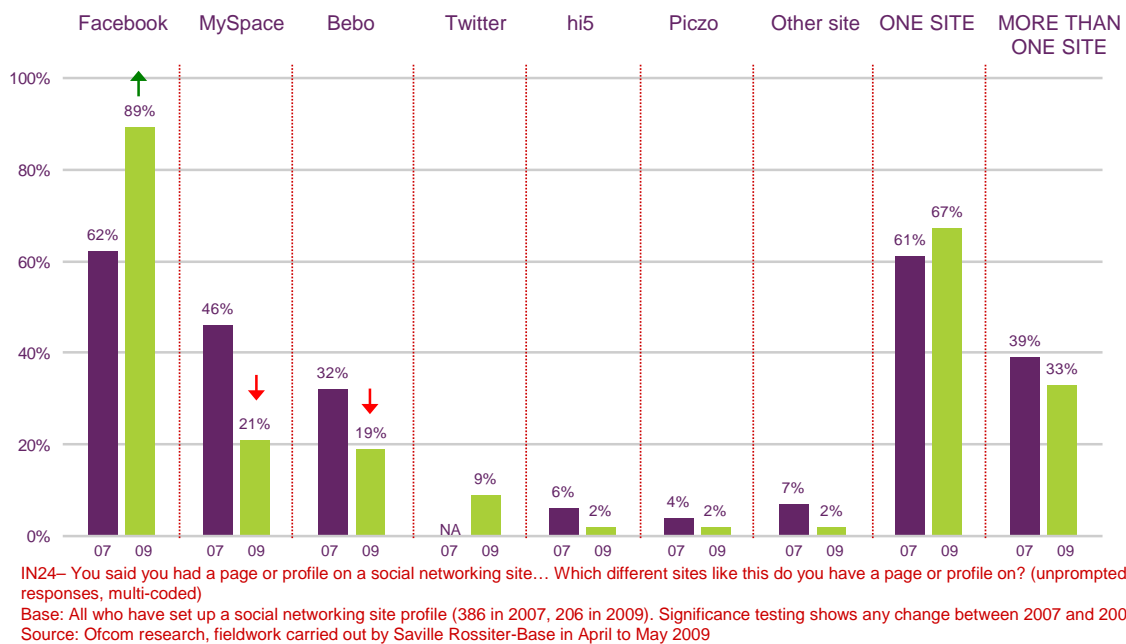

IN23A – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested. (prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 in 2007, 580 in 2009, 92 aged 16-24, 105 aged 25-34, 149 aged 35-44, 111 aged 45-54, 123 aged 55+, 273 male, 307 female, 150 AB, 187 C1, 115 C2, 128 DE) Significance testing shows any difference between 2007 and 2009, between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+. * Due to low base sizes those aged 55-64 and 65+ have been shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.7   Facebook is used by nine in ten adults with a social networking site profile

Those adults with a social networking site profile were asked to say on which sites they had a page or profile. As in 2007, Facebook is the most commonly-used social networking site, with a significant increase in the proportion of social networking site users naming it as a site on which they have a profile (89% vs. 62%)[10]. By contrast, the proportions of those with profiles on MySpace (21% vs. 46%) and on Bebo (19% vs. 32%) have declined since 2007.

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[10] By way of context, Nielsen NetView figures for April 2009, when fieldwork was carried out, show that 50.3% of internet users aged 18+ visited Facebook that month, 12.6% visited MySpace, and 10.2% visited Bebo. These NetView figures do not of course mean that visitors were necessarily visiting their own profile, but give an indication of the relative share of each site.

Figure 18: Sites used by those with a social networking site profile: 2007 and 2009

IN24– You said you had a page or profile on a social networking site… Which different sites like this do you have a page or profile on? (unprompted responses, multi-coded)
Base: All who have set up a social networking site profile (386 in 2007, 206 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

While relatively few use social networking sites other than Facebook, there are some key differences within the overall population of social networking site users. Users aged 16-24 are more likely than users as a whole to use Bebo (36% vs. 19%), and males are more likely than females to use MySpace (28% vs. 15%).

4.8   Increase in frequency of visiting social networking sites

Among those with a social networking site profile, there has been an increase since 2007 in the percentage visiting any social networking site every day (41% vs. 30%). The proportion visiting any social networking sites less often than once a week has halved since 2007 (12% vs. 20%).

Figure 19: Frequency of visiting any social networking sites: 2007 and 2009
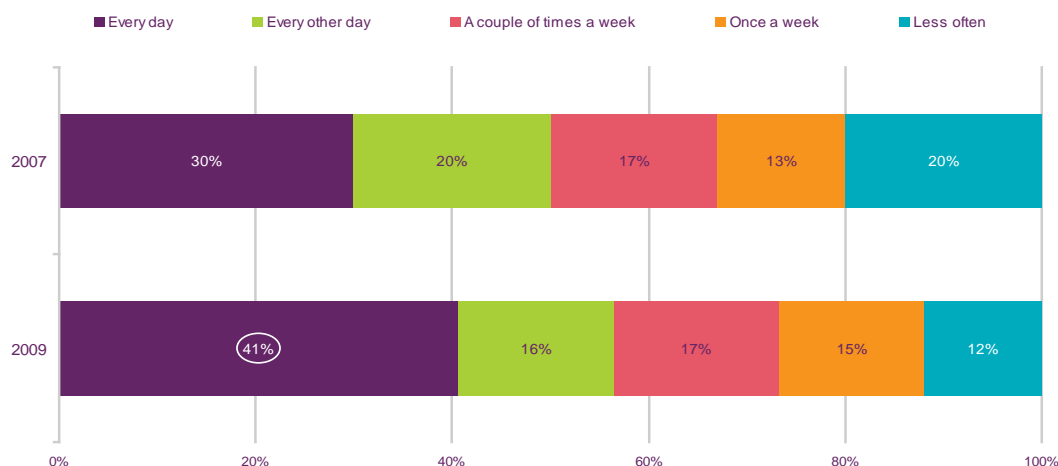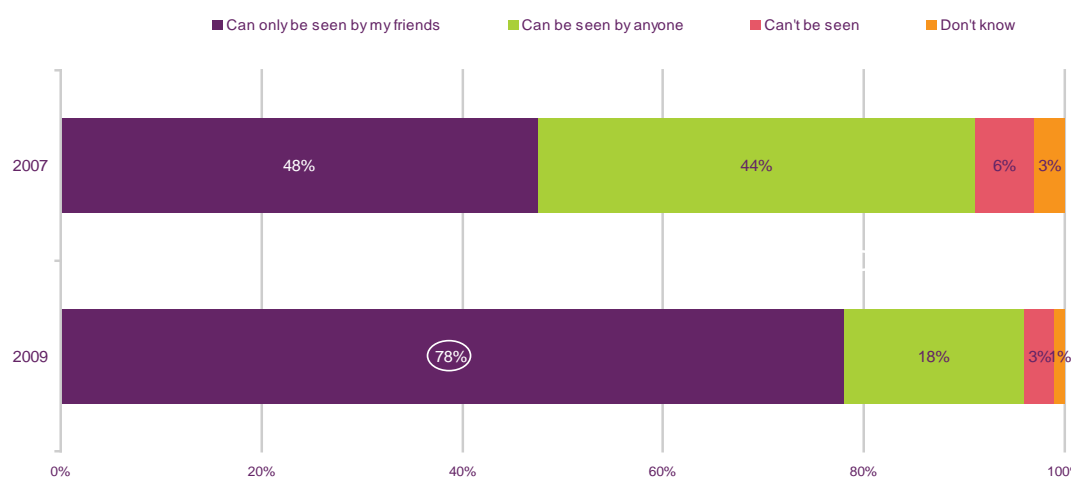

IN26– How often do you visit any social networking sites (like Facebook, Piczo, Bebo, hi5, Twitter or MySpace)? (prompted responses, single coded)
Base: All with a current social networking site profile (347 in 2007, 206 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.9   Most social networking site users say their profile can be seen only by their friends

Those with a social networking site profile were asked whether their profile can be seen by other people, and if so, whether it can be seen only by their friends, or by anyone. Social networking site users are now more likely to say they have a profile which can be seen only by their friends, compared to 2007 (78% vs. 48%).

