



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 2014 among 229 adults in Scotland, 229 adults in Wales, and 226 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 Differences between the nations and the UK are described when they are statistically significant at the 95% level, and are indicated as such in the figures by arrows.

²Please see the separate reports for each nation from Ofcom's *Communications Market Report 2015* <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15/> for an overview of these differences.

1.1 Scotland

Key findings

Compared to all UK adults, in 2014 those in Scotland are:

- less likely to say they regularly use a radio or a games console or player;
- more likely to be aware of the main sources of funding for BBC TV programmes;
- more likely to be unsure whether rules and regulations are in place relating to the content of games, and the age you need to be to purchase them; and
- less likely to have concerns about what is on television.

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

- less likely to say they use more than 20 websites in a typical week;
- less likely to say they only use websites or apps that they have visited before;
- less likely to go online, at least quarterly, for nine of the 32 activities asked about;
- less likely to agree strongly with the statement "I should be free to say and do what I want online";
- more likely to think that results listed by search engines are accurate or unbiased;
- more likely to have concerns relating to online security or fraud;
- more likely to be happy to enter various types of personal details online without having security concerns;
- more likely to make formal judgements about websites or judgements based on reviews or recommendations by peers or friends, before entering personal information;
- more likely only to skim-read website terms and conditions;
- less likely to say they give inaccurate or false details to websites to protect their personal identity, and more likely to say they provide personal information online to companies in order to get what they want; and
- less likely to use some types of online security features.

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

- less likely to use their mobile phone at least quarterly for taking videos, for using features such as maps or satellite navigation, and for downloading apps; and
- less likely to have concerns about mobile phones.

Take-up and use

When asked which media device they would miss the most, four in ten (43%) of all adults in Scotland chose the television set. One in three adults (34%) in Scotland said they would most miss their mobile phone. All other devices would be missed by about one in ten adults or less: desktop PC or laptop computer (9%), tablet (5%), books, magazines or newspapers (5%) and radio (3%). There are no differences in the devices that adults in Scotland would miss the most, compared to the UK average.

The overall claimed volume of internet use per week among internet users in Scotland does not differ from the UK average (19.9 hours vs. 20.5 hours for the UK overall). Similarly, there are no differences in internet use by location, when comparing Scotland and the UK overall. Overall, adults in Scotland and the UK spend a similar amount of time online at home (13.0 vs. 12.6 hours), in the workplace or place of education (4.8 vs. 5.5 hours) and elsewhere (2.1 vs. 2.3 hours).

Media activities

Nearly all adults in Scotland (94%) use a television set regularly (defined in the study as 'almost every day'), and eight in ten (79%) regularly use a mobile phone. More than half (55%) also regularly use a desktop computer or laptop, or read books, magazines or newspapers (52%). Less than half of all adults in Scotland regularly use a radio (45%) or a tablet computer (37%). One in seven adults use a DVD or Blu-ray player almost every day (14%) and one in ten (10%) a games console or player.

Compared to the UK average, adults in Scotland are less likely to regularly use radio (45% vs. 55%) or games consoles or players (10% vs. 15%).

Online use

Adults who go online were asked to estimate how many different websites they visited in a typical week. As with the UK overall, a majority of internet users in Scotland say they visit up to ten different websites in a typical week (67% vs. 65% for the UK overall). Internet users in Scotland are, however, less likely than all internet users to say they visit more than 20 different websites in a typical week (9% vs. 15%).

When asked to think about 'most weeks when they go online', half of all adult internet users in Scotland (51%) said they used "maybe one or two websites or apps not visited before". One in four (24%) said they used lots of websites or apps that they hadn't visited before. Both of these measures are in line with the UK overall, although compared to the UK average, adults in Scotland are less likely to say that they only use websites or apps they have visited before (22% vs. 30%).

Online activities

Internet users were prompted with a list of 32 online activities and were asked to say how frequently they undertook each of them. Nine activities are carried out at least quarterly (every three months or more often) by a majority of internet users in Scotland: general surfing or browsing (95%), emailing (89%), looking at social media sites or apps (76%), finding information for leisure time (72%), buying things online (68%), using instant messaging services (68%), banking and paying bills online (64%), watching online or downloading short video clips such as music videos or comedy clips (60%) and looking at news websites or apps (58%).

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

In 2014, compared to all UK adult users, there were no types of online activity that users in Scotland were more likely to do on a quarterly basis, and nine activities that internet users in Scotland were less likely to do on a quarterly basis:

- finding information for work/ job/ studies (49% vs. 58%)
- finding information about public services provided by local or national government (45% vs. 54%)
- finding information about health-related issues (39% vs. 50%)
- filling in a form or application online (31% vs. 43%)
- downloading software (23% vs. 35%)
- completing government processes online (24% vs. 34%)
- selling things online (14% vs. 22%)
- setting up or maintaining a website or blog (8% vs. 16%)
- looking at adult-only websites (3% vs. 9%)

Mobile activities

As in the UK overall, the most commonly-mentioned mobile phone activities carried out at least quarterly by a majority of mobile users in Scotland are: calls (99%), texts (91%), taking photos (71%), email (59%), photo messages (57%), visiting social media sites (57%) and visiting websites (56%).

Mobile phone users in Scotland are less likely, compared to all users, to say they take videos (38% vs. 47%), use features such as maps or satellite navigation (31% vs. 45%) or download apps (31% vs. 42%) on a quarterly basis.

Some mobile phone activities that we 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 (65% in Scotland vs. 66% 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 (89% for BBC TV programmes and 77% for commercial TV programmes) as well as for the BBC website (58%). Fewer adults in Scotland are aware of how search engines (such as Google or Ask. com) are funded (47%).

Compared to the UK average, adults in Scotland are more likely to be aware of the main sources of funding for BBC TV programmes (89% vs. 78%). They are as likely as all UK adults to be aware of the main source of funding for commercial TV programmes and search engine websites.

The majority of adults in Scotland believe that content on TV (91%), on radio (76%) and in the press/ newspapers (71%) is regulated. Although adults in Scotland are as likely as those in the UK as a whole to believe that each of these three types of content is regulated, they are more likely to be unsure about regulation of the press (21% vs. 14%).

UK adults were asked whether they were aware of any rules or regulations about the content of computer or online games, and what age you have to be to purchase them. Six in ten adults in Scotland (60%) are aware that such regulations are in place, comparable to the UK overall. Adults in Scotland are, however, more likely to say they are unsure whether such regulations exist (31% vs. 24%).

In 2014, adults were also asked about how much of what can be seen and read online they believe to be regulated. One in five adults (19%) in Scotland are unsure how much is regulated; more than a quarter (28%) believe that all or most of what can be seen or read online is regulated. In contrast, considerably fewer (5%) say that no online content is regulated. Nearly half of all adults (47%) gave the correct response; i.e. that some of what can be seen or read online is regulated. None of these measures differ from the UK average.

Internet users were asked the extent to which they agreed or disagreed that the internet needs to be regulated, in terms of what can be shown and written online. More than eight in ten internet users in Scotland (83%)³ agreed that the internet needs to be regulated, with a majority agreeing strongly (62%). These measures are in line with those for the UK overall.

³ This figure differs slightly to that shown in the chart due to rounding.

Nine per cent of internet users in Scotland disagreed that the internet needs to be regulated; this is also in line with the average for all UK internet users.

Internet users in Scotland are more likely to disagree (41%) than agree (32%) that "internet users should be free to say and do what they want online". They are less likely than all UK internet users to agree with this statement (32% vs. 40%).

More than six in ten of all search engine users in Scotland (56%) agree that "some of the websites returned will be accurate or unbiased and some won't be"; similar to the UK as a whole (60%). Three in ten (30%) think that if websites have been listed by the search engine, they will contain accurate and unbiased information; this is higher than the UK measure (23%). Less than one in ten in Scotland (8%) are unsure about the level of accuracy or bias in the results returned by search engine websites; this is higher than for the UK overall (4%).

Media concerns

Concern among users in Scotland about what is on the internet (49%), about apps specifically (22%) and about what is on the radio (5%) is similar to that found in the UK as a whole. Compared to all UK adults, people in Scotland with televisions in the household are less likely to have concerns about TV content (29% vs. 40%), while mobile users in Scotland are less likely than all users to have concerns about mobile phones (15% vs. 24%).

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 (37%), or about risks to others or risks to society (32%). They are, however, more likely to have concerns relating to security or fraud (31% vs. 21%). As for all UK internet users, around one in ten, or fewer, internet users in Scotland have concerns relating to personal privacy (12%) or any type of advertising (8%).

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 (29% vs. 40%). This is attributable to lower levels of concern relating to offensive content (15% vs. 23%) quality of content or repeats (13% vs. 19%) and advertising or sponsorship (2% vs. 7%).

Online safety and security

Compared to all UK internet users, those in Scotland are more likely to say they would enter online all the five types of personal information that they were asked about. Close to half of all internet users in Scotland said they would be happy to enter their personal email address online (48% vs. 39% for the UK overall). Fewer were happy to enter their mobile phone number (35% vs. 21% for the UK overall), their home phone number (30% vs. 19%), their home address details (30% vs. 21%) or their credit or debit card details (23% vs. 17%). As with the UK overall, a majority of internet users said they would enter their home address details (56%) or credit or debit card details online (62%) but would have security concerns about doing so.

Internet users in Scotland differ from all UK users in terms of the types of judgements they make about websites before entering personal information. While they are as likely to say they would not make any type of judgement about a website (10% vs. 13% for the UK overall), or that they would trust any website to be secure (0% vs. 3%), they are more likely to say they would make formal judgements, such as looking for padlocks or secure system messages (66% vs. 55%), or judgements based on online reviews or friends' recommendations (64% vs. 52%).

One in five internet users in Scotland (19%) say they read website terms and conditions or privacy statements thoroughly, more than half (58%) only skim-read them, and around one in five (20%) don't read them. Internet users in Scotland are more likely than all UK internet users to say they just skim-read them (58% vs. 43%).

Four in ten (40%) internet users in the UK say they have ever given inaccurate or false details to websites in order to protect their personal identity online. Internet users in Scotland are less likely to say they have done this (30%).

Compared to the UK average, internet users in Scotland are more likely to say they are happy to provide personal information online to companies, as long as they get what they want. Three in four (76%) internet users in Scotland say they feel this way, compared to two in three users (68%) in the UK overall; this is due to internet users in Scotland being more likely to say they 'sometimes' feel this way (57% vs. 47%).

While half of all internet users in the UK (51%) state that they always, often or sometimes do not think about the personal information they are asked to provide to companies online, this is more likely for those in Scotland (62%).

Home internet users were asked whether they were aware of six online security measures or safety features, and for each that they were aware of, whether these were installed on any of the devices they used to go online at home. Awareness of each of the six features does not vary between Scotland and the UK average. Levels of use of four of the six security features are lower in Scotland than in the UK overall: anti-virus software (64% vs. 75%), email filters that can block unwanted or spam emails (32% vs. 40%), home WiFi protection from unauthorised access (29% vs. 40%) and anti-spyware (25% vs. 34%). A majority of home internet users in Scotland use firewalls (55%) and one in four use cookie deletion (27%); both of these measures are comparable to the UK overall.

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 as likely to say they had experienced any of these nine events in the past 12 months (61%). Internet users in Scotland were, however, less likely to say they had received emails or instant messages sending them to a phishing website (18% vs. 25%) or to have had a virus on their home computer (13% vs. 23%).

A majority of internet users in Scotland (54%) said they had experienced spam email from companies trying to sell them something in the past year, but this is no more or less likely than for the UK overall (49%).

1.2 Wales

Key findings

Compared to all UK adults, in 2014 those in Wales are:

- more likely to say they regularly use a DVD or Blu-ray player, or a games console or player;
- more likely to be unsure about the main source of funding for the BBC website and commercial TV programmes; and
- less likely to think that radio content is regulated, and less likely to be aware that rules or regulations exist relating to the content of games, and the age you need to be to purchase them.

