

1. Executive summary

Media literacy is the ability to use, understand and create media and communications in a variety of contexts. Our 2017 Children's and Parents' Media Use and Attitudes report is part of Ofcom's media literacy research programme. It provides detailed evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as in-depth information about media access and use among children aged 3-4. It also includes data on parents' views about their children's media use, and the ways that parents seek – or not – to monitor or limit such use.

In 2017, the report includes findings from an additional online study was conducted with 500 children aged 12-15, which explored children's awareness, use and perceptions of content providers, and their interest in and ability to make critical judgements about news.

The report also includes results from the following research studies and analysis, in the Annex:

1. Analysis of children's television viewing habits sourced from BARB, the UK's television measurement panel, 2011-2016.
2. ComScore data on the frequency with which the most popular web entities among internet users were visited by children aged 6-14 in May 2017.

Published alongside this report is the Children's Media Lives 2017 qualitative research report.

This executive summary draws together findings from all these sources to provide an overarching narrative on children's media experience in 2017.

Media lives by age: a snapshot



3-4s

1% have their own smartphone, **21%** have their own tablet.

96% watch TV on a TV set, for around **15h a week**

41% watch TV on other devices, mostly on a tablet

40% play games, for nearly **6h a week**.

53% go online, for nearly **8h a week**.

71% of these mostly use a tablet to go online.

48% use YouTube, of which 52% of these say cartoons are their favourite thing to watch, 15% say unboxing videos.

0% have a social media profile.



5-7s

5% have their own smartphone, **35%** have their own tablet.

95% watch TV on a TV set, for around **13½h a week**

49% watch TV on other devices, mostly on a tablet

66% play games, for nearly **7½h a week**.

79% go online, for around **9h a week**.

63% of these mostly use a tablet to go online.

71% use YouTube, of which 30% say cartoons are their favourite thing to watch, 18% say funny videos or pranks.

3% have a social media profile.

The **TV set** is the device they say they would miss the most.



8-11s

39% have their own smartphone, **52%** have their own tablet.

95% watch TV on a TV set, for nearly **14h a week**.

55% watch TV on other devices, mostly on a tablet

81% play games, for around **10h a week**.

94% go online, for nearly **13½h a week**.

46% of these mostly use a tablet to go online, **22%** a mobile.

81% use YouTube, of which 23% say funny videos or pranks are their favourite thing to watch, 18% say music videos.

23% have a social media profile.

The **TV set** or **tablet** are the devices they would miss the most.



12-15s

83% have their own smartphone, **55%** have their own tablet.

91% watch TV on a TV set, for nearly **14½h a week**.

68% watch TV on other devices, mostly a tablet or mobile.

77% play games, for around **12h a week**.

99% go online, for nearly **21h a week**.

49% of these mostly use a tablet to go online, **26%** mostly use a mobile.

90% use YouTube, of which 26% say music videos are their favourite thing to watch, 23% say funny videos or pranks.

74% have a social media profile.

Their **mobile phone** is the device they would miss the most.

Overview of key themes

Traditional TV and YouTube both play important roles in a changing viewing landscape, but some children feel that there is not enough content that reflects their lives

Live viewing on the TV set remains an important part of children's lives. The TV set is still used by more children than any other device for watching content, and most of this viewing is made up of live TV, with early evening family entertainment from the BBC and ITV dominating the top ten most-watched programmes among 4-15s. For younger children, TV on the TV set makes up the largest proportion of their media time, and although there has been a decline over the last decade in the number of hours children spend watching, 2017 has seen an increase in the number of hours parents of younger children say their child spends watching TV on the TV set.

For older children the picture is more mixed. The 12-15s who watch TV on a TV set spend nearly 14 and a half hours a week viewing, similar to younger children. However, this is part of their larger overall media consumption, and they spend more hours online and using their mobiles in a typical week than watching on a TV set. This age group are also most likely not to watch on a TV set at all: around one in ten 12-15s say that they don't watch any television on a TV set, higher than last year, while the number who say this is the device they mostly use to watch TV has decreased since last year to around six in ten.

This change in the habits of older children is part of wider changes in the media landscape. For example, more 3-11s are online than in 2016, with much of this growth coming from increased use of tablets. Unsurprisingly, tablets and other portable, connected devices are also playing an important role in TV viewing, with increases in the numbers of children who ever watch TV on a device other than a TV set, and nearly a quarter of 12-15s mostly watching on either a tablet or a mobile phone.

The other important factor in the changing content consumption landscape is YouTube. Double digit increases this year mean that half of 3-4s and more than eight in ten 5-15s now use YouTube. It is the most recognized content brand among 12-15s, and the one they are most likely to think includes their age group in its target audience, saying either that it is aimed specifically at their age group or at everyone. It is the one they would turn to first for all types of content they say is important to them, and the one they say they would miss the most if it was taken away. More 8-11s and 12-15s also say they prefer watching content on YouTube than TV programmes on the TV set. Some of what children are watching on YouTube includes whole programmes, but there is huge variety, and younger children are most likely to be using it to watch cartoons, mini-movies or songs, while older children are most likely to watch music videos and funny or prank videos.

Despite the wide range of available content and services, however, around a third of 8-11s say that there are not enough programmes that show children that look like them, and four in ten 12-15s say there are not enough programmes that show children living in the same part of the country as them.