Figure 20: Visibility of the social networking site profile: 2007 and 2009


IN25– And do you know whether this profile can be seen by other people? Who can see it? (prompted responses, single coded)
Base: All with a current social networking site profile (347 in 2007, 206 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

4.10   Increase in talking to friends and family, and decrease in listening to music through social networking sites

Those adults with a social networking site profile were shown a list of activities and were asked to say which, if any, they used social networking sites for. Compared to 2007, social networking site users now appear to be more likely to use the sites to talk to friends and family they see a lot (80% vs. 69%) and to those they rarely see (73% vs. 65%).

Social networking site users appear to be less likely to use these sites for three types of activity compared to 2007: looking at other people's pages without leaving a message (33% vs. 40%), listening to music or finding out about bands (18% vs. 29%), and talking to people they don't know (11% vs. 17%).

Figure 21: Social networking site uses: 2007 and 2009
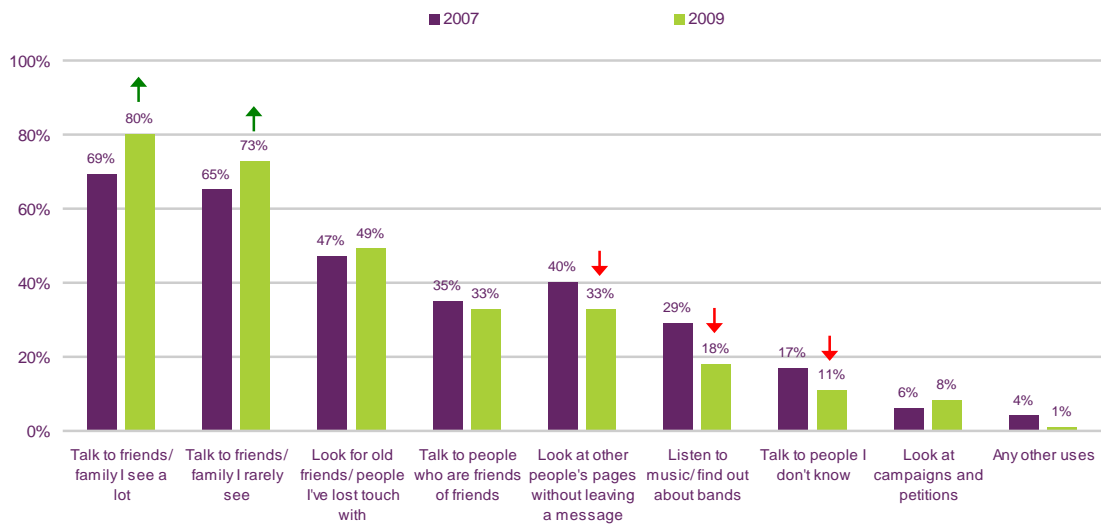
IN27 – Do you regularly use these social networking sites for any of the things shown on this card? (prompted responses, multi-coded)
Base: All with a current social networking site profile (347 in 2007, 206 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Understanding, security and concerns

This section looks at awareness of the main sources of funding for the BBC and commercial operators, and perceptions of regulation across different communications platforms. The questions relating to funding and regulation provide insight into the key area of 'understanding' within Ofcom's definition of media literacy. This section also provides a picture of attitudes towards illegal file sharing. It details the types of checks that internet users make when visiting new websites and their attitudes towards providing personal details online. Finally, this section looks at the extent to which adults have concerns about the main communications platforms and the key types of concerns.

Key findings

- Since 2007, UK adults are less likely to be aware of the main source of funding for BBC TV programmes (75% vs. 80%), BBC radio stations (55% vs. 62%) and the BBC website (36% vs. 41%).

- UK adults are now more likely to believe that content is regulated (in terms of what can be broadcast / shown / written) across each of television (82% vs. 79%), radio (68% vs. 58%), the internet (38% vs. 26%), mobile phones (25% vs. 20%) and gaming (36% vs. 29%).

- More UK adults believe that file sharing through downloading shared copies of copyright music and films should be illegal (42%) than believe it should not be illegal (33%), and 25% are unsure. Young people aged 16-24 are more likely to say that such content should not be illegal (55%).

- Internet users appear to be less willing to share personal information online now than in 2007.

- UK adults are more likely to have concerns about content on the internet (56%) than content on the other key media platforms (44% television, 24% mobile phones, 23% gaming, 9% radio).

5.1   Awareness of the licence fee as the main source of funding for BBC TV programmes, radio stations and website appears to be declining

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

Unprompted awareness of the main source of funding is higher for television than for radio, and considerably lower for the internet, as was also the case in 2007. Unprompted awareness of the main source of funding for the BBC remains higher than for the commercial operators, across television, radio and the internet.

While most adults say that the licence fee is the main source of funding for BBC television programmes, the interim data suggest that awareness has declined since 2007 (75% vs. 80%). Similarly, while more than half of all adults say that the licence fee is the main source of funding for BBC radio stations, awareness also appears to have declined since 2007 (55% vs. 62%).

Around one in three adults say that the licence fee is the main source of funding for the BBC's website; this also represents a decline since 2007 (36% vs. 41%).

Responses regarding the main source of funding for television programmes on ITV, Channel 4 and Five, the other main radio stations, and search engine websites such as Google, have not changed to any significant extent since 2007.

Figure 22: Awareness of the main source of funding for television programmes, radio stations and websites: 2005, 2007 and 2009
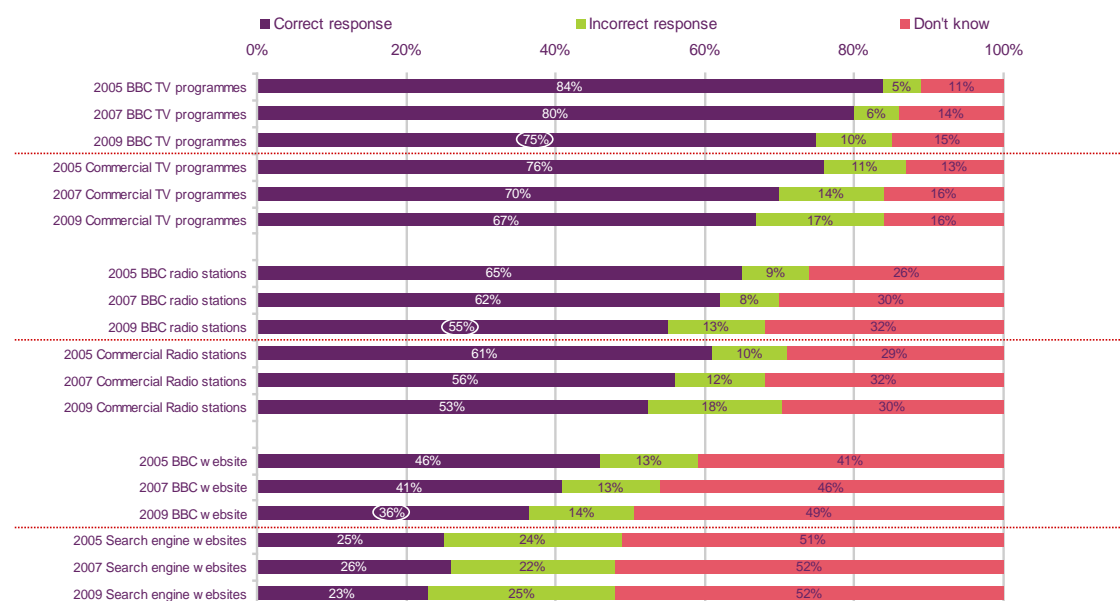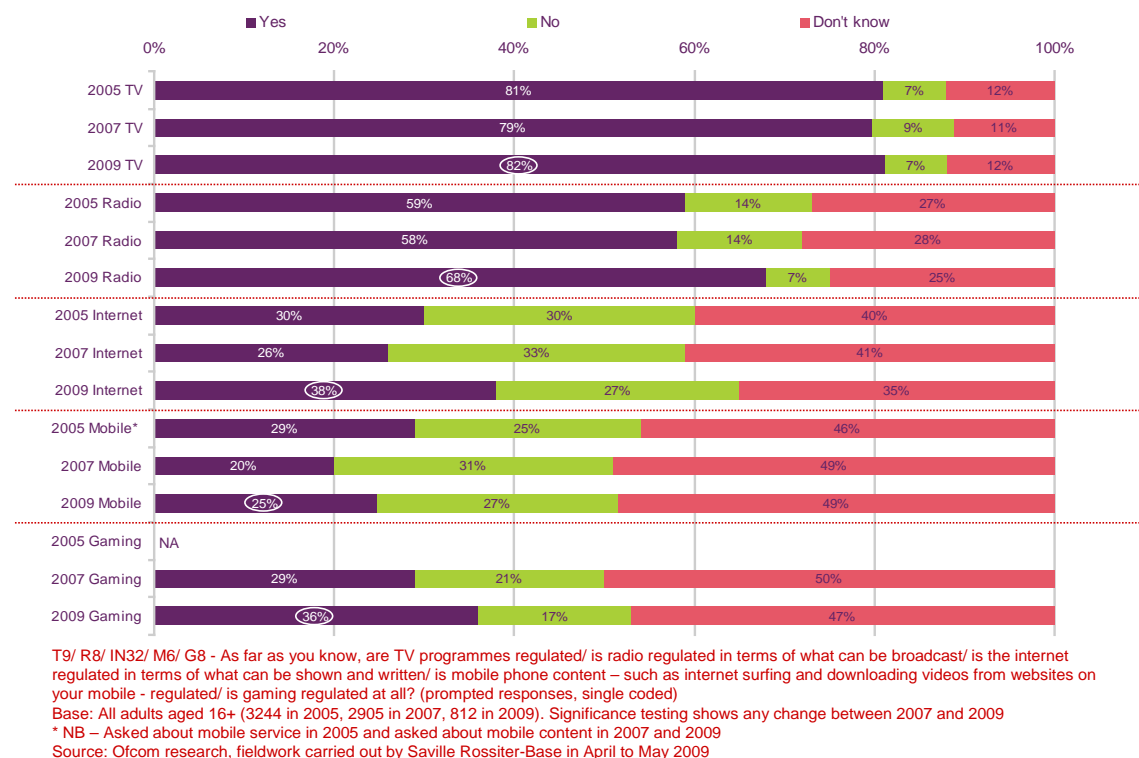

