1 Market in context

1.1 Market in context

1.1.1 Overview

This introductory chapter of the Communications Market Report 2017 looks at the sectors Ofcom regulates as a whole.

It starts by looking at communications sector revenues (telecoms, TV, radio and post), and average monthly household spend on communications services over the past five years, followed by take-up of communications services and devices.

Following on from this, two pieces of market research, conducted for this report, seek to understand consumer behaviour in relation to TV consumption and the use of images, both photos and videos, as a method of communication. *The changing TV landscape* looks at consumption of on-demand and streaming services. The UK's TV landscape is evolving: subscription library services like Netflix and Amazon Prime are becoming as important as live TV for family time; eight in ten adults have watched multiple episodes of the same programme back-to-back in one sitting; and nearly four in ten adults watch programmes and films outside the home. The research seeks to better understand the needs these different services are meeting and the benefits and disadvantages of this new approach to TV consumption.

The second piece of research, *The power of the online image*, seeks to investigate how images, both photos and videos, are being used. Images are becoming an increasingly central method of communication, with six in ten people saying they post images and videos online. And, with a minority of people thinking that it's easy to recognise if an image or video online is real or truthful, and just one in seven thinking that it's easy to delete photos from the internet once they've been posted, this research also explores sharing, trust and understanding of privacy rules in the online world.

1.2 Fast facts

Fast Facts: United Kingdom

Unless otherwise stated, figures are from Q1 2017

TV

94%	Proportion of UK homes with digital TV[1]
3h 32m	Minutes spent watching broadcast TV per day (per person aged 4+, average daily minutes across 2016)

Radio

57%	Proportion of radio listeners with a DAB radio in their household
46%	Proportion of listener hours through a digital platform (DAB, online DTV)
183	Minutes spent listening to radio per day (among radio listeners)[2]
329	Number of local radio stations broadcasting on analogue (excluding community stations) *(May 2017)*
251	Number of community radio stations currently on air *(May 2017)*
41	Number of UK-wide radio stations (analogue and DAB) *(May 2017)*

Internet

88%	Total household internet take-up
25.3m	Number of fixed broadband connections *(end 2016)*
10.8m	Number of superfast broadband connections *(end 2016)*
83%	Proportion of adults with broadband (fixed and mobile)
44%	Superfast broadband take-up (% of all connections) *(Q4 2016)*
36.2Mbit/s	Average actual fixed broadband speed *(Nov. 2016)*
58%	Proportion of homes with a tablet computer
66%	Proportion of people who use their mobile phone to access the internet

Landlines and mobiles

26.4m	Number of residential fixed landlines *(end 2016)*
33.5m	Number of fixed landlines in the UK, including ISDN channels *(end 2016)*
94%	Proportion of adults who personally own/use a mobile phone
76%	Proportion of adults with a smartphone
18%	Proportion of adults who live in a mobile-only home[3]
92.0m	Number of mobile subscriptions (including M2M) *(end 2016)*
52.4m	Number of 4G subscriptions *(end 2016)*

Post

11.8bn	Addressed letter mail volume in 2016
£4.2bn	Addressed letter revenues in 2016

[1] This figure is drawn from Ofcom's technology tracker. BARB's establishment survey measured TV take up at 95.6% of UK homes in Q1 2016 and this is set out in the TV section of this report.

[2] Average week in 2017

[3] A household that solely uses mobile phones to fulfil its voice telephony requirements.

1.3 Key market developments

1.3.1 UK communications market revenue

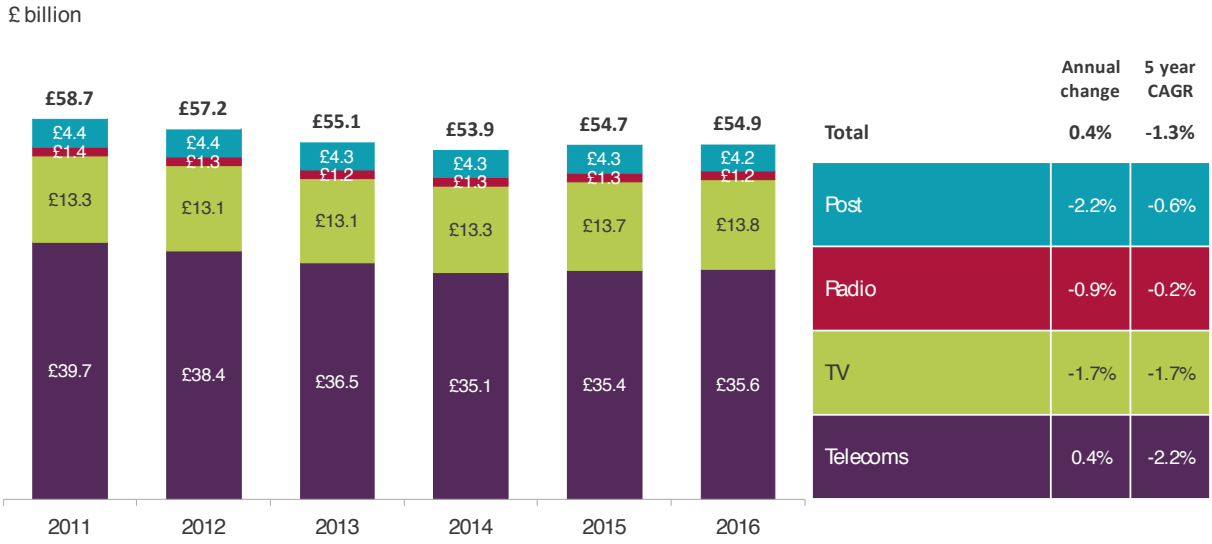
Total UK communications revenue stood at £54.9bn in 2016

Total UK communications revenues generated by telecoms, TV, radio and postal services increased in 2016, rising by £0.19bn (0.4%) in real terms (i.e. adjusted for inflation) to £54.9bn. This overall increase was due in part to a rise in total telecoms revenue,[1] which increased by £0.2bn (0.4%) in real terms to £35.6bn, mainly due to a 4.3% increase in retail fixed revenue during the year and was partially offset by declining wholesale service revenues. There was also a rise in the revenue generated by the broadcast UK television industry, up by 1.0% in real terms to £13.8bn in 2016, driven by a 2.8% increase in pay-TV subscription revenues.

Addressed letter mail revenue decreased slightly to £4.2bn in 2016 (down by 2.7% in real terms), driven by declining volumes.

Total UK radio industry revenue decreased slightly to £1.2bn in 2016 (down by 0.9% in real terms), reflecting stable commercial radio revenues and a decline in real-terms expenditure on BBC radio.

Figure 1.1: Communications industry revenue: telecoms, TV, radio and post (£bn)



Source: Ofcom/ operators.
Note: figures are adjusted for CPI (2016). TV revenue excludes subscription revenues from online on demand and streaming services such as Netflix and Amazon Prime. Includes licence fee allocation for radio and TV; prices) Post is addressed letter mail. Changes in the way that revenue data is collected for the commercial radio sector means that data prior to 2014 are not comparable to data for 2014 and 2015. In a change from previous years, telecoms revenues data excludes revenues generated by corporate data services.

[1] Comprised of revenues from retail and wholesale fixed and mobile voice and data services.

1.3.2 Household spend on communications services

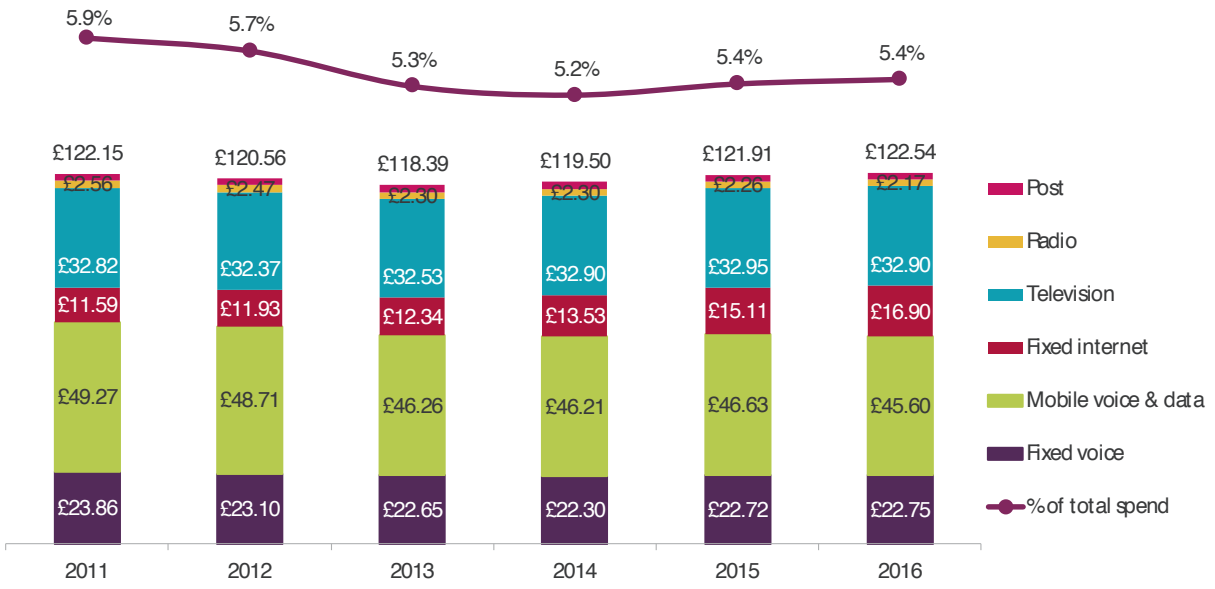
Average monthly household spend on communication services has increased slightly in real terms over the past five years

Average monthly household spend on communication services has increased slightly in real terms over the past five years from £122.15 in 2011 to £122.54 in 2016, representing a monthly increase of £0.39, or £4.64 per year.

Average spend on fixed internet reached £16.90 per month in 2016, an increase of 11.8% in real terms from previous year, largely due to consumers migrating to superfast broadband services, which tend to be more expensive than standard broadband services.

Household spend on television decreased by an average of five pence per month in 2016, returning to the 2014 level of £32.90 a month.

Figure 1.2: Average household spend on communications services



Source: Ofcom / operators/ ONS
Notes: Adjusted for CPI (2016 prices); historic telecoms figures have been re-stated, so are not comparable to those published in previous reports. Television excludes spend on subscriptions, download-to-own and pay-per-view through online on-demand and streaming services.

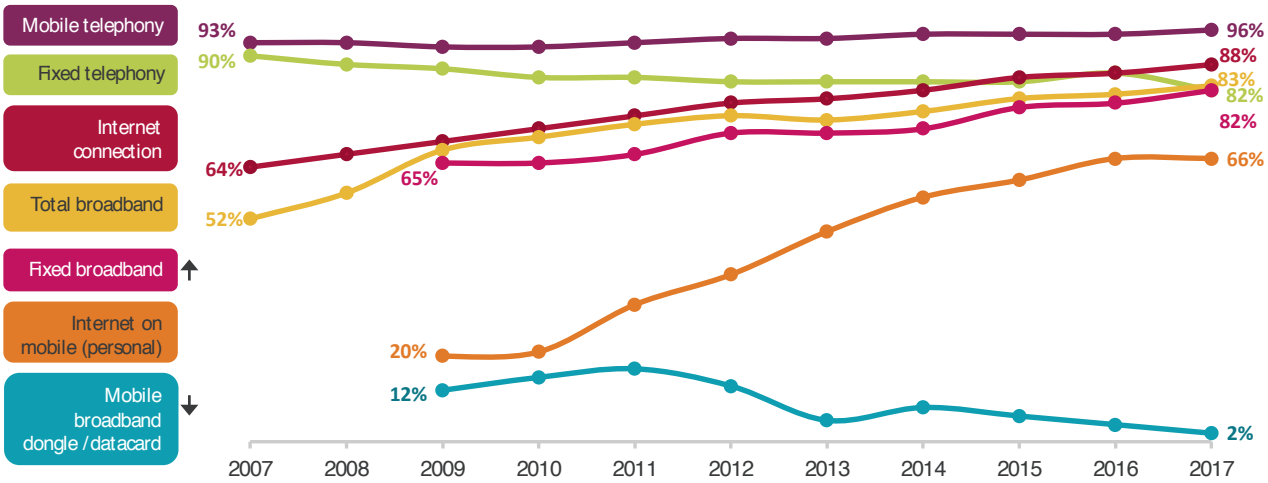
1.3.3 Take-up of communications services

More than eight in ten households now have a fixed broadband connection

Take-up of fixed broadband in the home has increased since last year; more than eight in ten (82%) households now have a fixed broadband connection, compared to 79% in 2016. The proportion of households with fixed telephony (82%) and mobile telephony (96%) remained relatively stable in 2017. Two-thirds of those aged 16 and over (66%) said they used their mobile phone to access the internet.

