

# Making **sense** of media

Monday 25 April 2022

# Topics for today's session

1. Media behaviours and attitudes
2. Online knowledge and understanding
3. Digital exclusion

# Media behaviours and attitudes

Caroline Cason & Adam Capstick

# We adapted and expanded our research programme in 2021



Pre-2020	2020	2021
<b>Subject:</b> All topics <b>Fieldwork:</b> Sep - Nov <b>Sample:</b> 1,883 adults aged 16+	<b>Subject:</b> All topics <b>Fieldwork:</b> Oct 2020 – Jan 2021 <b>Sample:</b> 3,015 adults aged 16+	<b>Core survey</b> <b>Subject:</b> breadth of internet use, device use and attitudes <b>Fieldwork:</b> Oct – Dec 2021 <b>Sample:</b> 3,660 adults aged 16+
		<b>Online behaviour and attitudes</b> <b>Subject:</b> social media, gaming, online attitudes <b>Fieldwork:</b> Jun-Jul 2021 (W1) + Sep-Oct 2021 (W2) <b>Sample:</b> 6,566 adults aged 16+ (3,552 W1 + 3,014 W2)
		<b>Online knowledge and understanding</b> <b>Subject:</b> critical understanding, personal data, trust, advertising <b>Fieldwork:</b> Nov – Dec 2021 <b>Sample:</b> 3,095 adults aged 16+

**Colour key**

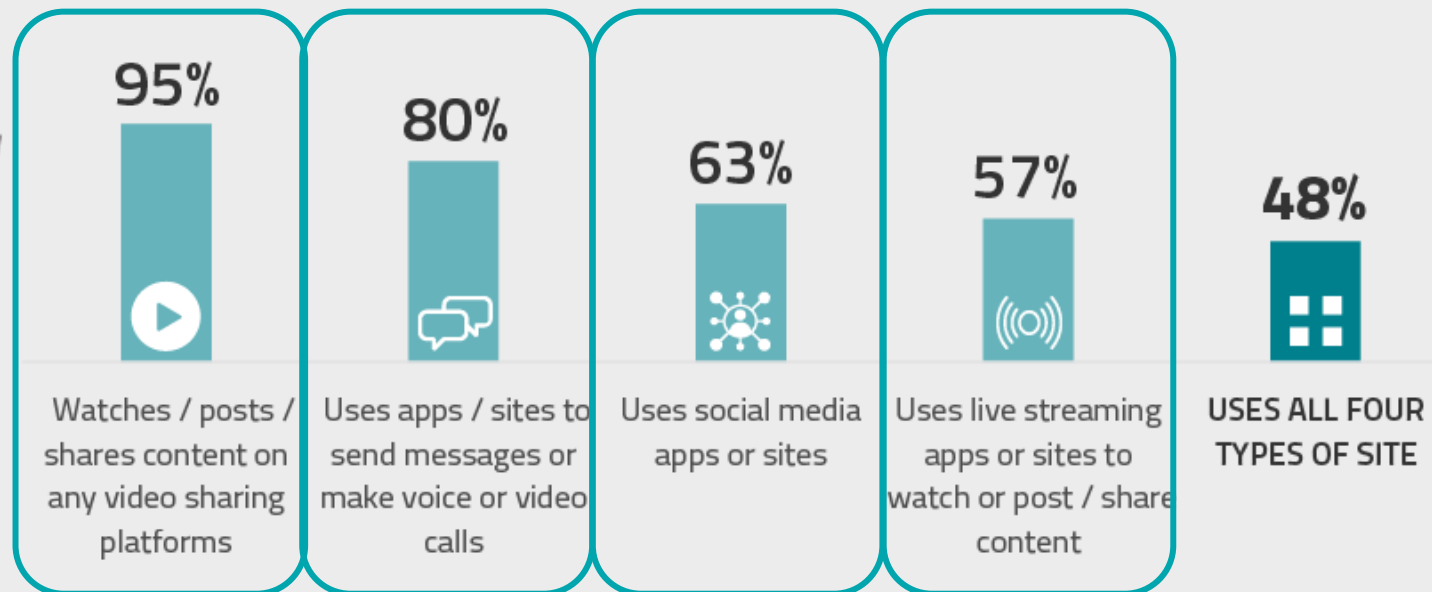
- Face-to-face only
- Online panel only
- Mixed post-to-web, post-to-paper & online panel

Pre-2020	2020	2021
<b>Subject:</b> All topics <b>Sample:</b> 3,243 children aged 5-15 & parents of children aged 3-15	<b>Survey 1</b> <b>Subject:</b> multiple topics inc. online and device access <b>Sample:</b> 2,972 children aged 3-15 & parents of children aged 3-15	<b>Parents only</b> <b>Subject:</b> parents' attitudes, concerns and mediation strategies <b>Sample:</b> 2,444 parents of children aged 3-17 <b>Fieldwork:</b> Post-to-web and online panels - Oct/Dec 2021
	<b>Survey 2</b> <b>Subject:</b> online activities <b>Sample:</b> 1,919 children aged 3-15 & parents of children aged 3-15	<b>Online behaviours and attitudes</b> <b>Subject:</b> online and other media use and attitudes <b>Sample:</b> 6,622 children 8-17 & parents of children 3-17 <b>Fieldwork:</b> Online panels - Jul/Aug and Sep/Oct 2021
		<b>Online knowledge and understanding</b> <b>Subject:</b> understanding of online platforms <b>Sample:</b> 2,113 children aged 8-17 <b>Fieldwork:</b> Online panels - Nov/Dec 2021

**Colour key**

- Face-to-face only
- Online panel only
- Mixed post-to-web & online panel

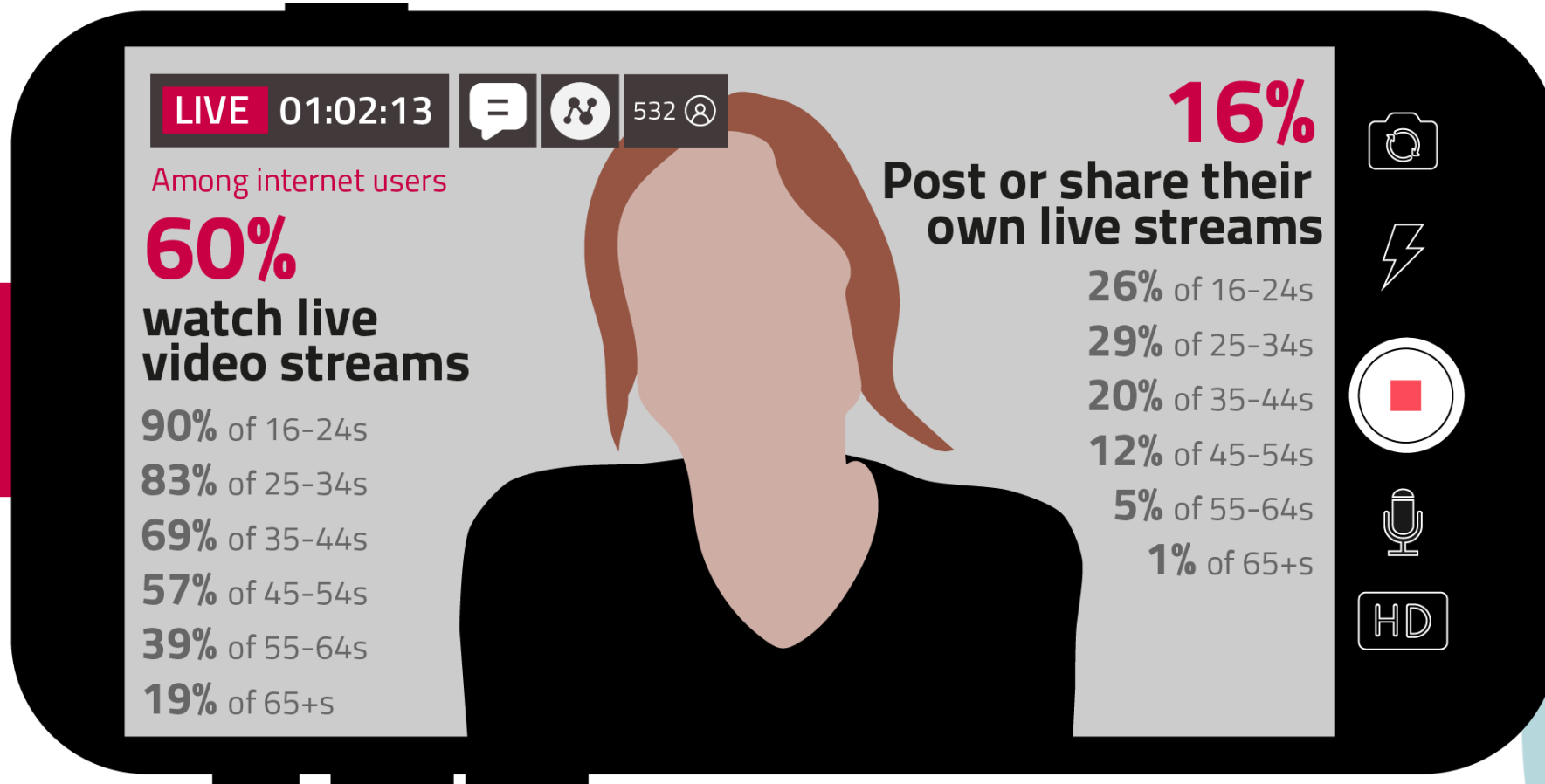
# Use of VSPs was the most prevalent activity among children