T5-T6/ R4-R5/ IN28-29 - How would you say BBC TV programmes are mainly funded?/ How would you say programmes are mainly funded on ITV, Channel 4 and Five?/ How would you say BBC radio stations are mainly funded?/ How would you say the other main radio stations are mainly funded? /How do you think the BBC's website is mainly funded / How do you think search engine websites such as Google or Ask.com are mainly funded? (unprompted responses, single coded)
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Based on the interim data from 2009, there are three groups within the overall adult population with consistently lower levels of awareness of the licence fee as the main source of funding for BBC television programmes, radio stations and website: those aged 16-24, females, and those in DE socio-economic groups.

5.2   Adults are now more likely to believe that content is regulated across all five key platforms

Adults were asked to say whether content is regulated[11] across each of television, radio, the internet, mobile phone and gaming. Compared to 2007, UK adults are more likely to believe that content is regulated across all five of these key platforms.

Figure 23: Belief that content is regulated: 2005, 2007 and 2009

T9/ R8/ IN32/ M6/ G8 - As far as you know, are TV programmes regulated/ is radio regulated in terms of what can be broadcast/ is the internet regulated in terms of what can be shown and written/ is mobile phone content – such as internet surfing and downloading videos from websites on your mobile - regulated/ is gaming regulated at all? (prompted responses, single coded)
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009
* NB – Asked about mobile service in 2005 and asked about mobile content in 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

As with the responses regarding the main source of funding, younger adults and those in DE socio-economic groups are less likely to believe that television and radio content is regulated. For example, belief that television programmes are regulated is lower among 16-24s (67% vs. 82% of all adults) and those in DE socio-economic groups (68% vs. 82% of all adults). For both television and radio, those who do not say that content is regulated are more likely to say they don't know, than to say that the content is not regulated.

The increase since 2007 in the proportion of adults who believe that internet content is regulated (38% vs. 26%) is evident across most of the demographic groups within the 2009 interim data. Those aged 35-44 are most likely to hold this belief (46% vs. 38%).

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[11] The following definition was offered as an explanation of a regulator. "A regulator is often called a "watchdog" – it sets rules or guidelines about content. People can also complain to the regulator if they feel something was inappropriate - perhaps because it was offensive, harmful, inaccurate or unfair."

5.3   Increase in belief that types of online content are regulated

We asked people whether they thought programmes or clips shown on broadcasters' own websites, or sites likes YouTube, and home-made videos made by the general public, were regulated or not. Adults were shown a list of different types of online content and were asked to say which, if any, are regulated[12] in terms of what can be shown on the internet. Compared to 2007, adults are more likely to believe that programmes or clips of programmes shown on broadcasters' websites (such as the BBC website or the ITV website) are regulated (32% vs. 27%). Adults are also more likely now than in 2007 to believe that content on sites such as YouTube is regulated (21% vs. 12%). Close to half of all UK adults (45%) are unsure whether any of the types of online content that we asked about are regulated.

Figure 24: Belief that online content is regulated:– 2007 and 2009

IN34 – Which, if any, of the following do you think are regulated in terms of what can be shown on the internet? (prompted responses, multi-coded)
Base: All adults aged 16+ (2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009
* 'Home-made' added to description in 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

5.4   16-24s are most likely to say file sharing of copyright content should not be illegal

It is illegal to share copies of copyright content without the permission of the rights holder.

As to whether downloading music and films in this way should be illegal, more adults believe that it should be illegal (42%) than believe it should not be illegal (33%), with the remainder (25%) unsure. The youngest adults, aged 16-24, are the only group within the adult population in which the majority say that downloading music and films in this way should not be illegal (55% vs. 33% of all adults). Adults aged 65 and over are more likely than adults as a whole to say they don't know (37% vs. 25%), and this is also true of females compared to males (29% vs. 21%).

Those in AB socio-economic groups are more likely than adults as a whole to say that downloading music and films in this way should be illegal (50% vs. 42%).

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[12] The following definition was offered as an explanation of a regulator. "A regulator is often called a "watchdog" – it sets rules or guidelines about content. People can also complain to the regulator if they feel something was inappropriate - perhaps because it was offensive, harmful, inaccurate or unfair."

Figure 25: Attitudes towards illegal file sharing, by age, gender and socio-economic group
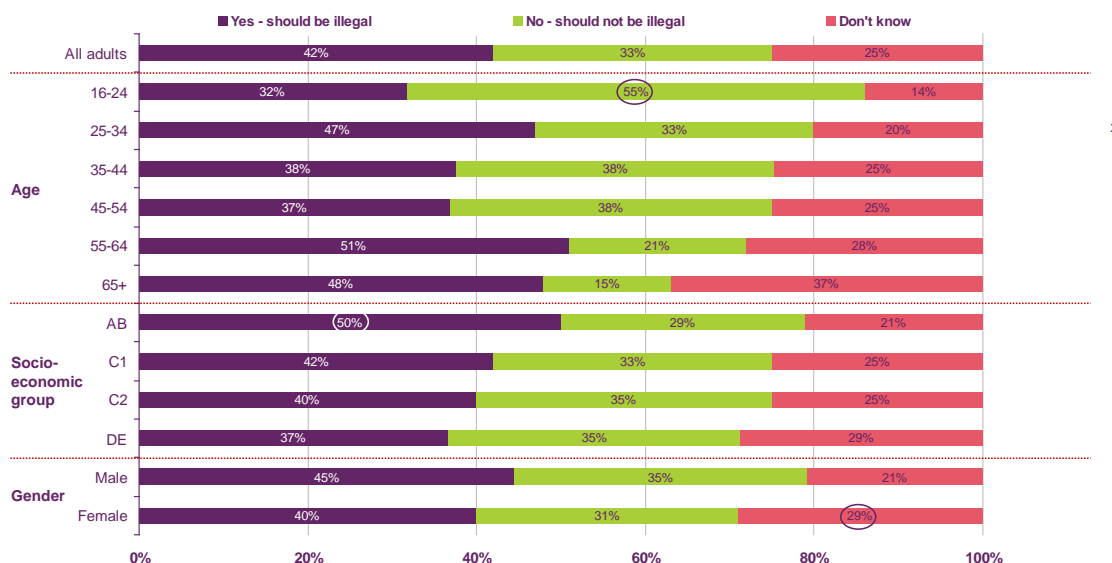

IN39 – (EXPLANATION OF SHARED CONTENT AND THAT THIS IS OFTEN ILLEGAL) Do you think that downloading music and movies for free in this way should be illegal? (prompted responses, single coded)
Base: All adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+, 175 AB, 228 C1, 168 C2, 241 DE, 388 male, 424 female). Significance testing shows any differences between any age group and all adults aged 16+, between any socio-economic group and all adults aged 16+, between males and females
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

5.5 One quarter of internet users now say they visit "lots" of new websites most weeks

One-third (35%) of adults who use the internet at home or elsewhere only use websites that they have used before in most weeks when they use the internet; this was also the case in 2007. There has, however, been an increase in the share of internet users who say they visit 'lots' of new websites most weeks (23% vs. 19% in 2007), at the expense of the share of internet users who say they visit 'maybe one or two' websites that are new to them (39% vs. 45% in 2007).

