



Annex A: Adults' media literacy in the nations

Research Document

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Section 1

Executive summary

This summary report provides an accessible overview of some of the key measures of media literacy across the devolved nations of the UK among adults aged 16 and over. The dataset comprises results from fieldwork conducted in autumn 2013 among 203 adults in Scotland, 201 adults in Wales, and 187 adults in Northern Ireland¹.

Because the population of England represents 83% of the population of the UK as a whole, findings for England are very similar to those for the UK, and therefore there is no separate summary for the English findings, although the data are charted for reference purposes.

It is important to note that some variations between nations will be influenced by demographic rather than geographic, cultural or statutory frameworks².

Ofcom's key measures for take-up of media can be found in our annual CMR publication, at www.ofcom.org.uk/cmr

1.1 Scotland

Key findings

Compared to all UK adults, in 2013 those in Scotland are:

- more likely to say they regularly listen to the radio, watch videos/ DVDs/ Blu-rays and listen to music on a hi-fi/CD/ tape player;
- more likely to say they would prefer to make a complaint in person about something they have purchased;
- more likely to say they would prefer to enter competition via texts or by phone;
- more likely to be aware of the main sources of funding for BBC TV programmes, the BBC website and for commercial radio stations; and
- less likely to have concerns relating to offensive content on TV.

Internet users in Scotland, compared to all internet users, are:

- more likely to say they use more than ten websites in a typical week;
- less likely to say they only use websites that they have used before;
- more likely to go online, at least quarterly, to look at news, watch /download short video clips, send/ receive tweets and to gamble online;
- less likely to go online, at least quarterly, to look at local news or events or to listen to radio; and
nearly twice as likely to have concerns relating to online risks to others/ risks to society.

¹ Differences between the nations and the UK are described as such when they are statistically significant at the 95% level, and indicated as such in the figures by arrows.

² Please see the separate reports for each nation from Ofcom's *Communications Market Report 2014* <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr14/> for an overview of these differences.

Mobile phone users in Scotland, compared to all mobile users, are:

- more likely to use their phone, at least quarterly, for checking their bank balance; and
- less likely to play games loaded on the phone, or to watch TV programmes on their phone, at least quarterly.

Take-up and use

When asked which media activity they would miss the most, half of all adults in Scotland (49%) chose television. Around one in five adults in Scotland said they would most miss using a smartphone (21%), with slightly fewer saying they would most miss going online via a computer/ laptop/ netbook or tablet (16%). None of these measures differ from those for the UK as a whole.

The overall claimed volume of internet use per week among internet users in Scotland does not differ from the all-UK figure (16.5 hours vs. 16.9 hours for the UK overall). Similarly, there are no differences in internet use by location between Scotland and the UK as a whole.

Overall, adults in Scotland and the UK spend a similar amount of time online at home (11.0 vs. 11.2 hours), in the workplace/ place of education (3.3 vs. 4.0 hours) and elsewhere (2.2 vs. 1.7 hours).

Media activities

Nearly all adults in Scotland watch television regularly (94%), and nine in ten (89%) regularly use a mobile phone. Around four in five listen to radio (79%) with a similar proportion regularly reading newspapers or magazines (72%) and going online via a computer/ laptop/ netbook/ tablet (71%). Two more activities are regularly undertaken by a majority of adults in Scotland: watching videos/ DVDs/ Blu-rays (67%) and listening to music on a hi-fi/ CD/ tape player (52%).

In 2013, three regular media activities were more likely to be undertaken by adults in Scotland than by the UK average: listening to the radio (79% vs. 70%), watching videos/ DVDs/ Blu-rays (67% vs. 55%) and listening to music on a hi-fi/CD/ tape player (52% vs. 44%).

Communication

People prefer to communicate in different ways to carry out a range of everyday activities. Adults in Scotland differ from the all-UK average in four of these seven scenarios.

They are less likely to say they prefer to book a holiday using their home/ landline phone (5% vs. 13% for all UK adults). When contacting the local council, e.g. to find out about refuse collection, adults in Scotland are more likely to say they prefer to do this via a mobile phone call (35% vs. 23%).

Preferences for making a complaint about a purchase from a nationwide retailer (either in a shop or online) also differ among adults in Scotland. They are less likely to say they prefer to do this by home/ landline phone call (12% vs. 18%) or by letter (3% vs. 8%) and more likely to say they prefer to do it in person (43% vs. 32% for all UK adults).

When stating a preference for entering a competition (where entries can be made in all possible ways) adults in Scotland are more likely to say they would do this by text message (21% vs. 7%) or by mobile phone call (13% vs. 6%) and less likely to prefer to do it by letter (3% vs. 8%).

Online use

Adults using the internet at home or elsewhere were asked to estimate how many different websites they visited in a typical week, for any purpose in any location. Internet users in Scotland are less likely than all internet users to say they visit up to ten different websites (43% vs. 62%), and more likely to say they visit between 11 and 20 websites (30% vs. 20%) or more than 20 websites (27% vs. 18%).

When asked to think about “most weeks when they go online”, half of all adult internet users in Scotland (49%) said they used “maybe one or two websites” they had not used before. This is more likely for adults in Scotland than for all UK adults (39%). Three in ten adults in Scotland (30%) said they used lots of websites they had not used before, similar to the UK measure (26%). Adults in Scotland were, however, less likely to have used only those websites they had used before (21% vs. 33%).

Online activities

Internet users were prompted with a list of 34 online activities and were asked to say how frequently they undertook each of them. Ten activities were carried out at least quarterly (every three months or more often) by a majority of internet users in Scotland: general online surfing/ browsing (95%), emailing (88%), using social networking sites or apps (75%), buying things online (70%), looking at news websites or apps (68%), using instant messaging services (62%), banking and paying bills online (61%), watching online, or downloading, short video clips such as music videos or comedy clips (58%), finding information for work/ job/ studies (52%) and finding information for leisure time (51%).

No other online activity that we asked about was undertaken, at least quarterly, by a majority of internet users in Scotland.

In 2013, there were four types of online activity that users in Scotland were more likely to do on a quarterly basis, compared to all UK adult internet users: looking at news websites or apps (68% vs. 54%), watching online, or downloading, short video clips such as music videos or comedy clips (58% vs. 48%), sending or receiving Twitter updates (29% vs. 22%) and online gambling (12% vs. 6%).

There were two activities that internet users in Scotland were less likely to do on a quarterly basis: looking at sites or apps for news about or events in their local area/ local community (21% vs. 32%) and listening to radio stations online (12% vs. 21%).

Online participation / publication

Close to three in four internet users in Scotland (73%) say they have ever set up a social networking site profile, with four in ten (40%) uploading or sharing photos to a website or app. About one in four (23%) have ever contributed comments to someone else's blog; less than one in ten (6%) have set up their own blog. One in six internet users in Scotland (17%) have made a short video and uploaded it to a website such as YouTube. None of these measures differ from those for the UK as a whole.

Mobile activities

As in the UK overall, the most commonly-mentioned mobile phone activities carried out at least quarterly by a majority of users in Scotland were calls (99%) and texts (96%), taking photos (70%), visiting websites (52%), sending/receiving photo messages (52%) and visiting social networking sites (50%).

Mobile phone users in Scotland are more likely than all mobile users to say they use their phone for checking their bank balance (37% vs. 28%). They are less likely, compared to all users, to say they play games loaded on the phone (28% vs. 37%) or watch TV programmes on their phone (7% vs. 13%) on a quarterly basis.

Arguably, some of the mobile phone activities that were asked about are more likely to be undertaken by people who use a smartphone. However, adults in Scotland are no more or less likely than all UK adults to use a smartphone (59% in Scotland vs. 62% in the UK).

Knowledge and understanding

How people assess the accuracy of media sources, the extent to which they understand how media are funded and regulated, and the concerns they have about certain types of media, can provide insight into what informs their media choices.

The majority of adults in Scotland are aware of the main sources of funding for TV programmes, for radio stations, and for the BBC website. Fewer are aware of how search engines (such as Google or Ask.com) are funded.

In 2013, there were differences in awareness levels compared to the UK as a whole. Adults in Scotland were more likely to be aware of the main sources of funding for BBC TV programmes (90% vs. 76%), for the BBC website (60% vs. 52%) and for commercial radio stations (70% vs. 60%).

The majority of adults in Scotland believe that content on TV, on radio and in the press/newspapers is regulated, and a minority believe that content on the internet, mobile phones or gaming is also regulated. Although adults in Scotland are as likely as those in the UK as a whole to believe that each type of content is regulated, they are more likely to be unsure regarding regulation of the internet (40% vs. 28%) and mobile content (58% vs. 49%).

More than six in ten of all search engine users in Scotland (64%) agree that "some of the websites returned will be accurate or unbiased", which is similar to the UK as a whole (59%). Close to one in five (18%) think that if websites have been listed by the search engine, they will contain accurate and unbiased information, which is also comparable to the UK measure (22%).

Media concerns

Concern about media platforms is similar to that found in the UK as a whole, for each platform: the internet (55%), mobile phones (17%) and radio (8%). As with the UK average, the only media platform that a majority of users in Scotland have concerns about is the internet (55%). Compared to all UK adults, people in Scotland with televisions in the household are less likely to have concerns about TV content (25% vs. 36%).

Looking specifically at online concerns, internet users in Scotland are as likely as all UK internet users to have concerns relating to offensive or illegal content (33%), and security/fraud (28%).

They are, however, nearly twice as likely as all UK users to have concerns relating to risks to others/ risks to society (29% vs. 15%), such as people masquerading as younger people online, or strangers contacting children. As for all UK internet users, less than one in ten internet users in Scotland have concerns relating to personal privacy (7%) or any type of advertising (7%).

As mentioned above, adults in Scotland with television in the household are less likely than all UK adults to have concerns about what is on television (25% vs. 36%); this is attributable to their being less likely to have concerns relating to offensive content (11% vs. 20%). They are just as likely to have concerns relating to quality of content/ repeats (14% vs. 18%), advertising/ sponsorship (7% vs. 6%), and diversity in content (3% vs. 4%).

Online safety and security

A majority of internet users in Scotland say they would be happy to enter their personal email address online (57% vs. 44% for the UK overall). Fewer are happy to enter their home address details (44% vs. 32%), their mobile phone number (43% vs. 30%), their debit/ credit card details (42% vs. 30%) or their home phone number online (39% vs. 26%). In 2013, internet users in Scotland were more likely than all UK users to say they would be happy to enter each of these details, and less likely to say they would never enter these details because of security concerns.

Internet users in Scotland also differ from all UK users in terms of the types of judgements they make about websites before entering personal information. While they are no more likely to make formal judgements, such as looking for padlocks or secure system messages (55%), or judgements based on the 'look and feel' of a website (such as whether it looks professional and 'not dodgy') (10%), they are more likely to make judgements based on online reviews or friends' recommendations (66% vs. 55%). One in ten internet users in Scotland (11%) say they would not make a judgement (comparable to the measure for the UK as a whole (11%)), although internet users in Scotland are less likely to say they would not trust any site to be secure (1% vs. 6%).

Just over half of internet users in the UK agree that people who buy things online put their privacy at risk (54%), but internet users in Scotland are less likely to agree with this statement (41%). One in five internet users in Scotland (20%) say they read website terms and conditions/ privacy statements thoroughly, two in five (42%) say they only skim-read them and around one in three (35%) say they don't read them. As such, internet users in Scotland are more likely than all UK internet users to say they do not read these (35% vs. 21%).

Home internet users were asked whether they were aware of six online security measures or safety features, and for each they were aware of, whether these were installed on their home PC/ laptop/ netbook.

Awareness of the following five security measures/ safety features is higher in Scotland than in the UK as a whole: firewalls (98% vs. 89%), email filters (92% vs. 79%), home WiFi protection from unauthorised access (83% vs. 73%) deleting cookies from the web browser (83% vs. 72%) and anti-spyware (89% vs. 75%).