TV is an important source of news for children, and is seen as more likely than social media to report the news truthfully

Around half of 12-15s say they are interested in the news, increasing to almost all 12-15s after prompting with a list of different types of news, including music, celebrities, sports and serious things going on in the UK and the world. TV is the most popular source of news among 12-15s, followed by social media and friends and family, and those who watch news on TV are more likely to say it is reported truthfully than those who get their news from social media.

News consumed online or via social media can be challenging to interpret, with nearly half of 12-15s who use social media for news agreeing that it is difficult to tell whether a news story is true, and two in five saying they have seen something online or on social media that they thought was fake news. However, most of those who use social media for news have strategies for checking whether a story is true, with the most popular approach checking to see if a story appears elsewhere, followed by looking at the comments to see what people had said about the story. The news brand was also important, with around a quarter looking to see whether the source of the story was trustworthy or whether they had heard of the organisation behind the story.

Children are adopting newer social media sites and services, but these can bring social pressure and parents are not always aware of the minimum age requirements

Almost a quarter of 8-11s and three-quarters of 12-15s have a social media profile. Although this is unchanged since 2016, the sites children use are changing. Fewer are using Facebook, and if they do, they are less likely to say it is their main profile. Snapchat has increased in popularity; the number saying it is their main profile has doubled since 2016. This is borne out in the qualitative research – Snapchat (and in particular Snapstreaks, where children send each other messages every day over consecutive days) is hugely popular across the sample. Other innovations are also catching on; one in ten 12-15s have 'gone live' by sharing a video using live streaming services such as Facebook Live, Snapchat's Live Stories or Instagram Live, while a third have not shared content themselves but have watched live streams.

However, social media can be difficult for children and parents to manage. One in eight 12-15s who say they use social media say there is pressure to look popular all the time, and parents aren't always aware of the minimum age requirements for social media sites. Close to two in five parents of 5-15s (38%) whose child has a profile on Facebook or Facebook Messenger are aware that 13 is the minimum age requirement for setting up a profile, with awareness lower among parents whose child has a profile on Instagram (21%), Snapchat (15%) or WhatsApp (7%).

Newer forms of online advertising can be hard for children to identify

The online world also brings other challenges, including a more complex advertising environment. While the majority of 12-15s are aware of personalised online advertising, and that vloggers may be paid to endorse products or brands, the qualitative research shows that they are not always able to identify this in practice, especially on social media when it looks similar to the other content they see. Similarly, while around half of 12-15s who use search engines understand that Google gets its

revenue from companies paying to advertise on the site, less than half correctly identify sponsored links on Google as advertising, despite these being distinguished by a box with the word 'ad' in it, and around a quarter of 8-11s and 12-15s believe that Google provides some kind of authenticating role, in that if a website is listed by the search engine then it can be trusted.

Some children report negative experiences online, although many are taking action in response

Almost all 8-11s and 12-15s who go online say they have been told how to use the internet safely. Nevertheless, going online can expose children to unwanted experiences: 17% of 8-11s and 29% of 12-15s who go online say they have ever seen something online that they have found worrying or nasty; 45% of 12-15s who go online say they have seen hateful content online in the last year¹, an increase since 2016; one in ten 12-15s have seen something online or on their phone of a sexual nature that made them feel uncomfortable; and 12% of 12-15s say they have been bullied on social media, equal to the number who say they have been bullied face to face.

Many children who have these types of experiences take action in response. Most 8-11s and 12-15s who go online say they would tell someone if they saw something worrying or nasty, with this most likely to be a family member. Around three-quarters of 12-15s are aware of online reporting functions, and one in eight who go online had used it to report something they had seen that was worrying or nasty. For hateful content, where the comments are less likely to be directed at the recipient personally, the most common response is to ignore it, followed by reporting it or commenting on it to say it was wrong. We also saw in the qualitative research that some children were prepared to use social media or other online forums to challenge comments that they thought were hurtful or hateful, and that many of the children saw social media as a powerful tool for spreading positive messages.

More parents than in 2016 are concerned about their children's media use, and more are taking action to protect their children online

Levels of concern among parents have increased; more parents than in 2016 are saying they are concerned about their child's media use across TV, online, mobile phones and gaming. Nevertheless, most parents continue to say that their child has a good balance between screen time and doing other things.

Perhaps prompted by these concerns, most parents have measures in place to manage their children's media use. They use a combination of approaches to mediate their child's access to and use of online content and services, including regularly talking to their children about staying safe online, using technical tools, supervising their child, and using rules. Sixteen per cent of parents of 3-4s who go online and 40% of parents of 5-15s use all four types of approach, and nearly all parents use at least one. The number of parents of 5-15s using network-level filters, which filter content on

¹ Children aged 12-15 were asked 'In the past year, have you seen anything hateful on the internet that has been directed at a particular group of people, based on, for instance, their gender, religion, disability, sexuality or gender identity? Examples of these sorts of things might be nasty or hateful comments or images that have been posted on social media, comments in response to an article that you read online, or videos posted on sites like YouTube.'

Children's and parents' media use and attitudes

all devices connected to the home broadband network, has increased since 2016; these are now used by around four in ten parents who have broadband and whose child goes online.