Corresponding to this increased take-up of fixed broadband, there continues to be a decline in the proportion of households that use mobile broadband via a dongle or data-only SIM-card in a laptop or tablet – this now accounts for just 2% of households (down from 4% in 2016).

Figure 1.3: Take-up of communications services



Source: Ofcom Technology Tracker. Data from Q1 of each year 2007-2014, then H1 2015-2017.
Base: All adults aged 16+ (2017 n=3743).
Significance testing: Arrows indicate any significant differences at the 99% confidence level between UK 2016 and UK 2017.
QC1: Is there a landline phone in your home that can be used to make and receive calls? QE1: Does your household have a PC or laptop computer? / **QE2:** Do you or does anyone in your household have access to the internet/ world wide web at home (via any device, e.g. PC, laptop, mobile phone etc.)? / **QE12 (QE9):** Which of these methods does your household use to connect to the internet at home?
Note: Use of internet on mobile is personal take-up measure, whereas the other data relate to household take-up.

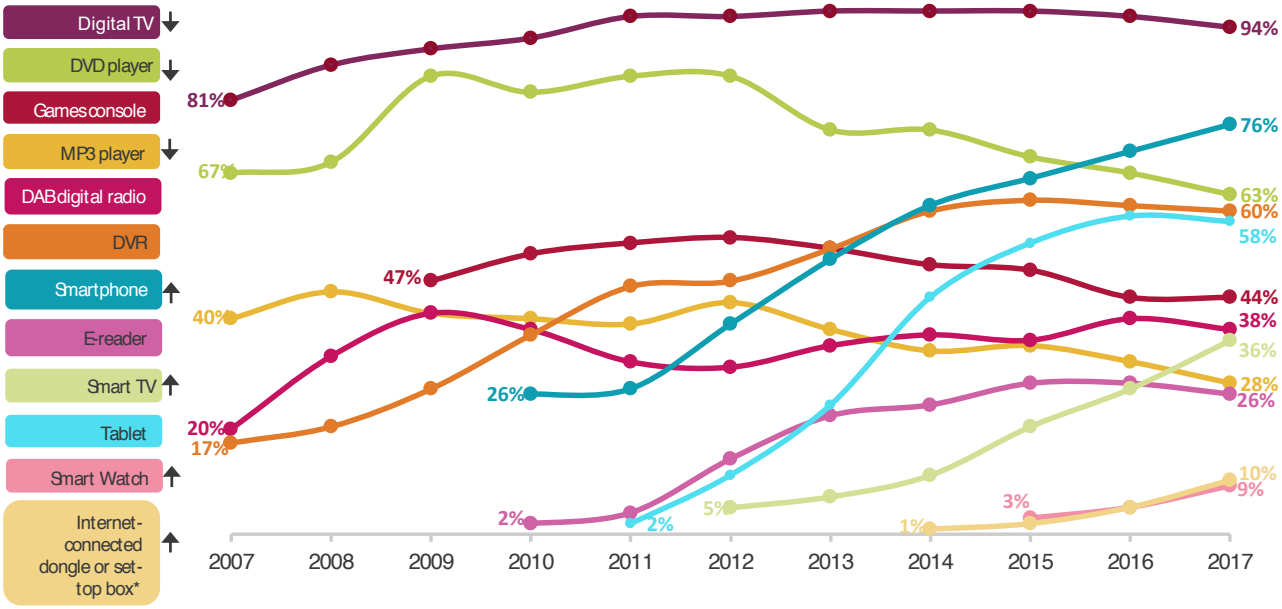
Although take-up of smart TVs continues to grow, TV ownership overall and DVD player ownership is declining

Figure 1.4 shows take-up of a range of communications and audio-visual devices over the last ten years. Take-up of paid-for and free TV services (such as Sky, Virgin Media and Freeview) has decreased by two percentage points since last year (down to 94% from 96%), whereas the take-up of smart TVs (with an integrated internet connection) has increased – more than a third of households (36%) now own one, compared to 27% in 2016. The decline in ownership of DVD players continues, with 63% of households now having one, compared to 85% five years ago. Take-up of internet-connected dongles (e.g. Amazon Fire TV, Google Chrome, Apple TV) or set-top boxes (10% in 2017, up from 5% in 2016) has increased.

Take-up of smartphones has continued to increase over the past year, with three quarters of adults (76%) now owning one. Take-up of smart watches has also increased and now around one in ten (9%) households own one (up from 5% in 2016). Take-up of MP3 players has declined, to 28% of households, down from 32% the previous year, probably due to the increasing popularity of listening to music via smartphones.

For the first time since 2011, take-up of tablets has remained stable year on year; just under six in ten households (58%) reported having at least one tablet computer (such as the Apple iPad or Samsung Galaxy Tab) in early 2017, in line with 2016 (59%).

Figure 1.4: Household take-up of digital communications/ AV devices: 2007-2017



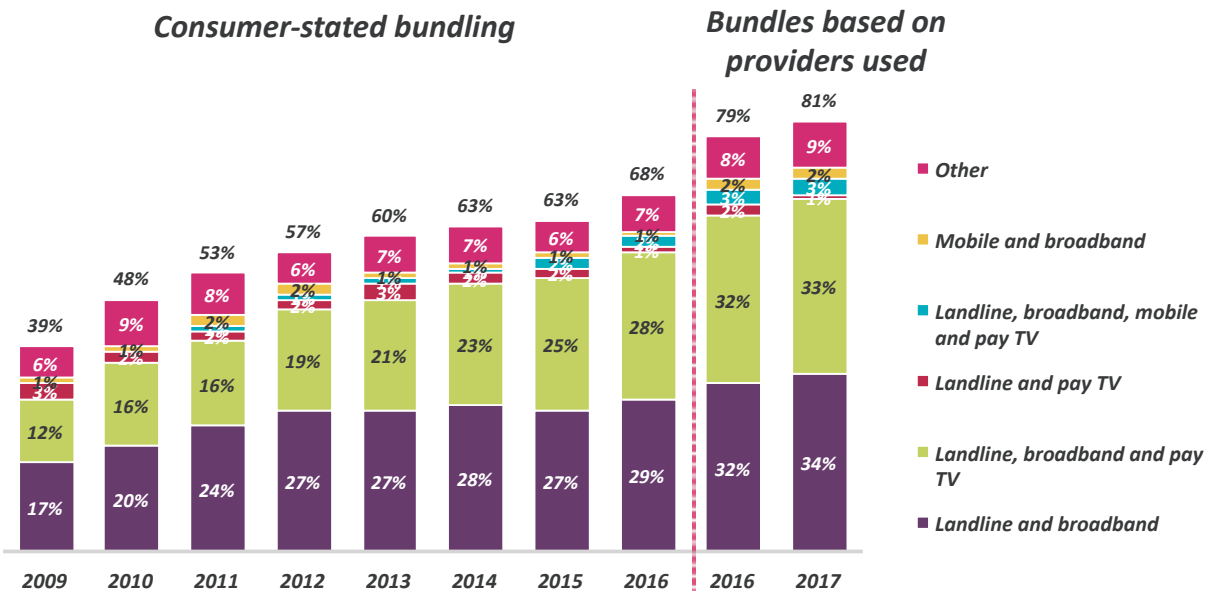
Source: Ofcom Technology Tracker. Data from Q1 of each year 2006-2014, then H1 2015-2017.
Base: All adults aged 16+ (2017 n=3743).
Significance testing: Arrows indicate any significant differences at the 99% confidence level between UK 2016 and UK 2017.
Note: The question wording for DVD Player and DVR was changed in Q1 2009 so data are not directly comparable with previous years.
* Internet-connected dongle or set-top box includes NOW TV set-top box, Roku, Google Chrome, Amazon Fire TV stick, Amazon Fire TV, Apple TV

1.3.4 Purchasing communications services in a bundle

Eight in ten households buy services in a bundle

Just over eight in ten households (81%) reported purchasing at least two of their communications services together, from the same supplier, in a bundle in 2017, in line with last year (79%).[1] Dual-play packages of landline and broadband, and triple-play packages of landline, broadband and TV were the most popular (at 34% and 33% of households respectively).

Figure 1.5: Take-up of bundled services



Source: Ofcom Technology Tracker, data as at Q1 2009-2014; H1 2015-2017
QG1. Do you receive more than one of these services as part of an overall deal or package from the same supplier?/ Q. Do you receive a discount or special deal for subscribing to this package of services? (latter question used for consumer-stated bundling figures)
Significance testing: Arrows indicate any significant differences at the 99% confidence level between UK 2016 and UK 2017.
Base: All adults 16+ (Q1 2009, 6090) (Q1 2010, 9013) (Q1 2011, 3474) (Q1 2012, 3772) (Q1 2013, 3750) (Q1 2014, 3740) (H1 2015, 3756) (H1 2016, 3737) (H1 2017, 3743), base excludes those who do not know the provider for one or more services

[1] OOfcom has recently revised its bundle take-up figures; in previous years we have reported data from a question asking consumers 'Do you receive more than one of these services as part of an overall deal or package from the same supplier?'. From 2017 we are reporting bundling data based on whether the same provider was stated for two or more services, and have revised the 2016 for comparison to 2017. As a result the revised 2016 figures are not comparable to data from previous years.

1.4 The changing TV landscape

The UK's TV landscape is evolving. We are no longer confined to the broadcasters' schedules.

People are supplementing live broadcast TV[1] viewing with broadcasters' on-demand and streaming services, recorded TV and paid-for streaming services like Netflix and Amazon Prime Video, which are becoming increasingly mainstream. Live broadcast TV remains a central component of TV viewing, but increasingly people are using different services and types of content to meet different needs.

The availability of a wide range of on-demand and streaming services combined with the increase in take-up of fixed broadband (82% of UK households in 2017, compared to 72% in 2012) and portable devices (76% and 58% of people used a smartphone and tablet in 2017 compared to 39% and 11% in 2012)[2] is giving us the freedom to watch what we want, when we want, wherever we want to watch it. This section explores the needs that these services are meeting, and the benefits and disadvantages of this new approach to TV consumption..

1.4.1 Highlights from the research

- People are most likely to use live broadcast TV when they want to keep up with the news and to provide 'background noise'.
- More than half (54%) of adults in the UK like the freedom of being able to watch when and where they want on their tablet or smartphone. Seven in ten (67%) say they like to watch TV programmes and films on-demand to avoid adverts, or because there are no adverts.
- 'Binge watching' is now commonplace with 35% of people in the UK saying they do it at least weekly.
- Only 30% of people in the UK say they sit together with family members to watch the same TV programme or film on the same device every day.
- Three in ten (31%) say that at least once a week, members of their household sit together in the same room while watching different programmes on different screens.
- Almost half (45%) of people in the UK say they watch programmes and films by themselves every day.
- More than half (58%) of people in the UK say they prefer to watch big national events on live broadcast TV instead of on-demand because it's good to know everyone is watching at the same time. Nearly half of respondents (45%) said the same for sports programmes.

Methodology:

This section draws on new Ofcom research carried out between 27 April and 9 May 2017 by Populus. This research was conducted via an online survey comprising 2,356 interviews among adults aged 16+, and 505 interviews among 12-15 year olds.