While they are no more likely than the UK average to be aware of anti-virus software, home internet users in Scotland (who use a PC/ laptop or netbook to go online) are more likely to use anti-virus software (88% vs. 79%). They are also more likely to use firewalls (77% vs. 64%), email filters (59% vs. 48%), cookie deletion (56% vs. 43%) and anti-spyware (58% vs. 42%).

Internet users were prompted with a list of possible negative online experiences and were asked whether they had experienced any of these in the past year. Compared to all UK internet users, those in Scotland were less likely to say they had experienced any of the nine events in the past 12 months (45% vs. 56%).

This is attributable to users in Scotland being less likely to have received spam or unwanted emails from companies (31% vs. 43%), to have seen something offensive online (5% vs. 10%) or to have had their email account or social networking site profile accessed without their permission (2% vs. 9%).

1.2 Wales

Key findings

Compared to all UK adults, in 2013 those in Wales are:

- more likely to say they regularly watch television;
- more likely to say they would most miss television, and less likely to say they would most miss using a smartphone;
- more likely to say they would prefer to complete Government processes face to face;
- more likely to say they would prefer to make a complaint in person about something they had purchased;
- less likely to be aware of how search engines are funded; and
- less likely to think that radio content, gaming and the press are regulated.

Compared to all UK internet users, those in Wales are:

- more likely to say they use fewer than five websites in a typical week;
- less likely to undertake 11 out of 34 online activities, at least quarterly;
- less likely to say they have shared or uploaded photos to a website or app or contributed to another person's blog;
- more likely to have concerns about the risks posed to others/society by the internet;
- less likely to make judgements about websites based on 'look and feel', before entering personal information;
- less likely to say they skim-read website terms and conditions; and
- less likely to be aware of, and use, online security features.

Compared to all UK mobile users, those in Wales are:

- less likely to own a smartphone; and
- less likely to say they use their mobile for 17 out of 22 activities at least quarterly.

Take-up and use

When asked which media activity they would miss the most, three in five adults in Wales chose television (61%); one in seven (13%) said they would most miss going online via a computer/ laptop/ netbook/ tablet, and a similar number said they would most miss using a smartphone (11%). Compared to all UK adults in 2013, those in Wales were more likely to say they would miss television (61% vs. 42%) and less likely to say they would miss using a smartphone (11% vs. 22%).

The overall claimed volume of internet use per week among users in Wales does not differ from that for all UK adults (who use the internet at home or elsewhere) (15.5 hours vs. 16.9 hours). Similarly, there are no differences by location of use: internet users in Wales and in the UK overall spend a similar amount of time online at home (10.7 vs. 11.2 hours), in the workplace/ place of education (3.5 vs. 4.0 hours) and elsewhere (1.3 vs. 1.7 hours).

Media activities

In 2013, people in Wales differed from those across the UK in terms of their media activities in only one respect: they were more likely to watch television regularly (100% vs. 96%). The majority of adults in Wales regularly watch television (100%), use a mobile phone (84%), listen to the radio (71%), go online via a computer/ laptop/ netbook or tablet (70%), read newspapers or magazines (69%), and watch videos/ DVDs/ Blu-rays (56%).

Communication

People prefer to communicate in different ways to carry out a range of everyday activities. Adults in Wales do not differ from the UK average in how they prefer to get in touch with a friend to arrange a meeting, to check their bank balance or to book a holiday. When contacting their local council, e.g. to find out about refuse collection, adults in Wales are less likely to prefer to make contact via email/ by using websites (12% vs. 17% among all UK adults).

For completing government processes such as registering for tax credits, renewing a driving licence, or completing a tax return, adults in Wales are more likely than the UK average to say they would prefer to make contact in person (26% vs. 18%) and less likely to want to do this by letter (7% vs. 13%).

When making a complaint about a product bought in a shop, or online from a nationwide retailer, preferences are different among adults in Wales compared to the UK average. They are less likely to say they would prefer to do this by letter (2% vs. 8%) or via email/ by using websites (16% vs. 28%), a larger proportion would choose to do this in person (47% vs. 32%). When entering a competition (where entries can be made in all possible ways) adults in Wales are more likely to say they would do this in person (10% vs. 4%) and less likely to say they prefer to do this via email/ by using websites (25% vs. 33%) or by text message (2% vs. 7%).

Online use

In 2013, adults using the internet at home or elsewhere were asked to estimate how many different websites they visited in a typical week, for any purpose and in any location. Internet users in Wales are more likely than all internet users to say they visited fewer than five different websites (35% vs. 22%). They were as likely as all UK internet users to visit five to ten, 11-20, and more than 20, different websites in a typical week.

When asked to think about "most weeks when they go online", four in ten of all adult internet users in Wales (42%) said they used "maybe one or two" websites they had not used before. More than one in three adults in Wales (35%) said they only used websites they had used before, while two in ten (19%) say they used lots of websites they had not used before. None of these measures differs to the UK as a whole.

Online activities

Internet users were prompted with a list of 34 online activities and were asked to say how frequently they undertook each of them. Eight activities were carried out at least quarterly (every three months or more often) by a majority of internet users in Wales: general online surfing/ browsing (86%), emailing (82%), using social networking sites (69%), buying things online (66%), using instant messaging services (62%), finding information for leisure time (53%), banking and paying bills online (52%) and finding information for work/ job/ studies (51%).

No other online activity that we asked about was undertaken, at least quarterly, by a majority of internet users in Wales.

In 2013, compared to all UK adult internet users, users in Wales were less likely to undertake 11 activities: general surfing/ browsing (86% vs. 91%), emailing (82% vs. 90%), banking and paying bills (52% vs. 61%), watching online, or downloading, short video clips such as music videos or comedy clips (38% vs. 48%), listening to or downloading music online (29% vs. 39%), playing games online (19% vs. 30%), listening to radio stations online (8% vs. 21%), looking at political/ campaign/ issues websites (8% vs. 14%), signing an online petition (3% vs. 8%), online gambling (2% vs. 6%) and looking at adult-only websites (1% vs. 6%).

Online participation / publication

A majority of internet users in Wales have experience of setting up a social networking profile (58%); comparable to the UK as a whole (66%). One in four internet users in Wales say they have ever uploaded or shared photos to a website (25%); less than all UK internet users (37%).

Internet users in Wales are also less likely to have contributed comments to another person's blog (11% vs. 23%). Around one in eight internet users in Wales has made a short video and uploaded it to a website such as YouTube (12%), similar to the measure for the UK as a whole.

Mobile activities

The most commonly-mentioned mobile phone activities carried out at least quarterly by a majority of users in Wales were calls (96%), texts (88%) and taking photos (57%). A minority of mobile phone users said they used their mobile phone, at least quarterly, for any of the other activities that we asked about.

Compared to all UK mobile users in 2013, mobile phone users in Wales were less likely to say they used their mobile phone on a quarterly basis for 17 of the 22 activities asked about.

These differences in quarterly mobile phone use could be attributable to the incidence of smartphone ownership; adults in Wales are less likely than all UK adults to own a smartphone (55% vs. 62%).

Knowledge and understanding

How people assess the accuracy of media sources, the extent to which they understand how media is funded and regulated, and the concerns they have about certain types of media, can provide some insight into what informs their media choices.

The majority of adults in Wales are aware of the main sources of funding for BBC TV programmes (80%), for commercial TV programmes (65%) and BBC radio stations (62%) and for commercial radio stations (54%).

A minority of adults in Wales are aware of the main sources of funding for the BBC website (46%) and for search engine websites (28%).

In terms of awareness of the main sources of funding for each of the BBC and commercial TV programmes, and BBC and commercial radio, there is no difference between adults in Wales and all UK adults. They are, however, less likely to be aware of how search engine websites are funded (28% vs. 36%) and more likely to be unsure about how the BBC website is funded (49% vs. 41%).

The majority of adults in Wales believe that content on TV (81%), in the press (60%) and on radio (59%) is regulated. Considerably fewer believe that online content (43%) is regulated, and fewer still believe that gaming (26%) and mobile (21%) are regulated.

In 2013, adults in Wales were less likely than all UK adults to believe that radio content is regulated (59% vs. 72%), that the press is regulated (60% vs. 71%) and that gaming content is regulated (26% vs. 40%). For each of radio, press, the internet, gaming and mobiles, adults in Wales were more likely than all UK adults to say they are unsure whether the content on these platforms is regulated.

Among those who use search engines, adults in Wales are as likely as those in the UK as a whole to say that if results are listed by a search engine, these websites will have accurate and unbiased information (20% vs. 22%), and to say that 'some websites will and some won't be accurate or unbiased' (64% vs. 59%).

Media concerns

More than half of all internet users in Wales have concerns about online content (57%), while around one in three TV viewers have concerns about television (36%) and one in six adult mobile phone users have concerns about mobiles (17%). Around one in 20 who listen to radio have concerns about radio (5%). These levels of concern, among adult users in Wales, do not differ to those seen among all UK adult users of each platform.

Although, at an overall level, internet users in Wales are as likely as all UK internet users to have concerns about the internet, they are more likely to say they have concerns relating specifically to risks to others /society (24% vs. 15%).

Compared to all UK adults, adults in Wales with televisions in the household are no more likely to have concerns relating to offensive content (23%) quality of content/ repeats (17%), advertising/ sponsorship (6%) or diversity in content (2%).

Online safety and security

In 2013, internet users in Wales were less likely than all UK internet users to say they would be happy to enter their personal email address online (28% vs. 44%), their home address (22% vs. 32%) or their home phone number (19% vs. 26%). For each of these measures, internet users in Wales were also more likely to say that while they would enter this information, they would have security concerns about doing so. They were also less likely to say they would be happy to enter their mobile phone number online (19% vs. 30%).

Over half of all internet users in Wales (56%) say they would make a formal judgement about a website (such as a padlock or secure system message) before entering personal information, similar to the proportion of all UK internet users (55%). A majority of internet users in Wales would rely on peer or recommendation judgements (54%) also close to the all-UK figure (55%).

Internet users in Wales are, however, less likely to make judgements based on the 'look and feel' of a website (such as whether it looks professional and 'not dodgy') (4% vs. 11%). As with the UK overall, around one in eight internet users in Wales say they would not make any type of judgement about a website (12%). Internet users in Wales are as likely as all UK users to agree that people who buy things online put their privacy at risk (55% vs. 54%).

Almost three in ten adult internet users in Wales (28%) say they read website terms and conditions/ privacy statements thoroughly, similar to the UK as whole (22%). More than one in three (35%) say that they are aware of them, but skim through them without reading them properly, which is lower than the measure for the UK as a whole (47%). One in four internet users in Wales say they don't read them; close to the UK figure (26% vs. 21%).

Home internet users (who use a PC/ laptop/ netbook to go online) were asked whether they were aware of various online security measures or safety features, and for each they were aware of, whether these were installed on their home PC/ laptop.

Awareness of the following four security measures/ safety features is lower in Wales than in the UK as a whole: email spam filters (64% vs. 79%), home WiFi protection from unauthorised access (58% vs. 73%), deleting cookies from a web browser (57% vs. 72%) and anti-spyware (63% vs. 75%).

For the first three of these security measures/ features, use is also lower among adults in Wales. While awareness is lower for anti-spyware, the level of use is similar to that of all UK internet users (36% vs. 42%).

Internet users were prompted with a list of possible negative online experiences and were asked whether they had experienced any of these in the past year. Internet users in Wales are as likely as all UK users to have experienced eight of the nine events in the past 12 months. They are, however, more likely to have had a computer virus on their home PC or laptop (27% vs. 20%).

1.3 Northern Ireland

Key findings

Compared to all UK adults, in 2013 those in Northern Ireland are:

- less likely to say they would most miss going online;
- more likely to say they would prefer to complete Government processes, check their bank balance and make a complaint about something they had purchased, in person; and
- more likely to think that radio content is regulated.