Aged 3-4	89%	50%	21%	32%	16%
Aged 5-7	93%	59%	33%	39%	25%
Aged 8-11	95%	84%	64%	54%	43%
Aged 12-15	98%	97%	91%	73%	70%
Aged 16-17	98%	99%	97%	79%	77%



# More than half of adult internet users watch live stream videos and it's a particularly popular media among 16-34s



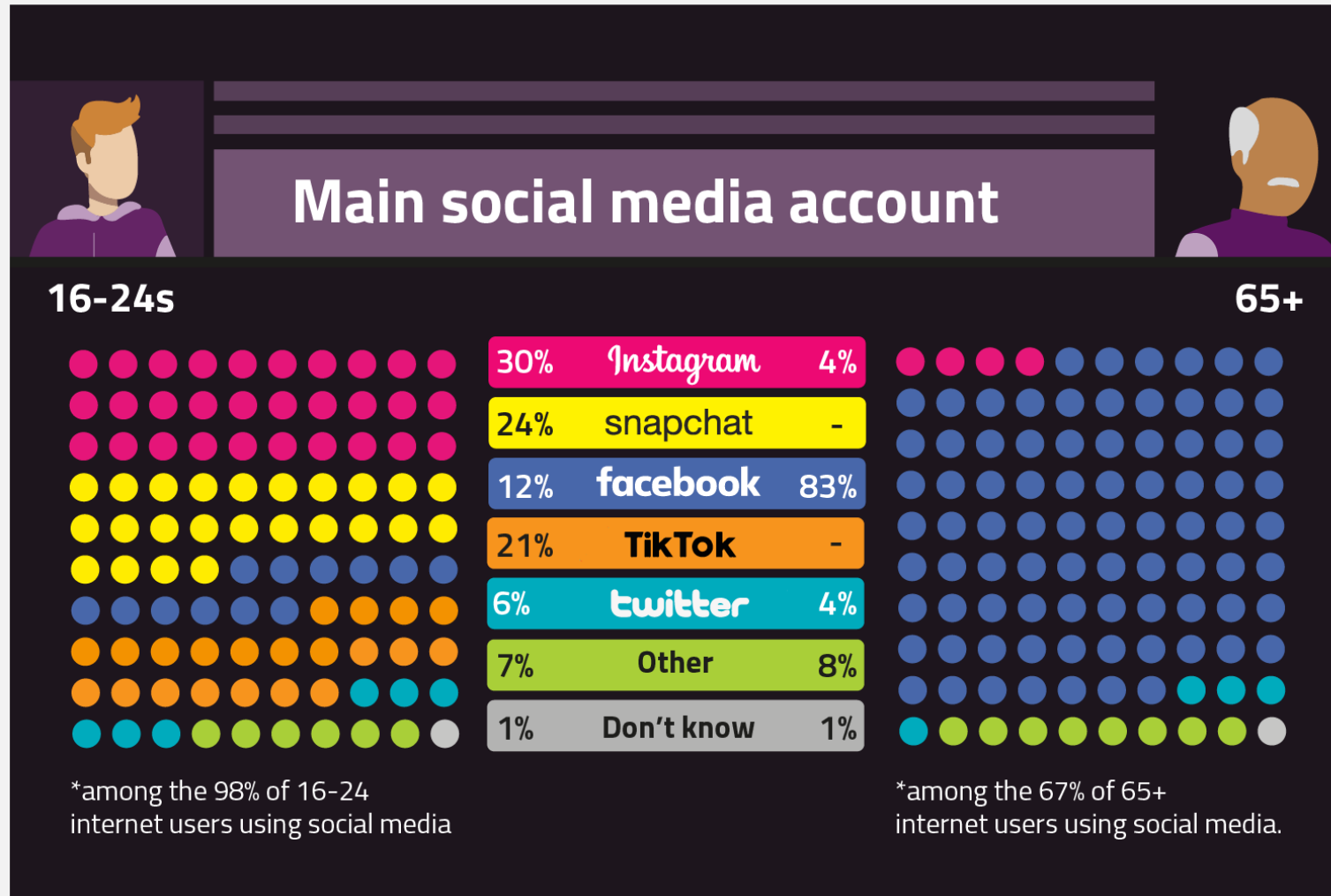
# Social media preferences vary significantly by age

8.7

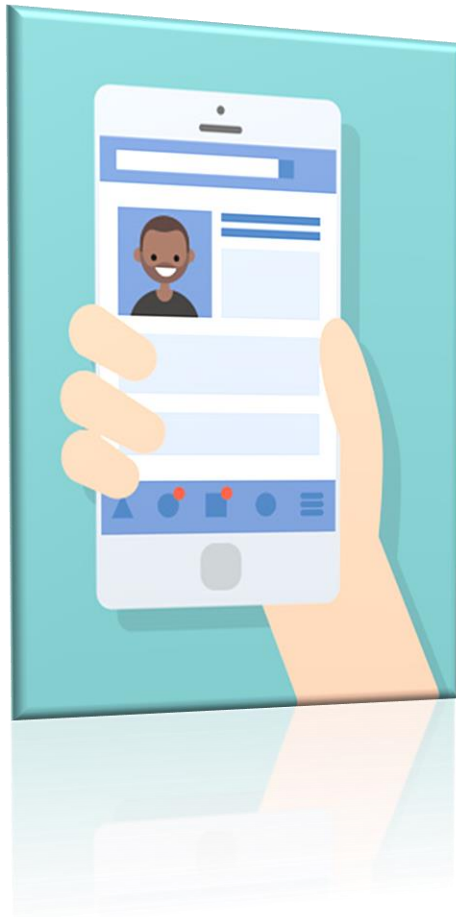
Average no. of  
online  
communication  
platforms used