Among internet users in the 2009 survey, those aged 55 and over are less likely than all internet users to say that they visit lots of new websites in most weeks when they use the internet (14% vs. 23%).

**Figure 26: Visits to new websites in most weeks when the internet is used**
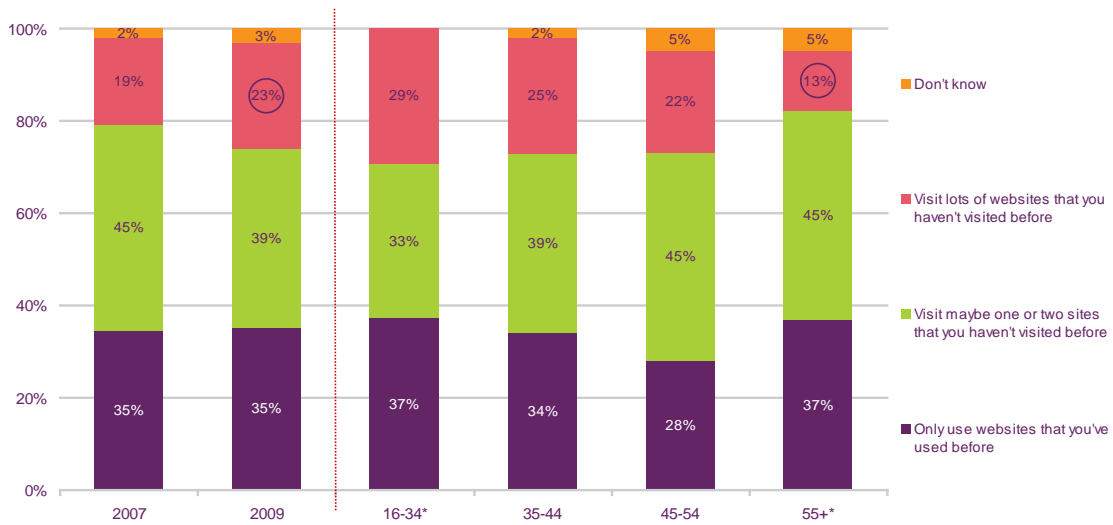
IN12 – In most weeks when you use the internet, would you say that you… (prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (1723 aged 16+ in 2007, 580 aged 16+ in 2009, 197 aged 16-34, 149 aged 35-44, 111 aged 45-54, 123 aged 55+). Significance testing shows any differences between any age group and all adults aged 16+. * Due to low base sizes 16-24s and 25-34s are shown as one group, and 55-64 and 65+ are shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

5.6   Eight in ten users say they make some sort of check when visiting new websites

All adults who use the internet at home or elsewhere were asked to think about new websites they visit and the types of checks they would make. Figure 27 excludes those who stated that they do not visit new websites, and shows the types of checks made in 2009.

While eight in ten (79%) users who ever visit new websites indicated that they make any of the ten types of checks we asked about, the check most commonly made (checking for a padlock or other secure symbol) is undertaken by just four in ten (38%) internet users.

Figure 27: Types of checks made when visiting new websites: 2009
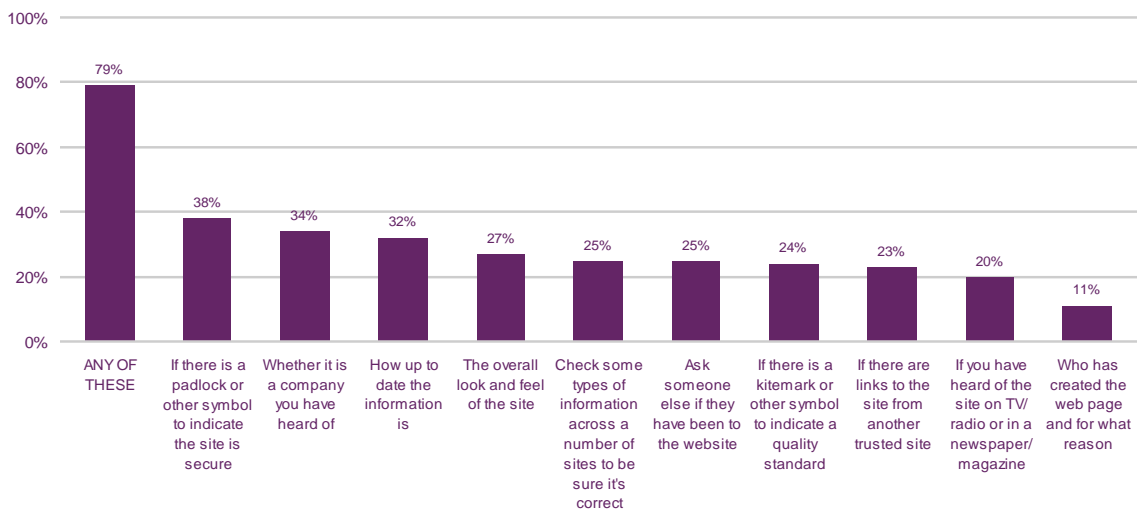
IN16 – Thinking about new websites you visit… Which, if any, of these things would you check? (prompted responses, multi-coded)
Base: Adults aged 16+ who use the internet at home or elsewhere and who visit new websites (530 aged 16+)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Within the overall population of internet users, those aged 55 and over are less likely to make any of the types of checks that we asked about (74% vs. 79%).

5.7 Internet users appear to be less happy to share personal information online compared to 2007

When registering on a website, users may be asked to provide several types of personal details. We asked internet users to consider six types of personal information and tell us how they would feel about entering these details online.
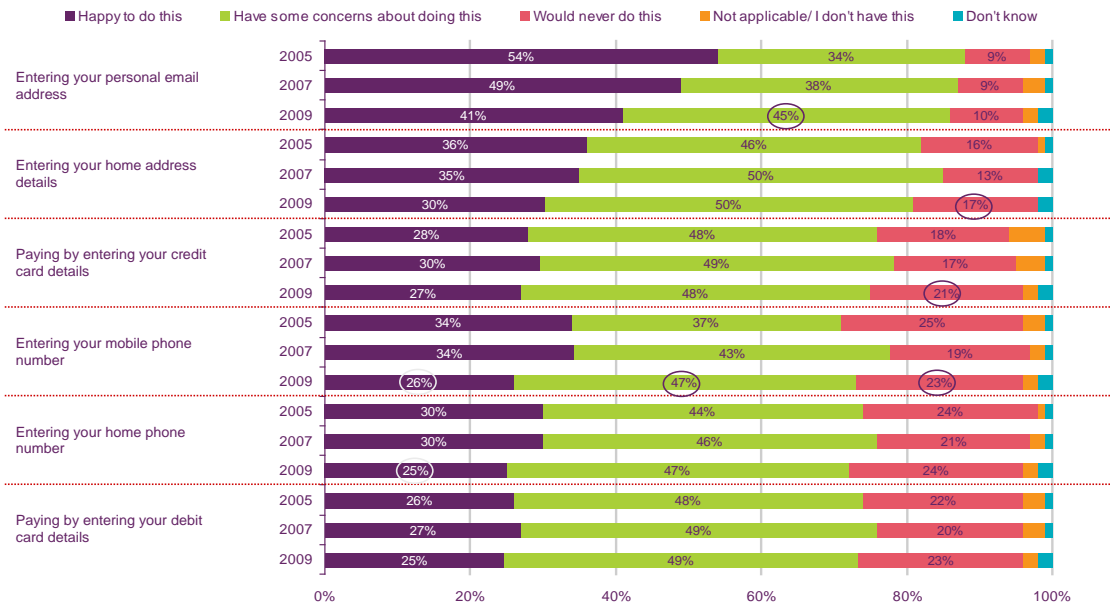
Compared to 2007, internet users are less happy to provide most of the six types of personal information. The information that internet users are most likely to be happy to provide is their email address, but this has declined since 2007 (41% vs. 49%).