Compared to all UK internet users, those in Northern Ireland are:

- spending fewer hours online per week;
- more likely to watch online or download short video clips, at least quarterly;
- less likely to fill in forms or applications, complete Government processes or sell things online, at least quarterly;
- less likely to say they had ever made a video and uploaded it to a site such as YouTube;
- less likely to judge websites based on reviews or recommendations by peers or friends, before entering personal details;
- less likely to be aware of website terms and conditions; and
- less likely to be aware of, and use, four online security measures.

Compared to all UK mobile users, those in Northern Ireland are:

- less likely to use their phone to visit websites, at least quarterly.

Take-up and use

When asked which media activity they would miss the most, more than four in ten adults in Northern Ireland (44%) chose television, as with the UK overall (42%). One in four Northern Ireland adults (24%) said they would most miss using a smartphone. Around one in ten said they would most miss going online via a computer/ laptop/ netbook/ tablet (9%), or listening to the radio (9%). Compared to all UK adults, in 2013 adults in Northern Ireland were less likely to say they would most miss going online via computer/ laptop/ netbook/ tablet (9% vs. 15%).

The overall claimed volume of internet use per week among internet users in Northern Ireland is lower than that for all UK adult internet users (13.8 hours vs. 16.9 hours). This is possibly because internet users in Northern Ireland use the internet for fewer hours per week in the workplace/ place of education (2.4 vs. 4.0 hours).

Media activities

Nearly all adults in Northern Ireland watch television regularly (97%), and close to nine in ten regularly use a mobile phone (86%). Seven in ten listen to radio (71%) or read newspapers/ magazines (69%) with two in three regularly going online using a computer/ laptop/ netbook/ tablet (66%).

All other activities were undertaken regularly by a minority of adults in Northern Ireland in 2013.

There is only one activity that adults in Northern Ireland are less likely than those in the UK as a whole to do regularly: going online via a computer/ laptop/ netbook/ tablet (66% vs. 75%). In 2013 there were no activities that adults in Northern Ireland were more likely than all UK adults to do regularly.

Communication

People prefer to communicate in different ways to carry out a range of everyday activities. In five of the scenarios we asked about, preferences among adults in Northern Ireland differed to those of all UK adults.

Adults in Northern Ireland are less likely to prefer to make contact online for: checking their bank balance (28% vs. 40%), completing Government processes such as renewing a driving licence, car tax or passport (20% vs. 48%) contacting the local council, e.g. to find out about refuse collection (7% vs. 17%), and when entering a competition (22% vs. 33%).

They are more inclined to prefer to meet in person for completing Government processes (43% vs. 18%), checking a bank balance (47% vs. 38%) or making a complaint about a purchase (in a shop or online) from a nationwide retailer (43% vs. 32%).

Online use

Compared to all internet users, those in Northern Ireland are more to say they visit fewer than five websites in a typical week (30% vs. 22%). They are, however, as likely as all UK internet users to visit five to ten, 11-20 and more than 20 different websites in a typical week.

When asked to think about "most weeks when they go online", almost four in ten of all adult internet users in Northern Ireland (38%) said they used "maybe one or two" websites they had not used before. A similar proportion said they only used websites they had used before (39%), while two in ten users in Northern Ireland said they used lots of websites they had not used before (22%). None of these measures differ to the UK as a whole.

Online activities

Of the 34 online activities covered, ten are carried out at least quarterly by a majority of internet users in Northern Ireland: general surfing/ browsing the internet (92%), emailing (87%), using social networking sites (70%), buying things online (69%), finding information for work/ job/ studies (62%), watching online, or downloading, short video clips such as music videos or comedy clips (61%), using instant messaging services (60%), banking and paying bills online (53%), looking at news websites or apps (51%) and finding information for leisure time (51%).

Among the types of activities undertaken at least quarterly in 2013, most are similar to those for all UK users, with four exceptions: users in Northern Ireland are more likely to watch online, or download, short video clips (61% vs. 48%), and less likely to fill in a form or application online (23% vs. 32%), to complete Government processes online (such as register for tax credits, renew driving licence, car tax or passport) (17% vs. 28%) or to sell things online (11% vs. 22%).

Online participation / publication

As with the UK overall, the majority of internet users in Northern Ireland have experience of setting up a social networking site profile (67%). One in three (34%) say they have ever uploaded or shared photos to a website or app (34%).

One in five internet users in Northern Ireland have contributed comments to another person's blog (19%), while less than one in ten have undertaken any of the other creative activities. Compared to all UK internet users, those in Northern Ireland are less likely to say they have made a short video and uploaded it to a website such as YouTube (7% vs. 16%).

Mobile activities

Mobile phone users in Northern Ireland are as likely as those in the UK to use their mobile phone at least quarterly to make/ receive calls (99% vs. 98%), to send/ receive texts (92% vs. 93%), to take photos (63% vs. 67%) or to send/ receive photo messages (52% vs. 53%).

A minority of those in Northern Ireland use their phone at least quarterly for any of the other types of activities that we asked about. Visiting websites is the only activity that users in Northern Ireland are less likely to undertake on a quarterly basis, compared to all mobile phone users (44% vs. 54%).

There are no activities that are more likely to be undertaken, at least quarterly, by users in Northern Ireland than by all UK internet users.

Knowledge and understanding

How people assess the accuracy of media sources, the extent to which they understand how media are funded and regulated, and the concerns they have about certain types of media, can provide some insight into what informs their media choices.

Among adults in Northern Ireland, the majority are aware of the main sources of funding for both BBC and commercial TV programmes and commercial radio stations, and a minority are aware of funding for BBC radio stations, the BBC website and search engines.

While awareness of the main sources of funding for BBC television, commercial television, commercial radio stations and the BBC website is comparable to that of all UK adults, those in Northern Ireland are less likely to be aware of the sources of funding for BBC radio

stations (45% vs. 64%) and search engine websites (18% vs. 36%). In addition, for both these platforms, adults in Northern Ireland are more likely to say they are unsure.

In 2013, adults in Northern Ireland were as likely as all UK adults to believe that content on TV (88%), the press (72%), the internet (44%) gaming (42%) and mobile phones (32%) is regulated. They were more likely than all UK adults to believe that radio content is regulated (84% vs. 72%).

Half (51%) of all search engine users in Northern Ireland believe that some of the websites returned by a search will be accurate or unbiased, while others will not, which is similar to the UK as a whole (59%).

Media concerns

A minority of internet users in Northern Ireland have concerns about online content (44%), about one in three TV viewers have concerns about television (33%) and one in seven adult mobile phone users in Northern Ireland have concerns about mobiles (15%). Around one in ten who listen to radio have concerns about radio (8%). These levels of concern among adult users in Northern Ireland do not differ to those among all UK adult users of each platform.

At an overall level, there are no differences in concerns about the internet among users in Northern Ireland compared to all UK users (44% vs. 51%), nor are there any differences when looking specifically at types of online concerns.

Adults in Northern Ireland with televisions in the household are no more likely than all UK adults to have concerns about television at an overall level (33% vs. 36%), but are more likely to be concerned because they consider television content to be untrustworthy or biased (2% vs. 0%).

Online safety and security

In 2013, internet users in Northern Ireland were less likely than all UK internet users to say they are happy to share each of the five types of personal information online: personal email address (33% vs. 44%), credit/ debit card details (20% vs. 30%), home address details (20% vs. 32%), mobile phone number (20% vs. 30%) and home phone number (18% vs. 26%). They are more likely to say they would never share each type of personal information online because they have security concerns.

Internet users in Northern Ireland are as likely as those in the UK as a whole to make formal judgements (such as looking for padlocks or other system messages) about websites before entering personal details (52% vs. 55%). One in three (34%) make peer judgements (online reviews or recommendations from friends); less than all UK internet users (55%). One in ten (10%) say they would not trust any site to be secure, or would not make any type of judgement (8%), and both these measures are comparable to the UK as a whole.

Internet users in Northern Ireland are as likely as all UK users to agree that people who buy things online put their privacy at risk (62% vs. 54%).

One in five adult internet users in Northern Ireland (20%) say they read website terms and conditions/ privacy statements thoroughly. More than four in ten (45%) say they skim them without reading them properly, and one in five (21%) say they don't read them. None of these measures differ to the UK overall. In 2013, internet users in Northern Ireland were, however, more likely to say they were not aware of them (10% vs. 4%).

Home internet users (who use a PC or laptop/ laptop or netbook to go online) were asked whether they were aware of various online security measures or safety features, and, for each they were aware of, whether these were installed on their home PC/ laptop.

Awareness of the following four security measures/ safety features is lower in Northern Ireland than in the UK as a whole: anti-virus software (80% vs. 94%), email spam filters (62% vs. 79%), home WiFi protection from unauthorised access (55% vs. 73%) and anti-spyware (56% vs. 75%).

Compared to the UK as a whole, home internet users in Northern Ireland are, therefore, less likely to use each of these four security measures or safety features.

Internet users were prompted with a list of possible negative online experiences and were asked whether they had experienced any of these in the past year. Close to half (47%) had experienced spam or unwanted email; comparable to this measure for the UK as a whole (43%).

Three in ten had received emails or instant messages from companies not known to them directing them to a website which asked them for their personal details (29%), which is also comparable to all UK internet users. Users in Northern Ireland are, however, more likely than all UK users to have had a computer virus in the past 12 months (29% vs. 20%).