3.0

Average no. of  
online  
communication  
platforms used



# Significant proportions of younger children have social media profiles



8-12-year-olds

60%

5-7-year-olds

33%

3-4-year-olds

24%

81% of  
parents  
aware of  
min. age  
requirement



58% gave incorrect  
age or did not know

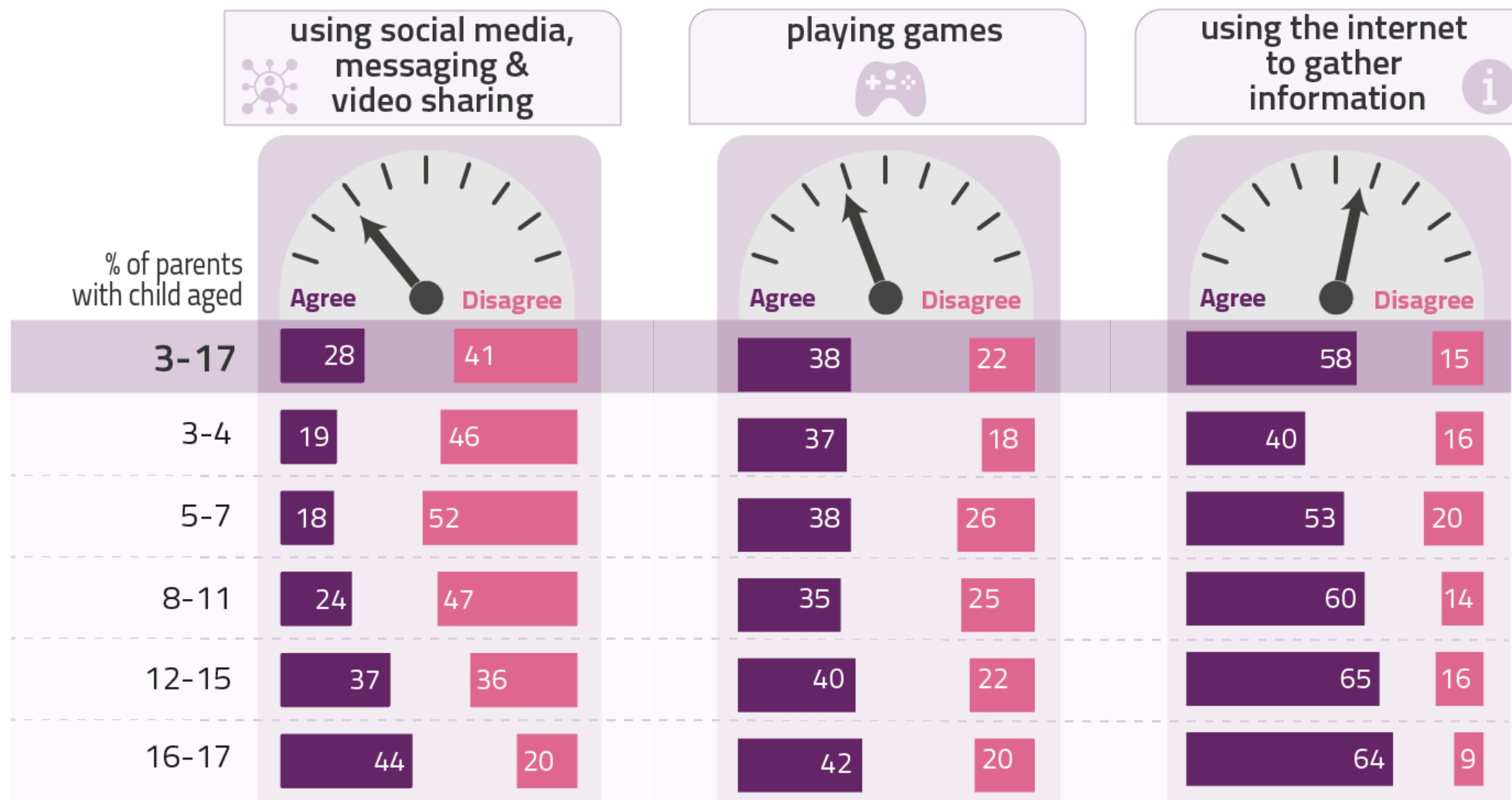
42% gave correct age  
of 13

31% of parents of 3-12 year-  
olds are willing to let their  
child have a profile while  
under age



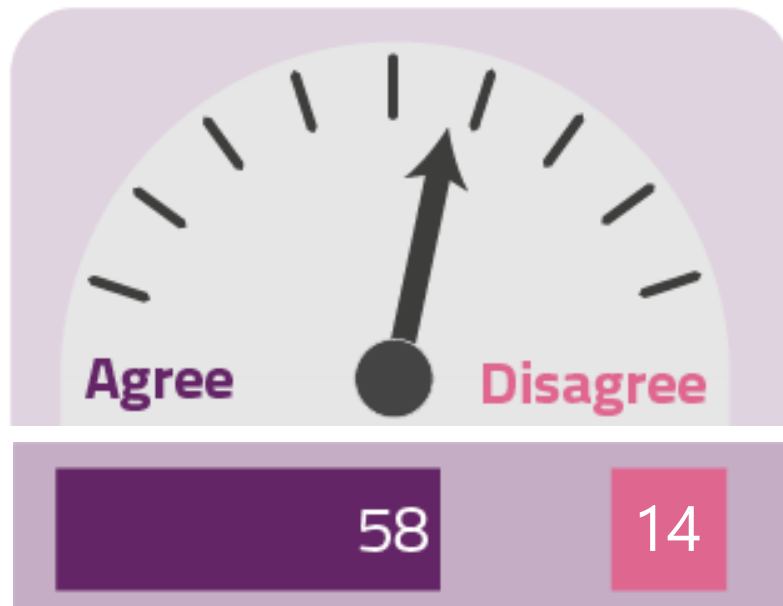


# Parents' agreement that the benefits outweigh the risks of child ...

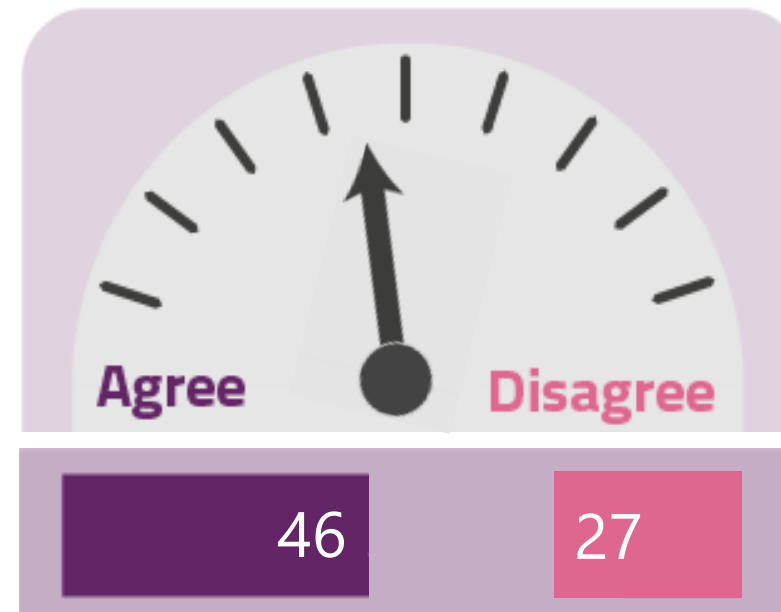


Most adult internet users agreed that the benefits of being online outweigh the risks, although some were cautious about the long-lasting consequences of what is said online.

“For me, the benefits of being online outweigh the risks”



“I worry about whether something I say online could cause me problems in the future”



# Gaming behaviours and preferences differed among men and women

## WOMEN

**56%**

Play games on any device

Most popular device

**41%**

Play on a smartphone

**34%**

Play online



more likely than men  
to opt for a game based  
around completing puzzles  
or quizzes

## MEN

**63%**

Play games on any device

Most popular device

**39%**

Play on a games console

**45%**

Play online



more likely than women  
to compete against others,  
follow a story or beat  
levels/challenges



# Children are more likely to be bullied via technology, than face-to-face

**84%**

Bullied via comms technology



(8-17s)

**61%**

Bullied face-to-face



**36%** seen worrying  
or nasty content online



(8-17s)

(12-17s)

**21%** use privacy/ incognito mode

**19%** delete history of sites visited

**6%** get around controls for restricted access

**5%** use proxy servers



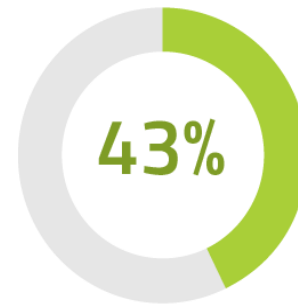
# Children aged 13-17 were more likely to feel positive, than negative, about being online