Close to two in ten internet users said they would never provide their home address details, which is higher than the comparable finding from 2007 (17% vs. 13%). Similarly, it appears that internet users are more likely to say they would not provide their credit card details to pay online compared to 2007 (21% vs. 17%). Within the population of internet users from the 2009 interim study, it appears that those aged 55 and over are more likely to say they would never provide their credit card (33% vs. 21% of all internet users) or debit card number (35% vs. 23%) to pay online.

Fewer internet users told us that they would be happy to provide their mobile phone number than in 2007 (26% vs. 34%), with users saying they would have some concerns about this (47% vs. 43%) or that they would never do this (23% vs. 19%). Similarly, fewer internet users told us that they would be happy to provide their home phone number, than in 2007 (25% vs. 30%).

It is possible that these changes in the extent to which internet users are prepared to provide personal information are a result of the change in the profile of internet users, as referred to earlier in this report. We will look at this issue in more detail in the final report, to be published in spring 2010.
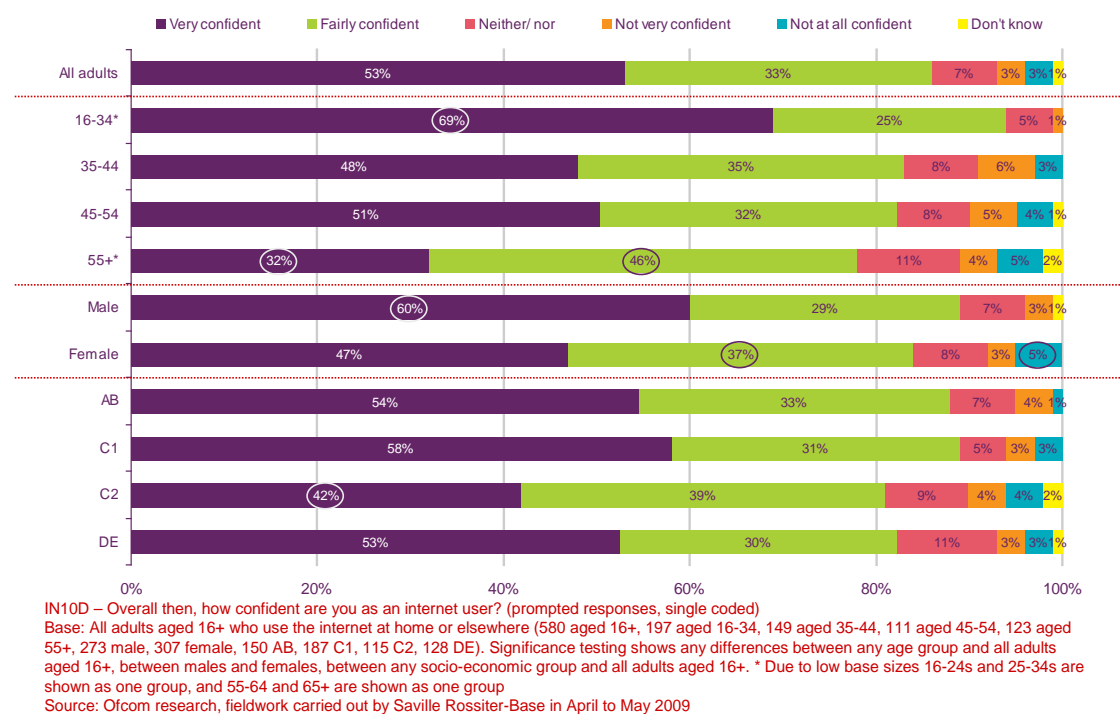
Figure 28: Personal details prepared to enter online: 2005, 2007 and 2009

Legend: ■ Happy to do this　■ Have some concerns about doing this　■ Would never do this　■ Not applicable/ I don't have this　■ Don't know

Entering your personal email address
- 2005: 54% | 34% | 9%
- 2007: 49% | 38% | 9%
- 2009: 41% | (45%) | 10%

Entering your home address details
- 2005: 36% | 46% | 16%
- 2007: 35% | 50% | 13%
- 2009: 30% | 50% | (17%)

Paying by entering your credit card details
- 2005: 28% | 48% | 18%
- 2007: 30% | 49% | 17%
- 2009: 27% | 48% | (21%)

Entering your mobile phone number
- 2005: 34% | 37% | 25%
- 2007: 34% | 43% | 19%
- 2009: (26%) | (47%) | (23%)

Entering your home phone number
- 2005: 30% | 44% | 24%
- 2007: 30% | 46% | 21%
- 2009: (25%) | 47% | 24%

Paying by entering your debit card details
- 2005: 26% | 48% | 22%
- 2007: 27% | 49% | 20%
- 2009: 25% | 49% | 23%

IN36A-F – I'm going to read out some types of information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
Base: Adults aged 16+ who use the internet at home or elsewhere (1468 in 2005, 1723 in 2007, 580 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October-December 2007

Internet users were asked to self-assess their confidence as an internet user, using a five-point scale ranging from 'very confident' to 'not at all confident'. Across all internet users, half (53%) say they are very confident and one-third (33%) say they are fairly confident - just over one in ten (14%) are not confident internet users. As shown in Figure 29, internet users aged 16-34 are more likely to say they are very confident, compared to all internet users (69% vs. 53%). Those aged 55 and over (32% vs. 53%) and adults in C2 socio-economic group (42% vs. 53%) are less likely to say they are very confident. Males are more likely than females to say they are very confident (60% vs. 47%).

Figure 29: Confidence as an internet user

IN10D – Overall then, how confident are you as an internet user? (prompted responses, single coded)
Base: All adults aged 16+ who use the internet at home or elsewhere (580 aged 16+, 197 aged 16-34, 149 aged 35-44, 111 aged 45-54, 123 aged 55+, 273 male, 307 female, 150 AB, 187 C1, 115 C2, 128 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+. * Due to low base sizes 16-24s and 25-34s are shown as one group, and 55-64 and 65+ are shown as one group
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

There appears to be a relationship between confidence as an internet user and how users feel about entering their personal information online. Those who say they are very confident as an internet user are more likely than others to say they would be happy to provide the specified types of personal information online. For example, those who say they are very confident are more likely to say they would be happy to pay by entering their credit card details, compared to all internet users (37% vs. 27%).

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

Responses have been grouped into the three broad types of checks made:

- professional signs (such as a padlock);

- personal instinct (such as a known company name, a professional appearance); and

- peer signs (such as an online review or a recommendation from a friend).

As in 2007, internet users are most likely to make judgements about websites based on professional signs, with this type of judgement made by around half (45% vs. 48% in 2007), before entering any personal details. Over four in ten make judgements based on personal instinct (42% vs. 45% in 2007), with relatively few making judgements based on peer reviews (21% vs. 24% in 2007).

The number of internet users who say they would not make any kind of judgement of a website before entering personal details, has increased since 2007 (15% vs. 11%).

**Figure 30: Judgements made about a website before entering personal details: 2005, 2007 and 2009**

IN37 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded)
Base: Adults aged 16+ who use the internet at home or elsewhere (1723 in 2005, 1468 in 2007, 580 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

5.8 Fewer adults appear to have concerns about each of the five key platforms, compared to 2007

We asked people, regardless of whether they used each platform, to say whether they have any concerns about what is on television, radio, the internet, mobile phones and gaming. People could mention any types of concerns they have about the platform in question, or tell us that they don't have any concerns about the platform, or say that they don't know. Figure 31 compares the overall mentions of any concerns for each of the key platforms in 2005, 2007 and 2009.

People have most concerns about what is on the internet and what is on television, compared with other platforms, as was the case in 2007. The proportion of adults mentioning any concerns has decreased since 2007 for each of television, radio, the internet, mobile phones and gaming. For television, radio and the internet, the proportion of adults with any concerns appears to be closer to the levels found in 2005 than the levels found in 2007. Concerns about mobile phones appear to be on a steady decline since 2005. We did not ask about concerns about gaming in the 2005 survey.