Section 2

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Section 3

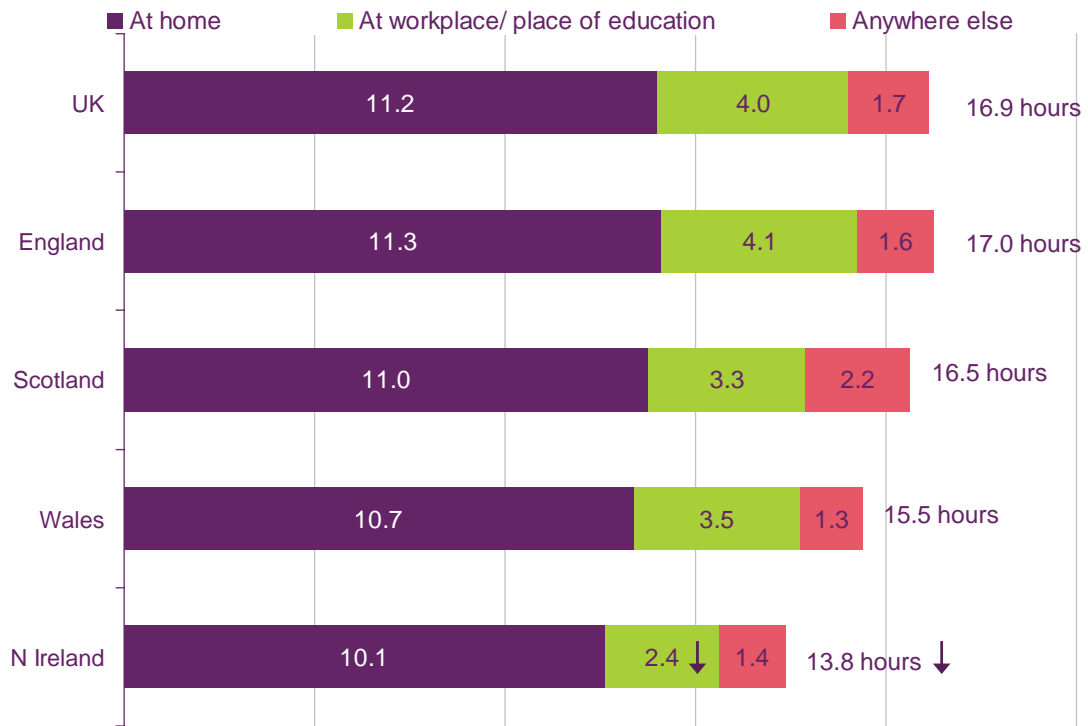
Media literacy, by nation: charts

Figure 1: Most-missed media activity – top five mentions, by nation: 2013



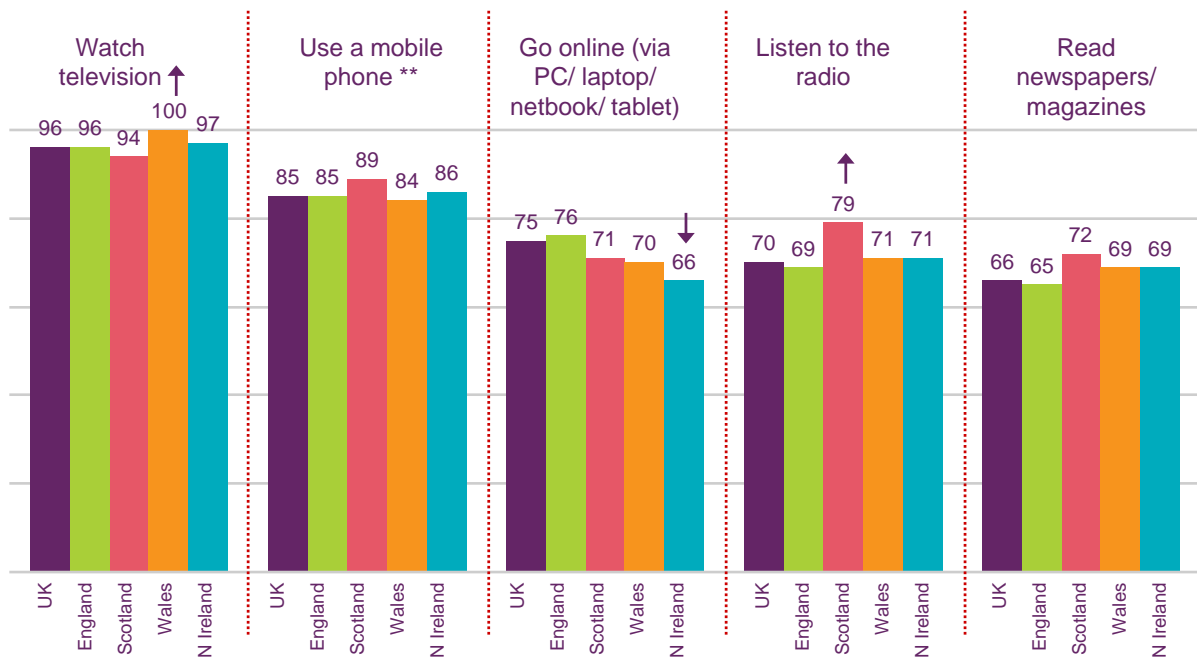
A2 – Which one of these would you miss doing the most? (Prompted responses, single coded) – NB Showing the five most popular responses in 2013 at an overall level. Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 2: Claimed volume of internet use per week, by nation: 2013



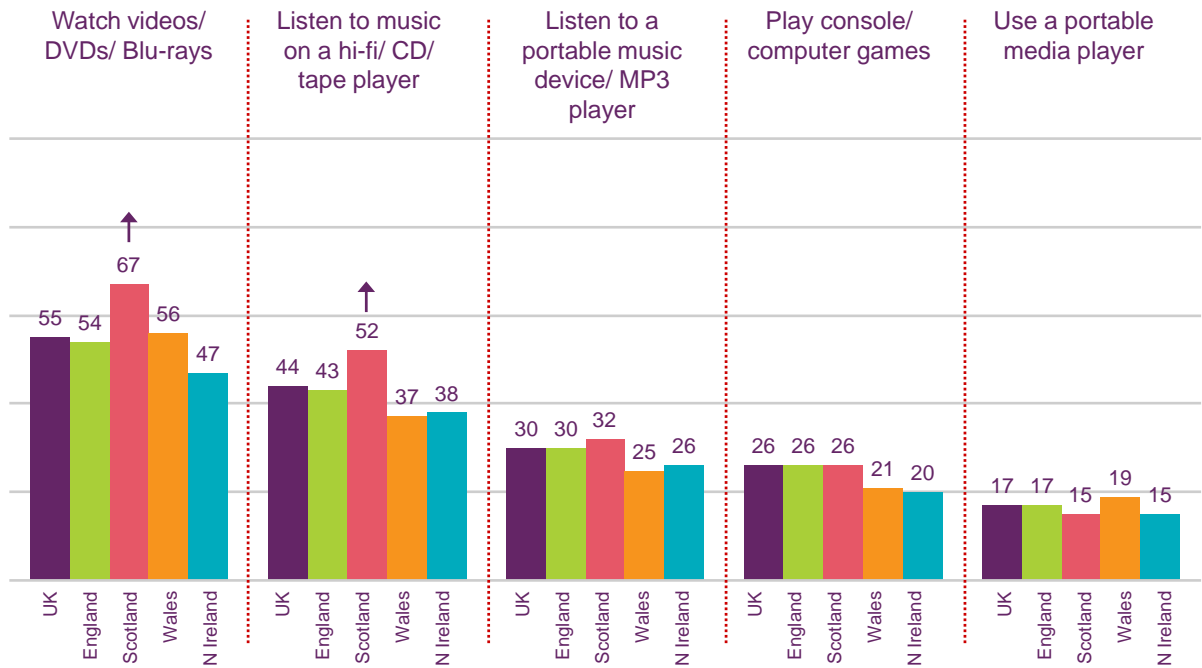
IN6A-C – How many hours in a typical week would you say you go online at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 3: Regular media activities, by nation (1–5 of 10): 2013



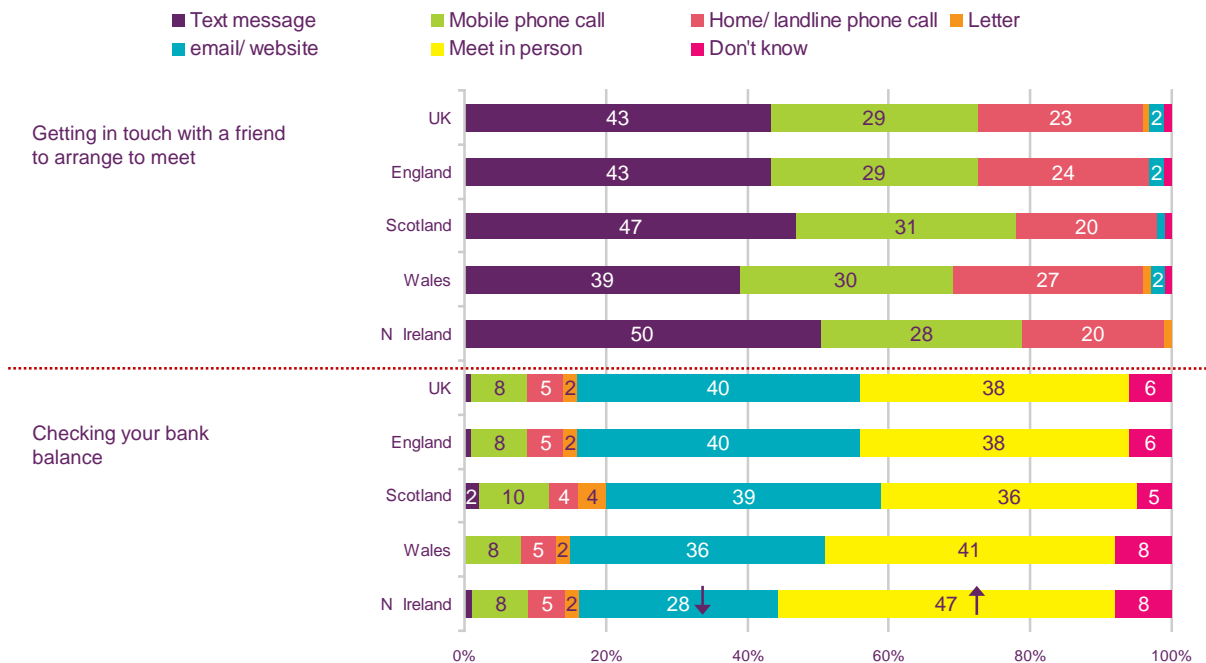
A1 – Which of the following do you regularly do? (Prompted responses, multi-coded) ** In 2013 using a mobile phone was split out into using a smartphone (60%) and using a non-smartphone (31%) but responses have been netted to achieve an overall measure
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 4: Regular media activities, by nation (6-10 of 10): 2013



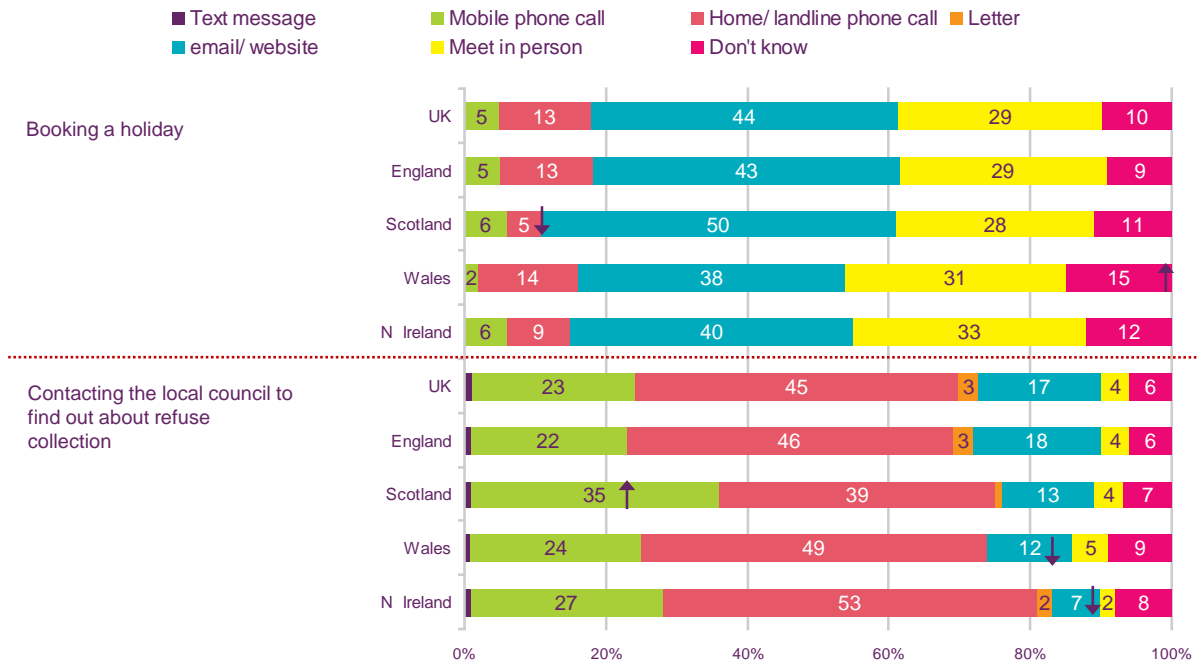
A1 – Which of the following do you regularly do? (Prompted responses, multi-coded)
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 5: Preferred communication method for making contact (1-2 of 7), by nation: 2013