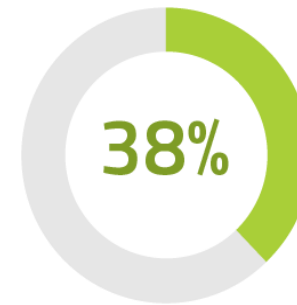
feel closer to  
friends/peers



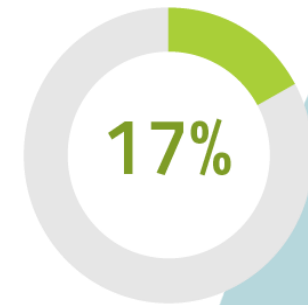
good for  
mental health



feel more  
relaxed



feel better about  
myself/improves  
self esteem



good for  
physical health



33%



33%



32%



26%



24%



21%



19%



12%



11%



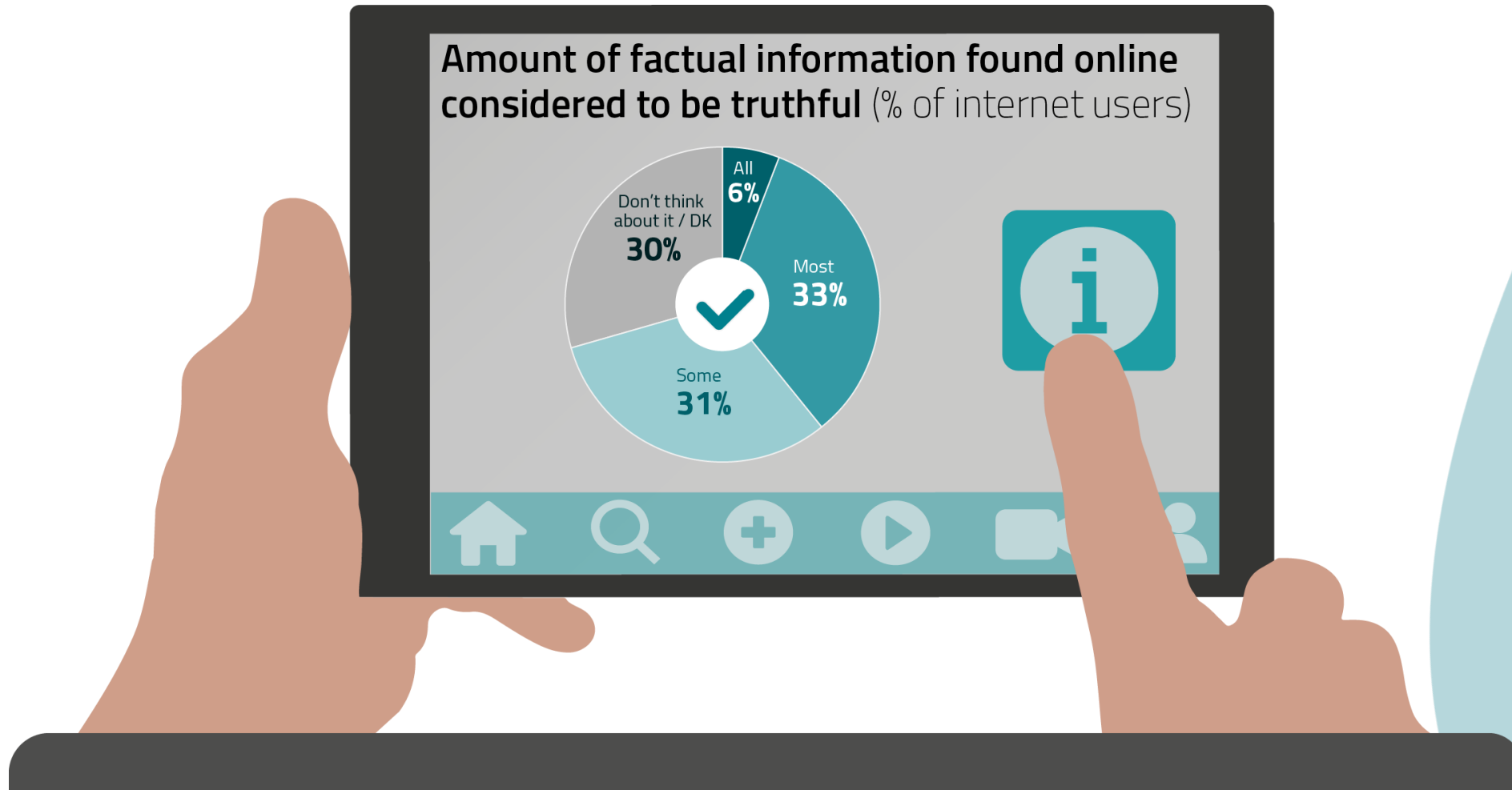
8%



# Online knowledge and understanding

Luca Antilli & Louisa Thompson

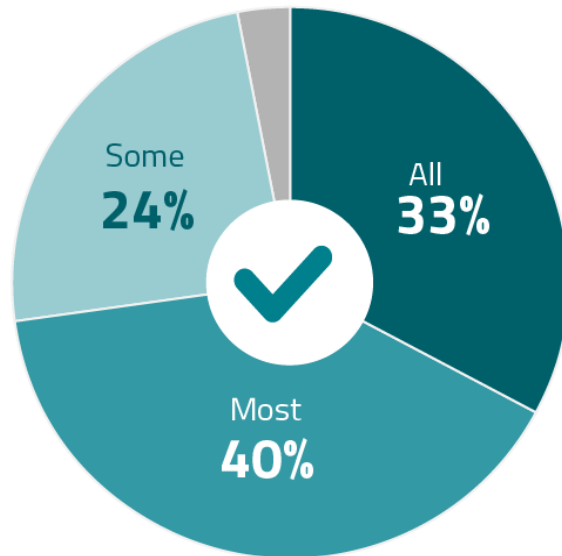
# Around a third of adult internet users were unaware of the potential for inaccurate or biased information online



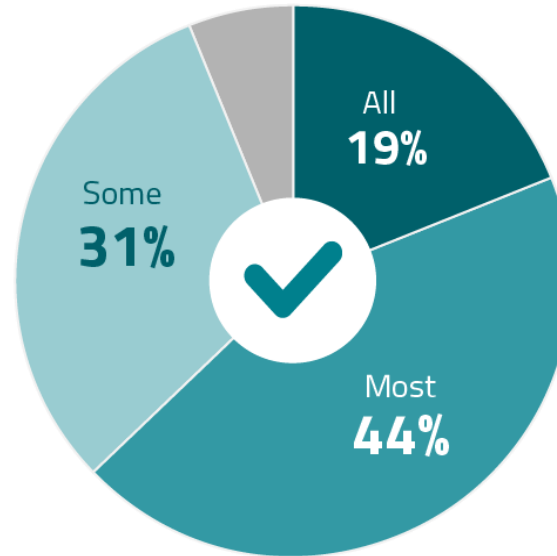
# Children are more trusting of apps and sites they use for school and homework than they are of news apps or sites and social media



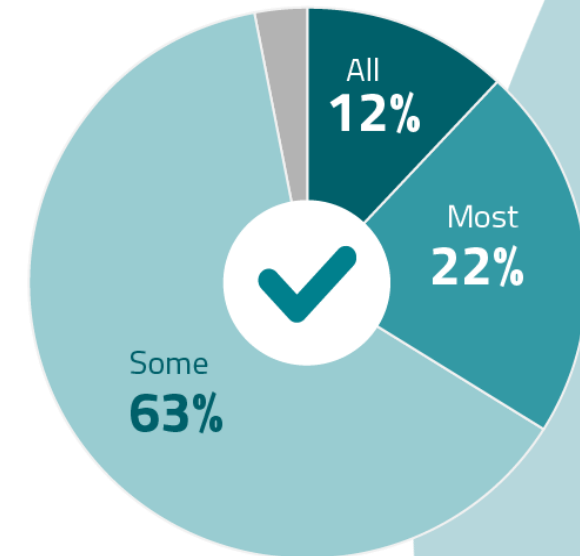
Apps or sites used for  
schoolwork or homework



News apps or sites



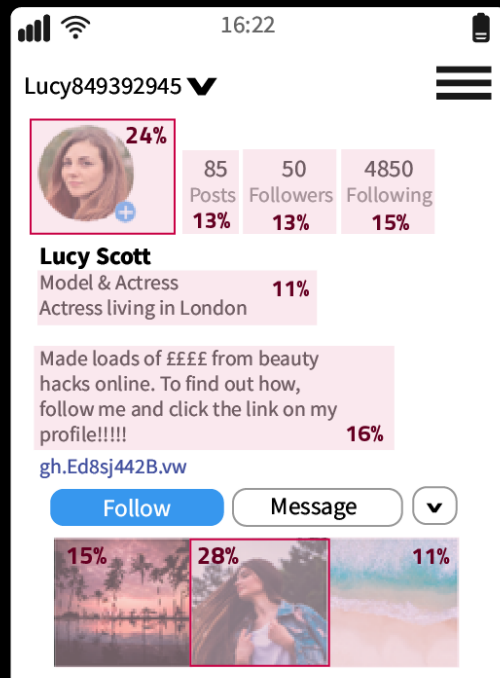
Social media



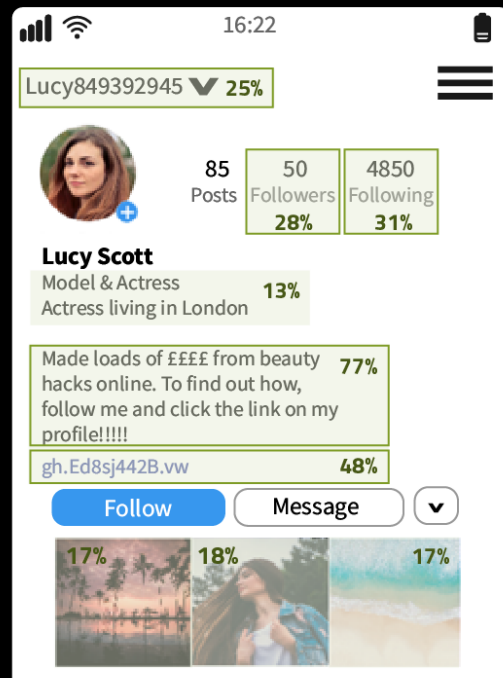


# Adults who were unable to spot a fake social media profile were more likely to consider the imagery when judging veracity