Figure 31: Concerns about platforms: 2005, 2007 and 2009
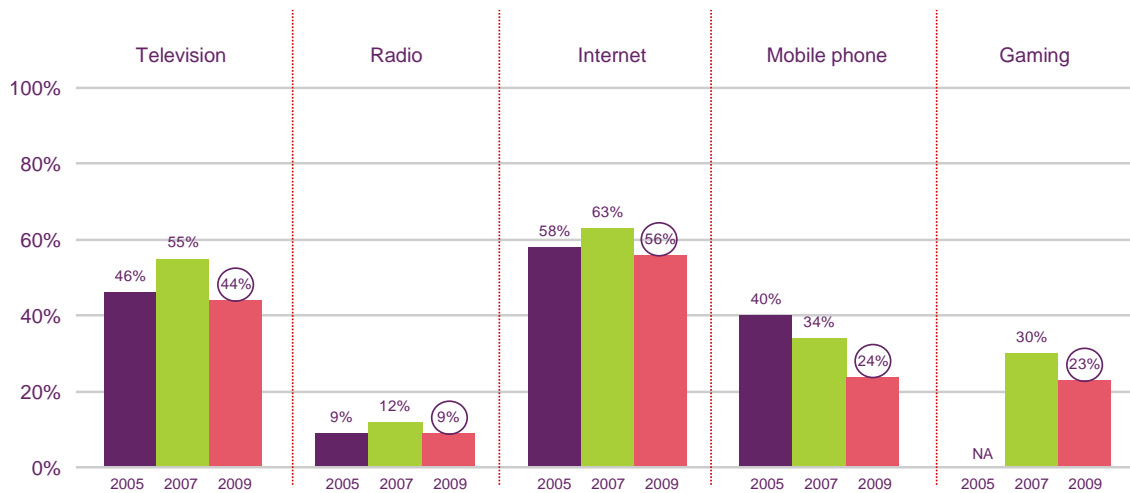
T7/ R6/ IN30/ M4/ G6 – Can you tell me if you have any concerns about what is on TV/ radio/ the internet/ mobile phones/ gaming? (unprompted responses, multi-coded)
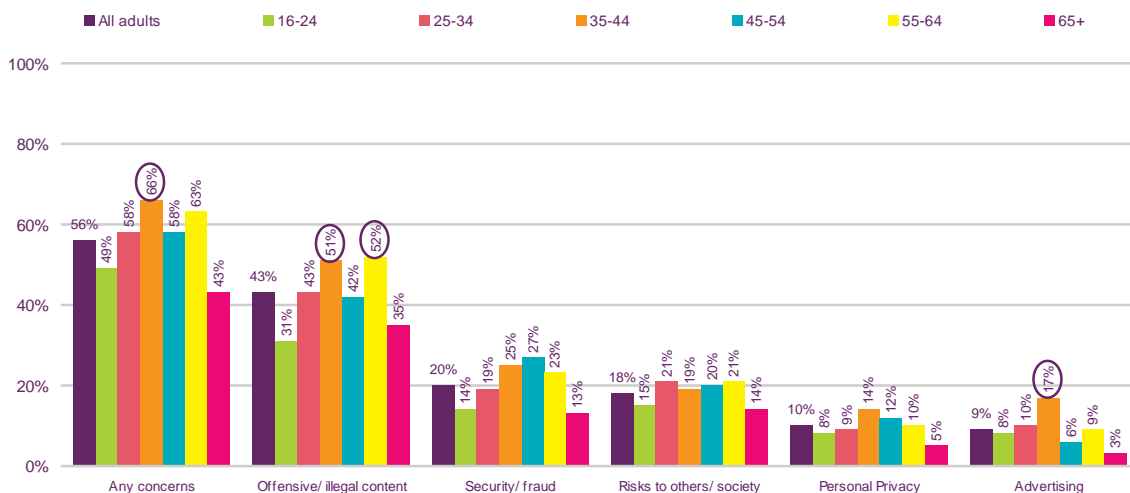Base: Adults aged 16+ (3244 in 2005, 2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

5.9   Adults are more likely to have concerns about the internet than other media platforms

When asked if they have any concerns about what is on the internet, six in ten adults (56%) told us about the concerns they have. These relate mainly to concerns which could be categorised as relating to offensive/ illegal content (43%), with fewer mentions of concerns relating to security/ fraud (20%) or relating to a risk to others or to society as a whole (18%). The top three specific[13] concerns about the internet, mentioned by adults, are: sexual content/ pornography (28%), content unsuitable for children (23%), and websites showing abuse of children (13%). Adults aged 35-44 (66%) are more likely than adults as a whole (56%) to have any concerns about the internet.

Figure 32: Concerns about the internet, by age

IN30 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)
Base: Adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+).
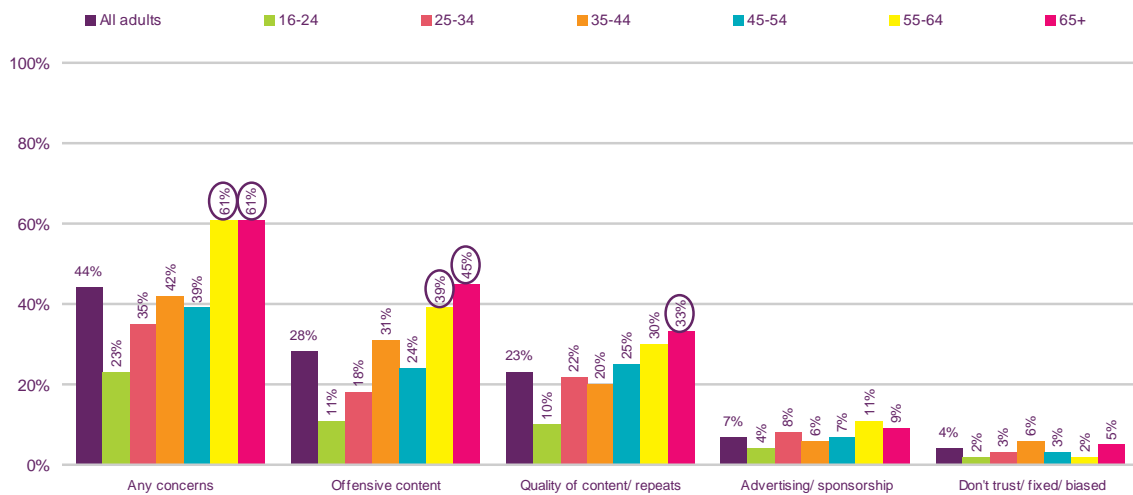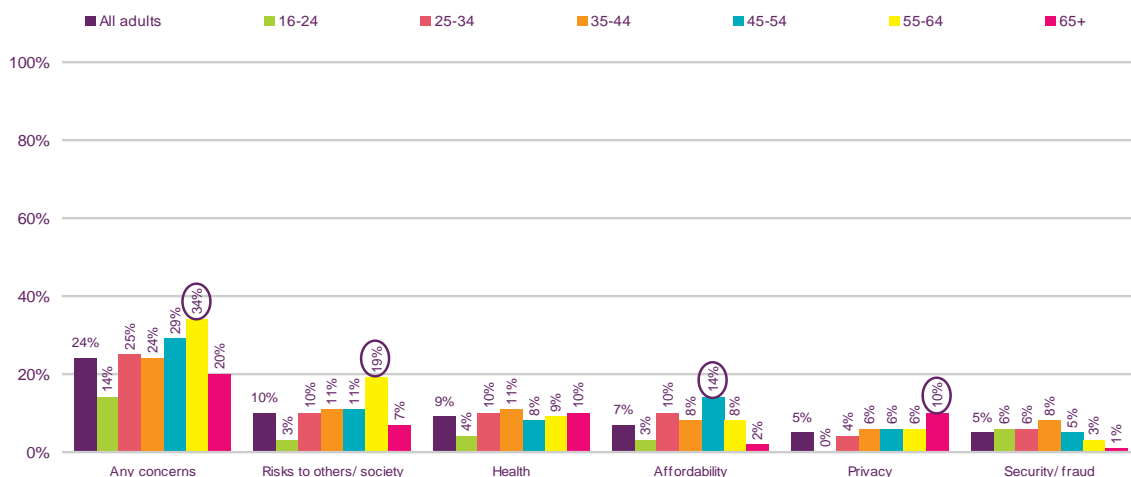Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

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[13] These specific (unprompted) concerns are then placed into the categories described.

When asked if they have any concerns about what is on television, four in ten adults (44%) told us about the concerns they have. These relate mainly to concerns which could be categorised as relating to offensive content (28%) and poor quality content or repeats (23%). The top three specific concerns about television, mentioned by adults, are: bad language/swearing (16%), violence (16%) and sex/ nudity (10%). Adults aged 55-64 (61%) and those aged 65 and over (61%) are more likely to have any concerns about television than adults as a whole (44%).