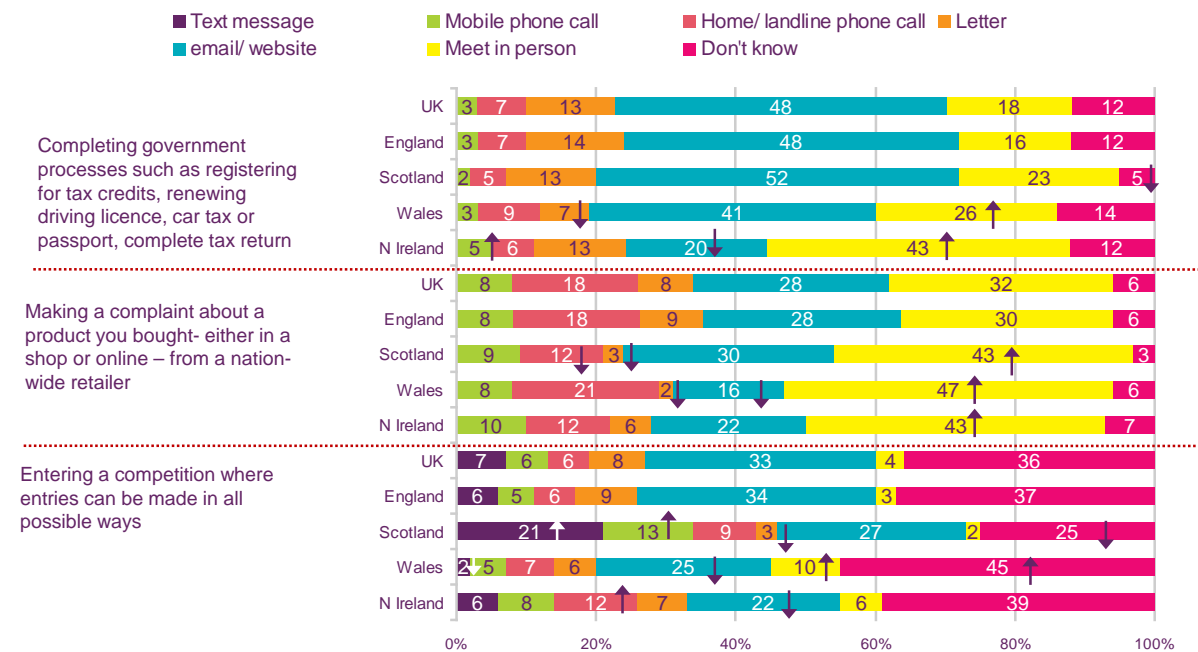
Z1A/ D. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded)
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 6: Preferred communication method for making contact (3-4 of 7), by nation: 2013



Z1C/ B. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded)
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 7: Preferred communication method for making contact (5-7 of 7), by nation: 2013



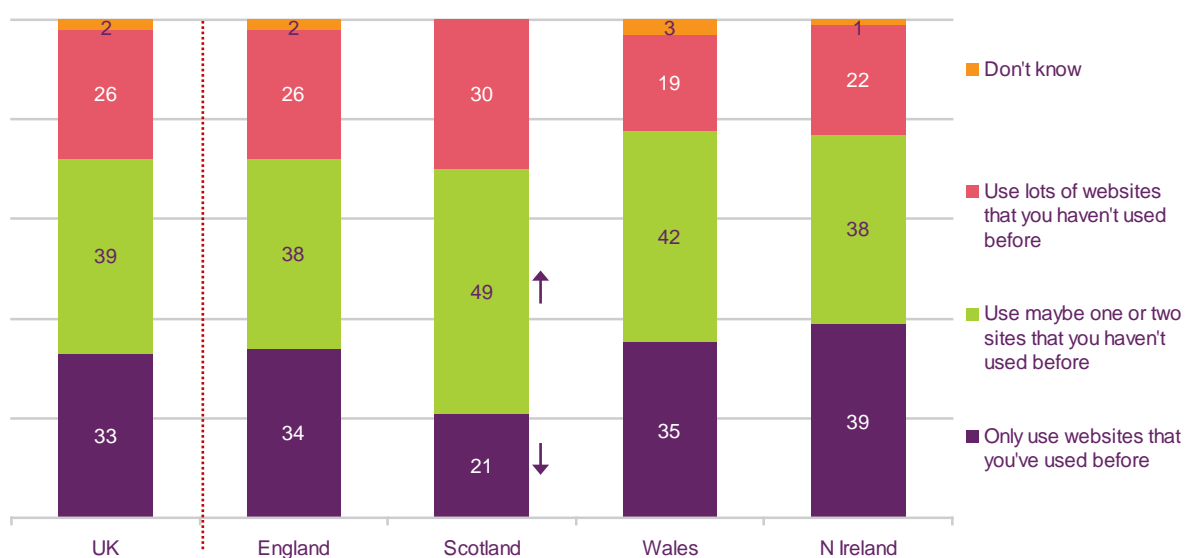
Z1E-G. Please use this list to say which one way you would prefer to make contact for a few different reasons that I'll read out. (Prompted responses, single coded)
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 8: Estimated number of different websites visited in a typical week, by nation: 2013



IN22 - Thinking now about all the different websites that you visit in a typical week for whatever purpose, whether that's at work, at home or elsewhere? How many different websites would you say you visit in a typical week? (Prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 9: Use of new websites in most weeks when the internet is used, by nation: 2013



IN16 - In most weeks when you go online using any type of computer, a mobile phone, a games console or a media player, would you say that you... (Prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 10: Internet activities carried out at least quarterly, by nation: 2013

	UK	England	Scotland	Wales	N Ireland
General surfing/ browsing the internet	91%	91%	95%	86%↓	92%
Sending and receiving emails	90%	90%	88%	82%↓	87%
Looking at social networking sites/ apps	69%	69%	75%	69%	70%
Buying things online	66%	65%	70%	66%	69%
Using Instant Messaging services	64%	64%	62%	62%	60%
Banking and paying bills online	61%	62%	61%	52% ↓	53%
Finding information for your work/ job/ studies	57%	58%	52%	51%	62%
Looking at news websites or apps	54%	53%	68% ↑	48%	51%
Find information for your leisure time including cinema and live music	53%	54%	51%	53%	51%
Watch online or download short video clips such as music videos or comedy clips	48%	47%	58%↑	38% ↓	61% ↑
Watch online or download TV programmes or films	40%	40%	42%	35%	42%
Finding information about public services provided by local or national government	40%	40%	34%	41%	35%
Listen to or download music online	39%	39%	47%	29% ↓	45%
Sharing links to websites or online articles – perhaps on Twitter, Facebook, Reddit or LinkedIn	38%	39%	37%	36%	37%
Finding information about health related issues	37%	38%	29%	35%	41%
Downloading software	33%	33%	31%	26%	33%
Filling in a form or application online	32%	32%	29%	31%	23% ↓
Looking at sites or apps for news about, or events in your local area/ the local community	32%	33%	21%↓	29%	28%
Finding information for booking holidays	31%	32%	26%	35%	35%
Playing games online	30%	31%	24%	19%↓	23%
Looking at job opportunities	29%	30%	28%	30%	25%
Complete government processes online – such as register for tax credits, renew driving licence, car tax or passport	28%	28%	26%	24%	17% ↓
Making or receiving telephone or video calls using services like Skype or FaceTime	26%	26%	31%	27%	29%
Selling things online	22%	23%	15%	21%	11% ↓
Send or receive Twitter updates	22%	21%	29%↑	17%	26%
Listening to radio stations online	21%	23%	12% ↓	8% ↓	19%
Maintaining a website or blog	16%	16%	12%	10%	13%
Looking at political/ campaign/ issues websites	14%	14%	18%	8% ↓	12%
Doing an online course to achieve a qualification	9%	8%	11%	9%	9%
Sign an online petition	8%	8%	7%	3% ↓	6%
Online gambling	6%	6%	12% ↑	2% ↓	5%
Looking at adult-only websites or apps	6%	7%	6%	1% ↓	5%
Contact a local councillor or your MP online	4%	4%	4%	2%	2%
Visiting dating websites	3%	3%	2%	4%	1%

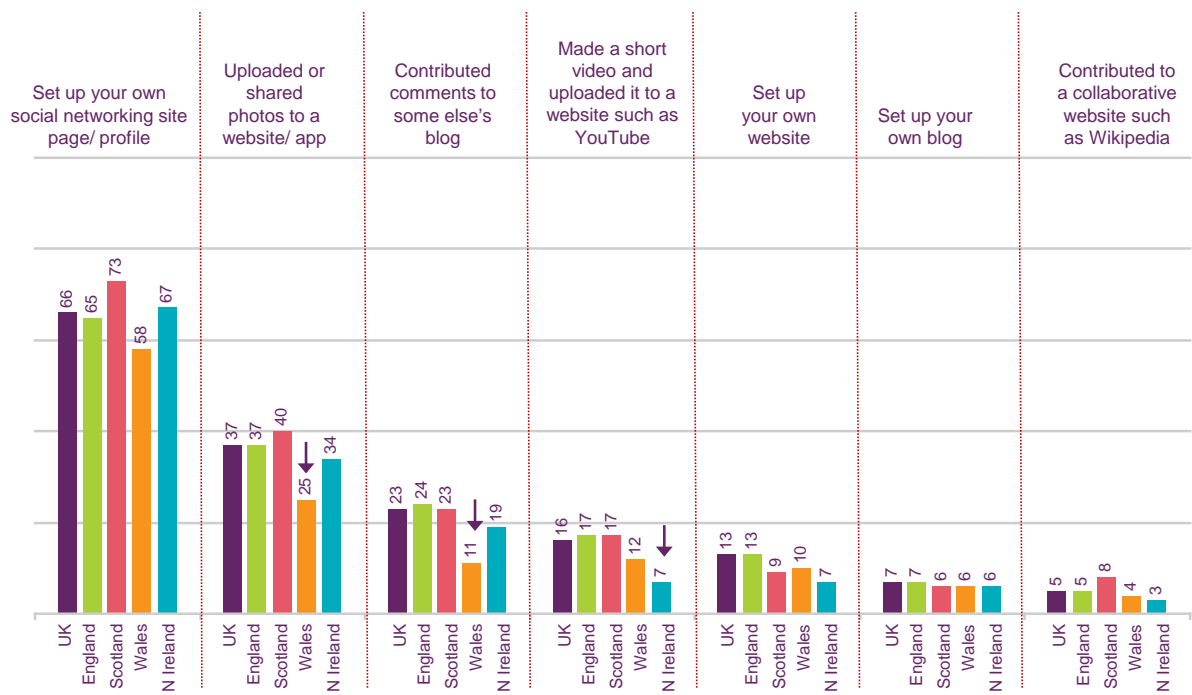
IN17/ 18 – Could you please tell me from this list the types of things you currently do using the internet, and how often you do each? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).

Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 11: Experience of using the internet for creative activities, by nation: 2013



IN23 Which if any of these things have you ever done online? (Prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland). Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 12: Mobile phone activities carried out at least quarterly, by nation: 2013

	UK	England	Scotland	Wales	N Ireland
Make or receive calls	98%	97%	99%	96%	99%
Send or receive text messages	93%	92%	96%	88%	92%
Take photos	67%	67%	70%	57% ↓	63%
Visit websites	54%	55%	52%	44% ↓	44% ↓
Send or receive photo messages	53%	54%	52%	41% ↓	52%
Send or receive email	51%	52%	48%	38% ↓	46%
Visit social networking sites	51%	51%	50%	42% ↓	44%
Take videos	41%	41%	43%	28% ↓	41%
Listen to music	41%	42%	38%	25% ↓	39%
Visit sites or apps like YouTube or Vine to look at videos or clips posted by other people	39%	39%	41%	27% ↓	33%
Download apps/ applications (including games)	39%	40%	32%	30% ↓	33%
Play games that are loaded on the phone	37%	38%	28% ↓	24% ↓	29%
Use features such as Maps or satellite navigation to get to where you want to go/ plot a route to a destination	36%	37%	29%	22% ↓	29%
Use Instant Messaging services	35%	35%	33%	26% ↓	36%
Put photos or videos on sites like YouTube, Facebook or Instagram for others to see	31%	31%	35%	25%	34%
Send or receive video clips	29%	29%	29%	19% ↓	33%
Check your bank balance	28%	27%	37% ↑	18% ↓	29%
Buy things from websites or apps	24%	24%	27%	17% ↓	25%
Send or receive Twitter updates	21%	21%	23%	16%	19%
Make or receive telephone or video calls using services like Skype or FaceTime	20%	20%	23%	13% ↓	20%
Play games over the internet	17%	17%	17%	14%	16%
Watch TV programmes	13%	14%	7% ↓	5% ↓	13%