16% thought post was  
**GENUINE**



69% thought post was  
**NOT GENUINE**



**Confidence**

in judging what is true or false online

Among social media users

**24%**  
confident  
but not able

**55%**  
confident  
and able

**7%**  
not confident  
and not able

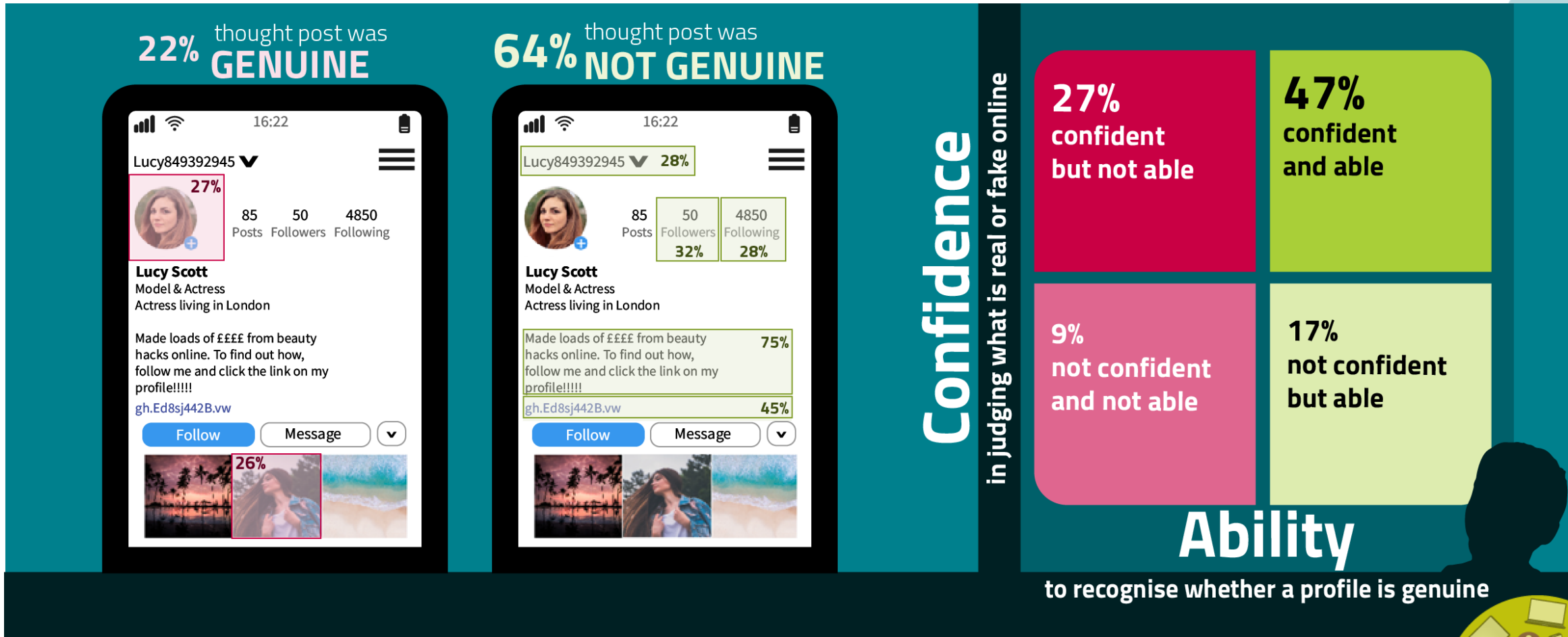
**14%**  
not confident  
but able

**Ability**

to recognise whether a profile is genuine



# Children were also more likely to consider imagery when assessing the profile



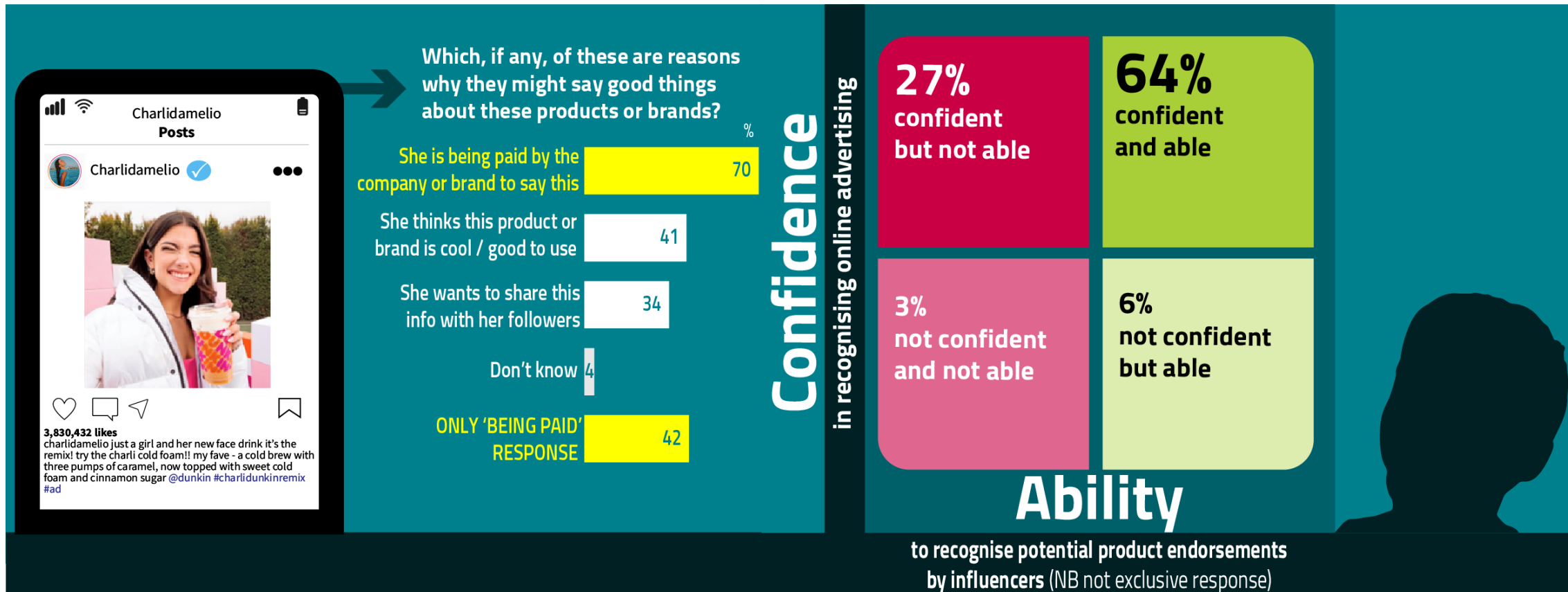
# Children also showed a confidence in recognising online advertising which was not matched by ability to identify sponsored search results