[1] The term 'Live TV' covers live scheduled programming that is broadcast as part of a linear channel.
[2] Ofcom Technology Tracker

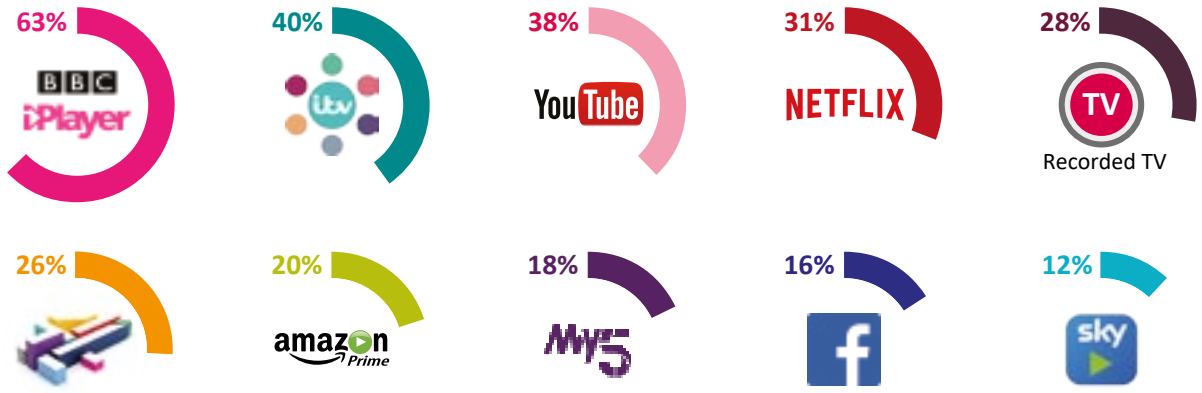
1.4.2 The services people use

On-demand and streaming are becoming more mainstream

While 91% of UK adults watched live TV in an average week in 2016[1], data from BARB show that the amount of time UK adults spend watching has fallen since 2010, with a decline in average daily viewing time of 36 minutes (-14%) to 3 hours 51 minutes per adult (16+) per day in 2016[2].

When respondents to our 2017 survey were asked what services other than live broadcast TV they used to watch TV programmes and films, BBC iPlayer was the most popular choice, with 63% of UK adults citing this, followed by ITV Hub (40%) and YouTube (38%). Almost a third (31%) said they used Netflix for watching programmes and films followed by All4 (26%) and Amazon Prime (20%), My5 (18%) and Facebook (16%), with all other services below 15%.

Figure 1.6: The proportion of adults who use different services for watching TV programmes/films (%)

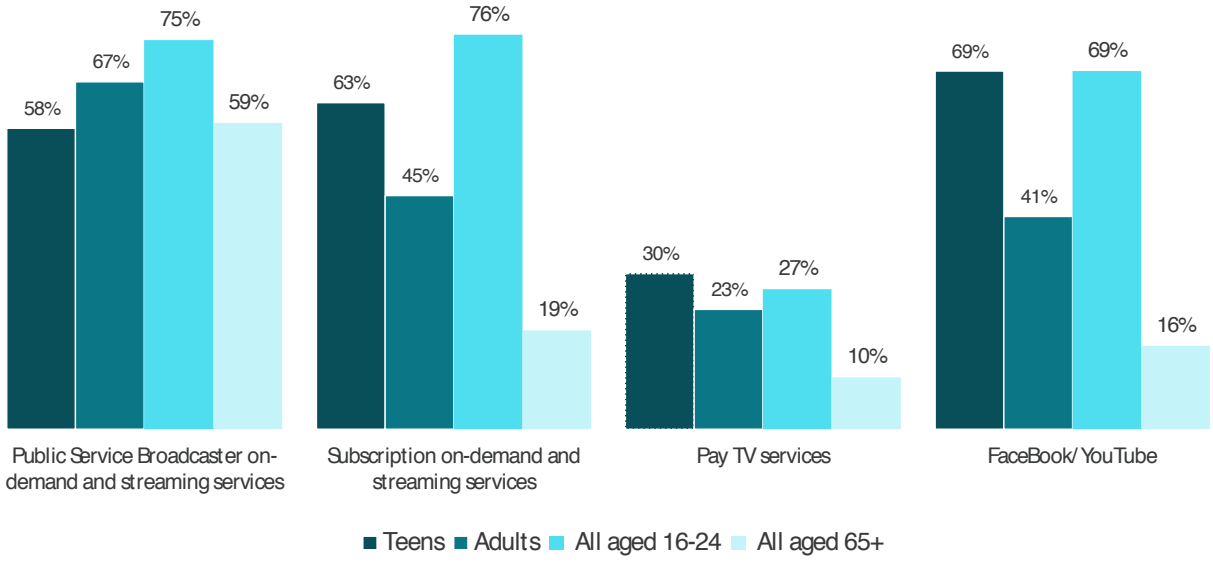


When we group these together into types of services, we can see that the most popular on-demand and streaming services for watching programmes and films are the public service broadcasters' online services (BBC iPlayer, All4, ITV Hub, My5) used by 67% of adults combined, followed by subscription on-demand and streaming services such as Amazon Prime and Netflix (45%), social media platforms such as Facebook and YouTube (41%) and pay TV services such as Sky TV and Virgin Media (23%). Adults aged 16-24 are most likely to use most types of services, including three-quarters who say they use subscription on-demand and streaming services (76%) and broadcaster on-demand and streaming services (75%).

[1] https://www.ofcom.org.uk/research-and-data/multi-sector-research/digital-day

[2] Adults 16+. Based on viewing to scheduled, broadcast TV on TV sets including live at the time of broadcast plus time-shifted viewing through DVRs and catch-up TV up to seven days after transmission.

Figure 1.7: Non-broadcast services used by adults and teens for watching TV programmes and films



Source: Use of on-demand and streaming services CMR research 2017 – Populus
Q5. Thinking about when you watch TV programmes/films, do you use any of the following?
Base: Adults (2356) teens (505) 16-24 (704) 65+ (498)

1.4.3 Reasons for using different services

To understand why people choose different services, we asked them which service they would use for a range of different needs. Live broadcast TV, on-demand and streaming services and social media sites have different roles to play in viewers' lives.

People are most likely to watch live broadcast TV for keeping up with the news

People are most likely to use live broadcast TV when they want to keep up with the news. When we asked adult users of broadcast TV why they used live TV, 57% said they used it to keep up with the news and what's happening around them, but this purpose was chosen by only 19% of viewers of broadcasters' on-demand and streaming services and 8% of those using subscription on-demand and streaming services. There is less of a difference among teens: 15% of teen viewers of live broadcast TV said they used it to keep up with the news, and a similar number (10%) said they used broadcasters' on-demand and streaming services.

Live broadcast TV is also the most likely service to be used to provide 'background noise'; 20% of respondents who watch live broadcast TV do so for this purpose. Among respondents who watch broadcasters' on-demand and streaming services, 8% do it for this reason, and among users of subscription on-demand and streaming services, pay TV services and Facebook/ YouTube, the figure is 9%.

Figure 1.8: Services used by adults in the United Kingdom to 'keep up with the news / keep up with what's happening around me'

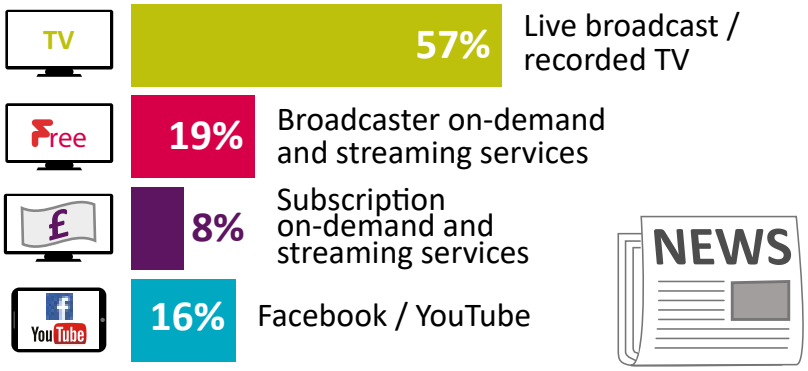
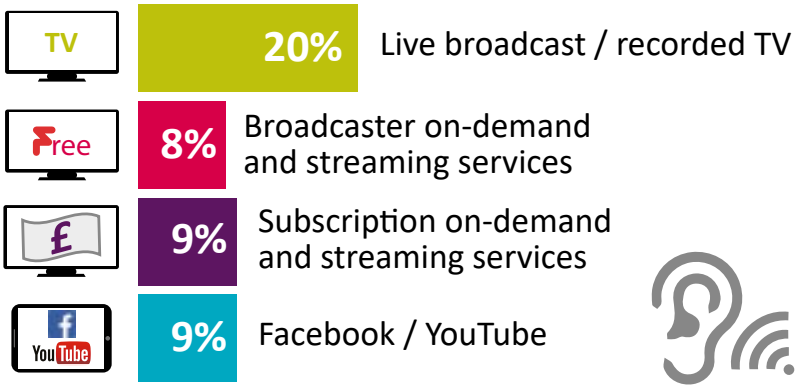


Figure 1.9: Services used by adults in the United Kingdom 'for background noise'



Adults and teens turn to different services to de-stress

Watching TV is also the way many people de-stress and unwind. Adults turn to a range of services for this. Forty-four per cent of live broadcast viewers use it to de-stress, as do 42% of subscription on-demand and streaming users, a third (33%) of both viewers of broadcasters' on-demand and streaming services and users of Facebook or YouTube, and 29% of pay-TV viewers. Teen viewers are also likely to use a range of services for this, although at lower levels: 27% of 12-15s who watch programmes and films on social media do it to de-stress, 25% of those who watch live broadcast TV do it for this reason, as do 23% of users of subscription on-demand and streaming services.

Teens are more likely than adults to turn to social media when they want some 'alone time'

In order to create some 'alone time', and to be able to watch what they want to, similar numbers of adult users say they turn to live or recorded TV (55%), broadcasters' on-demand and streaming services (50%) and subscription on-demand and streaming services (55%). Teens tend to choose social media (53%) or subscription on-demand and streaming services (50%) for this purpose.

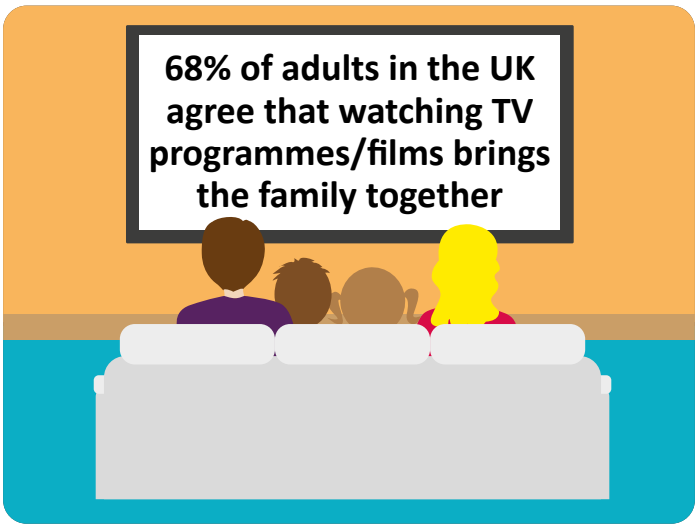
This desire to watch alone is reflected in the numbers who say they watch TV programmes and films by themselves on any device. More than four in ten (45%) adults in the UK say they do this every day, three in ten (31%) do it several times a week, and one in ten (11%) do it once a week. Collectively, almost nine in ten (87%) engage in solitary viewing at least weekly and 92% do so at least monthly.

The numbers are higher for teens: more than nine in ten (93%) watch TV programmes/films by themselves at least weekly. Despite this, 57% of adults agree that "people spend too much time watching by themselves on their tablets and smartphones nowadays".

Live TV is most likely to be cited by teens as the service they use for family time, while adults cite both live and subscription library services

Respondents were also asked how often, if at all, they sat together with family to watch the same TV programmes/films on the same device. Three in ten (30%) adults in the UK say they do this every day, another three in ten (30%) say they do this several times a week, and one in ten (10%) that they do it once a week. Collectively, seven in ten (70%) watch with others on the same device at least weekly and three-quarters (75%) do so at least monthly. Amongst teens, almost nine in ten (88%) watch with others on the same device weekly and more than nine in ten (93%) do so monthly.