Figure 33: Concerns about television, by age

T7 – Can you tell me if you have any concerns about what is on TV? (Spontaneous responses, multi-coded)
Base: Adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+).
Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

When asked if they have any concerns about mobile phones, two in ten of all adults (24%) told us about the concerns they have. No single category of concern dominates, with broadly equal mentions of concerns which could be categorised as relating to risks to others or to society as a whole (10%), health concerns (9%), and concerns relating to affordability (7%). The top three specific concerns about mobile phones mentioned by adults are: health concerns about using a handset (7%), the general cost of making calls (5%) and health concerns about mobile signal masts (5%). Adults aged 55-64 (34%) are more likely to have any concerns about mobile phones than adults as a whole (24%).
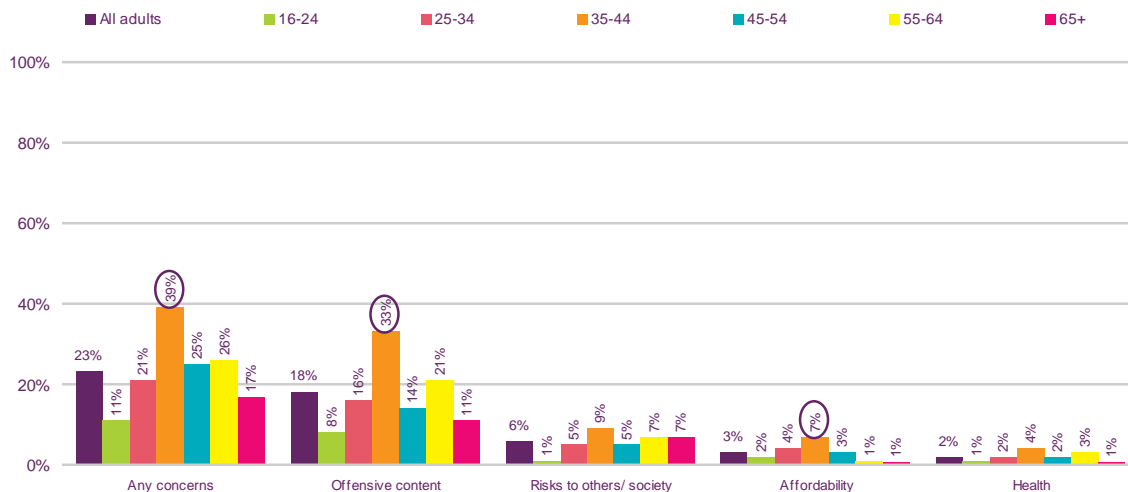
Figure 34: Concerns about mobile phones, by age

M4 – Can you tell me if you have any concerns about mobile phones? (Spontaneous responses, multi-coded)
Base: Adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+).
Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

When asked if they have any concerns about gaming, two in ten adults (23%) told us about the concerns they have. These relate mainly to concerns which could be categorised as relating to offensive content (18%). The top three specific concerns about gaming mentioned by adults are: violent content (14%), content unsuitable for children (10%) and bad language/swearing (5%). Adults aged 35-44 (39%) are more likely to have any concerns about gaming than adults as a whole (23%).
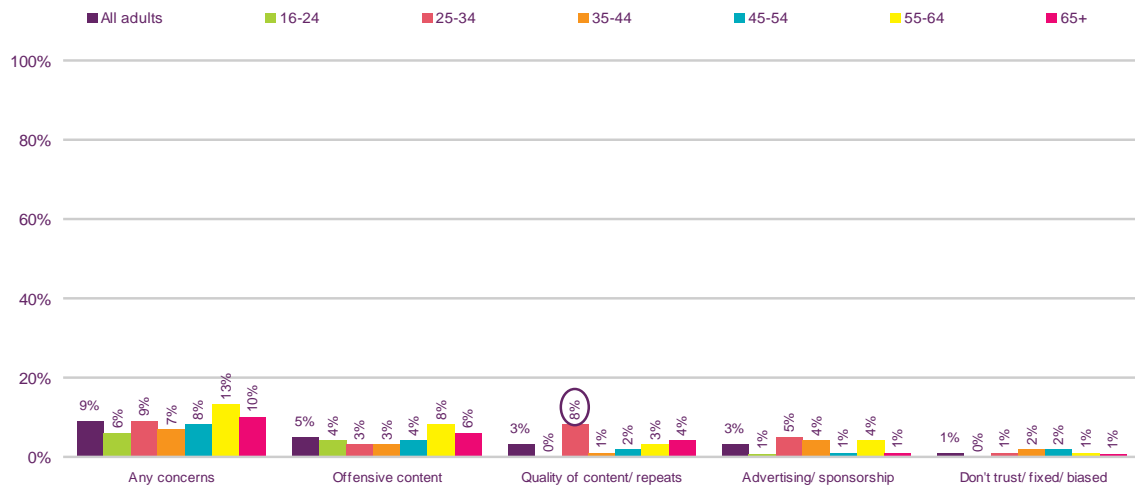
Figure 35: Concerns about gaming, by age

G6 – Can you tell me if you have any concerns about gaming? (Spontaneous responses, multi-coded)
Base: Adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+).
Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

When asked if they have any concerns about what is on radio, one in ten adults (9%) told us about the concerns they have. No single type of concern dominates, with broadly equal mentions of concerns which could be categorised as relating to offensive content (5%), poor quality content or repeats (3%) and concerns relating to advertising or sponsorship (3%). The top three specific concerns about radio mentioned by adults are: bad taste/ shock tactics (3%), bad language/swearing (3%) and too many advertising breaks (2%). No single age group is more likely to have concerns about radio, compared to adults as a whole.

Figure 36: Concerns about radio, by age

R6 – Can you tell me if you have any concerns about what is on radio? (Spontaneous responses)
Base: Adults aged 16+ (812 aged 16+, 106 aged 16-24, 126 aged 25-34, 173 aged 35-44, 140 aged 45-54, 106 aged 55-64, 161 aged 65+).
Significance testing shows any differences between any age group and all adults aged 16+
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Section 6

Learning

This section looks at adults' preferred methods of learning about digital technology, as well as their experience of, and interest in, learning.


Key findings

- Most UK adults have a preferred way to learn about digital technology (93%), but this is less common among adults aged 65 and over (84%). Of the five methods that we asked about, the most preferred ways of learning about digital technology are by reading the manual/ instructions (49%), by asking friends or family (45%) and through trial and error (42%). Fewer adults say they prefer to learn through asking the supplier or store (14%) or by going to a class (10%).

- Few UK adults have experience of formal learning about digital technology or are interested in learning more. Those aged 65 and over are less likely than UK adults as a whole to be interested (18% vs. 30%).

6.1 Most adults have a preferred way to learn about digital technology

Adults were shown a list of ways of learning about digital technology and were asked to say which they prefer. Informal learning methods such as reading the manual (49%) or learning from friends and family (45%) are more popular than attending a class (10%). Compared to 2007, more adults said they prefer to learn through reading a manual (49% vs. 45%) or attending a class (10% vs. 6%), but the overall picture of preferred ways to learn is very similar.

Figure 37: Preferred ways to learn about digital technology: 2005, 2007 and 2009
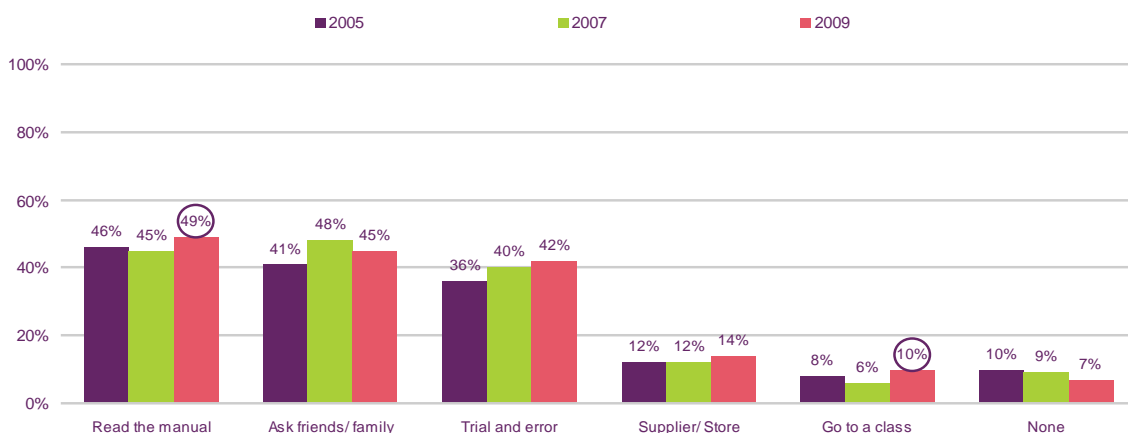
Z5 – We have discussed digital television and radio, the internet, mobile phones and games players. Which of these are ways you prefer to learn about using such services or products? (prompted responses, multi-coded)
Base: All adults aged 16+ (3244 in 2005, 2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Based on the interim data from the 2009 survey, there are a number of differences between demographic groups in relation to their preferred ways to learn about digital technology. Those aged 25-34 are more likely than adults as a whole to say they prefer to learn through trial and error (59% vs. 42%) while those aged 45-54 are more likely than adults as a whole to say they prefer to learn from reading the manual or following the instructions (64% vs. 49%). Adults aged 65 and over are more likely than adults as a whole to say that they do not have a preferred way to learn about digital technology (16% vs. 7%).