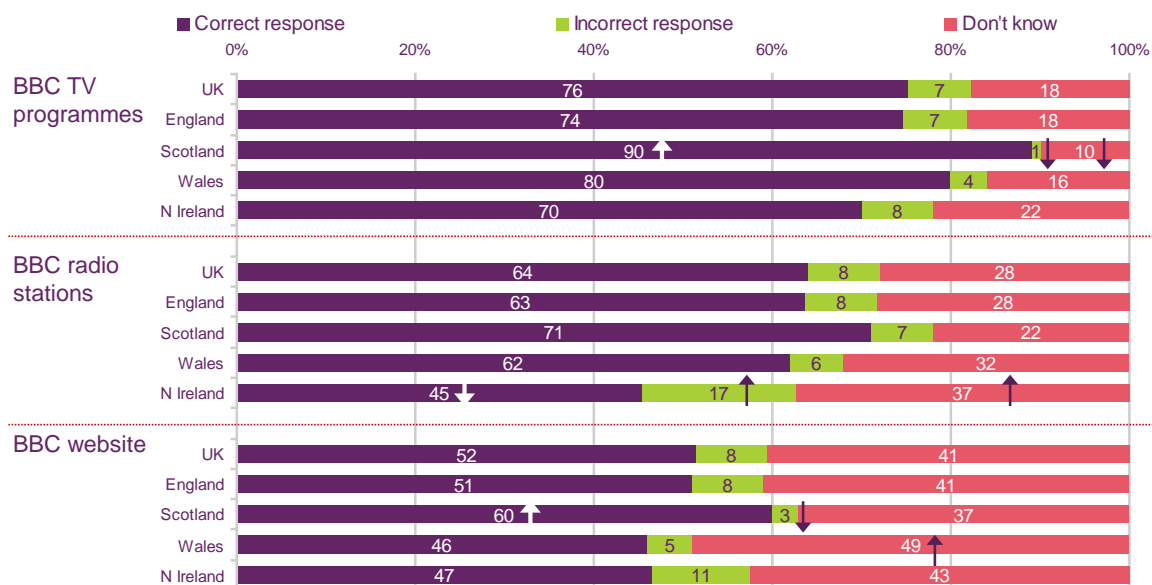
M8A-M8V – Please tell me from this list the types of things you use your mobile phone for, and how often you do each.

Base: All adults aged 16+ who use a mobile phone (1465 UK, 936 England, 181 Scotland, 180 Wales, 168 Northern Ireland).

Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 13: Awareness of the main source of funding for BBC television programmes, radio stations and website, by nation: 2013

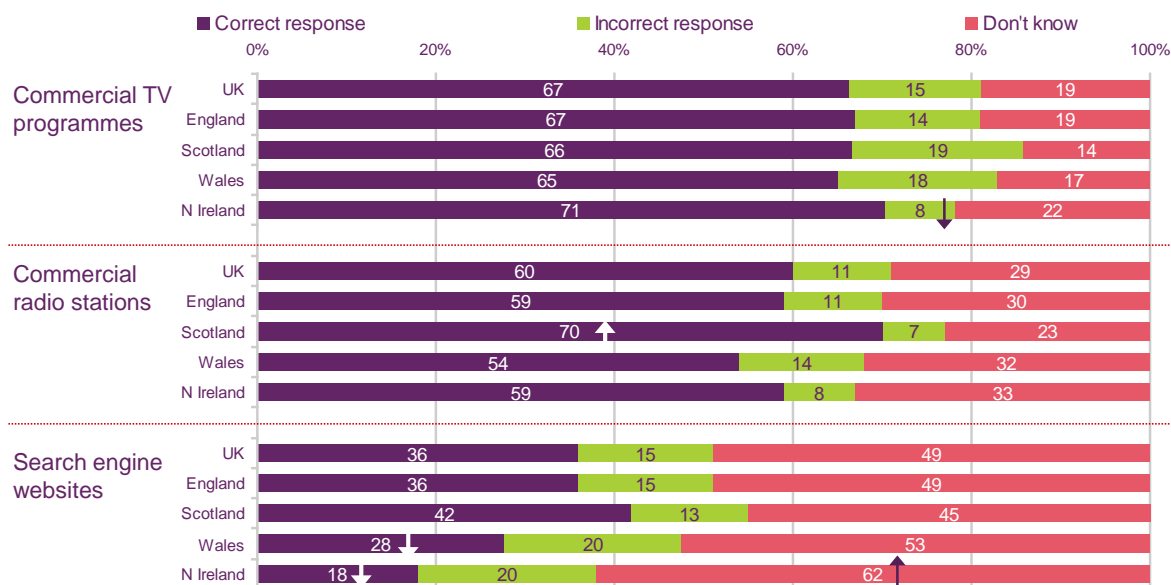


T3/ R3/ IN28 - How would you say BBC TV programmes are mainly funded? / How would you say BBC radio stations are mainly funded? / How do you think the BBC's website is mainly funded (unprompted responses, single coded)

Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 14: Awareness of the main source of funding for commercial television programmes, radio stations and search engine websites, by nation: 2013

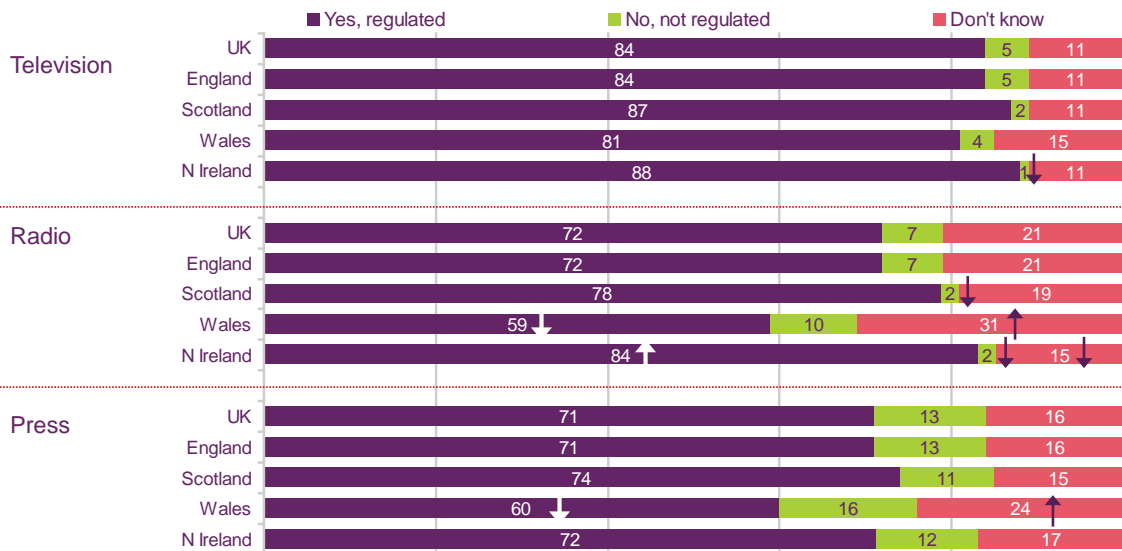


T4/ R4/ IN29 - How would you say programmes are mainly funded on ITV, Channel 4 and Five? / How would you say the other main radio stations are mainly funded? / How do you think search engine websites such as Google or Ask.com are mainly funded? (unprompted responses, single coded)

Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 15: Belief that content is regulated, by nation (1-3 of 6): 2013



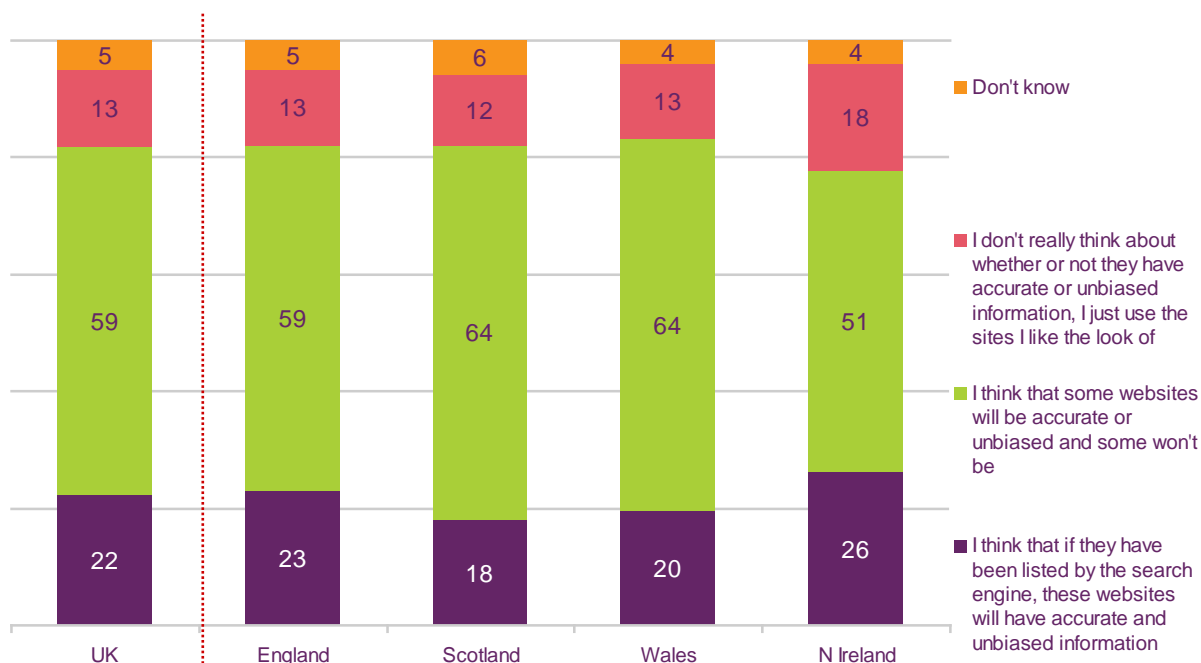
T6 / R6/ Z2 – As far as you know, are TV programmes regulated/ is radio regulated in terms of what can be broadcast/ is the press regulated in terms of what they show and write (Unprompted responses, single coded)
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 16: Belief that content is regulated, by nation (4-6 of 6): 2013



IN31/ G8/ M7– As far as you know, is the internet regulated in terms of what can be shown and written / Is gaming regulated at all/ is mobile content – such as the websites that you visit directly or through an App on your mobile phone or the videos you may download on your mobile – regulated at all ? (Unprompted responses, single coded)
 Base: All adults aged 16+ (1642 UK, 1051 England, 203 Scotland, 201 Wales, 187 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 17: Search engine user attitudes towards the accuracy or bias of the websites returned by a search, by nation: 2013

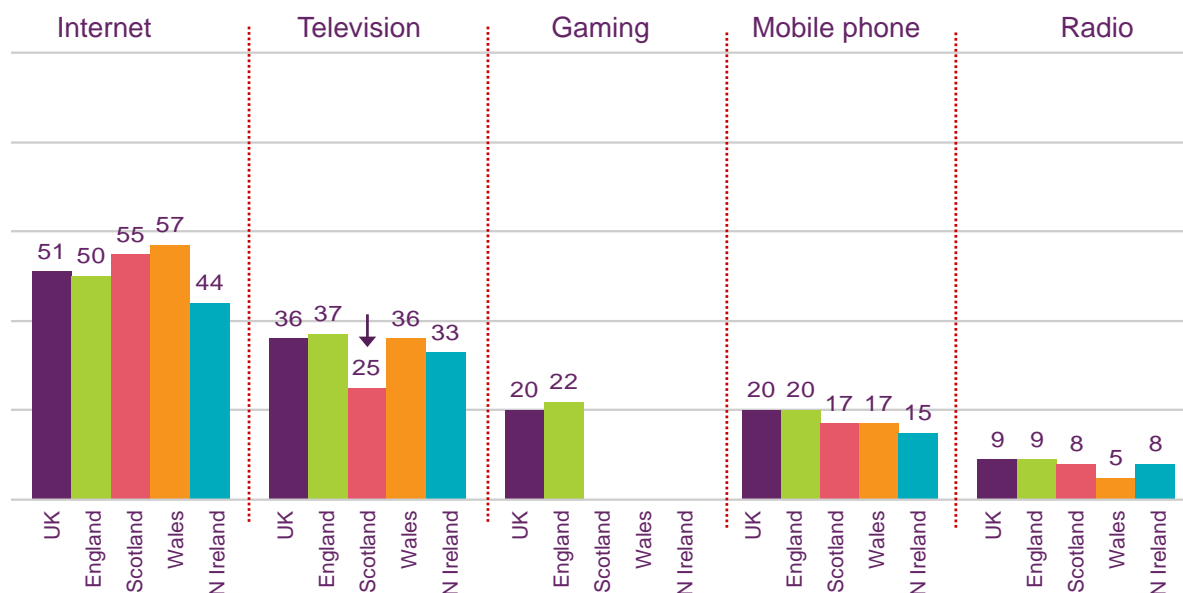


IN41 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded)