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

- spending more time online at home per week, and less time online in other locations;
- less likely to undertake five of the 32 online activities at least quarterly;
- more likely to disagree strongly with the statement "I should be free to say and do what I want online";
- more likely to understand that results listed by search engines may not always be accurate and unbiased;
- less likely to be happy to enter certain types of personal information online;
- less likely to say they would not make a judgement about a website before entering personal information; and
- less likely to say they give out inaccurate or false details to websites to protect their personal identity.

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

- less likely to say they use their mobile for 16 out of 22 activities at least quarterly.

Take-up and use

When asked which media device they would miss the most, close to two in five adults in Wales chose a television set (38%), three in ten (28%) said they would most miss their mobile phone, and one in seven (15%) their desktop or laptop computer. A similar number would miss radio (6%), books, magazines or newspapers (5%), or a tablet computer (5%). There are no differences in the devices that adults in Wales would miss the most compared to all UK adults.

The overall claimed volume of internet use per week among users in Wales does not differ from that for all UK adult users (21.2 hours vs. 20.5 hours). There are, however, differences by location of use: internet users in Wales say they spend more time online at home (15.3 vs. 12.6 hours for the UK overall), and less time online in the workplace or place of education (4.2 vs. 5.5 hours) or elsewhere (1.6 vs. 2.3 hours).

Media activities

Nine in ten adults in Wales (90%) use a television set regularly (defined in the study as 'almost every day'), and more than eight in ten (83%) regularly use a mobile phone.

Regular use of a desktop or laptop computer (68%), books, magazines or newspapers (58%) or radio (55%) is lower than regular use of a TV set or mobile phone, but these are still used almost every day by a majority of adults in Wales.

As with the UK overall, less than half of adults in Wales regularly use a tablet computer (40%), a DVD or Blu-ray player (33%) a games console or player (21%) or an MP3 player (16%). For two devices, regular use of differs to the UK average: adults in Wales are more likely to use a DVD or Blu-ray player (33% vs. 19%) and a games console or player (21% vs. 15%).

Online use

Adults who go online were asked to estimate how many different websites they visited in a typical week. Internet users in Wales are as likely as all UK internet users to visit one to four (26%), five to ten (39%), 11 to 20 (17%), and more than 20 (19%) different websites in a typical week.

When asked to think about 'most weeks when they go online', four in ten adult internet users in Wales (43%) said they used "maybe one or two websites or apps they had not visited before". One in three users in Wales (34%) said they only used websites or apps they had visited before, while one in five (20%) said they used lots of websites or apps they had not visited before. None of these measures differ to those for UK users as a whole.

Online activities

Internet users were prompted with a list of 32 online activities and were asked to say how frequently they undertook each of them. Eleven activities are carried out at least quarterly (every three months or more often) by a majority of internet users in Wales: general online surfing/ browsing (93%), emailing (87%), buying things online (74%), looking at social media sites or apps (71%), using instant messaging services (71%), finding information for leisure time (68%), looking at news websites or apps (62%), watching online or downloading short video clips such as music videos or comedy clips (62%), banking and paying bills online (58%), finding information for work/ job/ studies (56%) and finding information about health-related issues (52%).

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

In 2014, compared to all UK adult internet users, users in Wales were no more likely to undertake any of the 32 online activities and were less likely to undertake five: filling in a form or application online (33% vs. 43%), making or receiving telephone or video calls using services like Skype or FaceTime (31% vs. 42%), completing government processes online (27% vs. 34%), looking at political or campaign or issue websites (18% vs. 26%) and setting up or maintaining a website or blog (11% vs. 16%).

Mobile activities

The most commonly-mentioned mobile phone activities carried out at least quarterly by a majority of users in Wales are calls (95%), texts (89%), taking photos (64%), visiting websites (54%), sending or receiving photo messages (54%) and sending or receiving emails (51%). A minority of mobile phone users in Wales 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 2014, mobile phone users in Wales are less likely to say they use their mobile phone on a quarterly basis for 16 of the 22 activities that we asked about.

These differences in quarterly mobile phone use might be attributable to the incidence of smartphone ownership, although adults in Wales are as likely as all UK adults to own a smartphone (62% vs. 66% for the UK overall).

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.

The majority of adults in Wales are aware of the main sources of funding for BBC TV programmes (79%), for commercial TV programmes (73%) and for the BBC website (54%). A minority of adults in Wales are not aware of the main sources of funding for the BBC website (46%) and for search engine websites (38%).

There is no difference between adults in Wales and all UK adults in terms of awareness of the main sources of funding for search engine websites. Adults in Wales are, however, more likely to be unsure about how the BBC website is funded (36% vs. 28%) and how commercial TV programmes are funded (19% vs. 13%).

The majority of adults in Wales believe that content on TV (85%), in the press (76%) and on radio (71%) is regulated. In 2014, adults in Wales were less likely than all UK adults to believe that radio content is regulated (71% vs. 79%) and more likely to say they are unsure (20% vs. 14%).

UK adults were asked whether they were aware of any rules or regulations about the content of computer or online games, and what age you had to be to purchase them. More than four in ten adults in Wales (44%) were aware that such regulations were in place; lower than the UK average (60%). Adults in Wales are more likely than all UK adults to say they are unsure whether such regulations exist (43% vs. 24%). These differences may be attributable to the incidence of gaming. However, adults in Wales are as likely as all UK adults to play games at home or elsewhere (38% vs. 44% for the UK overall).

In 2014, adults were asked to say how much of what can be seen and read online they believe to be regulated. One in five adults (20%) in Wales are unsure how much is regulated; a quarter (25%) believe that all or most of what can be seen or read online is regulated. In contrast, considerably fewer (7%) say that no online content is regulated. Close to half of all adults in Wales (48%) gave the correct response, i.e. that some of what can be seen or read online is regulated. None of these measures differ from the UK average.

Internet users were asked the extent to which they agreed or disagreed that the internet needs to be regulated, in terms of what can be shown and written online. More than eight in ten internet users in Wales (83%) agree that the internet needs to be regulated; a majority

agree strongly (65%). These measures are in line with those for the UK overall. Six per cent of internet users in Wales disagree that the internet needs to be regulated; this is also similar to the UK average.

Internet users in Wales are more likely to disagree (49%)⁴ than agree (35%) with the statement "I should be free to say and do what I want online". Compared to all internet users, those in Wales are more likely to disagree strongly (29% vs. 19% for the UK overall) and are less likely to agree strongly (10% vs. 16% for the UK overall).

Among those who use search engines, adults in Wales are more likely than those in the UK as a whole to give the correct response that "some websites will and some won't be accurate or unbiased" (72% vs. 60%). One in ten (11%) search engine users in Wales think that if websites have been listed by the search engine they will contain accurate and unbiased information; this is lower than the UK measure (23%).

Media concerns

More than half of all internet users in Wales have concerns about what is on the internet (56%), while more than one in three TV viewers have concerns about what is on television (36%). Around one in four app users (27%) have concerns about apps, and a comparable proportion of adult mobile phone users have concerns about mobiles (23%). Around one in 20 who listen to radio have concerns about radio (7%). These levels of concern among adult users in Wales do not differ from those seen among all UK adult users.

Four in ten internet users in Wales say they have concerns relating specifically to offensive or illegal content (42%) with three in ten citing risks to others or to society (30%) and one in five saying they have security or fraud concerns (19%). A similar proportion of internet users in Wales are concerned about online advertising (8%) or personal privacy (6%). None of these incidences differ from all UK internet users.

Compared to all UK adults, adults in Wales with a television in the household are no more likely to have concerns relating to offensive content (22%) quality of content or repeats (15%), advertising or sponsorship (4%) or diversity in content (4%).

Online safety and security

In 2014, internet users in Wales were as likely as all UK internet users to say they would be happy to enter their home address details online (19%) or would have security concerns about doing so but would still do it (61%). A similar proportion of internet users in Wales are happy to enter their credit card details online (15%) or would do it but with concerns (62%); both of these latter measures are also in line with the UK average.

Compared to the other personal details they were asked about, internet users in Wales, as for the UK overall, are more likely to say they would never enter their mobile phone number (27%) or their home phone number online (27%), due to security concerns. Compared to the UK average, internet users in Wales are less likely to say they would be happy to enter their email address (29% vs. 39%) or their mobile phone number (14% vs. 21%).

Over half of all internet users in Wales (59%) say they would make a formal judgement about a website (such as looking for 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 judgements based on reviews or recommendations by peers or friends (55%); this is also comparable to the UK average (52%). Users in Wales

⁴ This figure differs slightly to that shown in the chart due to rounding.

are, however, less likely to say that they would not make a judgement about a website before entering personal details (4% vs. 13% for the UK overall).

More than two in ten adult internet users in Wales (22%) say they read website terms and conditions/ privacy statements thoroughly, similar to the UK as whole (23%). Two in five (40%) say that they are aware of them, but skim through them without reading them properly, which is also comparable to the UK average (43%). One in four internet users in Wales say they don't read them, as for the UK overall (25%).

While four in ten (40%) internet users in the UK say they have ever given inaccurate or false details to websites in order to protect their personal identity online, those in Wales are less likely to say they have done this (20%).

Compared to the UK average, internet users in Wales are as likely to say they are 'always' happy to provide personal information online to companies as long as they get what they want (8% vs. 7% for the UK overall). A further one in six (17%) internet users in Wales say they are 'often' happy to provide this information, while more than four in ten (42%) say they are 'sometimes' happy to. These measures are also in line with the UK average.

Internet users in Wales are twice as likely as all UK internet users to say they do not 'always' think about the personal information they are providing to companies online (29% vs. 14% for the UK overall).

Home internet users were asked whether they were aware of six online security measures or safety features, and for each that they were aware of, whether these were installed on any of the devices they used at home to go online. The majority of internet users in Wales are aware of all six features: anti-virus software (93%), firewalls (83%), email filters that can block unwanted or spam emails (65%), anti-spyware (65%), home WiFi protection from unauthorised access (58%), and browser cookie deletion (57%). In contrast, only two, anti-virus software (73%) and firewalls (54%), are used by a majority of internet users in Wales.

Awareness and use of five of the six features does not vary when comparing Wales to the UK average. Internet users in Wales are more likely to say they do not use anti-virus software (20% vs. 14%).

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 all nine events in the past 12 months. More than half (52%) have received spam or unwanted emails, one in four (27%) have received emails or messages sending them to a 'phishing' website and one in five (20%) have had a computer virus on their home computer. All of the other remaining six negative types of online activity were experienced by less than one in ten internet users in Wales.

1.3 Northern Ireland

Key findings

Compared to all UK adults, in 2014 those in Northern Ireland are:

- less likely to say they would most miss a television set and more likely to miss a mobile phone or a radio;
- less likely to regularly use a desktop computer or laptop, books, magazines or newspapers, a DVD or Blu-ray player or an MP3 player;
- less likely to be aware of how search engine websites are funded;
- more likely to be unsure about the extent to which online content is regulated and less likely to say that 'some' of this content is regulated; and
- more likely to have concerns about offensive content on television.

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

- less likely to undertake 11 of the 32 online activities at least quarterly;
- more likely to disagree strongly with the statement "I should be free to say and do what I want online";
- less likely to understand that the results listed by search engines may not always be accurate and unbiased;
- more likely to have concerns about the risks posed to others or to society by the internet;
- more likely to judge websites based on reviews or recommendations by peers or friends before entering personal details;
- more likely to say they do not read website terms and conditions;
- more likely to say they don't really think about the personal information they are providing to companies online; and
- less likely to be aware of, and use, most online security measures.

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

- less likely to use their phone to take photos, for email and for features such as maps or satellite navigation, at least quarterly.