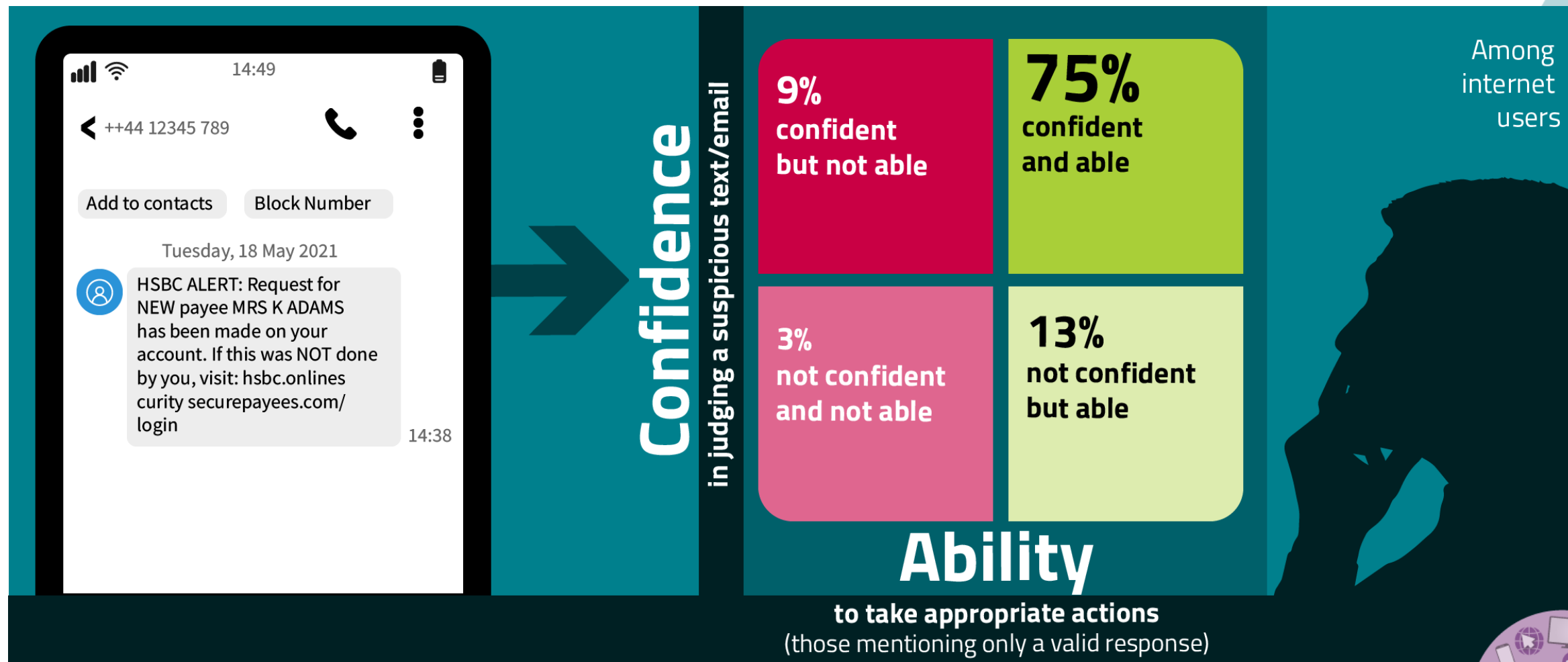
# There was a gap between adults' confidence in being able to recognise advertising online and actual awareness



# But the majority of children *were* able to recognise a commercial motive behind a sponsored Instagram post



# When judging suspicious messages, one in ten adult internet users claimed to be confident but did not take appropriate actions



# Digital exclusion

Eleanor Johnston & Caroline Cason

# Ofcom considers digital exclusion to have three aspects that are often intertwined

A

## Access

Those who are digitally excluded because they have no access to the internet at home or elsewhere.

A

## Ability

Those who lack the digital skills and/or confidence to navigate the online environment safely and knowledgeably.

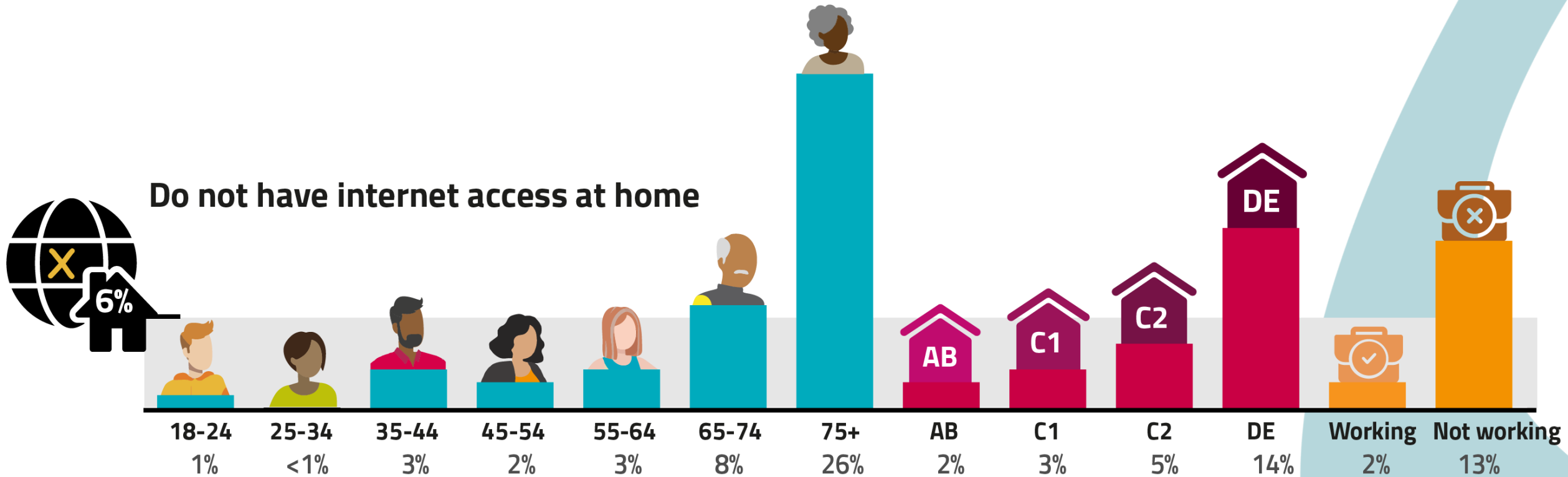
A

## Affordability

Those who struggle to afford access to the internet, and so either go without it, or experience other financial strains to retain access.



# 1.7 million households continue to not have internet access at home



# Proxy use remained an important gateway to completing online activities for half of those who did not use the internet at home

In the past year, have you asked  
someone else to do something  
for you on the internet?

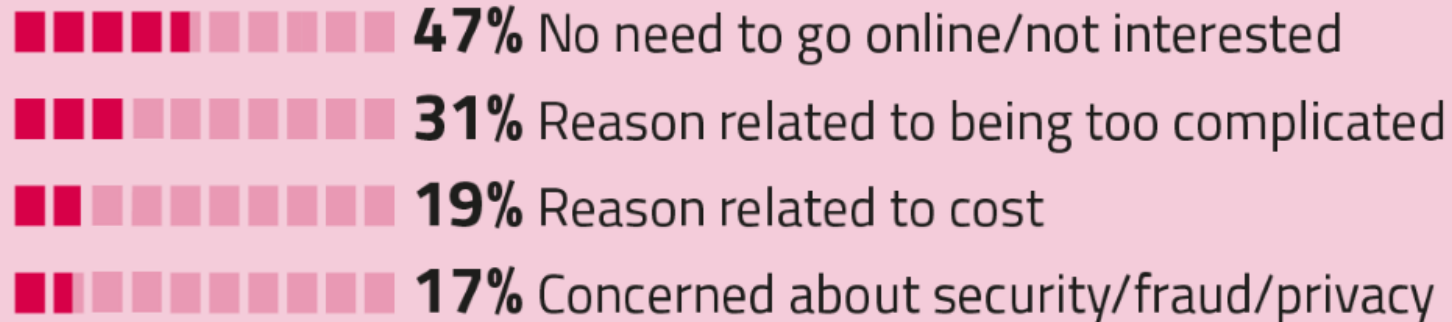
What did you ask someone else to do for you?