Base: All adults aged 16+ who ever use search engines (1199 UK, 777 England, 147 Scotland, 151 Wales, 124 Northern Ireland). Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 18: Concerns about key media platforms, by nation: 2013



IN30/ T5/ G7/ M3/ R5 – Can you tell me if you have any concerns about what is on the internet/ TV/ gaming/ mobile phones/ radio? (unprompted responses, multi-coded)

Base: Adults aged 16+ who use each platform (variable base) – NB Data for gaming in each of Scotland, Wales and N Ireland cannot be shown due to low base sizes

Significance testing shows any difference between any nation and the UK

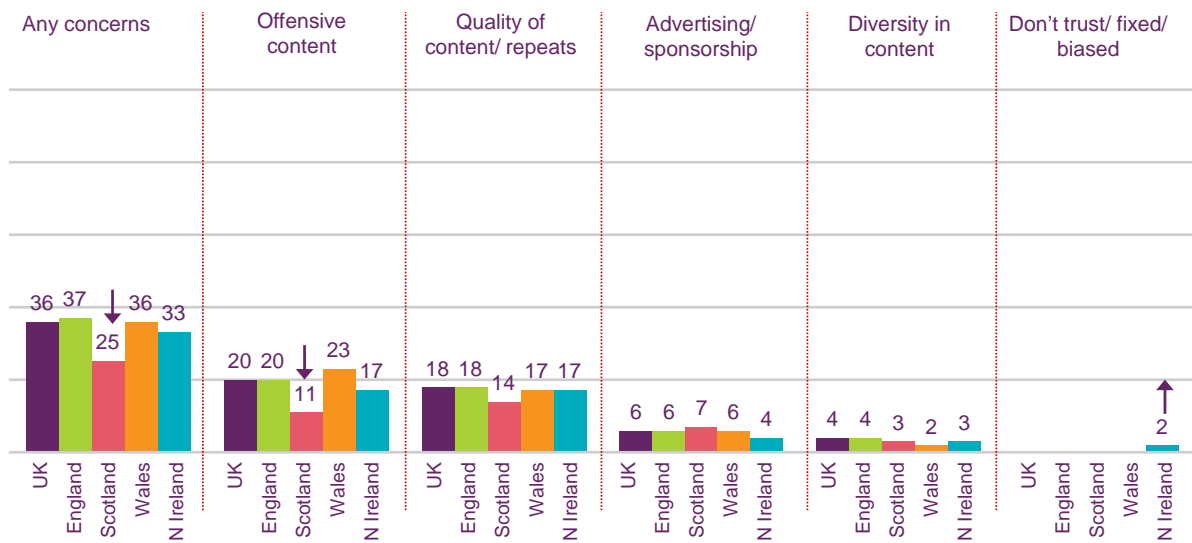
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 19: Concerns about the internet, by nation: 2013



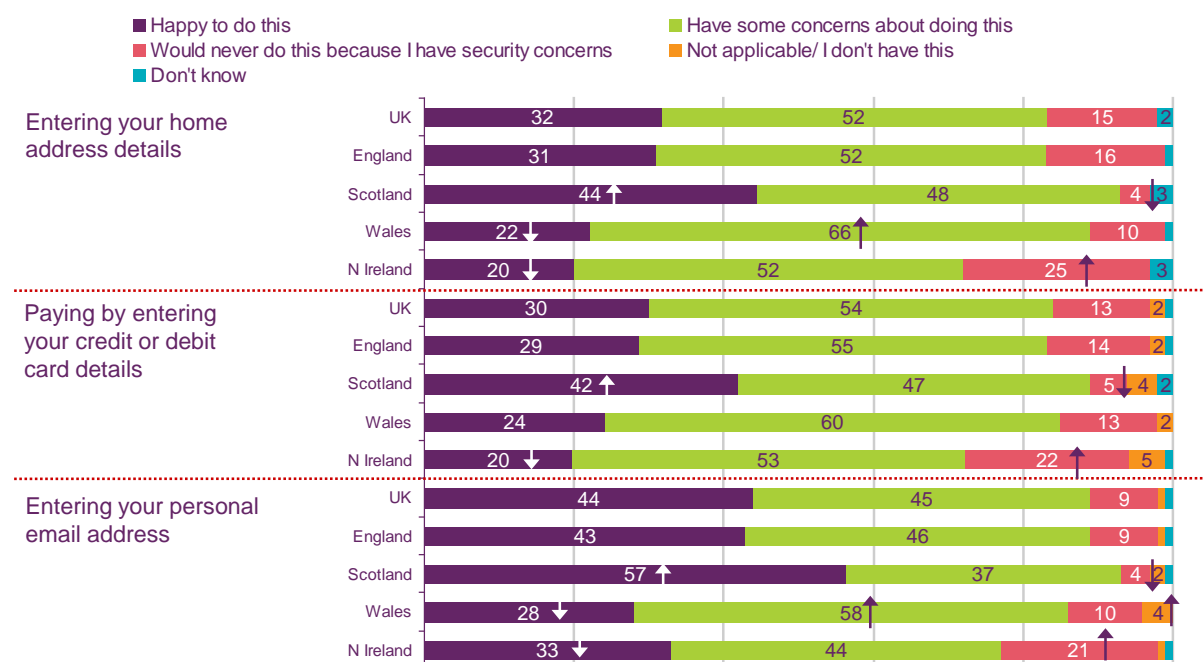
IN30 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 20: Concerns about television, by nation: 2013



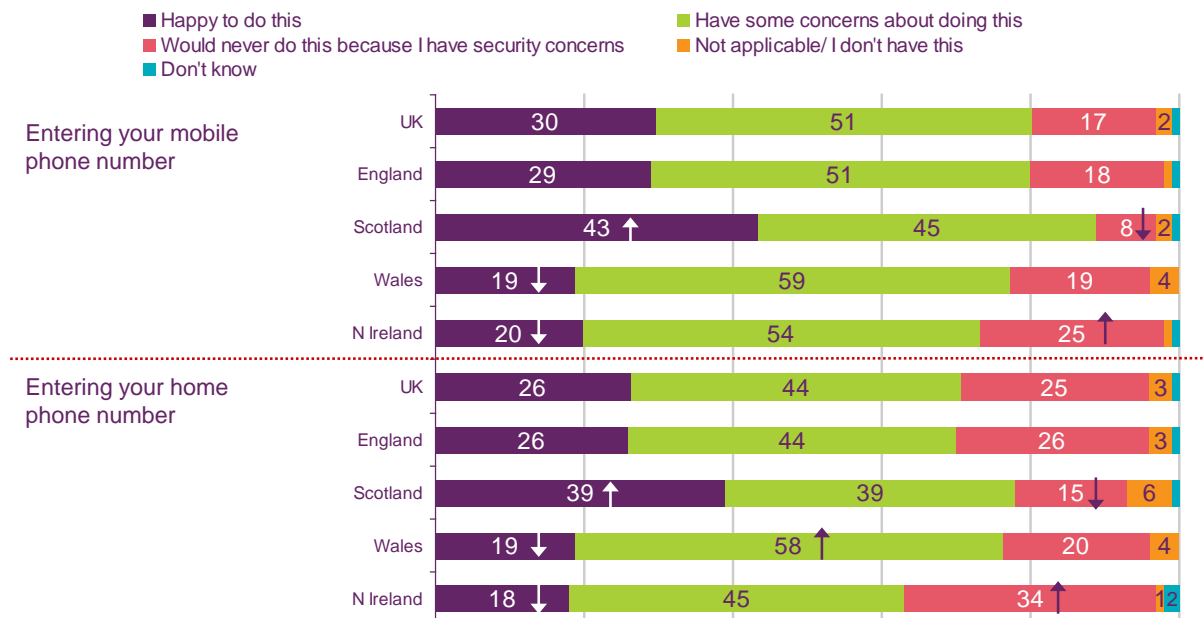
T5 – Can you tell me if you have any concerns about what is on TV? (Spontaneous responses, multi-coded)
 Base: All adults with any TVs at home (1610 UK, 1029 England, 195 Scotland, 200 Wales, 186 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 21: Personal details prepared to enter online, by nation (1-3 of 5): 2013



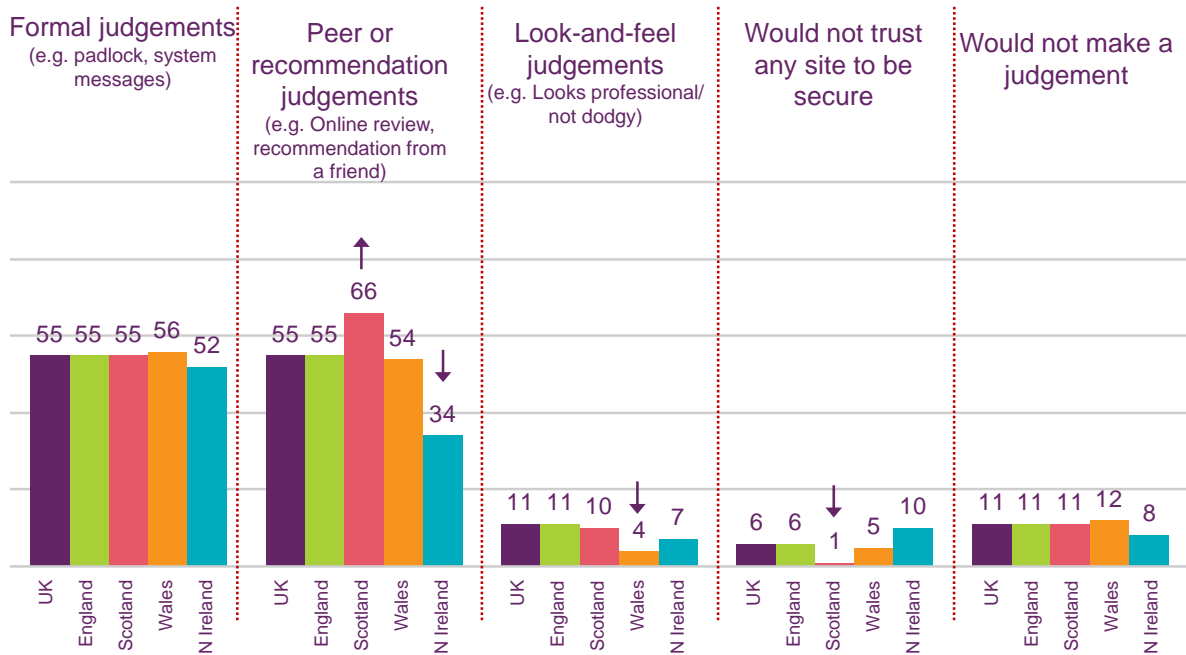
IN33B/ A/ E – I'm going to read out some types of information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 22: Personal details prepared to enter online, by nation (4-5 of 5): 2013