Take-up and use

When asked which media device they would miss the most, more than four in ten adults in Northern Ireland (43%) chose their mobile phone, three in ten chose the TV set (29%), one in ten a desktop computer or laptop (11%) or radio (11%). Three per cent of adults said they would miss their tablet most, and only 1% chose books, magazines or newspapers. Unlike England, Scotland and Wales, there are differences in the most-missed media among adults in Northern Ireland when compared to the UK average. Adults in Northern Ireland are more likely to say they would miss their mobile phone (43% vs. 32%) or radio (11% vs. 5%) and less likely to miss a TV set (29% vs. 37%) or books, magazines and newspapers (1% vs. 5%).

The overall claimed volume of internet use per week among internet users in Northern Ireland is comparable to that for all UK adult internet users (21.6 hours vs. 20.5 hours). Similarly, there are no differences in internet use by location when comparing Northern Ireland and the UK overall. Overall, adults in Northern Ireland and those in the UK as a

whole spend a similar amount of time online at home (13.6 vs. 12.6 hours), in the workplace or place of education (5.3 vs. 5.5 hours) and elsewhere (2.7 vs. 2.3 hours).

Media activities

More than nine in ten (94%) adults in Northern Ireland use a TV set regularly (defined in the study as 'almost every day'), and close to nine in ten (86%) regularly use a mobile phone. Six in ten regularly listen to radio (59%) while four in ten read books, magazines or newspapers (40%), use a desktop computer or laptop (39%), or use a tablet (39%). One in eight adults in Northern Ireland (13%) regularly use a DVD or Blu-ray player and one in ten regularly use a games console or player (11%). Less than one in ten regularly use an MP3 player (7%).

Adults in Northern Ireland are no more likely than the UK average to regularly use any of these media devices. They are, however, less likely to regularly use four devices: desktop computer or laptop (39% vs. 61%), books, magazines or newspapers (40% vs. 54%), DVD or Blu-ray player (13% vs. 19%) and MP3 player (7% vs. 12%).

Online use

Adults who go online were asked to estimate how many different websites they visited in a typical week. Internet users in Northern Ireland are as likely as all UK internet users to visit one to four (19%), five to ten (45%), 11 to 20 (19%), and more than 20 (15%) 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 Northern Ireland (42%) said they used "maybe one or two websites or apps they had not visited before". Slightly fewer said they only used websites or apps they had visited before (34%), while two in ten users in Northern Ireland said they used lots of websites they had not used before (19%). None of these measures differs to the UK as a whole.

Online activities

Of the 32 online activities covered, 12 are carried out at least quarterly by a majority of internet users in Northern Ireland: general surfing/ browsing the internet (92%), emailing (77%), looking at social media sites/ apps (71%), using instant messaging services (69%), looking at news websites or apps (61%), buying things online (60%), finding information for leisure time (58%), watching online, or downloading, short video clips such as music videos or comedy clips (56%), banking and paying bills online (53%), finding information for work/ job/ studies (53%), finding information about public services provided by local or national government (51%), and sharing links to websites or online articles, e.g. on Twitter, Facebook, Reddit or LinkedIn (51%).

Among the types of activities undertaken at least quarterly in 2014, the majority are similar to those for all UK users, with some exceptions. Users in Northern Ireland are less likely than those in the UK as a whole to: email (77% vs. 88%), buy things online (60% vs. 69%), find information for leisure time (58% vs. 69%), bank and pay bills online (53% vs. 63%), look at sites or apps for news about or events in the local area or the local community (37% vs. 48%), make or receive telephone or video calls using services like Skype or FaceTime (34% vs. 42%), look at job opportunities (28% vs. 36%), complete government processes online (24% vs. 34%), fill in a form or application online (22% vs. 43%), sell things online (14% vs. 22%), or sign an online petition (7% vs. 13%).

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 or receive calls (99% vs. 97%), send or receive texts (93% vs. 93%), send or receive photo messages (60% vs. 58%), visit websites (59% vs. 61%), and visit social media sites (55% vs. 56%). Taking photos is the only other activity carried out by a majority of mobile users in Northern Ireland (65%) but this is less likely than in the UK overall (72%).

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. Two of these activities are less likely to be undertaken quarterly by mobile users in Northern Ireland compared to the UK overall: email (48% vs. 59%) and using features such as maps or satellite navigation to plan a route to a destination (36% vs. 45%).

No activities are more likely to be undertaken, at least quarterly, by users in Northern Ireland than by UK mobile 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 BBC television (79%), commercial TV programmes (67%) and the BBC website (63%), and a minority are aware of funding for search engines (33%).

While awareness of the main sources of funding for BBC television, commercial television, and the BBC website is comparable to that of all UK adults, those in Northern Ireland are less likely to be aware of the main source of funding for search engine websites (33% vs. 45%), and more likely to say they are unsure (41% vs. 31%).

In 2014, adults in Northern Ireland were as likely as all UK adults to believe that content on TV (86%), in the press (74%), and on radio (74%) is regulated.

Adults were asked whether they were aware of any rules or regulations about the content of computer or online games, and what age you had to be to purchase them. Six in ten adults in Northern Ireland (60%) are aware that such regulations are in place, one in four (26%) are unsure, and the remaining 14% believe that such regulations do not exist. None of these measures differ to those for the UK overall.

In 2014, adults were asked about how much of what can be seen and read online they believe to be regulated. More than one in four adults (27%) in Northern Ireland are unsure how much is regulated; three in ten (31%) believe that all or most of what can be seen or read online is regulated. In contrast, considerably fewer (9%) say that no online content is regulated. One in three adults in Northern Ireland (33%) gave the correct response, i.e. some of what can be seen or read online is regulated. Compared to all UK adults, those in Northern Ireland are less likely to give the correct response, (33% vs. 46%) and are more likely to be unsure (27% vs. 18%).

Internet users were asked the extent to which they agreed or disagreed that the internet needs to be regulated, in terms of what can be shown and written online. Eight in ten internet users in Northern Ireland (80%) agreed that the internet needs to be regulated, with a majority agreeing strongly (60%). These measures are in line with those for the UK overall.

Eight per cent of internet users in Northern Ireland disagreed that the internet needs to be regulated; this is also in line with the UK average.

Internet users in Northern Ireland are more likely to disagree strongly (27%) than to agree strongly (20%) with the statement "I should be free to say and do what I want online". Compared to all internet users, those in Northern Ireland are more likely to disagree strongly (27% vs. 19% for the UK overall).

Four in ten (40%) 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'; this is lower than the UK average (60%). Around one in eight (13%) search engine users in Northern Ireland are unsure about the level of accuracy or bias in the results returned by search engine websites, higher than for the UK overall (4%).

Media concerns

A majority of adult internet users in Northern Ireland have concerns about internet content (56%), and four in ten TV viewers have concerns about what is on television (41%). Three in ten app users are concerned about apps (30%) and one in five adult mobile phone users in Northern Ireland have concerns about mobiles (20%). Less than one in ten who listen to radio have concerns about what is on 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 (56% vs. 51%). When looking at specific types of concern, internet users in Northern Ireland are more likely than all UK internet users to have concerns relating to risks to others or to society (39% vs. 28%). There are no further differences when looking specifically at types of online concerns.

Adults in Northern Ireland with a television in the household are no more likely than all UK adults to have concerns about television at an overall level (41% vs. 40% for the UK overall), but are more likely to have concerns relating to offensive content on television (35% vs. 23%).

Online safety and security

In 2014, internet users in Northern Ireland were as likely as all UK internet users to say they were happy to share each of five types of personal information online: personal email address (33% vs. 39%), home address details (26% vs. 21%), mobile phone number (26% vs. 21%), home phone number (21% vs. 19%), and credit/ debit card details (17% vs. 17%).

Internet users in Northern Ireland are as likely as those in the UK as a whole to make formal judgements about websites (such as looking for padlocks or other system messages) before entering personal details (61% vs. 55%). Six in ten (62%) make peer judgements (online reviews or recommendations from friends), which is greater than for all UK internet users (52%). Four per cent say they would not trust any site to be secure, and one in ten (11%) would not make any type of judgement. Both these latter measures are comparable to the UK as a whole.

One in eight adult internet users in Northern Ireland (13%) say they read website terms and conditions/ privacy statements thoroughly. Four in ten (40%) either say they skim them without reading them properly, or say they don't read them (39%). Compared to all UK internet users, those in Northern Ireland are less likely to say they read them thoroughly (13% vs. 23%) and more likely to say they do not read them (39% vs. 26%).

Four in ten (40%) internet users in Northern Ireland say they have ever given inaccurate or false details to websites in order to protect their personal identity online; this matches the UK average (40%). Users in Northern Ireland are, however, less likely to say they 'always' give false information (0% vs. 3% for the UK overall).

Three in four (74%) internet users in Northern Ireland say they are happy to provide personal information online to companies as long as they get what they want; this measure is in line with the UK average (68%).

Two in three (65%) internet users in Northern Ireland say they don't really think about the personal information they are providing to companies online, higher than the figure for all UK internet users (51%).

Home internet users were asked whether they were aware of six online security measures or safety features, and for each that they were aware of, whether these were installed on any of the devices they used at home to go online. Awareness of the following five security measures or safety features is lower in Northern Ireland than in the UK as a whole: anti-virus software (82% vs. 90%), anti-spyware (55% vs. 65%), email spam filters (54% vs. 67%), home WiFi protection from unauthorised access (50% vs. 63%) and browser cookie deletion (42% vs. 57%). Compared to the UK as a whole, home internet users in Northern Ireland are therefore less likely to use each of these five security measures or safety features. While awareness of firewalls does not differ between internet users in Northern Ireland and the UK overall, they are less likely to be used in Northern Ireland (47% vs. 55%).

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. More than one in four users in Northern Ireland (28%) had experienced spam or unwanted email, lower than the UK average (49%).

Close to two in ten (18%) had received emails or instant messages from companies not known to them, directing them to a website which asked them for their personal details; this is also less likely than among all UK internet users (25%). Users in Northern Ireland are also less likely than all UK users to say they have had emails sent from their email address or social media account without permission (5% vs. 10%).