Males are more likely than females to prefer to learn about digital technology through trial and error (51% vs. 34%) or through the supplier or store (18% vs. 10%), while females are more likely than males to say they prefer to learn through friends and family (55% vs. 35%).

Adults in AB socio-economic groups are more likely than adults as a whole to say they prefer to learn from reading the manual or following the instructions (57% vs. 49%) or attending a class (15% vs. 10%), while adults in C2 socio-economic group are more likely than adults as a whole to say they prefer to learn through friends and family (54% vs. 45%).

6.2 One in four adults have experience of formal learning about digital technology

Across all UK adults, a minority say they have experience of 'formal learning', through classes or training, about any of the aspects of digital technology that we asked about. Experience of formal learning about digital technology appears to have declined since 2007 (23% vs. 27%). The only type of learning experienced by more than one in ten adults relates to how to use the internet (17%), as was also the case in 2007 (20%). One in ten adults say they have learned about using the internet safely (9%), which was not addressed by the 2007 survey.

Figure 38: Experience of formal learning about digital technology: 2005, 2007 and 2009
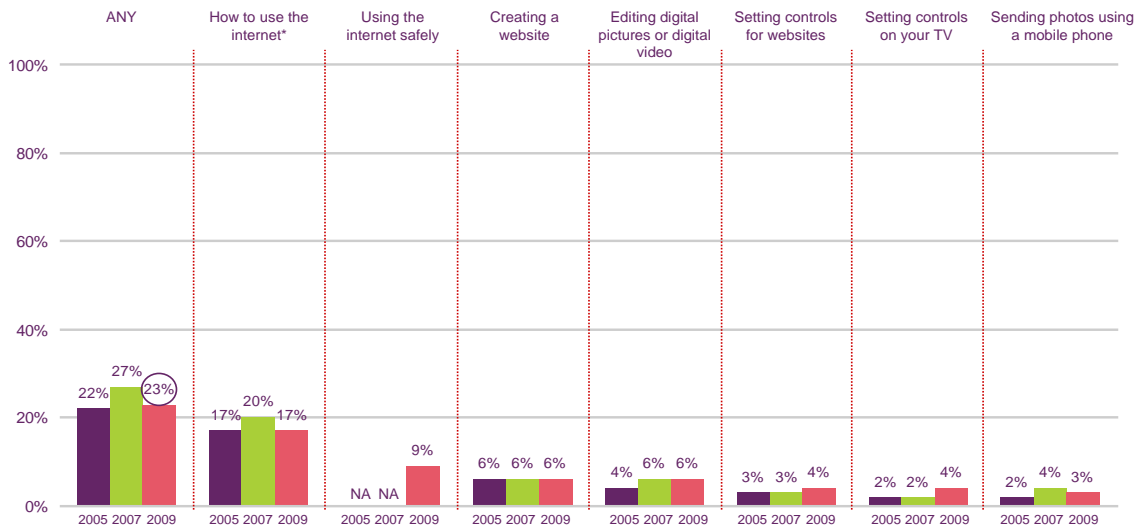
Z6 – Thinking about the types of things you might learn about TV, the internet, mobile phones and so on… Which, if any, of these you have learned about through classes, training or any other type of formal learning? (prompted responses, multi-coded)
Base: All adults aged 16+ (Shows responses from 3% or more) (3244 in 2005, 2905 in 2007, 812 in 2009). Significance testing shows any change between 2007 and 2009. * Amended from 'Using the internet' in 2005 and 2007
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Within the interim data from the 2009 survey, experience of formal learning about digital technology is less likely among those aged 65 and over compared to adults as a whole (17% vs. 23%). The youngest adults, aged 16-24, are more likely than adults as a whole to have

experience of learning about creating a website (12% vs. 6%) and sending photos using a mobile phone (7% vs. 3%).

Experience of learning about digital technology does not appear to differ between males and females. Adults in AB socio-economic groups are more likely than adults as a whole to have experience of learning about using the internet safely (15% vs. 9%).

6.3   A minority of adults are interested in learning more about digital technology

Across all UK adults, a minority say they would be interested in learning more about any of the aspects of digital technology that we asked about. Levels of interest in learning more about digital technology at an overall level have not changed since 2007 (30% vs. 31%), and this is also true for each of the ways of learning that we asked about.

Figure 39: Interest in learning about digital technology: 2005, 2007 and 2009
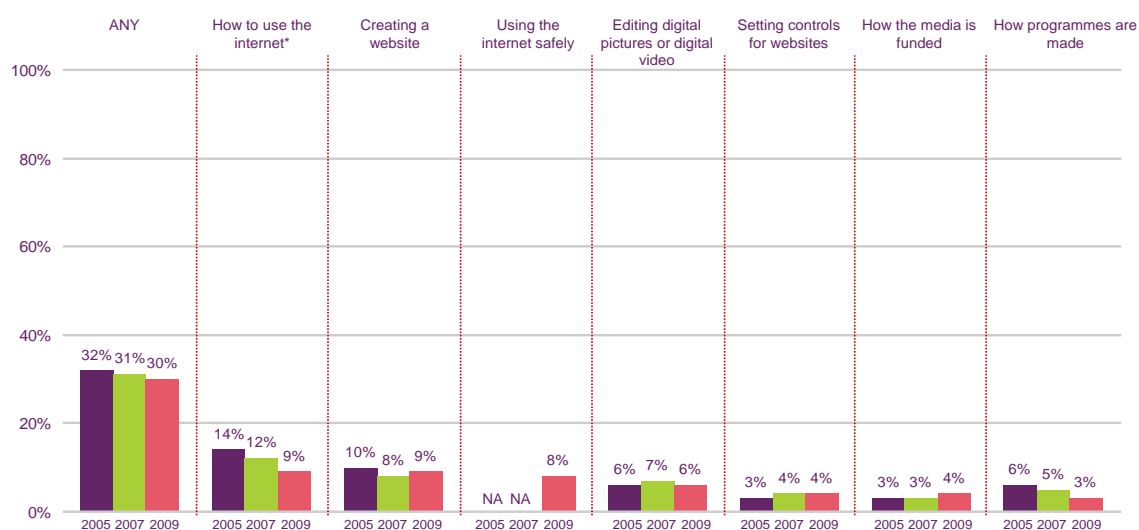
Z7 – Which, if any, of these you would you be interested in learning more about? (prompted responses, multi-coded)
Base: All adults aged 16+ (Shows responses from 3% or more) (3244 in 2005, 2905 in 2007, 812 in 2009)). Significance testing shows any change between 2007 and 2009
* Amended from 'Using the internet' in 2005 and 2007
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May 2009

Within the interim data from the 2009 survey, interest in learning more about digital technology is less likely among those aged 65 and over compared to adults as a whole (18% vs. 30%). However, those aged 55-64 are more likely than all adults to be interested in learning about how to use the internet (18% vs. 9%) and using the internet safely (16% vs. 8%). While the overall proportion interested in learning about digital technology does not differ by gender, males are more likely than females to be interested in learning about creating a website (11% vs. 7%).

Adults in DE socio-economic groups are more likely than adults as a whole to be interested in learning about how to use the internet (14% vs. 9%), while those in AB socio-economic groups appear to be more likely than adults as a whole to be interested in learning about how programmes are made (6% vs. 3%).