Family time is also a valued reason for viewing, with nearly seven in ten (68%) adults and 85% of teens in the UK agreeing that watching TV programmes/films brings the family together. When asked which services they use for family time, both live TV (35%) and subscription on-demand and streaming services (31%) are popular among adults, with pay TV (27%) and broadcasters' on-demand and streaming services (24%) not far behind, showing that all these services now play a role in family viewing.



Live/recorded TV is also particularly important for teens, with 56% of users aged 12-15 citing family time as a reason for viewing, compared to around a third of users of broadcaster on-demand and streaming services, subscription on-demand and streaming services and pay TV. There is evidence that TV is also useful for keeping children entertained, with more than a third (36%) of those with children in the household reporting that they use live broadcast TV to keep children entertained. Two in ten (22%) adults with children in the household use pay TV services for this purpose.

The analysis above demonstrates that live broadcast TV remains important and is the clearly preferred way of viewing certain types of content, but that people are also embracing the choice offered by on-demand services. Around nine in ten adults (88%) and teens (92%) agreed that they enjoy the ability to watch what they want when they want. On-demand viewing also allows people to tailor what they're watching in a way that gives them control over their own personal viewing experience, evidenced by the nearly seven in ten (67%) of adults, and almost eight in ten teens (77%) who said they like to watch TV programmes and films on-demand to avoid adverts or because there are no adverts.

Figure 1.10: Reasons for using services: adults 16+

	Live broadcast/ recorded TV	Broadcasters' on-demand and streaming services	Subscription on-demand and streaming services	Pay TV services	Facebook/ YouTube
Base	1233	1578	997	555	945
Family time	35%	24%	31%	27%	14%
Alone time (I can watch anything I want to watch)	55%	50%	55%	35%	49%
For background noise	20%	8%	9%	9%	9%
To keep children entertained	9%	5%	9%	9%	7%
For de-stressing/unwinding	44%	33%	42%	29%	33%
To learn something new	34%	24%	14%	13%	23%
To keep up with the news/ to keep up with what's happening around me	57%	19%	8%	15%	16%
To keep up-to-date with the storyline/to keep up with a programme	51%	42%	29%	24%	13%
To keep up-to-date with the latest sport	26%	9%	3%	18%	6%
For company	13%	7%	5%	6%	6%

Source: Use of on-demand and streaming services CMR research 2017 – Populus
Q12. You said you watch programmes/films for the reasons below, which services do you use for this?
Base: shown in table

Figure 1.11: Reasons for using services: teens 12-15

	Live broadcast/ recorded TV	Broadcasters' on-demand and streaming services	Subscription on-demand and streaming services	Pay TV services	Facebook/ YouTube
Base	242	292	299	148	352
Family time	56%	35%	36%	32%	12%
Alone time (I can watch anything I want to watch)	41%	41%	50%	28%	53%
For background noise	12%	5%	8%	9%	9%
For de-stressing/unwinding	25%	19%	23%	12%	27%
To learn something new	17%	12%	8%	14%	18%
To keep up with the news/ to keep up with what's happening around me	15%	10%	3%	5%	9%
To keep up-to-date with the storyline/to keep up with a programme	40%	37%	28%	15%	16%
To keep up-to-date with the latest sport	17%	11%	4%	14%	8%
For company	4%	4%	3%	-	4%

Source: Use of on-demand and streaming services CMR research 2017 – Populus
Q12. You said you watch programmes/films for the reasons below, which services do you use for this?
Base: shown in table

1.4.4 Watching on different devices

Viewers like the flexibility of being able to watch the content they want, when they want, using their chosen device

More than half (54%) of adult respondents said they liked the freedom of being able to watch when and where they wanted on their tablet or smartphone. This is particularly notable among the younger age groups: 81% of 12-15s and 83% of those aged 16-24 agree with this statement. Although this is not entirely the preserve of the young, with 28% of over-64s also agreeing.

When we look at what devices people are using for viewing, 55% of adults say they use laptops/PCs to watch TV programmes or films, while 35% say they use tablets and 35% use smartphones. Younger age groups are more likely to use devices other than the TV set to view content. Almost eight in ten (77%) 16-24 year olds say they use their laptops or PCs, compared to 40% of over-64s.

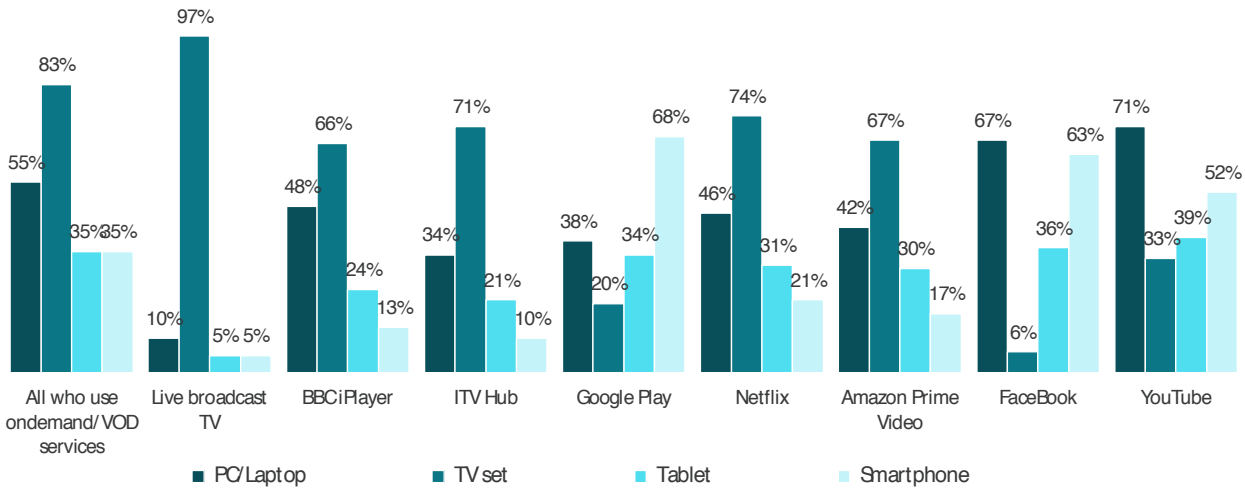
Four in ten (41%) 16-24s use their tablets, compared to 19% of over-64s, and more than six in ten (64%) 16-24s use their smartphones, compared to 6% of over-64s. Teens are less likely than young adults to use laptops or PCs (56% vs. 77%), but have higher levels of use of tablets (51% vs. 42%) and are not far behind on use of smartphones (56% vs. 64%).

In spite of the relatively small screen size, smartphones are used by adults to view programmes and films via various services including social networking platforms: 63% of Facebook users and 52% of YouTube users use their phones to view programmes and films via these services[1]. They are also being used to view pay-as-you-go on demand and streaming content, with 68% of Google Play users viewing this content on their smartphones.

17% of Amazon Prime users and 21% of Netflix users watch these services on their phones.

Despite the growth in the use of alternative devices, the TV set remains the device most used by adults overall to watch TV programmes/films, with Ofcom's Technology Tracker showing that 94% of UK adults use a TV set.[2] However, the way we use the TV set is changing too: 24% of those who use on demand and streaming services said they watched content via the iTunes store on their TV set, 21% via Google Play, 7% said they watched programmes and films on Facebook via their TV set, and 4% are even using the TV to look at content on Snapchat.

Figure 1.12: Devices used to access services



Source: Use of on-demand and streaming services CMR research 2017 – Populus
Q7. Thinking about the way you use ... for programmes/films what devices do you ever use to access it?
Base: All respondents who use catch up/VOD services (2155)

[1] It is possible that respondents considered watching video clips, as well as watching TV programmes and films when answering this question.
[2] Tech Tracker H1 2017

1.4.4 Viewing on the move

More than a third of people watch TV outside the home

The availability of a wide range of different services, and the widespread take-up of smartphones and tablets, has changed not just what people are watching, but when and where they are watching it. This means that people can now tailor what they watch to suit their location as well as their mood. Consequently, over a third (37%) of respondents ever watch content on any device outside their home. A quarter (24%) say they watch content when on holiday or breaks away from home, 16% say they do so while travelling or commuting and 7% say they do so in a pub, café or restaurant.

Younger people are the most likely to watch outside the home. Six in ten of those aged 16-24 say they do this (58%), compared to 37% overall, and 22% of those aged 65 and over.

Figure 1.13: Location where adults in the United Kingdom watch programmes/films on any device or service

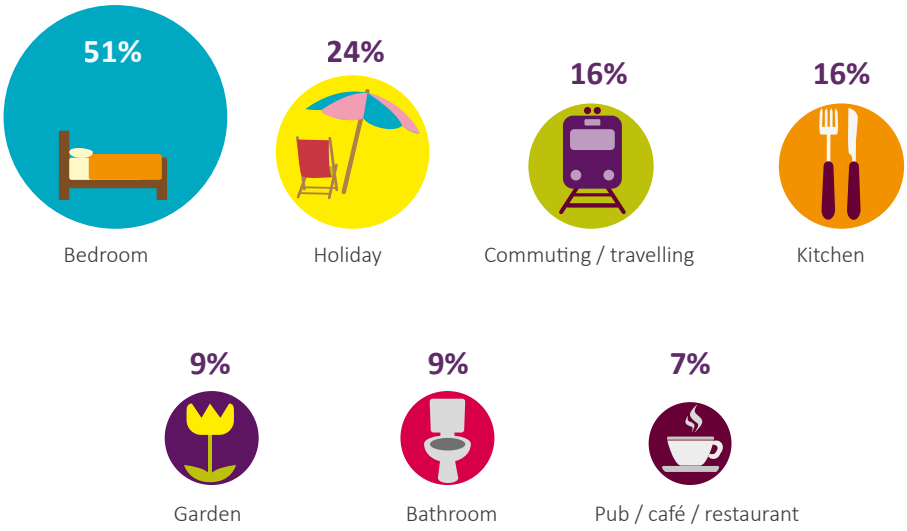
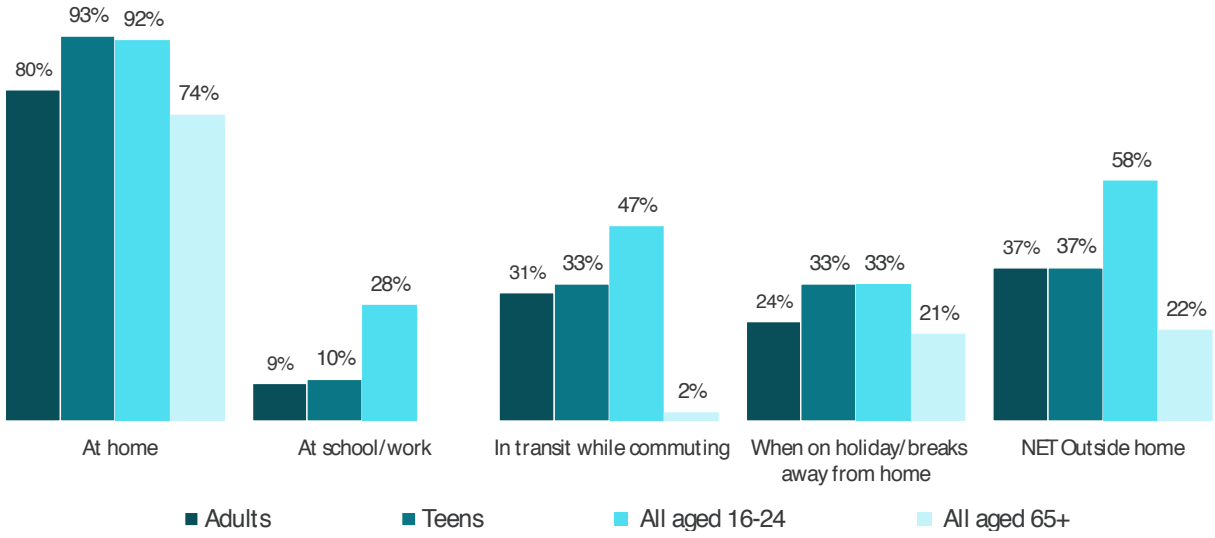


Figure 1.14: Location of watching TV programmes/films



Source: Use of on-demand and streaming services CMR research 2017 – Populus
Q32: How often do you watch any programmes/films on demand in any of the following locations?
All respondents: At home (2319) Net outside home (1063) At school/work (257) In transit while commuting (900) When on holiday/away from home (708)

1.4.6 Family time and the use of multiple screens

Most recognise the importance of spending time together as a family but are increasingly doing their own thing

The proliferation of new viewing options is changing behaviour, as people embrace the increased choice and flexibility. This is having an impact not just on viewing behaviour, but also on the etiquette around it.