Section 2

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Section 3

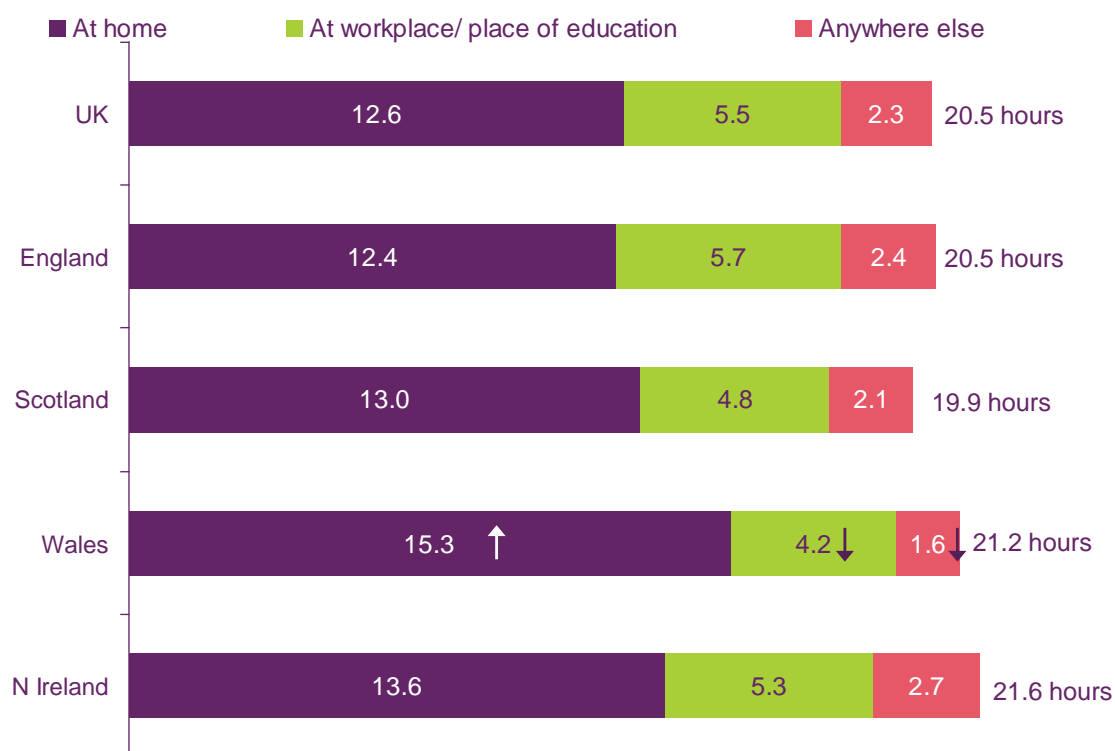
Media literacy, by nation: charts

Figure 1: Most-missed media device, by nation: 2014



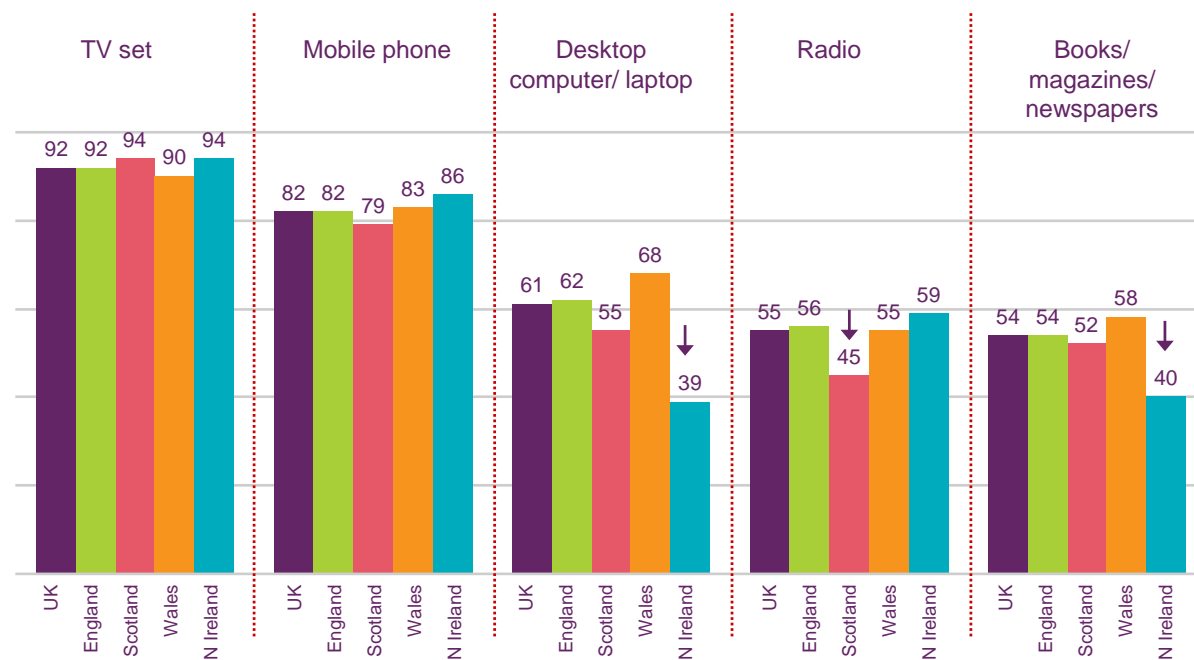
A2 – Which one of the things you use almost every day would you miss the most if it got taken away? (Prompted responses, single coded) – NB Showing responses in 2014 given by more than 2% at an overall level.
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland). 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 2014

Figure 2: Claimed volume of internet use per week, by nation: 2014



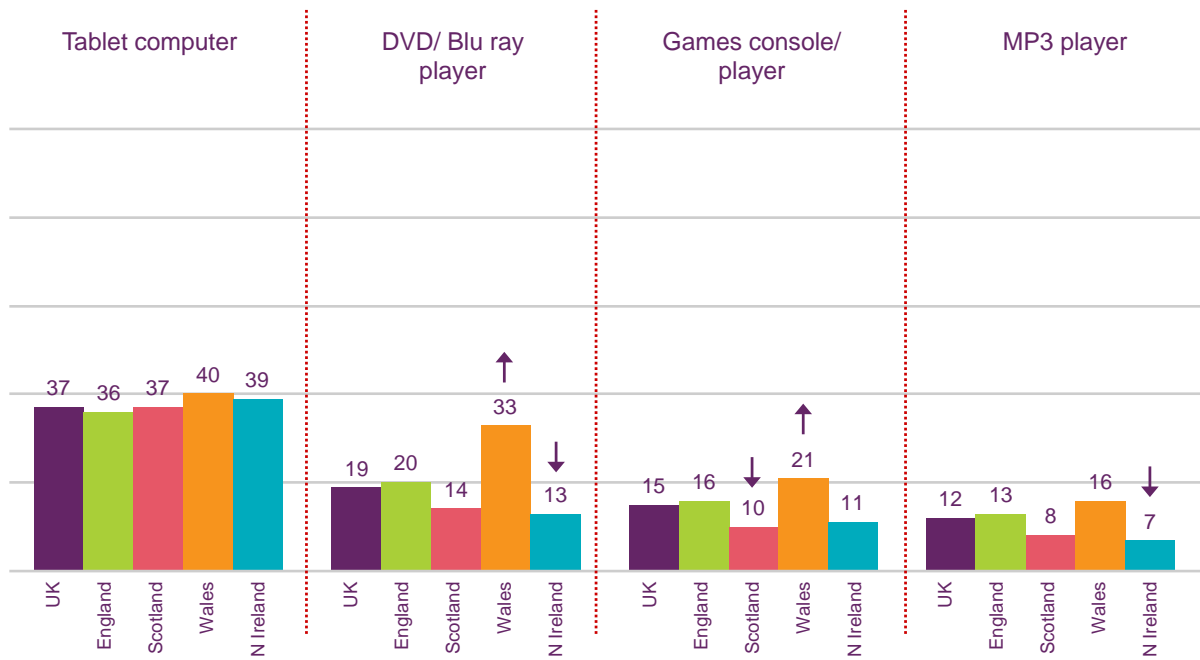
IN6A-C – How many hours in a typical week would you say you go online at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern 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 2014

Figure 3: Regular use of media devices, by nation (1–5 of 9): 2014



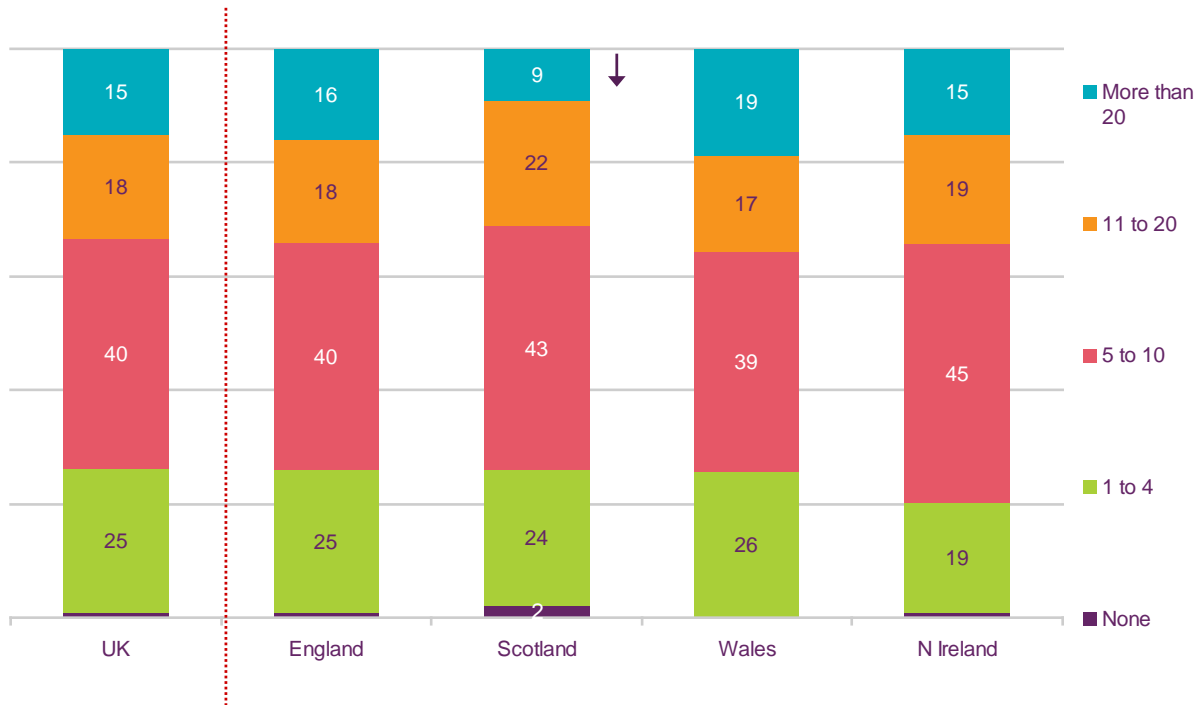
A1 – Which of the following do you use almost every day? (Prompted responses, multi-coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 4: Regular use of media devices, by nation (6-9 of 9): 2014



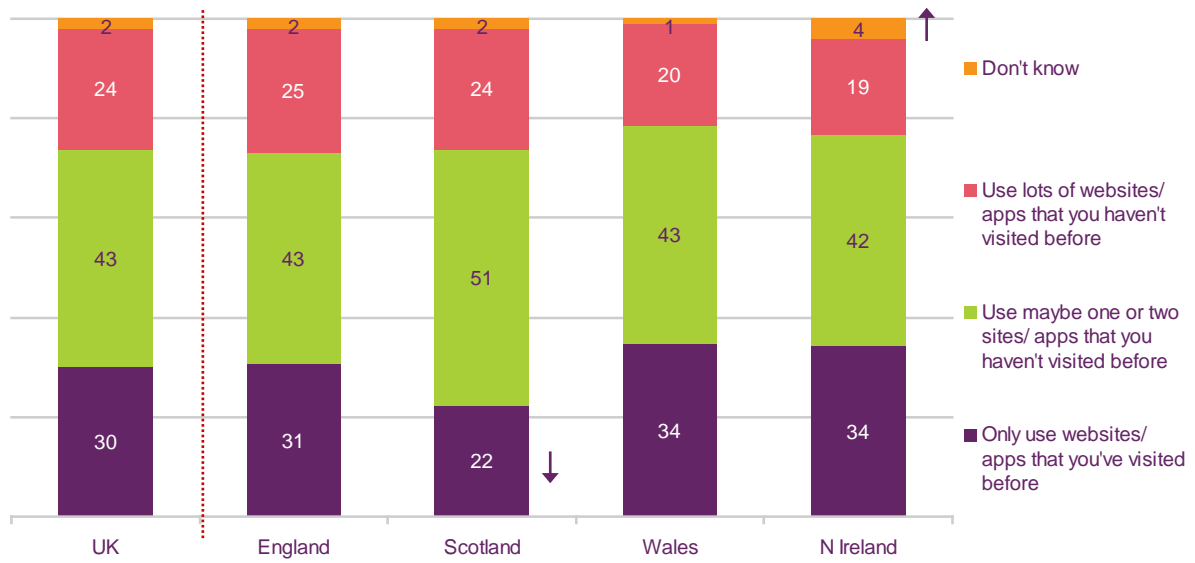
A1 – Which of the following do you use almost every day? (Prompted responses, multi-coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 5: Estimated number of different websites visited in a typical week, by nation: 2014