- Buy something / for shopping
- Access other public services provided  
by the Government or Council
- Access other information
- Access health services online
- Get in touch with someone
- Apply or claim for some type of benefit



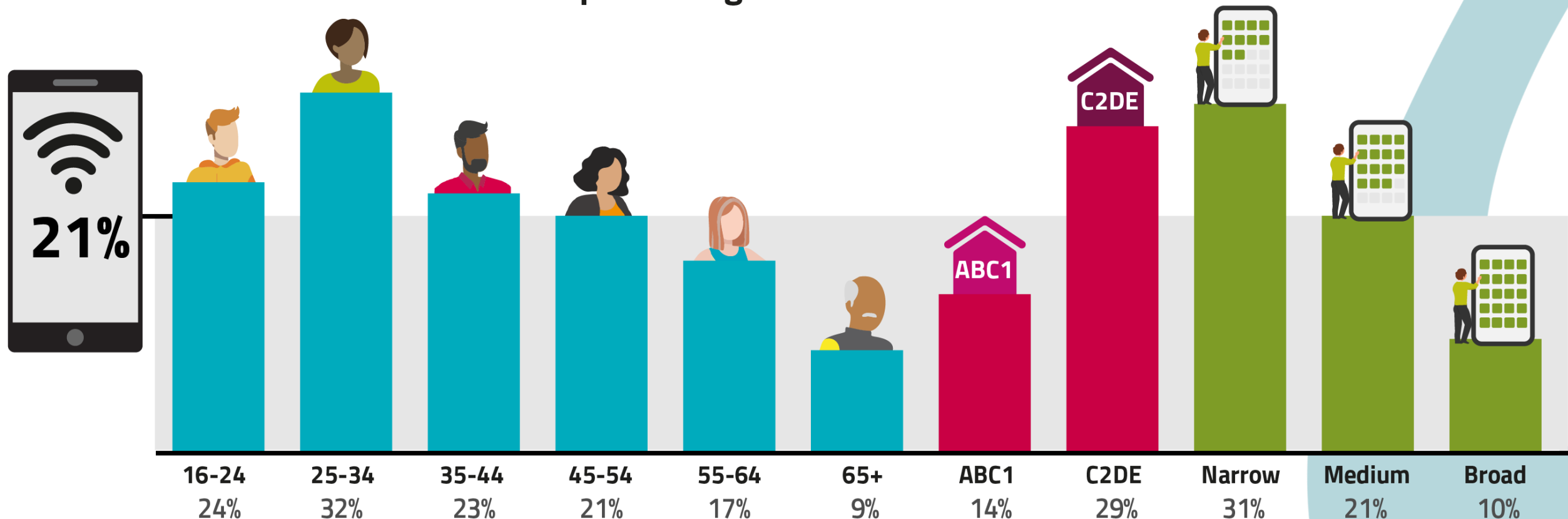
Half of those without home internet access were not interested in getting online, but other barriers included perceived complicatedness and cost

## Reasons for not having internet access at home



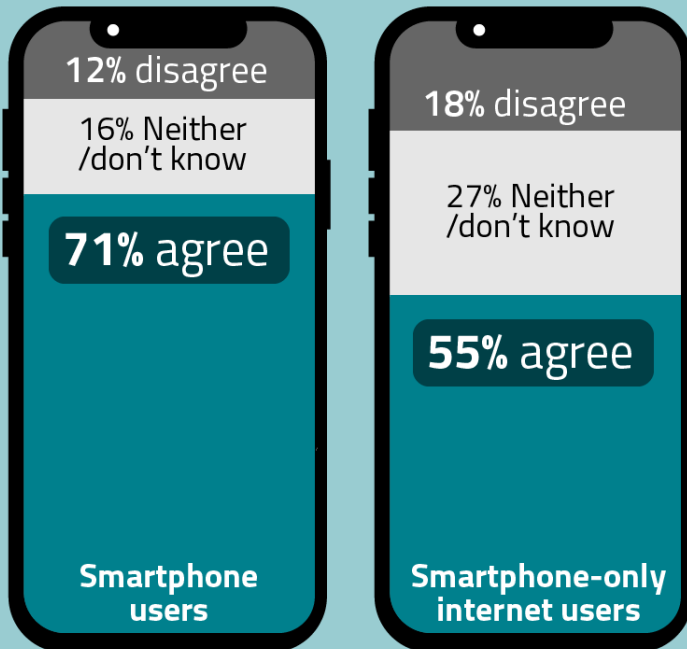
# One in five adult internet users were accessing the internet exclusively via a smartphone

Internet users who ONLY use a smartphone to go online

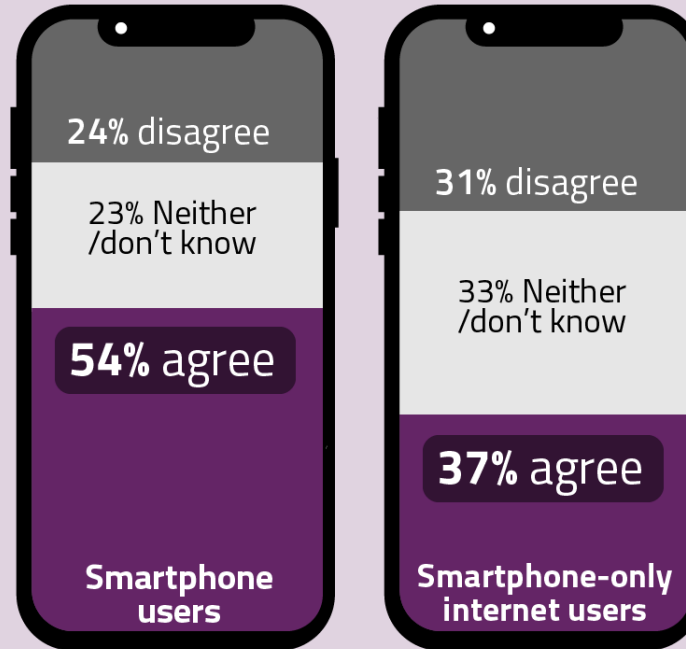


# Those reliant on smartphones as their only device to access the internet may find it difficult to use some online services

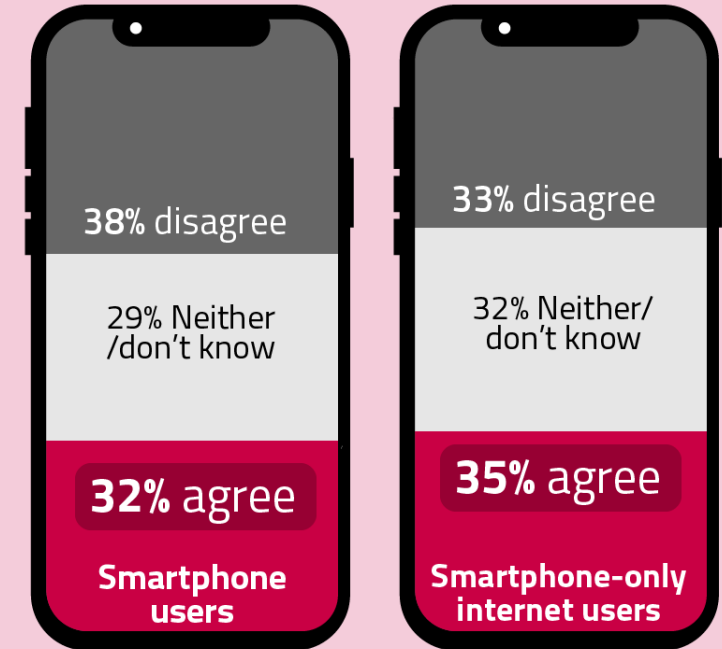
Completing forms and working on documents is more difficult on my smartphone than on a laptop or desktop



Comparing products or services online is more difficult on my smartphone than on a laptop or desktop