While the majority (68%) of people agree that watching TV programmes and films brings the family together, a third (31%) say that at least once a week, members of their household sit together in the same room while watching different programmes on different screens. This is particularly prevalent among younger people, with half of 12-15s (51%) and four in ten 16-24s (40%) doing this at least weekly compared to 12% of over-64s.

When those who watch seperately in this way were asked how they felt about it, a quarter (26%) of those who do it say they like it because it's peaceful, 10% of adults and 14% of teens said it stopped arguments (a benefit of everyone getting to choose what they want to watch), and overall, almost six in ten of both adults (57%) and teens (58%) say they don't mind, indicating general acceptance of this behaviour.

However, recognising the drawback this scenario sometimes presents, 15% of adults who said this happens in their household agreed that it disrupts face-to-face communications and 16% said it makes talking to other people in the room difficult. Four percent even said they get angry when it happens.

Furthermore, use of multiple screens doesn't mean people no longer have family TV time; 30% said they sat together with family members to watch the same TV programme or film on the same device every day, while 70% said they did this at least once a week.

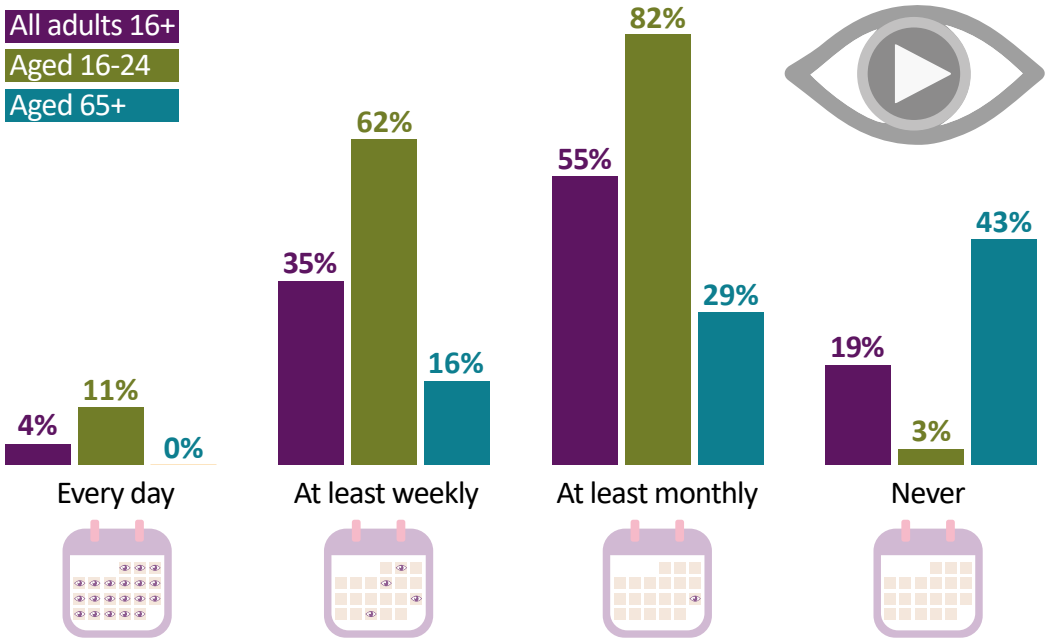
1.4.7 Back-to-back viewing

Over a third of people are regular 'binge viewers', watching multiple episodes of the same programme in one setting at least weekly

Another feature of the new TV landscape that on-demand and streaming has created is the ability to watch multiple episodes back-to-back, sometimes referred to as 'binge watching'. As the reach of paid-for on-demand services has increased, so has the availability of entire series. It is no longer necessary to wait a whole week to find out what happens after the cliff-hanger, and many people are taking advantage of this, with eight in ten (79%) people overall saying they ever watch multiple episodes of the same programme back-to-back in one sitting, and over a third (35%) doing this at least weekly.

As with much of the other viewing behaviour discussed, this kind of viewing is predominately the domain of the young. More than eight in ten (86%) teens ever engage in 'binge watching' including 53% who do at least weekly. Also, more than nine in ten of 16-24 year olds ever watch back-to-back, including more than six in ten (62%) who do so at least once a week. In contrast, just 16% of over-64s and doing it weekly and 56% ever do it at all.

Figure 1.15: How often people in the UK watch multiple episodes of the same programme back-to-back in one sitting



Nearly half of those who watch episodes back-to-back do so with family and friends

When asked about why they do this back-to-back viewing, seven in ten (70%) of those who watch back-to-back episodes at least once a month said they found it relaxing and enjoyable. It also provides a chance for people to spend time with others; 46% of those who watch in this way do it with friends and family, with this most likely to be with a partner (22%) or family member (19%). For some this can be a bonding experience: 24% said it gave them something to talk about with friends, 11% said it had brought them closer to friends/family and 6% said it gave them an opportunity to socialise.

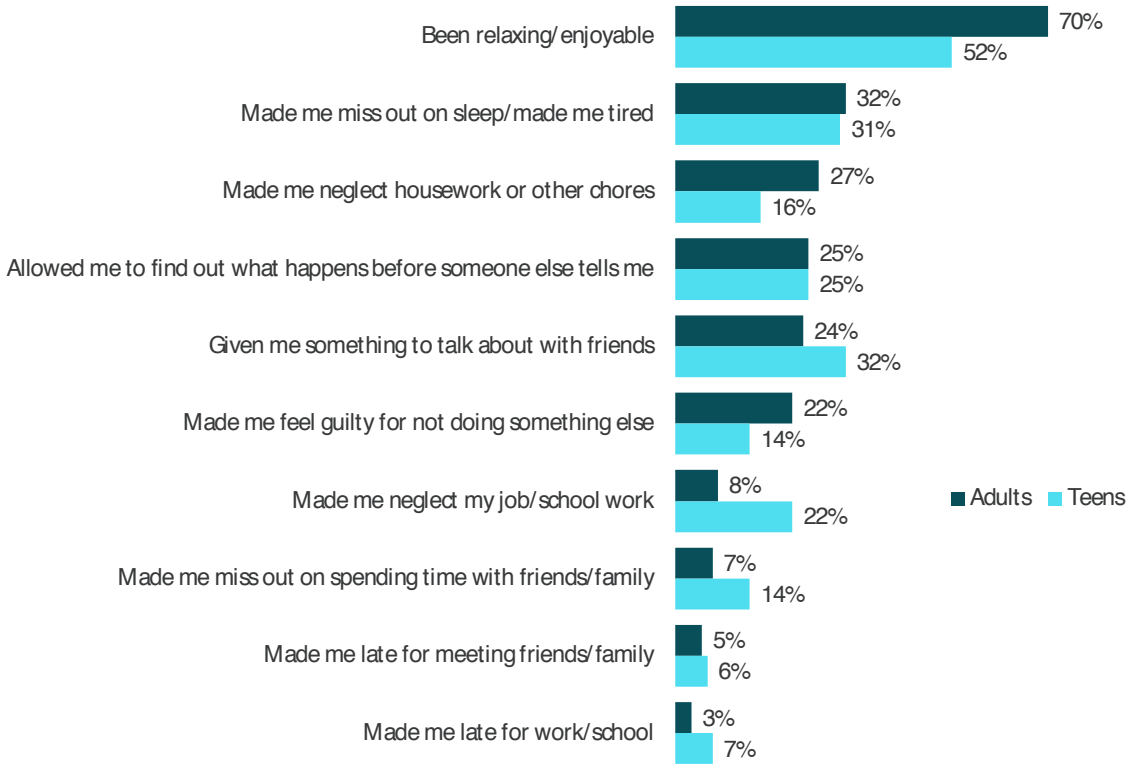
This kind of back-to-back watching isn't always a planned activity. Seventy-four per cent of those who watch multiple episodes back to back at least once a month said this was sometimes unintentional, while 18% of people said it always was. This could be because paid-for video-on-demand services are now putting original content at the forefront of their branding and often releasing the full season of shows at one time, with Netflix showcasing original content like *House of Cards* and *The Crown*, and Amazon Prime showing series like *The Man in the High Castle*.

A third of those who watch back-to-back say they have missed out on sleep as a result

A third (32%) of adults who binge watch at least monthly admitted to sometimes missing out on sleep or being tired the next day because of this kind of viewing. More than a quarter (27%) said it had made them neglect housework or other chores, a fifth (22%) said it made them feel guilty for not doing something else, 8% said it made them neglect their job/school work and 7% said it made them miss out on spending time with friends/family.

Teens tend to do the same thing: 31% of 12-15s who binge watch at least once a month said they had missed out on sleep or been tired as a result, 22% said it made them neglect their school work, 16% that it had made them neglect their chores and 14% that it had made them feel guilty that they weren't doing something else and that it had made them miss out on spending time with friends and family.

Figure 1.16: Reactions to binge watching: adults and teens



Source: Use of on-demand and streaming services CMR research 2017
Q23 Watching lots of episodes of the same programme in one sitting is sometimes called binge watching. Thinking about when you have done this, do any of the statements below apply?
Base: All respondents who binge watch at least once a month, Adults (1300), teens (357)

Over a third of binge viewers have cut down on their viewing in some way

Thirty-five per cent of back-to-back viewers say that they have cut down on this type of viewing in some way. This is higher among young adults; almost half (47%) of back-to-back viewers aged 16-24 have taken action to cut down.

Almost one in five (19%) adults who view back-to-back at least monthly said they had rationed the amount of TV they watched, one in ten (10%) said they had found an alternative activity/hobby to occupy them, a similar proportion (9%) said they now watched more live broadcast TV and 4% had cancelled a subscription on-demand or streaming service, thereby removing temptation altogether.

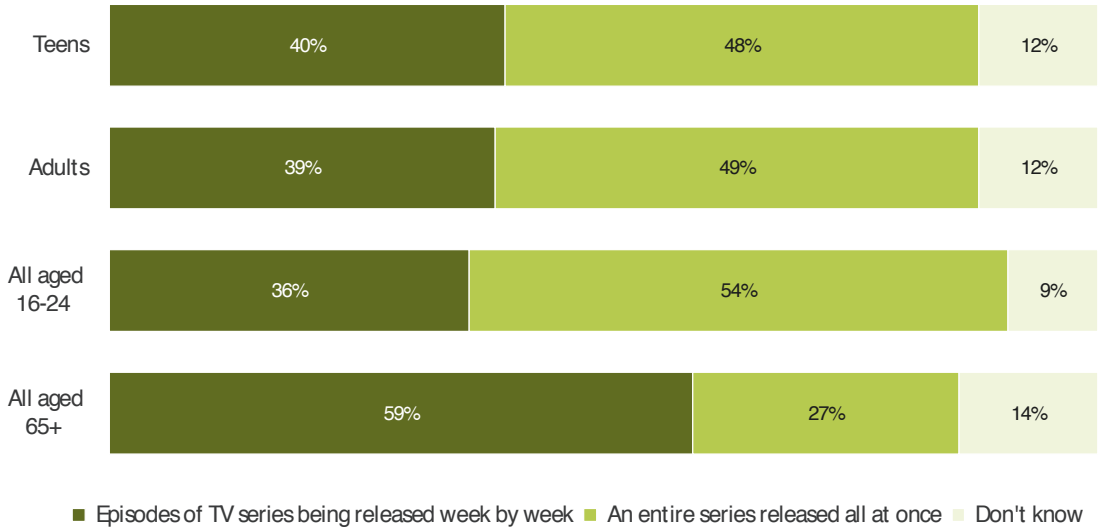
1.4.8 Awareness of and attitudes to box sets

Younger viewers are more likely to prefer a whole series being available at once

Despite the proliferation of catalogue and library services such as Netflix and Amazon, where viewers can access whole series at once, it is important to remember that this is still a minority activity. When asked whether they were aware that it is possible to view a whole new series in one go via these services, just 47% said they were aware, a similar proportion to those watching on-demand and streaming services. This is where age differences are most evident; just over half of teens (55%) and 77% of 16-24s were aware, dropping to 25% among over-64s.