IN19 - 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 (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 6: Use of new websites in most weeks when the internet is used, by nation: 2014



IN14 – 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 (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 7: Internet activities carried out at least quarterly, by nation: 2014

	UK	England	Scotland	Wales	N Ireland
General surfing/ browsing the internet	94%	93%	95%	93%	92%
Sending and receiving emails	88%	88%	89%	87%	77% ↓
Looking at social media sites/ apps	71%	71%	76%	71%	71%
Buying things online	69%	69%	68%	74%	60% ↓
Using Instant Messaging services	69%	69%	68%	71%	69%
Find information for your leisure time including cinema and live music	69%	69%	72%	68%	58% ↓
Banking and paying bills online	63%	64%	64%	58%	53% ↓
Looking at news websites or apps	62%	62%	58%	62%	61%
Watch online or download short video clips such as music videos or comedy clips	60%	60%	60%	62%	56%
Finding information for your work/ job/ studies	58%	59%	49% ↓	56%	53%
Finding information about public services provided by local or national government	54%	55%	45% ↓	49%	51%
Finding information about health related issues	50%	51%	39% ↓	52%	49%
Upload or share videos or photos online	49%	50%	45%	43%	43%
Listen to or download music online	48%	49%	41%	44%	45%
Looking at sites or apps for news about, or events in your local area/ the local community	48%	48%	43%	46%	37% ↓
Watch online or download TV programmes or films	47%	48%	44%	45%	41%
Sharing links to websites or online articles – perhaps on Twitter, Facebook, Reddit or LinkedIn	47%	46%	48%	47%	51%
Filling in a form or application online	43%	45%	31% ↓	33% ↓	22% ↓
Making or receiving telephone or video calls using services like Skype or FaceTime	42%	43%	38%	31% ↓	34% ↓
Looking at job opportunities	36%	37%	35%	31%	28% ↓
Downloading software	35%	36%	23% ↓	28%	32%
Complete government processes online – such as register for tax credits, renew driving licence, car tax or passport	34%	36%	24% ↓	27% ↓	24% ↓
Contributed comments to a website or blog	33%	34%	29%	27%	28%
Playing games online	30%	31%	24%	32%	26%
Looking at political/ campaign/ issues websites	26%	26%	28%	18% ↓	19%
Selling things online	22%	24%	14% ↓	20%	14% ↓
Listening to radio stations online	21%	22%	18%	22%	26%
Setting up or maintaining a website or blog	16%	18%	8% ↓	11% ↓	14%
Sign an online petition	13%	14%	10%	12%	7% ↓
Doing an online course to achieve a qualification	13%	14%	10%	10%	10%
Looking at adult-only websites	9%	9%	3% ↓	4%	5%
Contact a local councillor or your MP online	6%	6%	3%	3%	6%

IN15/ 16 – From this list please tell me the types of things you currently do online, and how often you do each. (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 8: Mobile phone activities carried out at least quarterly, by nation: 2014

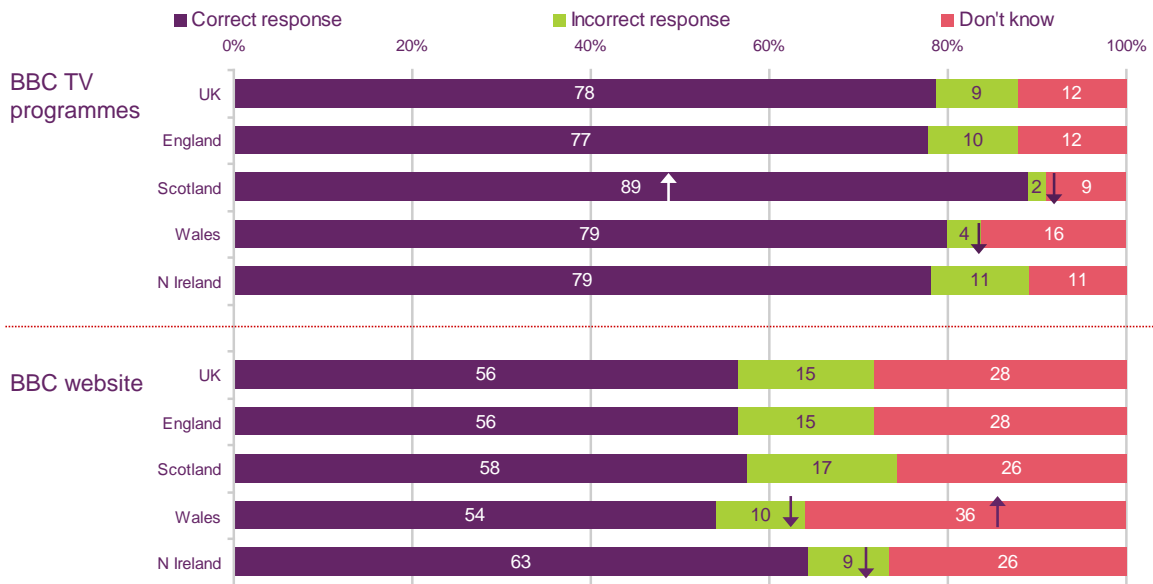
	UK	England	Scotland	Wales	N Ireland
Make or receive calls	97%	97%	99%	95%	99%
Send or receive text messages	93%	94%	91%	89% ↓	93%
Take photos	72%	73%	71%	64% ↓	65% ↓
Visit websites	61%	62%	56%	54% ↓	59%
Send or receive email	59%	60%	59%	51% ↓	48% ↓
Send or receive photo messages	58%	58%	57%	54%	60%
Visit social media sites	56%	57%	57%	47% ↓	55%
Visit sites or apps like YouTube or Vine to look at videos or clips posted by other people	50%	50%	49%	41% ↓	45%
Use Instant Messaging services	49%	50%	48%	41% ↓	46%
Listen to music	48%	49%	46%	41%	42%
Take videos	47%	49%	38% ↓	42%	42%
Use features such as Maps or satellite navigation to get to where you want to go/ plot a route to a destination	45%	48%	31% ↓	33% ↓	36% ↓
Download apps/ applications (including games)	42%	44%	31% ↓	34% ↓	36%
Put photos or videos on sites like YouTube, Facebook or Instagram for others to see	41%	42%	41%	30% ↓	41%
Check your bank balance	39%	39%	45%	34%	34%
Send or receive video clips	38%	38%	33%	31%	40%
Play games that are loaded on the phone	37%	38%	36%	24% ↓	32%
Make or receive telephone or video calls using services like Skype or FaceTime	34%	35%	28%	21% ↓	30%
Buy things from websites or apps	32%	32%	32%	23% ↓	29%
Send or receive Twitter updates	24%	24%	22%	14% ↓	29%
Play games over the internet	23%	24%	19%	15% ↓	24%
Watch TV programmes	18%	18%	21%	12% ↓	16%

M7 – From this list, please tell me the types of things you use your mobile phone for, and how often you do each.
(Prompted responses, single coded)

Base: All adults aged 16+ who use a mobile phone (1670 UK, 1054 England, 202 Scotland, 203 Wales, 211 Northern Ireland). Significance testing shows any difference between any nation and the UK

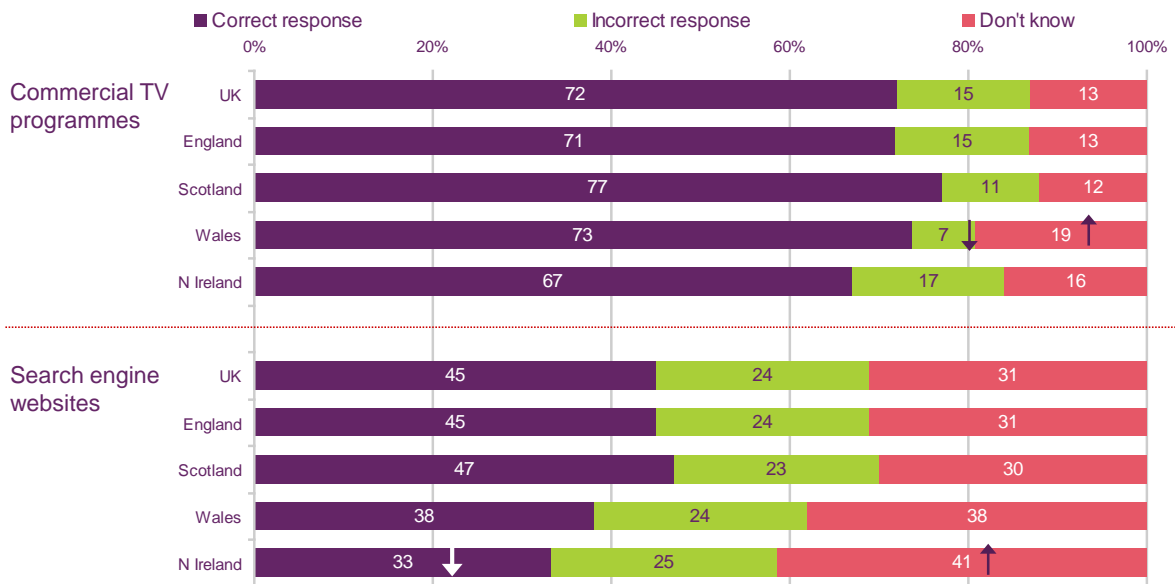
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 9: Awareness of the main source of funding for BBC television programmes and website, by nation: 2014



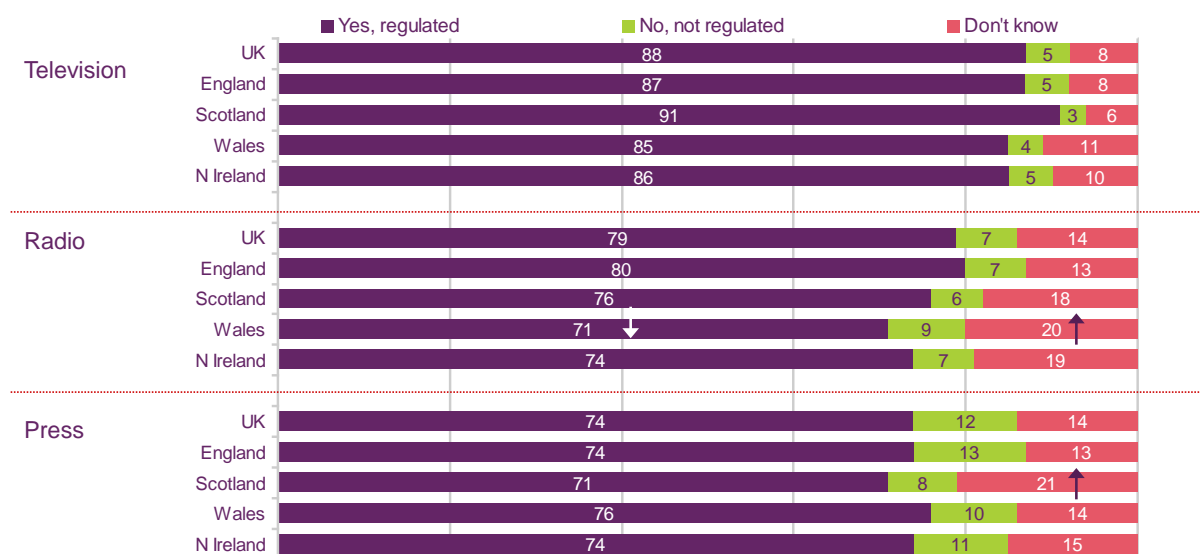
T3/ IN32- How would you say BBC TV programmes are mainly funded? / How do you think the BBC's website is mainly funded (unprompted responses, single coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 10: Awareness of the main source of funding for commercial television programmes and search engine websites, by nation: 2014