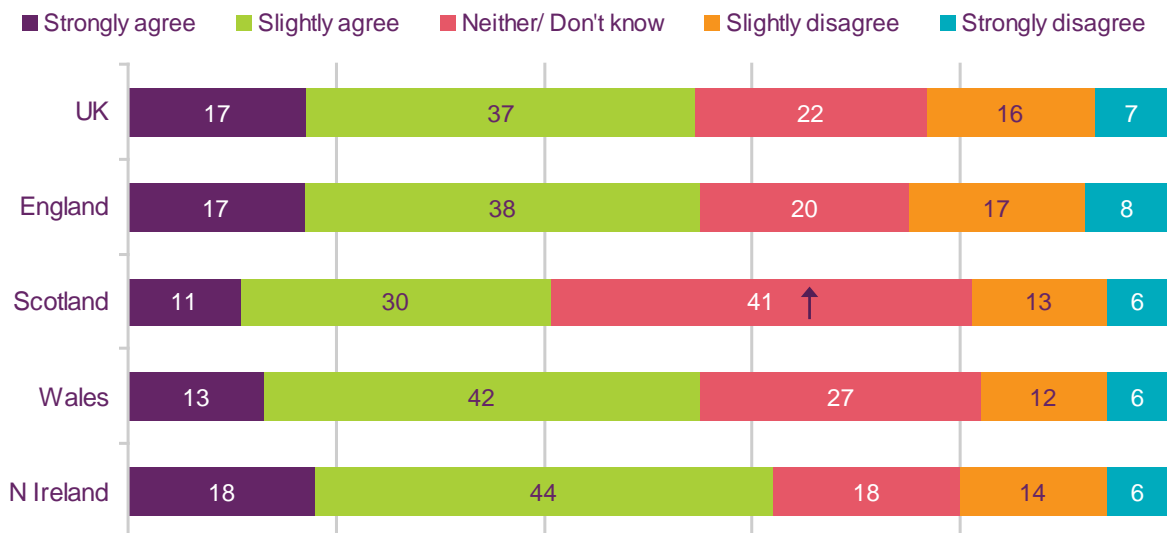
IN33D/ C – I'm going to read out some types of information you could be asked to enter when you're on the internet, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 23: Types of judgements made about a website before entering personal details, by nation: 2013



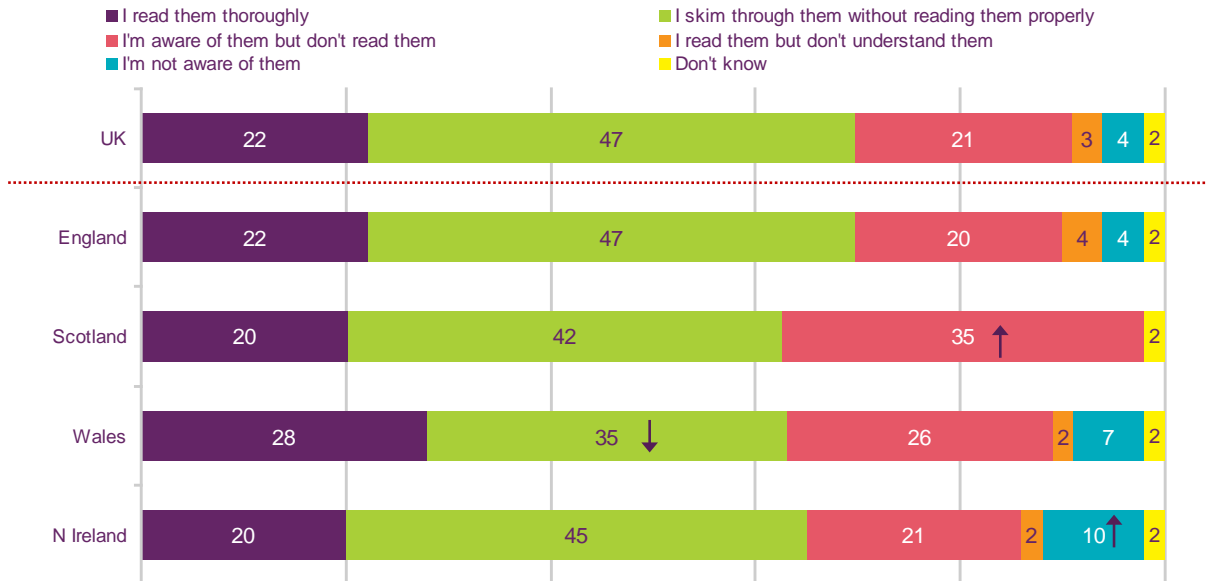
IN34 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure? (unprompted responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 24: Agreement with statement “People who buy things online put their privacy at risk”: 2013



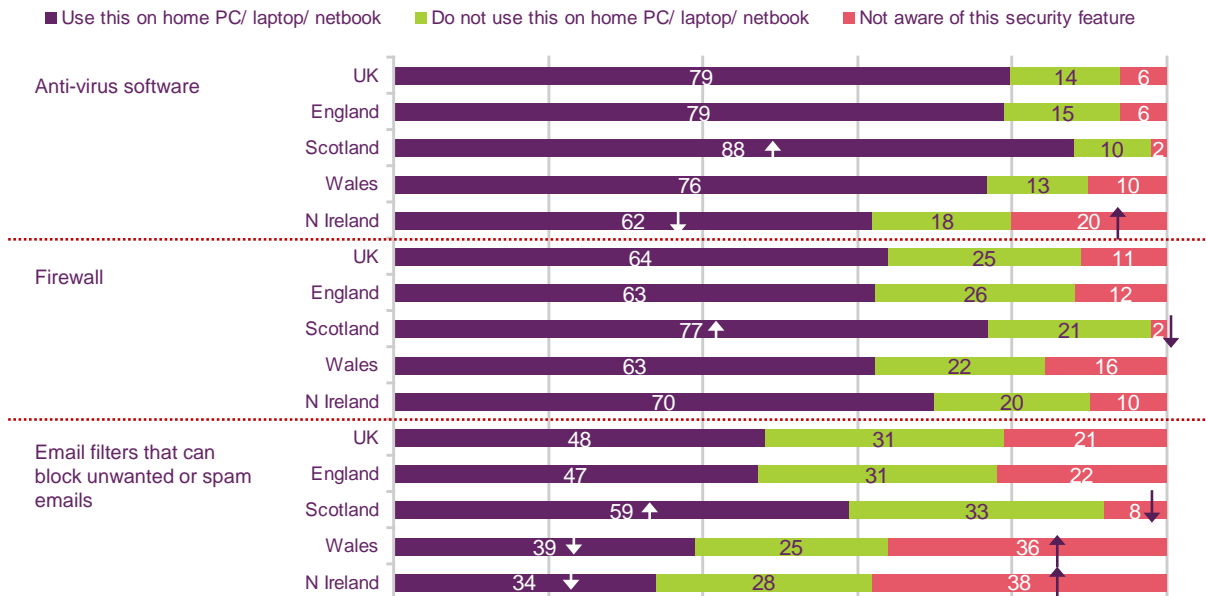
IN36C Here are some things people sometimes say about using the internet. Whether you use the internet or not can you please tell me to what extent you agree or disagree with each statement using the scale on the card. (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 25: Awareness of, and reaction to, website terms and conditions/ privacy statements, by nation: 2013



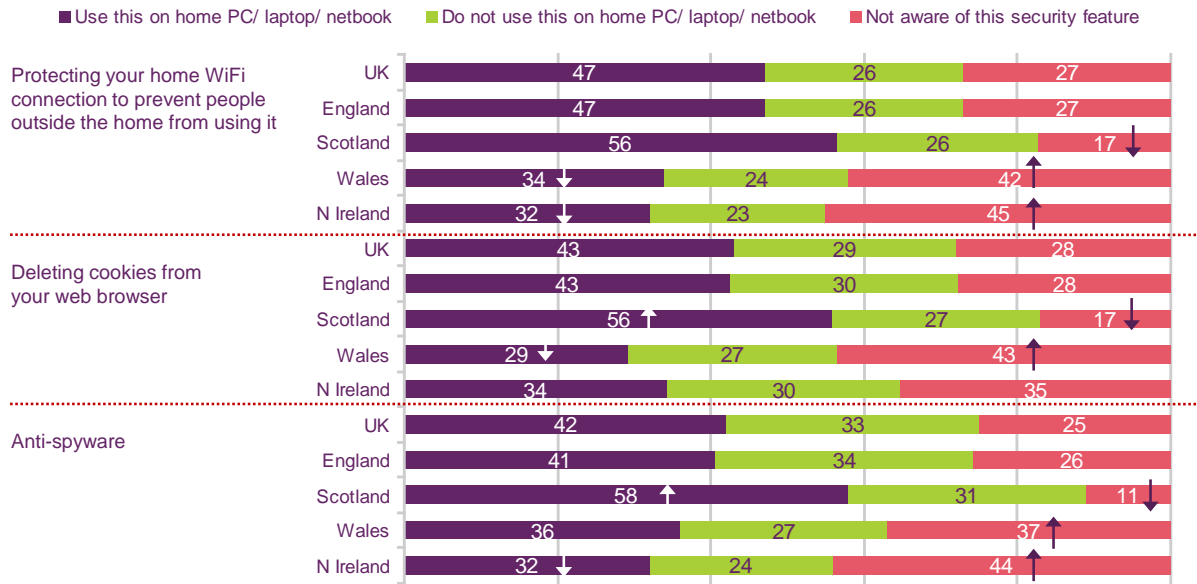
IN38 There are a number of ways you can control who has access to and what is done with your personal information online. One way is to read the company's terms and conditions and/ or privacy statements to inform your decision about whether to use a website or service. Which of the following statements best describes what you do about website terms and conditions or privacy statements? (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 26: Security measures/ safety features installed on PC/ laptop used at home (1-3 of 6), by nation: 2013



IN7/ IN8 Before today, which, if any, of the following online security measures or safety features had you heard of? And which if any, of those measures or features do you have or use on the PC/ laptop / netbook that you use at home? (prompted responses, multi-coded)
 Base: Adults aged 16+ who use the internet at home on a PC/ laptop/ netbook (1202 UK, 785 England, 131 Scotland, 156 Wales, 130 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 27: Security measures/ safety features installed on PC/ laptop used at home (4-6 of 6), by nation: 2013



IN7/ IN8 Before today, which, if any, of the following online security measures or safety features had you heard of? And which if any, of those measures or features do you have or use on the PC/ laptop / netbook that you use at home? (prompted responses, multi-coded)
 Base: Adults aged 16+ who use the internet at home on a PC/ laptop/ netbook (1202 UK, 785 England, 131 Scotland, 156 Wales, 130 Northern Ireland).

Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013

Figure 28: Experience of negative types of online activity in past 12 months, by nation: 2013

	UK	England	Scotland	Wales	N Ireland
Received spam or unwanted emails from companies trying to sell you something	43%	45%	31% ↓	36%	47%
Received emails or instant messages from companies you don't know directing you to a website which asked for your personal details (such as your bank details, user name, password, etc.)	27%	28%	21%	21%	29%
A computer virus on your home PC, laptop or netbook	20%	20%	13%	27% ↑	29% ↑
Emails being sent from your email address without you agreeing to it	11%	11%	10%	13%	8%
Seen something online that you consider to be nasty or offensive	10%	11%	5% ↓	9%	12%
Someone accessing your email account or social networking profile (such as Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest) without you knowing about it	9%	9%	2% ↓	7%	8%
Bought something online which was misrepresented/ got scammed/ 'ripped off' through an online transaction	4%	4%	2%	3%	2%
Your credit card details being stolen as a result of an online transaction	3%	3%	3%	1%	3%
Being a victim of online identity theft	2%	1%	4%	2%	2%
ANY OF THESE	56%	57%	45% ↓	55%	60%

IN9 – Which, if any, of the following have you personally experienced in the last 12 months? (prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1272 UK, 824 England, 150 Scotland, 163 Wales, 135 Northern Ireland). Significance testing shows any difference between any nation and the UK

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2013