
Ofcom's Children's Media Literacy Tracker

Consultation on proposed changes to future surveys
(2021 and beyond)

Overview

Background to our research

The Children's Media Literacy Tracker has historically been used to provide detailed evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as about the media access and use of young children aged 3-4. It also helps to provide evidence on parents' views about their children's media use, and the ways that parents seek – or decide not – to monitor or limit use of different types of media.

Up to 2019, the fieldwork was conducted once a year¹ via a face-to-face c. 30-minute CAPI² questionnaire. As a face-to-face survey, it crucially also measured the incidence of households that are not online or have limited access.

During 2020, due to the Covid-19 pandemic and following government guidelines, fieldwork could not be conducted via face-to-face methodology to protect the safety of everyone involved. Instead, the survey was split between a post-to-web³ methodology and online panels.

The media landscape is evolving, and so must our research and insight tools

Ofcom's legacy of media literacy data and insights, garnered through long-standing quantitative and qualitative studies, is a uniquely rich and robust resource for our internal and external stakeholders. Since we started tracking media behaviour and attitudes in 2005, the media landscape has changed dramatically, driven in particular by digital technology and access, and 'media literacy' as a concept now encompasses a broader range of everyday activities than ever before.

We believe it's time to refresh and future-proof our suite of research vehicles in the media literacy domain. This means that we are reviewing what we ask and how we ask it, and at the same time looking to make the most of new and emerging tools and techniques.

Our media literacy trackers form part of a wider set of Ofcom research activities to understand user's engagement with media online. As part of this broader work, and to support our work relating to our new duties to regulate video-sharing platforms, we are exploring new and innovative ways of measuring user behaviour and experience online. This includes exploring the benefits of automated research tools, as well as utilising a range of methodologies to ensure we have a rounded understanding of online user consumption and attitudes.

¹ Up to 2019, the face-to-face survey was conducted during April-June/July of each year.

² CAPI: Computer Assisted Personal Interview.

³ A post-to-web methodology involves a letter being posted out to the general UK population inviting parents of children aged 3-15 and their child (if aged 8-15) to complete an online survey each.

We must adapt our research to be more attractive, engaging and relevant to child participants

The current survey can take up to c. 30 minutes for completion, between parent and child (for the children aged 8+ taking part). We recognise that this can be too long a period to ask a child to participate, especially the younger age group of 8-11-year-olds. In our 2020 survey we addressed this by reducing the survey length to 15 minutes for those completing online. We will continue this approach as we adapt our research for the future.

We also appreciate that children's behaviours are increasingly online, with a vast variety of content available to entertain them. Therefore, to ensure participant engagement, we need to adapt our surveys to better reflect children's behaviour and maintain their attention.

But we must also ensure we capture the offline population

It is essential that at least an element of Ofcom's research into children's media literacy is fully nationally representative, and therefore able to capture those not online and provide a measure of digital exclusion among children. As such, we need to retain some face-to-face research (CAPI).

Considering the current situation with the Covid-19 pandemic, we will continue to monitor when it is safe for a face-to-face methodology to be put in place.

The changes will impact trend data but will provide more timely and relevant data

The Children's Media Literacy Tracker has provided trend data to help us understand children's use and understanding of media over time. By reviewing and refreshing our approach to this research, we will impact the ability to provide trend data to previous years.⁴

However, we strongly believe that it is imperative for us to collect and provide more timely, relevant and insightful data via the new surveys. Where possible, we will endeavour to provide indicative trend data from the outset, offering insight to the direction of trends compared to previous years.

⁴ The unavoidable change to methodology in 2020 (due to the pandemic) also means that, for the most part, we will also be unable to compare 2020 data to previous years. We will be evaluating the extent of this once all data is delivered in early 2021.

What we are proposing – in brief

We propose to make the following changes to the current annual face-to-face tracker:

- Split the existing Children's Media Literacy tracker into three shorter trackers; to be conducted via two methodologies across four waves of fieldwork per year:
 1. Core tracker: conducted face-to-face, once a year
 2. Digital literacy tracker: conducted via an online panel, once a year
 3. Social media tracker: conducted via an online panel, twice a year
- We will also include the 16-17-year-old age group in the surveys (currently the age range for child participants is 8-15).

Further information can be found in the rest of this document. If you would like any further information or if these changes will cause any problems for your organisation, please email market.research@ofcom.org.uk by 4pm on Wednesday 23 December 2020.

Proposed changes to the Children's Media Literacy Tracker, 2021 and beyond

Moving from one to three trackers

In this rapidly evolving environment, children's online behaviours and attitudes are constantly changing. We need to keep track of these changes and provide up-to-date insights. We believe this can be achieved by more frequent waves of fieldwork. Furthermore, given the breadth of topics we need to cover, and the need to keep the online trackers as short as possible to ensure participant engagement, we propose splitting the media literacy modules across three trackers. The naming of each tracker is not yet confirmed but are noted below as potential titles.