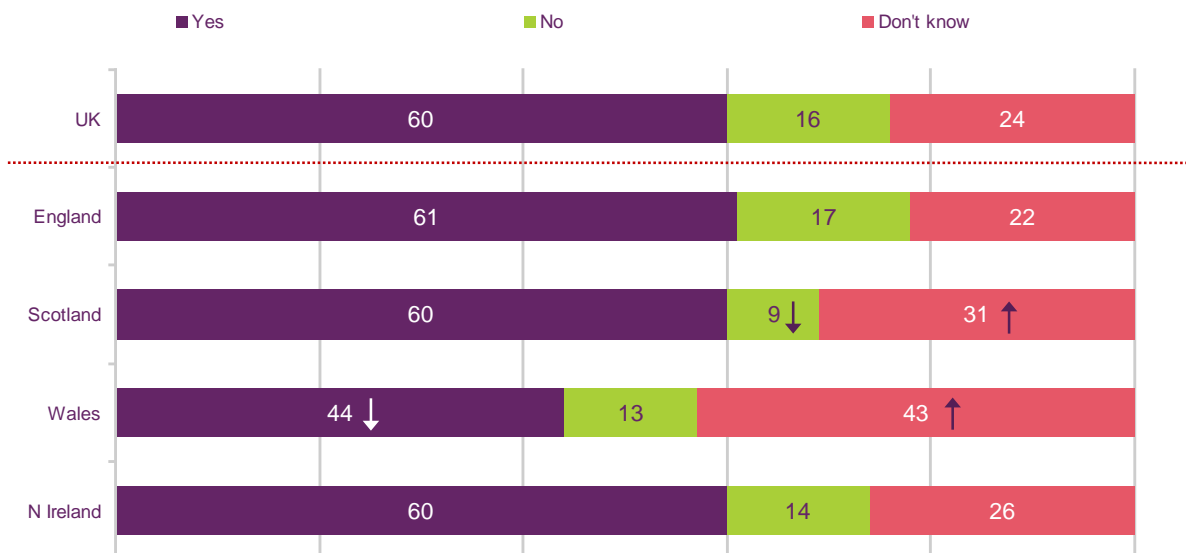
T4/ IN33 - How would you say programmes are mainly funded on ITV, Channel 4 and Five? / How do you think search engine websites such as Google or Ask.com are mainly funded? (unprompted responses, single coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland). 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 2014

Figure 11: Belief that content is regulated, by nation: 2014



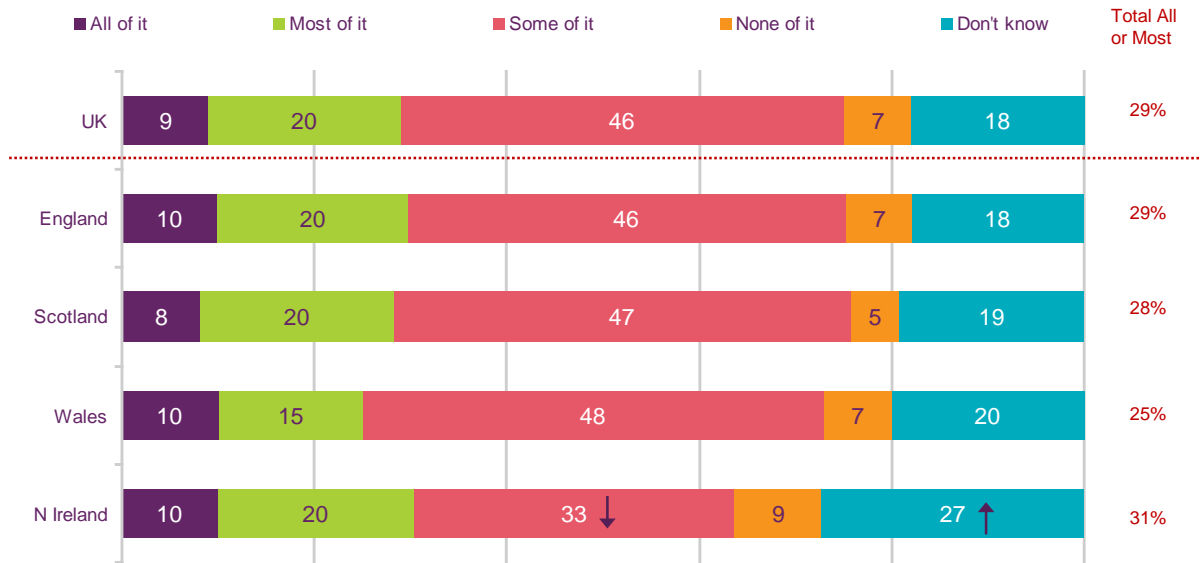
T6 / R4/ Z1 – As far as you know, are TV programmes regulated/is radio regulated in terms of what can be broadcast/ is the press regulated in terms of what they show and write (Unprompted responses, single coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern 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 2014

Figure 12: Awareness of rules and regulations relating to the content of games, by nation: 2014



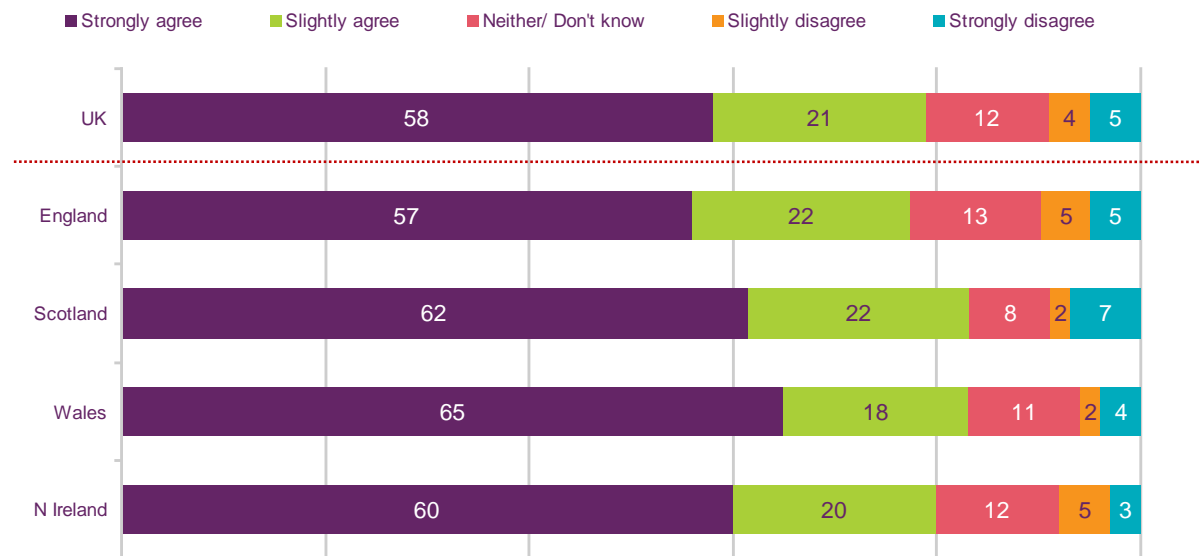
G4 - As far as you know, are there any rules or regulations in place about the content of computer games or online games and what age you have to be to buy them (unprompted responses, single coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 13: Opinions on extent to which online content is regulated, by nation: 2014



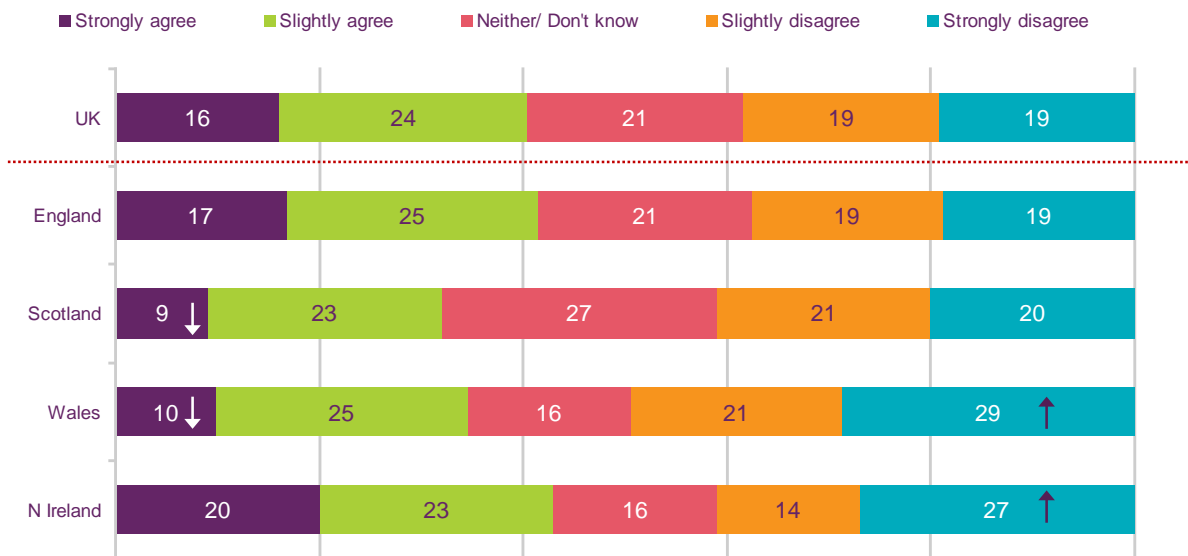
IN36 - As far as you know, how much of what can be seen or read online is regulated (prompted responses, single coded)
 Base: All adults aged 16+ (1890 UK, 1206 England, 229 Scotland, 229 Wales, 226 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 14: Extent of agreement that the internet needs to be regulated, by nation: 2014



IN35C - I'm going to read out some things that other people have said about being online. Please use this card to tell me the extent to which you agree or disagree with – The internet needs to be regulated in terms of what can be shown and written online (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 15: Extent of agreement “I should be free to say and do what I want online”, by nation: 2014



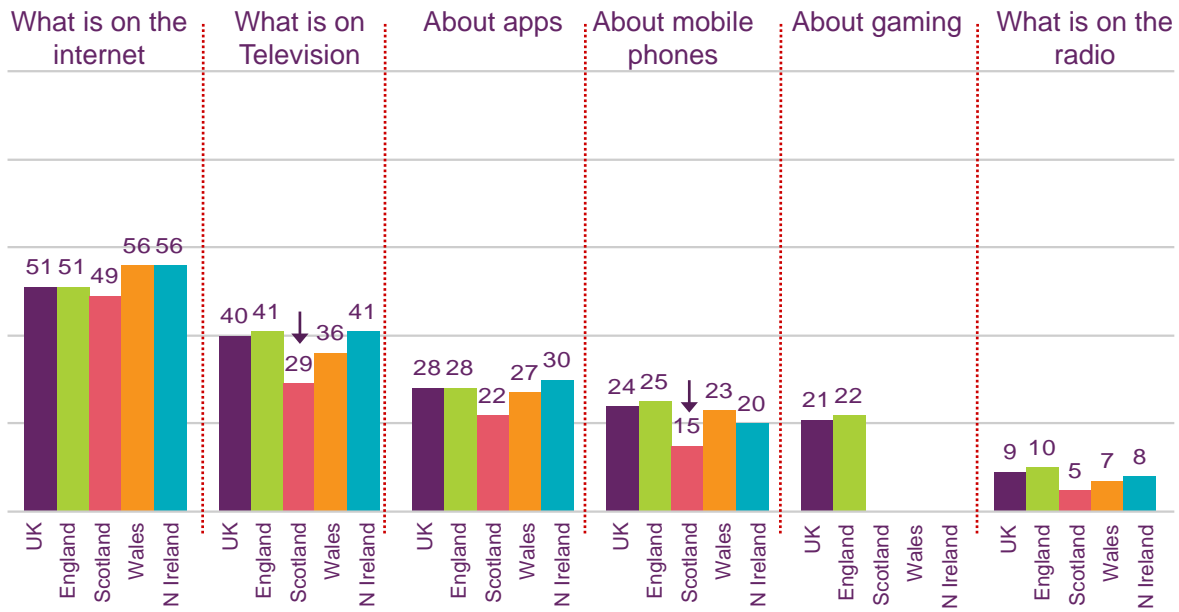
IN35A - I'm going to read out some things that other people have said about being online. Please use this card to tell me the extent to which you agree or disagree with – I should be free to say and do what I want online (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 16: Search engine users' attitudes towards the accuracy or bias of the websites returned by a search, by nation: 2014