Those who were aware were asked which they would prefer: 'episodes of TV series being released week by week' or 'an entire series released all at once'. Among all adults 49% preferred the entire series all at once, despite the temptation, while 39% opted for the weekly release. However, there is a marked difference in preferences by age: 54% of 16-24s want to see everything all at once, compared to 27% of over-64s.

Figure 1.17: Preference of episode release: Adults and Teens



Source: Use of on-demand and streaming services CMR research 2017
Q26 Which of the following do you prefer?
Base: Adults who are aware of straight-to-VOD programmes (1127) teens (279) 16-24(310) 65+(120)

The release of all episodes in one go could be a reason for watching episodes back-to-back, as an attempt to avoid spoilers

The fact that many episodes are available all at once, inevitably means that others are more likely to spoil the ending for you if they're watching the same content. A quarter (25%) of people who watch back-to-back said it allowed them to find out what happens in a programme before someone else tells them, one in five (20%) said it allowed them to avoid other people giving the plot away, while 16% said they felt under pressure to watch the latest episode so they could keep up with friends and family. This desire to make sure nobody gives away the ending is also driving other behaviour: 37% of people say they have actively avoided going on the internet to avoid spoilers, with this particularly prevalent among young adults aged 16-24, more than six in ten (61%) of whom do this.

1.4.9 Summary: the ongoing importance of live TV

Despite all this, live TV still underpins our TV-watching habits

People are changing the way they view, by using different services for different needs and drawing heavily on the flexibility and choice offered by on-demand, on-the-go video content. However, traditional live broadcast TV is still at the heart of our viewing experience. When asked what they would do first when wanting to watch a TV programme or film, the top answer was 'switch on the TV and see what's airing on live broadcast TV'. This response was chosen by half (50%) of people in the UK. The second-ranked answer was 'go straight to Netflix, Amazon Prime, Now TV or other on-demand services that you pay a monthly subscription for' (12%), followed by 'go straight to recorded TV via DVR', selected by 11% of people in the UK. Other options were mentioned by less than 10% of respondents.

As we saw above, live broadcast TV dominates as the place to keep up with what's going on in the world and to share important moments with friends, family and the nation. BARB viewing data illustrates this. Included in the top 5 are the Euro 2016 final: Portugal vs. France (11.4 million) and programmes such as *The Great British Bake Off* (14.6 million) and *Strictly Come Dancing: the final* (12.2 million).

These popular viewing experiences are still an important part of people's TV consumption. However, as more people take up the opportunities offered by new devices and services, they are increasingly becoming part of a wider mix, supplemented with a back-to-back viewing of the latest Netflix hit, time on the train catching up with the soaps on iPlayer and even, for some, broadcasting their own content via live-streaming.

1.5 The power of the online image

1.5.1 Introduction

In 2012 text messages were the most-used method of everyday communications with friends and family.[1]

But five years on, the landscape has shifted, with images becoming an increasingly central method of communication. There have been reports that emojis are now the fastest-growing language in the UK,[2] Snapchat is now used by more than 158 million people worldwide every day[3], and the rise of Instagram has paved the way for the creation of a whole new celebrity: the 'instafamous'.

Changes in the communications market have enabled this shift. Take-up of portable devices has risen dramatically (76% of people own a smartphone in 2017, up by 37 percentage points since 2012, while take-up of tablets is now at 58%, up by 49pp since 2012)[4]. At the same time, camera capability and performance is constantly improving, and increasing data allowances and further roll-out of fixed and mobile broadband makes it ever easier to access image-sharing social media sites. People can now share their latest selfie or photo of their cat with a click of a button, no matter where they are.

Ofcom commissioned research to investigate how images, both photos and videos, are being used. It also explores sharing and trust in the online world as well as understanding of the privacy rules that apply to it.

[1] Ofcom Ofcom Communications Market Report 2012
[2] http://www.bbc.co.uk/newsbeat/article/32793732/uks-fastest-growing-language-is-emoji
[3] http://uk.businessinsider.com/the-rise-of-snapchat-from-a-stanford-frat-house-to-a-3-billion-ipo-2017-1
[4] Ofcom Technology Tracker

1.5.2 Highlights from the research

- Holiday photos are the most popular types of images that people post and share, followed by pets/animals and landscapes/ buildings. However, 18-24s are most likely to post and share pictures of themselves.
- Selfie-takers take six selfies, on average, before choosing the right one to post online, while almost half (44%) of respondents who say that selfies are the types of images they post and share most online, edit them before posting.
- People tend to be cynical about the photos that other people post; 74% of adults say that when they look at other people's photos/videos they 'often' or 'sometimes' think they show a 'rose-tinted' view of that person's life.'
- Only 16% of all respondents agree that it is easy to recognise if an image or video online is real or truthful, while 44% respondents disagree, and 10% of all respondents said they don't know.
- Around half of all respondents (51%) say that they check the source of photos and videos they see online before they decide whether they are trustworthy.
- Four in ten (42%) respondents say they would not know who to complain to if they saw misleading or untruthful content online.
- When asked if it is easy to delete photos or videos from the internet once they have been posted, 50% disagree. However, 17% say that it is easy, a further 17% neither agree nor disagree, and 16% say they do not know.
- Fifty-six per cent of parents say that they do not use social media to share, post or blog photos or videos of their children.

Methodology:

This section draws on two pieces of research: a new Ofcom-commissioned study carried out between 25 and 30 April 2017, using YouGov's online panel of 1,000 nationally representative adults aged 18+, across the UK. The second is Ofcom's Adults' Media Lives, a qualitative longitudinal study looking at participants' relationships with digital media over time. We also asked five of the Media Lives participants, aged between 20 and 62, about their experiences with posting and viewing online images. These responses are presented as quotes within the chapter. We have also drawn on other Ofcom research when relevant, and this is referenced in the footnotes.

1.5.3 The growth of social media and messaging apps in people's lives

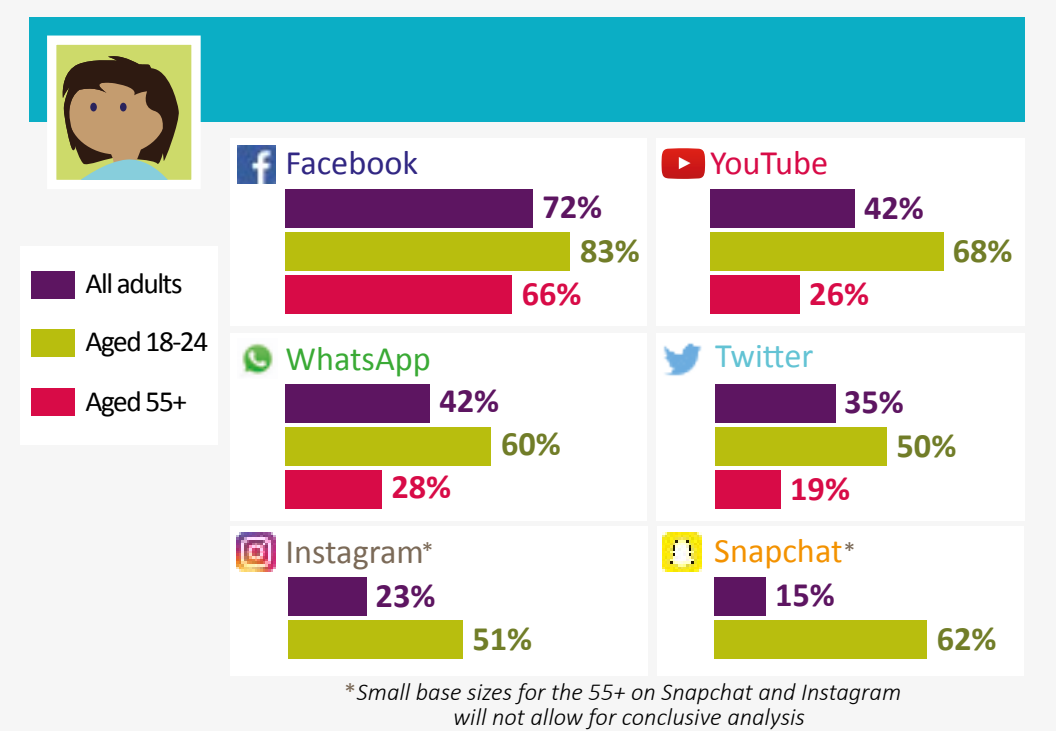
Facebook is the most popular social media site, followed by WhatsApp and YouTube

The YouGov research shows that the most popular social media site to belong to, or use, is Facebook, with seven in ten (72%) UK adults claiming that they either use and/or have a profile on this site. This is followed by WhatsApp and YouTube (both at 42%), Twitter (35%), Instagram (23%) and LinkedIn (21%). Less than 20% of adults used and/or had a profile on all the other sites asked about.

Other research shows that use of many of these sites has increased rapidly. Ofcom's 2017 Adults' Media Literacy Report shows that between 2015 and 2016 there was growth in the use of WhatsApp (45% vs. 28%), Instagram (31% vs. 22%) and Snapchat (23% vs. 12%), while the use of Facebook and Twitter remained stable.[1]

These sites are particularly popular among younger users: more than half the 18-24 age group in the YouGov survey say that they belong to and/or use Snapchat (62%), WhatsApp (60%) and Instagram (51%).

Figure 1.18: Social media and messaging apps or sites people belong to/use



Source: YouGov Reports: The Power of the Image Online 2017
Base: All respondents (1020 nationally representative adults aged 18+), 18-24 (115), 55+ (438)
Q2. Which if any, of the following online social media/messaging apps or sites do you personally belong to/use? Please choose all that apply

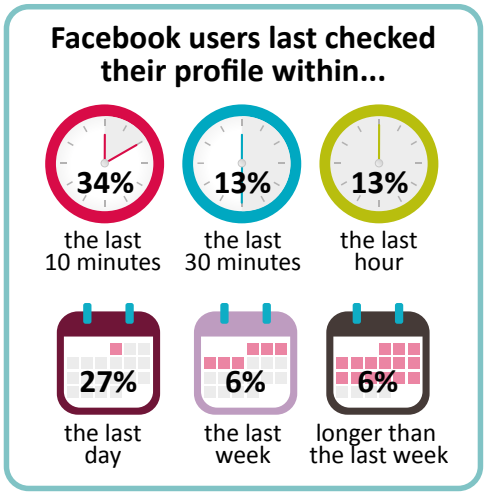
[1] https://www.ofcom.org.uk/__data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf

For many, social media is a constant companion

We asked respondents how often they checked their social media sites and apps. Facebook is the site that is checked most regularly, with 34% of users saying they had checked it within the last ten minutes. This was followed by WhatsApp (31%), Snapchat (26%) and Twitter (26%). .

Younger people tend to check their social media sites more frequently. For example, 31% of 25-34s who use WhatsApp said they had checked it in the last ten minutes (compared to 18% for all adults); and almost a quarter (24%) Instagram users aged 25-34 said they had checked it in the last ten minutes (14% for all adults). As respondents are online when they complete the survey, this may be more representative of their behaviour when online than at all times of the day.

Figure 1.19: Frequency of checking Facebook site/app



Source: YouGov Reports: The Power of the Image Online 2017
Base: All those who use Facebook (733)
Q4. When did you last check your social media account(s)?

1.5.4 Sharing images online

Six in ten respondents say they post images and videos online

Ofcom's Adults' Media Literacy survey shows that in 2016, nearly all (97%) smartphone users used their smartphone to take photos or videos, while 37% used them to edit photos or videos[1]. So it is unsurprising that six in ten (62%) of respondents in the YouGov survey say they post images and videos online.

While older people are more likely to post photos of their holidays, selfies are the top choice for younger age groups

The results show that people who do post and share images are often posting photos of similar things. People want to share what they see, where they are, what food they're eating, what a fun time they're having, and most importantly, for younger people, how good their life is.