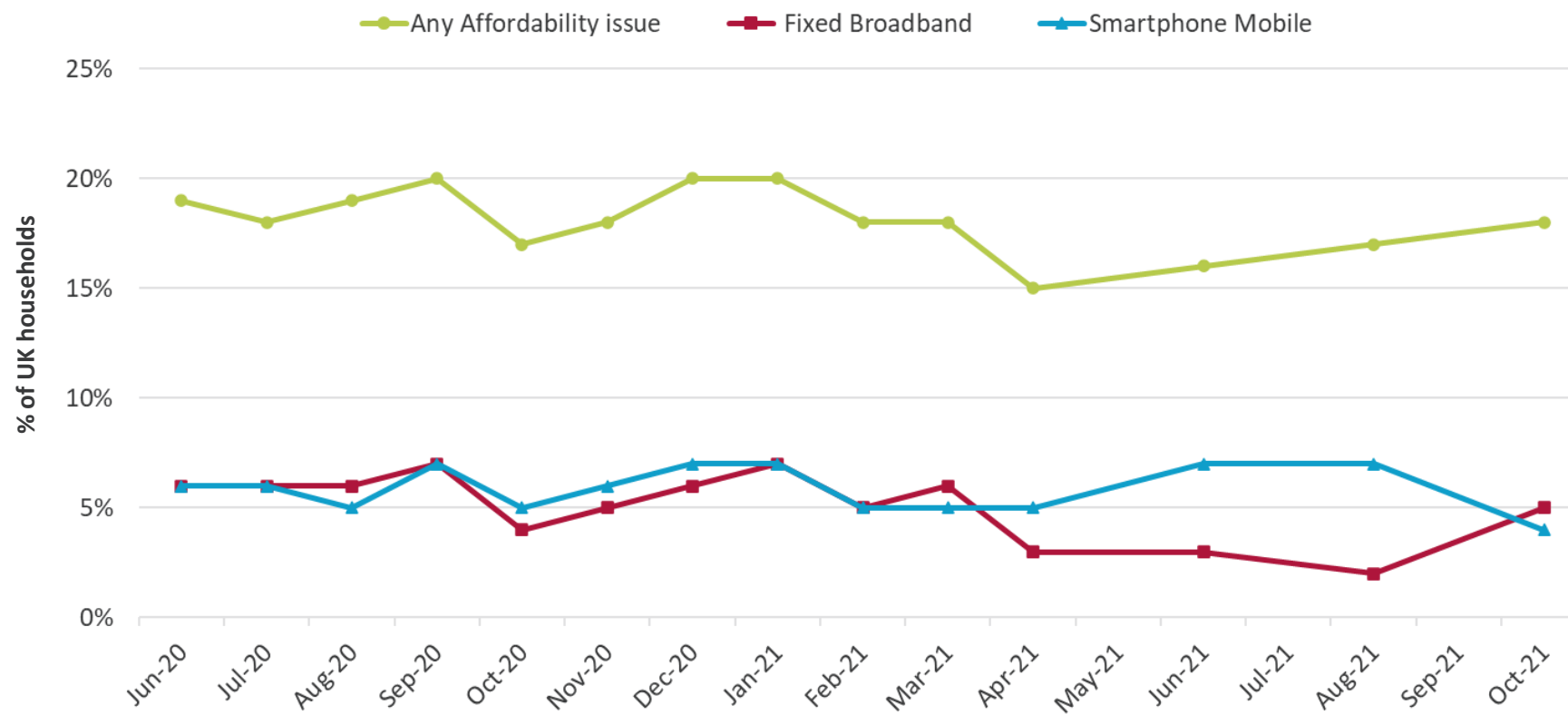


When I go online on my smartphone to complete tasks, I tend to do this as quickly as possible to avoid using up too much data



# Ofcom estimates that about 2 million households were experiencing affordability issues with either their fixed broadband and/or smartphone in October 2021

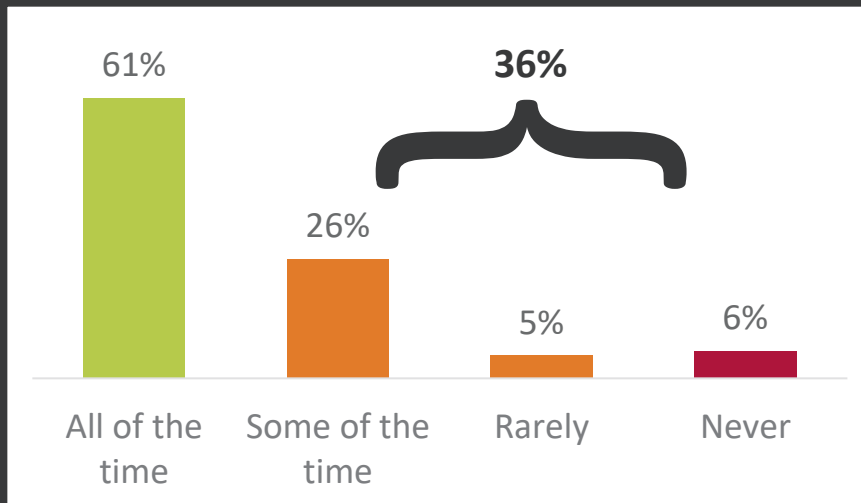
## Trend in experience of affordability issues



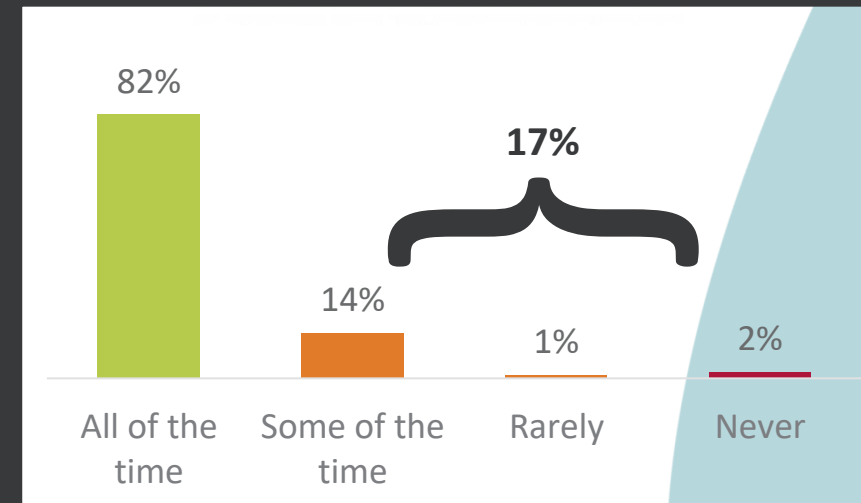
# Primary school aged children were less likely to have access to appropriate devices for home learning



**Primary age**



**Secondary age**



**65% shared a device**







## ADULTS' MEDIA LIVES WAVE 17: 2022

A report for Ofcom  
March 2022

Prepared by Mark Ellis

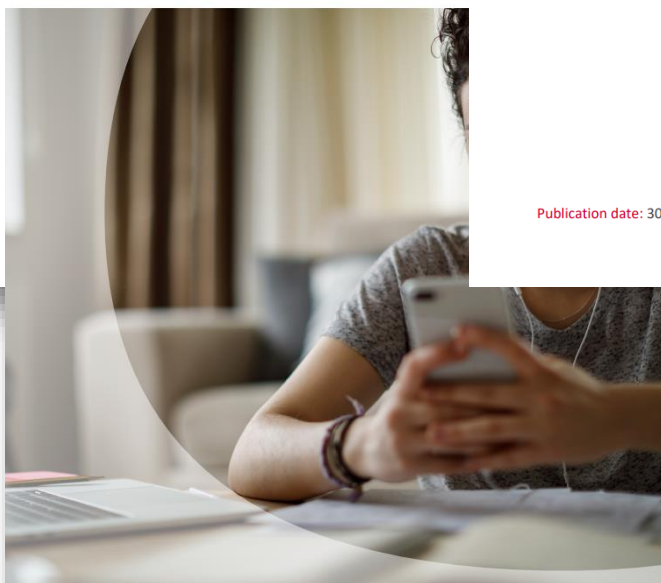
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### Adults' Media Lives and Attitudes



Welsh overview available

Published 30 March 2022



### Digital exclusion

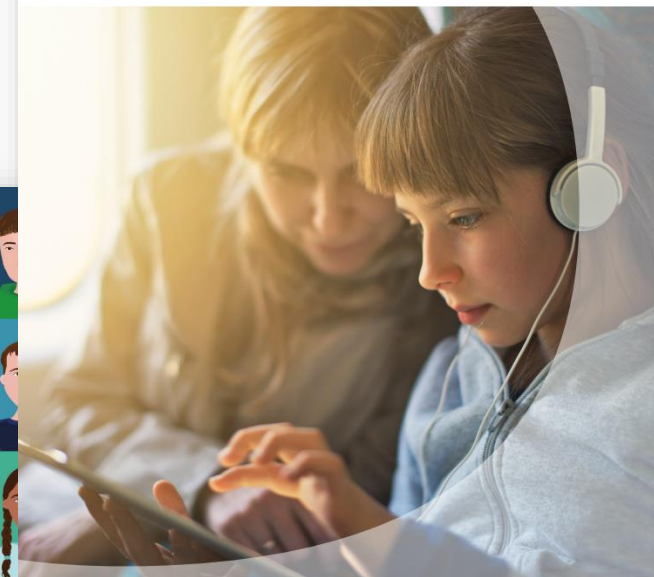
A review of Ofcom's research on digital exclusion  
among adults in the UK

[Digital exclusion review](#) – Welsh overview

Publication date: 30 March 2022



### Children and parents: media use and attitudes report 2022



Welsh overview available

Published 30 March 2022



### Children's Media Lives 2022

A report for Ofcom

REVEALING REALITY



# Making sense of media

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