IN45 – 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 (1516 UK, 965 England, 188 Scotland, 192 Wales, 171 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 2014

Figure 17: Concerns about key media platforms, by nation: 2014



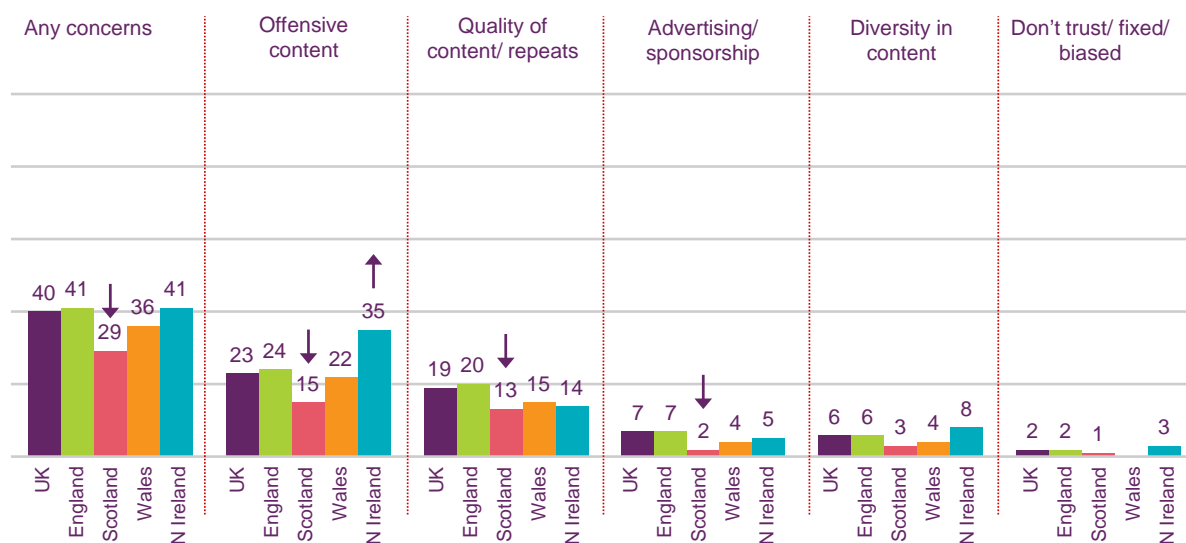
IN34/ T5/ R3/ G3/ M3/ IN23 – Can you tell me if you have any concerns about what is on the internet/ TV/ radio. Do you have any concerns about gaming/ mobile phones/ apps? (unprompted responses, multi-coded)
 Base: Adults aged 16+ who use each platform (variable base) – NB Data for gaming in each of Scotland, Wales and N Ireland cannot be shown due to low base sizes (<100 interviews).
 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 2014

Figure 18: Concerns about the internet, by nation: 2014



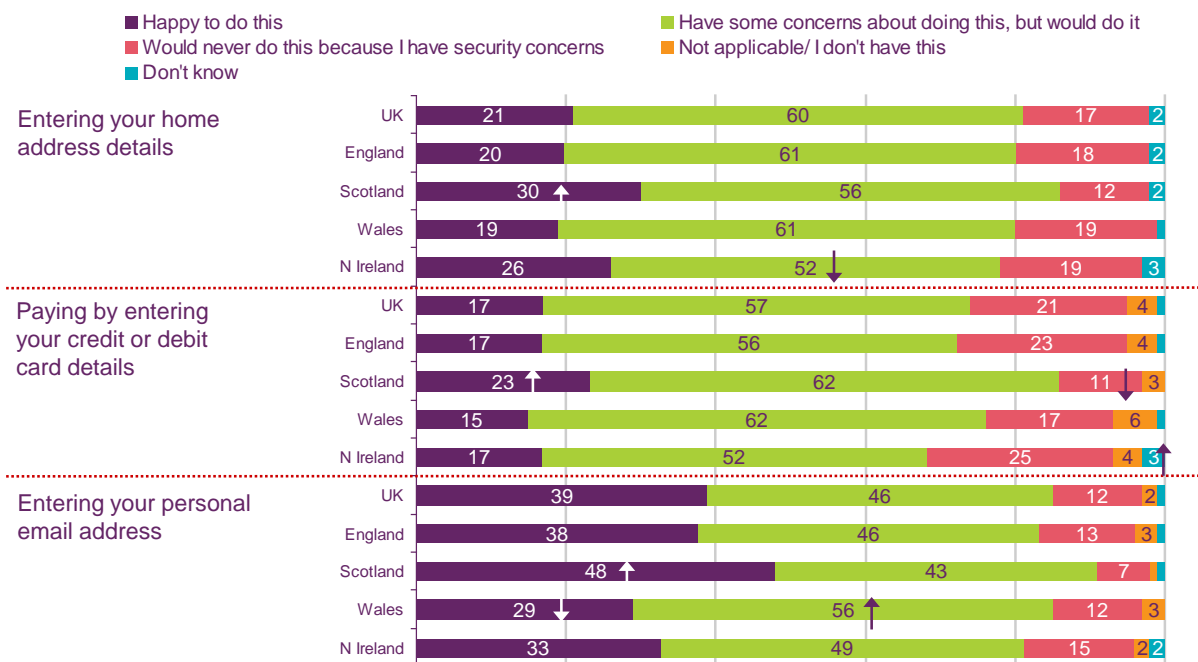
IN34 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland).
 Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 19: Concerns about television, by nation: 2014



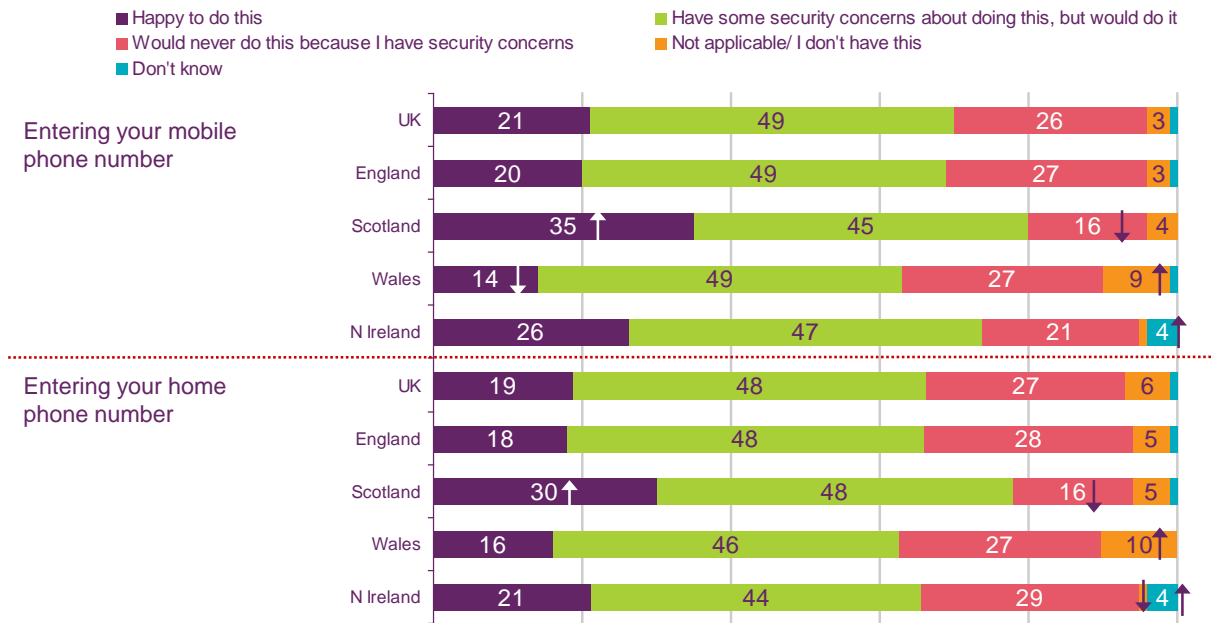
T5 – Can you tell me if you have any concerns about what is on TV? (Spontaneous responses, multi-coded)
 Base: All adults with any TVs at home (1846 UK, 1177 England, 228 Scotland, 217 Wales, 224 Northern Ireland). Significance testing shows any difference between any nation and the UK
 Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Figure 20: Personal details prepared to enter online, by nation (1-3 of 5): 2014



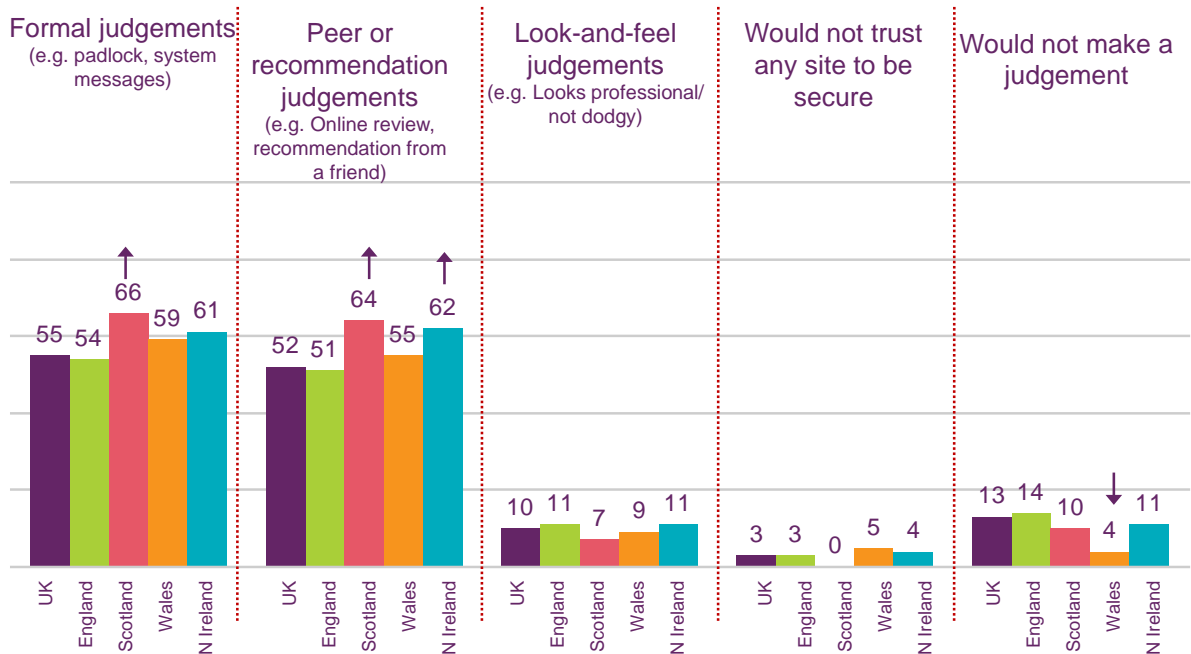
IN38B/ A/ E – I'm going to read out some types of information you could be asked to enter when you go online, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 21: Personal details prepared to enter online, by nation (4-5 of 5): 2014