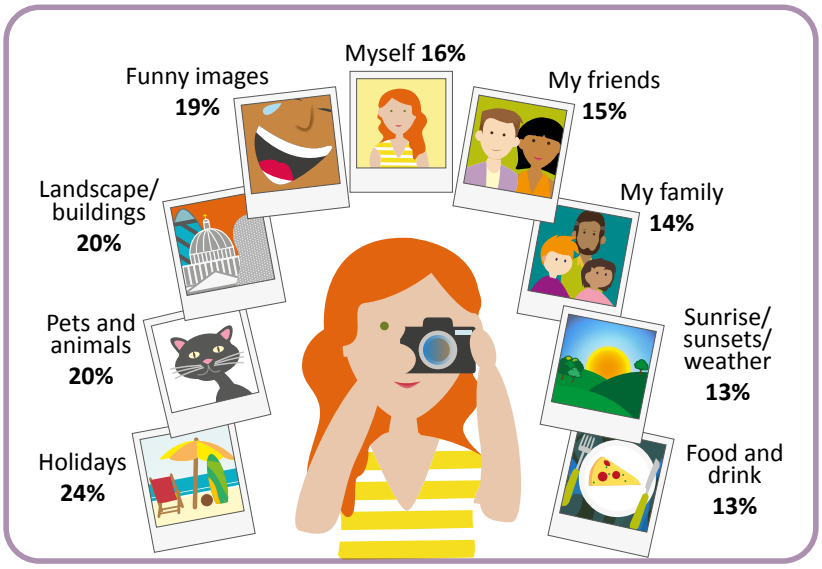
[1] https://www.ofcom.org.uk/__data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf

"Generally, I do [post pictures on Facebook] when on holiday, just so that friends and family back home can see what we're doing on holiday".

(Male, aged 42, Derbyshire)

When all respondents were asked what types of photos they posted and shared most often, holiday pictures came out on top. Almost a quarter (24%) said that they posted and shared pictures of their holiday, followed by photos of pets, and of landscapes and buildings. When we look at younger age groups, their priorities are a little different. 18-24 year olds are most likely to post and share pictures of themselves (34%), followed by landscapes and buildings (32%) and holidays (31%). People aged 55+ are more likely to post and share pictures of their holiday (22%), landscapes and buildings (17%) and their pets/animals (17%).

Figure 1.20: What types of image do people post and share the most on social media?



Source: YouGov Reports: The Power of the Image Online 2017
Base: All respondents (1020 nationally representative adults aged 18+)
Q6. And thinking about the images that you post and share online, which of the topics in the list below do you think you tend to post and share the most?

Qualitative research[1] shows that people post different kinds of images on different social media apps and sites, depending on the audience and the functionality of the service:

"...with Snapchat it's a little bit different because there's that kind of process of the image deleting. So I do find myself sending more kind of funny, like jokey, photos that I probably wouldn't put up on Facebook just because I've got family and stuff on there. But jokes with mates and that kind of thing that you can post on Snapchat – if you see something funny in the street or wherever, you take a photo of it – it might be something that my grandparents maybe wouldn't find appropriate or funny but mates from home would".

(Male, aged 20, Oxford)

[1] https://www.ofcom.org.uk/__data/assets/pdf_file/0021/102756/adults-media-lives-2016.pdf

1.5.5 Confidence in managing and interpreting images online

People's confidence in managing their images online, their ability to edit and manipulate these images, and their ability to comment on and make judgements about others' images are all key media literacy skills[1]; skills that enable people to use, understand and create media and communications. This section looks at how people manage content they post online, and how they protect themselves from any risks associated with using social media.

Four in ten 18-24s feel that it is important to receive approval for the photos and videos they post online

Overall, a fifth of all respondents (21%) say it is important to receive online approval, such as likes, shares and re-tweets, for photos and video they post. Twice as many 18-24 year olds (43%) as all adults feel that it is important to receive this kind of approval for their photos/videos, and twice as many women as men feel that it is *very* important (9% vs. 4%).

Seventy-one per cent of selfie posters say it is important to look their best in a selfie

Of the 16% of respondents who said that photos of themselves are the types of images they post and share the most online, three in ten (30%) do this at least once a month, 24% do it at least once a week, while some (4%) do it daily. Younger people are particularly likely to post regular selfies: 27%[2] of 18-24 year olds say they do this weekly, and 8%[3] every day.

Nearly half (47%) of selfie posters agreed that they feel pressure to look good online, and 71% agreed that it is important to look their best in a selfie that they post, increasing to 77% of 18-24s.[4] Women were more likely to agree with these statements: 60% agreed that they feel pressure to look good online, compared to 32% of men, while 82% of women agreed that it is important to look your best in a selfie, compared to 58% of men.

This can often require taking multiple photos. Six selfies are taken, on average, before choosing the right one to post online. Younger people tend to take more; 20% of respondents aged 18-24 who post photos of themselves online say that they tend to take between six and ten pictures before choosing one to post. A further 10% say they take between 11 and 15 photos, while 7% take between 16 and 20.

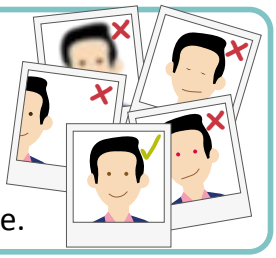
71% said it is important to look their best in a selfie.

"When I am posting a picture online I don't go to that much trouble. I probably take about three photographs, pick the best one because often my eyes are closed when I take the photograph so obviously I don't want to put that one up".

(Female, aged 55, London)

47% take 2-3 photos before choosing a picture to post online, while **21%** take 4-5 photos and **13%** take 6-10.

Six photos are taken, on average, before choosing just the right selfie to post online.



[1] Note: small base size of 40 is indicative rather than conclusive
[2] Note: small base size of 40 is indicative rather than conclusive
[3] Note: small base size of 40 is indicative rather than conclusive

More than four in ten selfie posters say they edit their selfies before posting them

Almost half (44%) of respondents who say that selfies are the types of images they post and share most online, say they edit them before posting. Three in ten (29%) spend one to two minutes editing. However, for some people it can take longer; 17% say they spend longer than two minutes editing a photo. This could include things such as filtering options that services such as Instagram and Snapchat offer.

As well as being more likely to take multiple photos to get the perfect shot, younger people are also more likely to edit a photo before sharing it online, and likely to spend longer doing this. Over-35s who post selfies online are more likely to say that they do not spend any time editing their pictures.

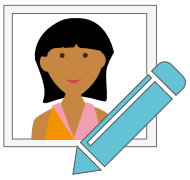
"If I see photographs of family I automatically assume that they are not photo-shopped. Having said that, if my young niece sends me a video or photograph within the internet, I have to assume because she's more used to the technology than most other people, then there is at least a possibility"

(Male, aged 62, London)

44% edit their selfies before posting.

29% spend 1-2 minutes editing.

17% spend longer than 2 minutes.

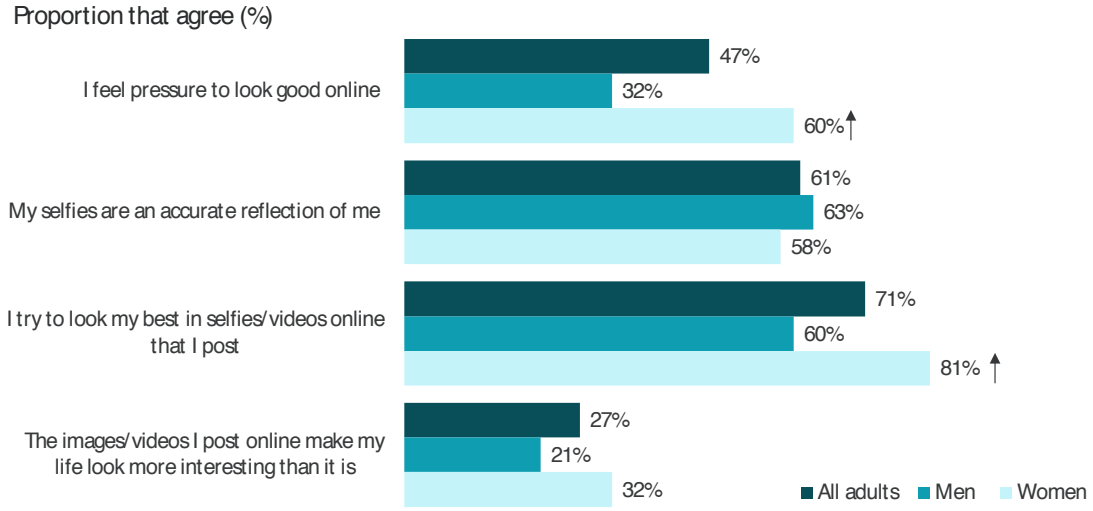


… despite almost half of selfie posters saying they edit their selfies, most think that the photos and videos they post represent them accurately

Most selfie-posters say that the photos and videos they post are accurate representations of themselves (61%). However, there is some ambivalence around this; 25% said they neither agree nor disagree, 9% disagree and 6% say don't know.

This ambivalence persists when we ask about the range of photos and videos that they share; 27% agree that 'make my life look more interesting than it is'. Women are particularly likely to agree with this – 32% agreed with this statement, compared to 21% of men. Women are alsvho less likely to say that the selfies and videos they post represent them accurately (58% vs. 63%).

Figure 1.21: Attitudes to online presentation



Source: YouGov Reports: The Power of the Image Online 2017 **Base:** 162 adults who use social media/messaging apps or sites for sharing/posting photos of themselves online, Men (74), Women (89) **Q16.** To what extent, if at all, do you agree with the following statements? **Note:** Arrows indicate statistically significant differences between men and women

...most respondents believe that other people's photos and videos may not match up to reality

People tend to be cynical about the photos that other people post. Seven in ten (74%) adults say that when they look at other people's photos/videos they 'often' or 'sometimes' think they show a 'rose-tinted' view of that person's life. Younger people are more likely to feel this way; while 85% of 18-24s and 88% of 25-34s agree with this statement, only 65% of over-54s agree.

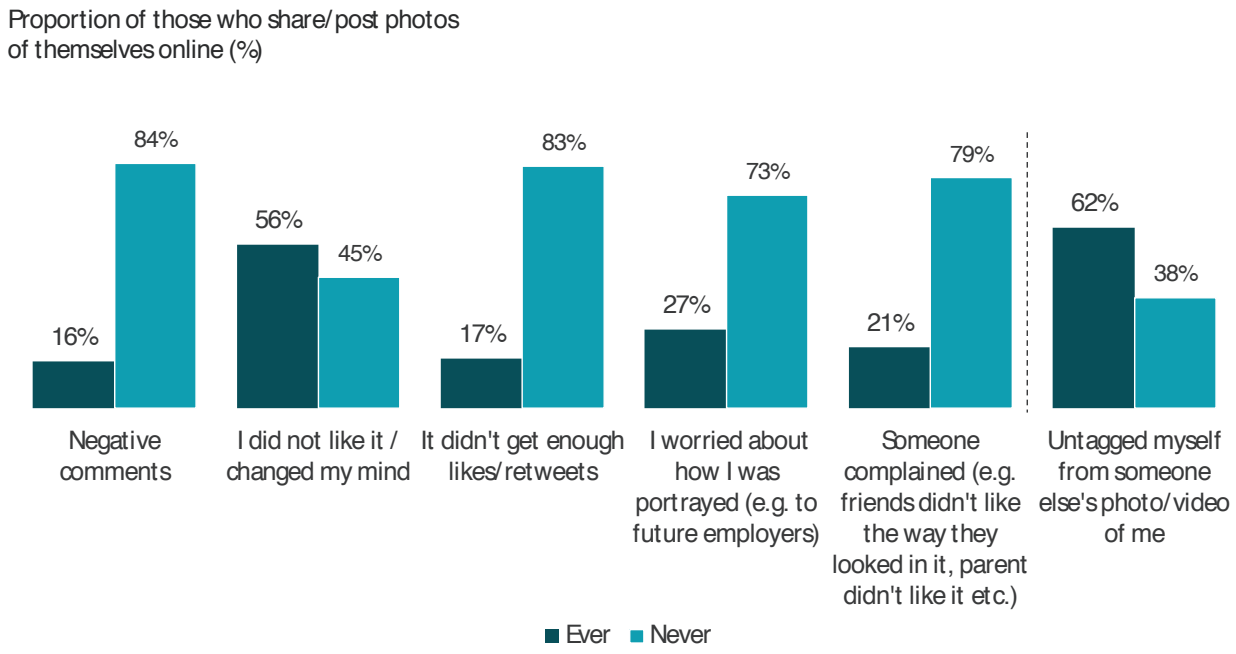
This can have a negative effect on people. Around a third (32%) of all respondents said that looking at other people's photos has 'often' or 'sometimes' left them feeling that their life doesn't match up. This feeling is more prevalent among younger people; more than half (53%) of 18-24s say they feel this 'often' or 'sometimes', and 45% of 25-34 year olds say the same (compared to 29% of 45-54s and 17% of over-54s).