Details of the broad content of each tracker are noted later in this document.

a) **Core Tracker**

This will be conducted via a face-to-face methodology, ensuring to capture the offline population. This will include a set of standard key metrics to be measured once a year.

b) **Digital Literacy Tracker**

This will be conducted via an online panel, focusing on the critical understanding elements of children's media literacy. This will be measured once a year.

c) **Social Media Tracker**

This will be conducted via an online panel, focusing on social media, messaging, video-sharing platforms, live streaming and online gaming. Due to the rapid evolution of content and services, this tracker will be conducted across two waves a year to deliver more up-to-date data.

The review of our media literacy trackers aligns with the award of a new research contract from 2021 for the children's quantitative research, of which the successful supplier was announced in late

November 2020. As such, we are in the early stages of discussing with the research agency how best to achieve our research requirements going forward. This includes exploring the possibility of comparability of certain data across the new trackers, considering the different methodologies and sample sizes. This will be discussed further during our stakeholder reviews early next year.

Inclusion of 16-17-year olds in the children's research

In general, Ofcom's market research among adults starts at age of 16. However, UK children are (for the most part) still defined as children until they reach the age of 18.⁵ We are therefore going to expand our participant age range in the children's quant research to include 16-17-year olds from 2021.

This will mean we will continue to interview parents of the younger age groups (3-15s), but our child participants will now range from 8-17. This also aligns more closely with our qualitative research into children's media literacy, which interviews children from the age of 8-18.

Content of the trackers

It is important to note that although the frequency of fieldwork and the methodology of the surveys will change, the broad content of the current Children's Media Literacy tracker will remain but be spread across the new surveys.

The below graphics represent the topics to be included within each tracker; although please note that this is subject to change following stakeholder review and research agency guidance.

The question wording within each tracker will also be considered and reviewed with stakeholders, to ensure minimal impact to key metrics. Standard classification questions will also be included in each tracker: such as household demographics (size, income, country, region and urbanity) and demographics of each child participant (age and gender). This will allow us to analyse between geographic and demographic groups.

⁵ In England, Northern Ireland and Wales a child is someone who has not yet reached their 18th birthday. In Scotland, a child legally becomes an adult when they turn 16, but statutory guidance which supports the Children and Young People (Scotland) Act 2014, includes all children and young people up to the age of 18.

Core Tracker

This survey will focus on key metrics such as device and internet access and use.

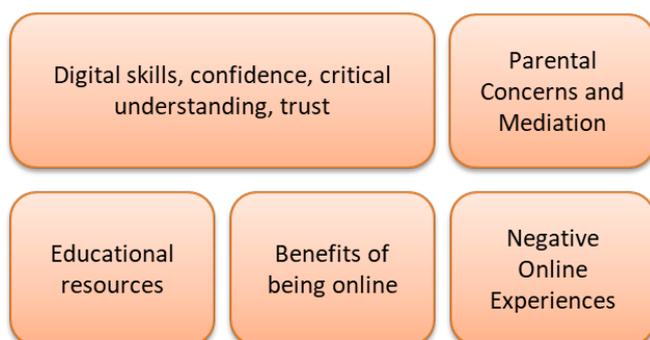


** We have suggested including these modules in both the face-to-face and online trackers, to be able to capture the attitudes and parental concerns of both internet users and those who are offline.*

*** TV consumption is a core part of children's lives, whether they have internet access or not. Therefore, we feel this should be included in the face-to-face tracker.*

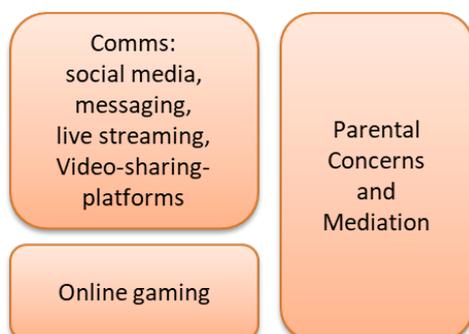
Digital Literacy Tracker

This survey will focus on critical thinking skills and understanding, attitudes towards media and online safety.



Social Media Tracker

This survey will focus on use of social media, messaging, video-sharing platforms, live streaming and online gaming.



Timeline

To address the need to be more sensitive to a very dynamic landscape, in particular around the constant changes in services and platforms used, we are planning to conduct four waves of fieldwork a year: one wave of the Core and the Digital Literacy Trackers, and two waves of the Social Media Tracker.

We will aim to produce interim data analysis throughout the year, to feed into a final report at the end of the year. However, note that this is still in discussion and subject to change as the project progresses.

Our proposed plan of fieldwork is laid out below.⁶ This takes into account the interviewing of children during term time (as per previous years); and to potentially produce a final report during the same year as fieldwork.



Stakeholder involvement

As in previous years, we greatly appreciate the advice and enthusiasm from our stakeholders as to the content of our surveys. We understand the importance that stakeholders place on our research and want to ensure that all are kept involved in the scoping of our new surveys.

With this in mind, arrangements will be put in place for stakeholder review to discuss, in detail, the survey content within the first quarter of 2021 (such as round-tables, and other forms of input).

⁶ In light of the Covid-19 pandemic, the conducting of the face-to-face core tracker will be dependent on guidance from the UK government and the Market Research Society. If this methodology cannot go ahead, we will review other potential methodologies for this year.