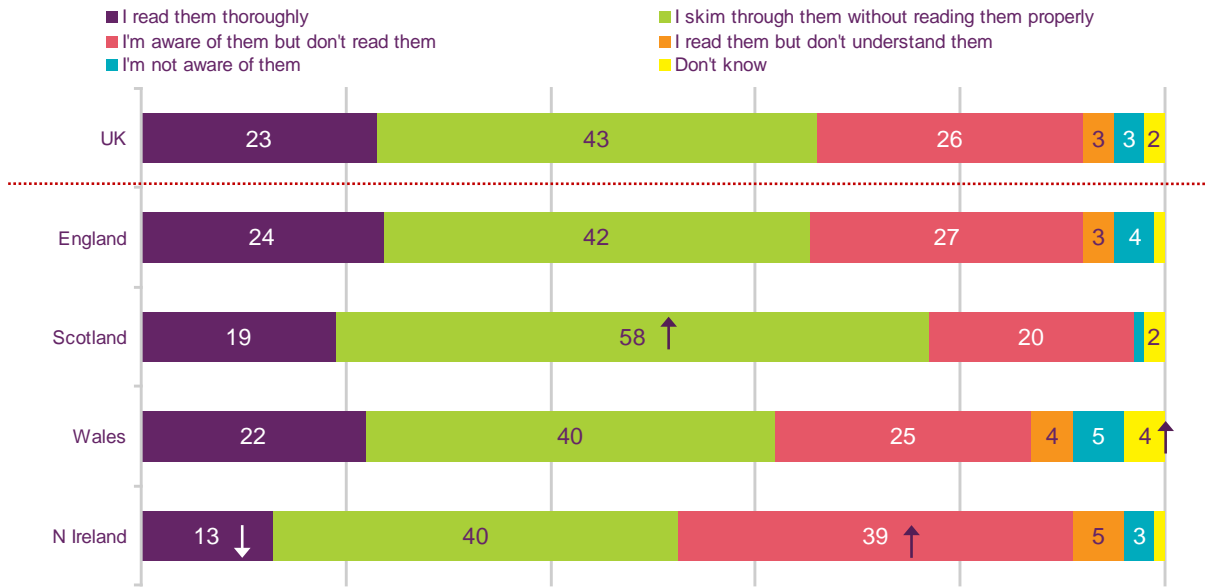
IN38D/ C – I'm going to read out some types of information you could be asked to enter when you go online, and for each one I'd like you to say how you would feel about doing this in terms of any security concerns. (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 22: Types of judgements made about a website before entering personal details, by nation: 2014



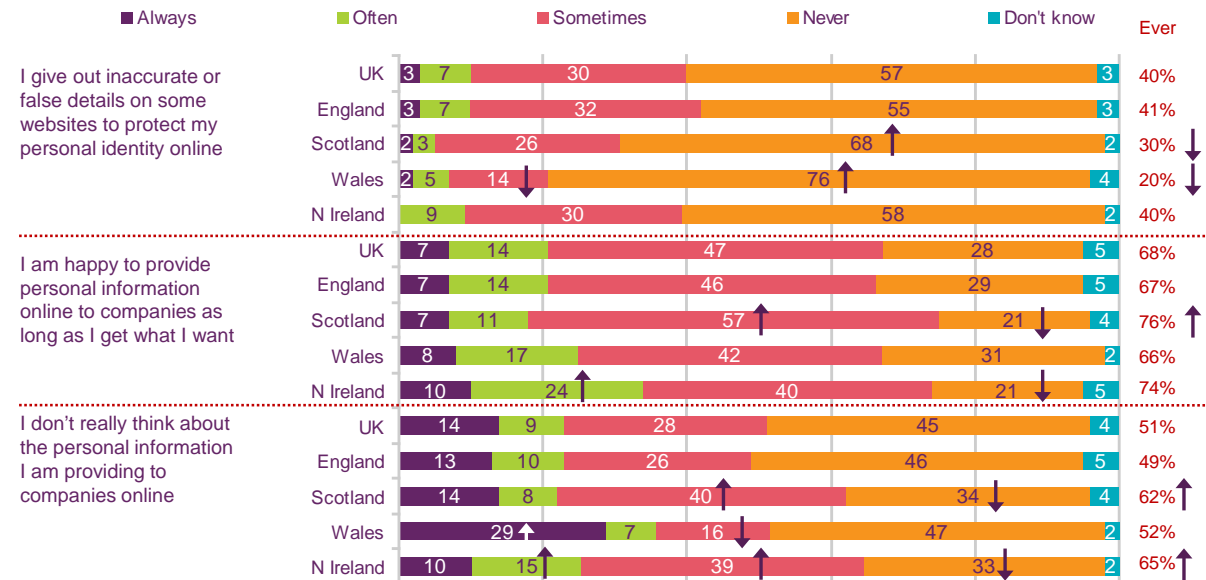
IN39 – Could you tell me whether you would make a judgement about a website before entering these types of details? (credit/ debit card details, home/ mobile number, home/ e-mail address) How would you judge whether a website is secure to enter these type of details? (unprompted responses, multi-coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 23: Awareness of, and reaction to, website terms and conditions/ privacy statements, by nation: 2014



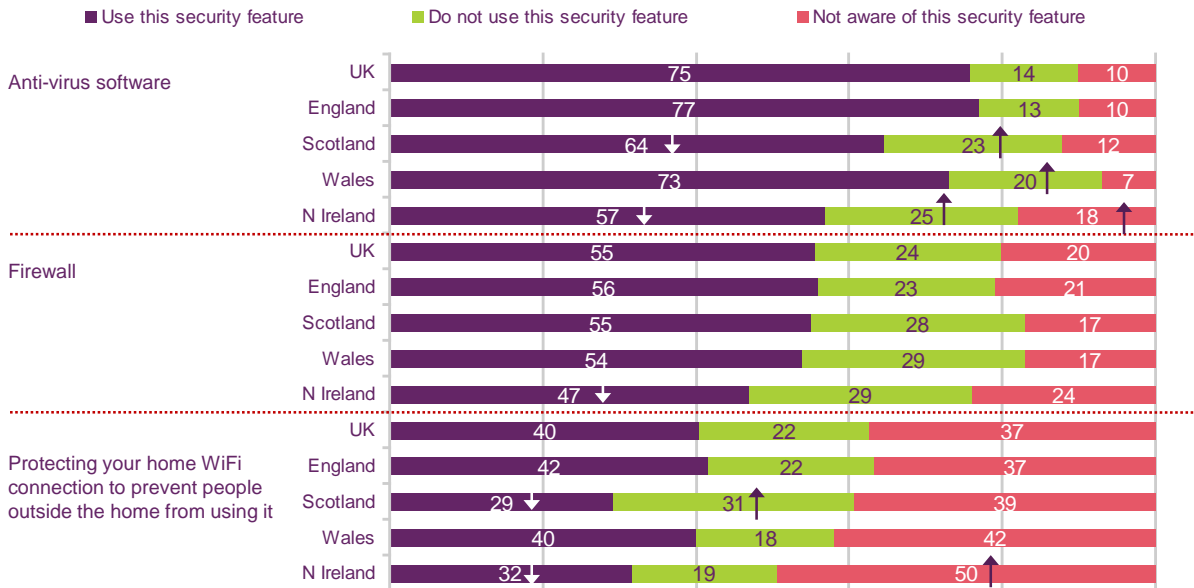
IN42 - There are a number of ways you can control who has access to and what is done with your personal information online. One way is to read the company's terms and conditions and/ or privacy statements to inform your decision about whether to use a website or service. Which of the following statements 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 (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014

Figure 24: Extent to which statement about providing companies with personal information applies, by nation: 2014



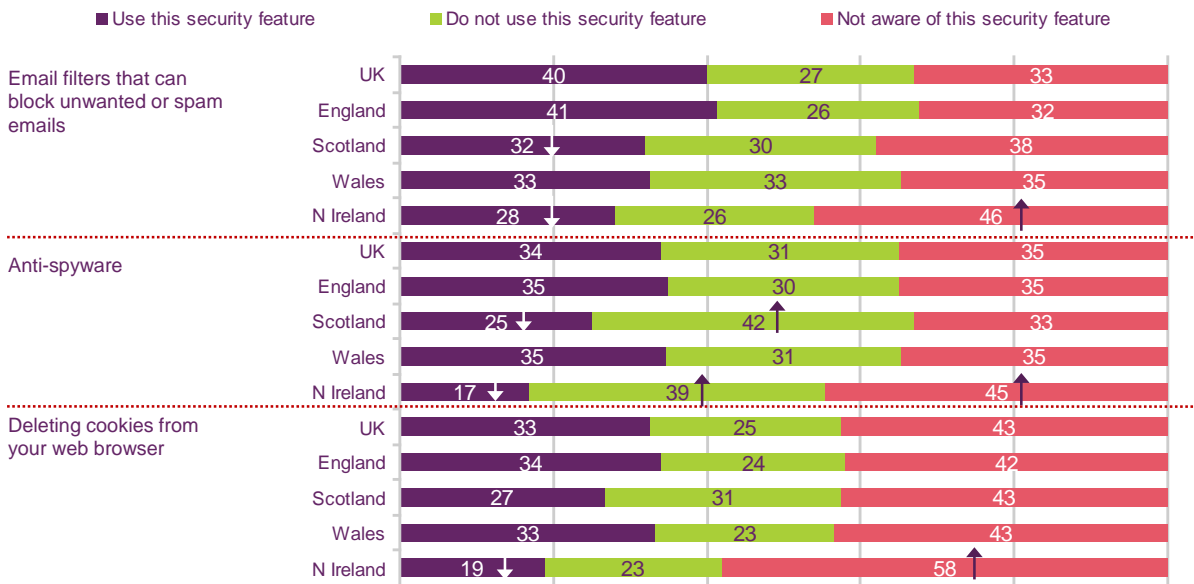
IN43A /C /D – Which of these best describes how you feel about providing personal information to companies or organisations online (prompted responses, single coded)
 Base: All adults aged 16+ who use the internet at home or elsewhere (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 Northern Ireland).
 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 2014

Figure 25: Security measures/ safety features installed on devices used to go online at home (1-3 of 6), by nation: 2014



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 any of the devices used to go online at home? (prompted responses, multi-coded)
 Base: Adults aged 16+ who use the internet at home (1573 UK, 994 England, 191 Scotland, 199 Wales, 189 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 2014

Figure 26: Security measures/ safety features installed on devices used to go online at home (4-6 of 6), by nation: 2014



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 any of the devices used to go online at home? (prompted responses, multi-coded)
 Base: Adults aged 16+ who use the internet at home (1573 UK, 994 England, 191 Scotland, 199 Wales, 189 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 2014

Figure 27: Experience of negative types of online activity in past 12 months, by nation: 2014

	UK	England	Scotland	Wales	N Ireland
Received spam or unwanted emails from companies trying to sell you something	49%	49%	54%	52%	28% ↓
Received emails or instant messages sending you to a 'phishing' site i.e. a website which asked for your personal details (such as your bank details, user name, password, etc.)	25%	26%	18% ↓	27%	18% ↓
Getting a computer virus on your home PC, laptop or netbook	23%	24%	13% ↓	20%	18%
Emails being sent from your email address or social media account without your permission	10%	10%	15%	6%	5% ↓
Seen something online that you consider to be nasty or offensive	10%	10%	7%	9%	6%
Someone accessing your email account or social media account without your permission	9%	10%	6%	9%	8%
Buying something online which wasn't what it was supposed to be (i.e. it was misrepresented/ got scammed or ripped off)	5%	5%	2%	4%	3%
Your credit card details or bank details being stolen after using them online	4%	4%	2%	4%	2%
Someone using any of your personal information online without your permission or knowledge (i.e. online identity theft)	2%	2%	2%	1%	1%
ANY OF THESE	62%	63%	61%	64%	48% ↓

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 (1609 UK, 1022 England, 194 Scotland, 200 Wales, 193 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 2014