For many, retaining control of their online image is important

Few people take selfies down once they have been posted online. When people do, the most common reason is because they do not like it or they have changed their mind.

As we have seen, people take a lot of care over the representation of themselves in the images they post. While it is harder to control what other people post, many will exert what control they can by un-tagging themselves from others' posts (62% of selfie-posters said that they had ever untagged themselves from someone else's photo/video of them).

Figure 1.22: Reasons for taking a selfie down



Source: YouGov Reports: The Power of the Image Online 2017
Base: 162 adults who use social media/messaging apps or sites for sharing/posting photos of themselves online
Q17. How often have you done any of the following?

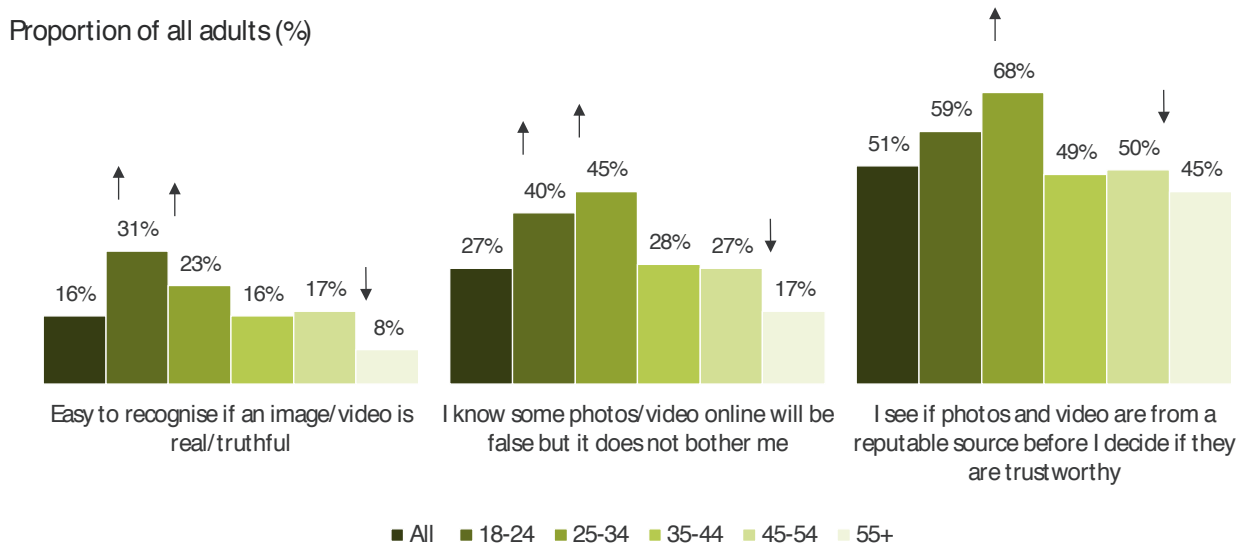
1.5.6 Recognition of misleading / untruthful content

More than four in ten respondents say that it is not easy to recognise real/ truthful images/ videos online.

Only 16% of all respondents agreed that is easy to recognise if an online image or video is real or truthful, while 44% respondents disagreed, and 10% said they did not know. The younger age groups (18-24s and 25-34s) are more likely than all adults to be confident that they can recognise if an image or video is real or truthful, while over-54s are less likely. Women are more likely to say they find it harder; 20% of men agreed that it was easy, compared to 12% of women.

While the younger age groups are more confident in their ability to tell whether an image or video is real, they are also more likely to say that they know some content will be false but that it does not bother them. Around half of all respondents (51%) say that they check the source of photos and videos they see online before they decide whether it is trustworthy. The 25-34 age group are the most likely to do this.

Figure 1.23: Trust in online images/videos



Source: YouGov Reports: The Power of the Image Online 2017
Base: All respondents (1020), 18-24 (115), 25-34 (127), 35-44 (171), 45-54 (169), 55+ (438)
Q24. To what extent, if at all, do you agree with the following statements regarding trusting images/video online?
Note: Arrows indicate statistically significant differences between all adults and different age groups

Four in ten would not know who to complain to if they saw something misleading or untruthful online

In line with our media literacy duties, we wanted to know whether people would be likely to complain to a social media site/app if they saw misleading or untruthful content online. Thirty-six per cent of respondents say they would complain, while 44% would not. Younger people are less likely to complain; more than half (55%) of 18-24s say that they would be unlikely to complain, compared to 35% of respondents aged 55+. We also wanted to know whether people would know to whom they should complain. Four in ten (42%) respondents say they would not know who to complain to. This increases to 45% among those aged 55+.

Most social media networks and platforms allow users to report or complain about harmful or illegal content. This can be done via the settings or help functions on websites or apps.

1.5.7 Privacy implications of sharing photos and videos online

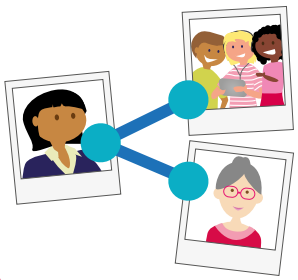
Half of respondents do not recognise the permanency of online images

Most people (62%) say that they usually accept terms and conditions without reading them on social media and messaging sites. This is more likely to be the case among younger age groups (83% of 18-24s and 88% of 25-34 year olds). Despite not reading terms and conditions, there is a recognition among some respondents that once a post is online, they no longer have control over it. When asked if it was easy to delete photos or videos from the internet once they have been posted, 50% disagreed. However, 17% said that it was easy, a further 17% neither agreed nor disagreed and 16% said they did not know.

Younger people tend to feel more confident about using social media privacy settings to control who sees their photos and videos

More than half (56%) of respondents say that they are confident in using the settings on their social media accounts to control who sees the photos and videos they share. Younger people feel more confident in using the security settings on their social media apps (18-24, 81%; 25-34, 75%), and this confidence decreases with age.

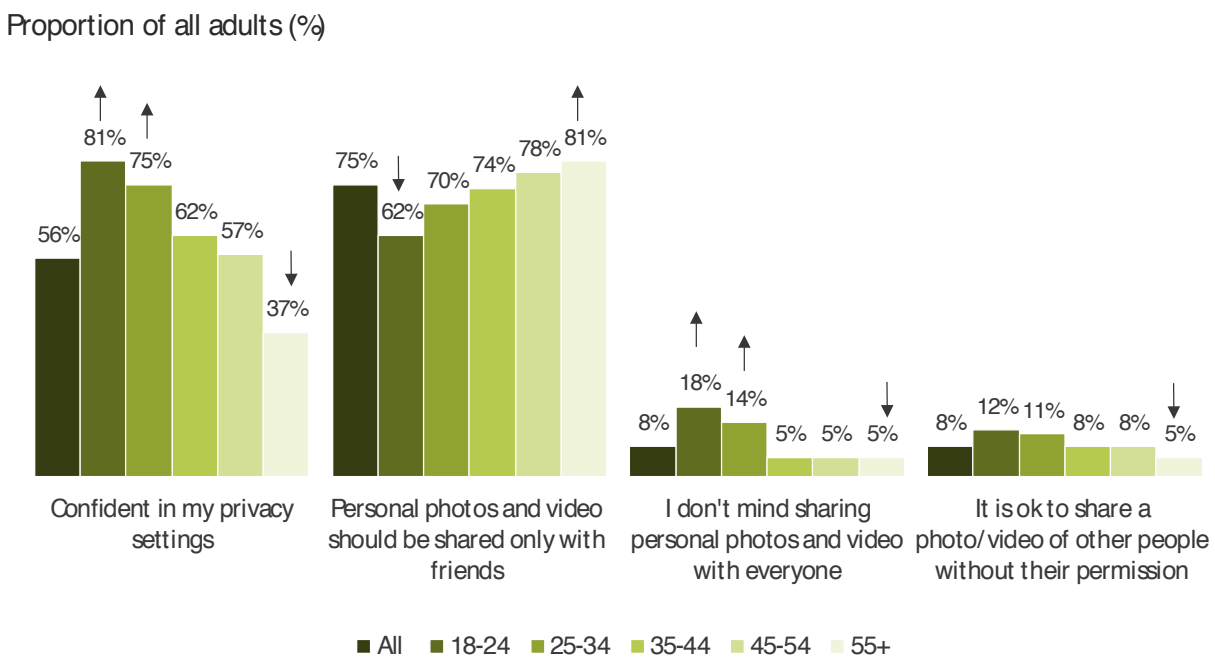
Seven in ten people think that photos and images of people should not be shared without the permission of the people in the photo/video (70%) and three-quarters of respondents feel that personal photographs and video should only be shared with friends and followers (75%). Younger people tend to be more relaxed about who they share their online images with.



70% do not think that it is ok to share a photograph or video of other people without their permission .

36% strongly agree that personal photographs should only be shared with friends and followers

Figure 1.24: Opinions on privacy settings and sharing personal photos/videos



Source: YouGov Reports: The Power of the Image Online 2017
Base: All respondents (1020), 18-24 (115), 25-34 (127), 35-44 (171), 45-54 (169), 55+ (438)
Q8. To what extent, if at all, do you agree with the following statements?
Note: Arrows indicate statistically significant differences between all adults and difference age groups

More than half of parents say that they do not share, post or blog about their children

Fifty-six per cent of parents say that they do not use social media to share, post or blog photos or videos of their children. Of those parents who do not do this, an overwhelming majority agreed that their children's lives should remain private (87%). Seven in ten (67%) agreed that it would be inappropriate to do this, and 38% said that their children would not want them to do it.

Of the parents who say they do share, post or blog photos or videos of their children online (42%), almost four in ten (50%) say that they do this at least once a month. More than five in ten (52%) say that their children are happy for them to share photos or videos online, and more than eight in ten (84%) say that they only share photos or video that they know their children will be happy with. The majority say that they are careful about who has access to the photos or videos that they share of their children (85%), and perhaps because of this, few agreed that they worry about what their children will think about the shared content when they are older (15%).

"the only other people I have in my pictures would be my mum and dad and my boys [sons]. They're not bothered whether I upload them to Facebook or not because they're not on Facebook. So the boys wouldn't know, which is bad isn't it!"

(Female, aged 43, Essex)

1.5.8 Emojis in communication

It's not just photos and videos people are using in communications, emojis are also popular

Emojis are small digital images or icons used to express an idea or emotion in electronic communication e.g. a smiley

More than two-thirds of respondents (79%) say that they use emojis, and 55% of users agree that they use them more than they used to (67% of 18-24s and 64% of 25-34s).

Just over a quarter of respondents (27%) say that they use them every day, while a further fifth (21%) of people use them on a weekly basis. Daily use rises to nearly six in ten (57%) of 18-24s and 46% of 25-34s. Despite this increase in popularity, just 27% of respondents agree that they are important in their communications, while 47% of people disagree.

27% use emojis at least daily.

21% agree that emojis are important in their communications.

33% agree that emojis are quicker than writing

Capturing a public mood was top choice for using an image rather than words

Eight in ten (80%) emoji users say they use for fun, while 54% use them because they are humorous. A similar proportion do so because they will make the recipient smile (53%) and four in ten (40%) because they are quicker than text. However, emojis can also bring the risk of misinterpretation; two in five (39%) agree that they find them hard to understand. Over-54s are more likely to feel like this; 49% agree that it can be difficult.

Although the use of emojis is growing, there are some circumstances in which people say they prefer to use words than images. The majority say they prefer to use words when sharing bad news (82%), when sympathising with somebody (81%) and when expressing an emotion (59%). Capturing a public mood was the top choice for using an image rather than words, with 23% saying they would use an image to do this.

Figure 1.25: People who prefer to use words, images or both for specific messages