



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 2015 among 223 adults in Scotland, 225 adults in Wales, and 224 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. Please also note that market research surveys are subject to sample error and will occasionally report anomalous results.

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 indicated as such in the figures by arrows.

² Please see the separate reports for each nation from Ofcom's *Communications Market Report 2016* www.ofcom.org.uk/cmr for an overview of these differences.

1.1 Scotland

Key findings

Compared to all UK adults, in 2015 those in Scotland are:

- more likely to only use devices other than a desktop computer/ laptop to go online;
- less likely to have concerns relating to quality of TV programme content/ repeats.

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

- more likely to have ever gone online for three of the 35 activities asked about;
- less likely to mostly use a smartphone to watch short video clips online (such as on YouTube);
- more likely to read online reviews before purchasing a product or service;
- more likely to write online reviews after purchasing a product or service;
- more likely to have concerns about what is on the internet – particularly concerns about risks to others/ to society and security/ fraud;
- more likely to say they are happy to purchase through apps;
- more likely to agree strongly with the statement "I tend to use the same passwords online";
- less likely to use anti-virus software on devices used to go online at home; and
- less likely to recall receiving spam or unwanted emails in the previous 12 months.

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

- more likely to use their mobile phone to take videos, download apps, look at social media sites, upload or share videos/ photos online and to bank online.

Take-up and use

When asked which media device they would miss the most, four in ten (41%) of all adults in Scotland chose a mobile phone. Three in ten adults (31%) in Scotland said they would most miss the television set. All other devices would be missed by around one in ten adults or less: desktop PC or laptop computer (13%), tablet (5%), radio (4%) or books, magazines or newspapers (3%). There are no differences in the devices that adults in Scotland would miss the most compared to the UK average.

As shown in Figure 2, close to one in four (23%) adults in Scotland only use devices other than a desktop computer or laptop to go online. This is more likely than for the UK overall (16%). One in ten (9%) adults in Scotland only use a smartphone to go online; this is in line with the measure for the UK overall.³

The overall claimed volume of internet use per week among internet users in Scotland does not differ from the UK average (20.8 vs. 21.6 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 (13.1

³ Ofcom's key measures for take-up of media can be found in our annual CMR publication, at www.ofcom.org.uk/cmr

vs. 13.4 hours), in the workplace or place of education (5.4 vs. 6.0 hours) and elsewhere (2.4 vs. 2.2 hours).

When asked to think about 'most weeks when they go online', around two in five of all adult internet users in Scotland say they usually only use websites or apps that they've used before (40%), or 'maybe one or two' websites or apps they had not used before (44%). Sixteen per cent say they use lots of websites or apps that they haven't used before. Each of these measures are comparable to those for the UK overall.

Online activities

Internet users were prompted with a list of 35 online activities and were asked to say how frequently they undertook each of them. Eight activities have 'ever' been carried out by at least four in five internet users in Scotland: general surfing or browsing (94%), sending or receiving emails (91%), buying things online (86%), looking at social media sites or apps (84%), finding information for leisure time (83%), watching short video clips online (such as on YouTube) (82%), looking at news websites or apps (82%) and using instant messaging services (81%).

In 2015, compared to all UK adult users, there are no types of online activity that users in Scotland are less likely to have ever undertaken, and three activities that internet users in Scotland are more likely to have ever done:

- looking at social media sites or apps (84% vs. 76%)
- uploading or sharing videos or photos online (78% vs. 70%)
- online gambling (13% vs. 8%)

As shown in Figure 7, two of the 35 activities looked specifically at the frequency with which internet users watched video content online. As already mentioned, four in five internet users in Scotland have ever watched short video clips online (82%) and more than two in five (43%) do this at least weekly. Three in ten internet users in Scotland (30%) say they do this less frequently than weekly, but at least quarterly (every three months); this is higher than the figure for the UK overall (20%). Compared to those ever watching clips on sites like YouTube (82%) internet users in Scotland are less likely to say they have ever watched TV programmes or films online through broadcasters' services (66%), while three in ten (30%) say they do this at least weekly. Neither of these incidences for watching content through broadcasters' services differ from the UK overall figure.

Seven of the 35 activities that internet users were asked about can be grouped under the heading of 'accessing public or civic services online'. Eight in ten internet users in Scotland have ever looked for news about or events in their local area (79%). Around two in three internet users in Scotland have ever looked for public service information on government websites such as gov.uk and HMRC (69%), or completed government processes online such as registering for tax credits, renewing a driving licence, car tax or passport or completing a tax return online (66%), or looked for information on public services provided by the local council (66%). One in three internet users in Scotland say they have ever signed an online petition (35%) or looked at political or campaigning websites (35%) and 18% have ever contacted a local councillor or their MP online. The incidence of having ever undertaken each of the seven public or civic activities online, among internet users in Scotland, does not differ compared to the UK overall.

In 2015, internet users who undertook five specific activities online were asked to nominate the device they used most for each activity. A majority of internet users in Scotland (57%) said they mostly used a smartphone for social media, with less than one in five using a laptop/ netbook (17%) or a tablet (16%). One in ten internet users in Scotland say they

mostly use a desktop computer (9%). Internet users in Scotland who look at news websites or apps were also most likely to say they used a smartphone for this purpose (38%) followed by a laptop/ netbook (23%) or a tablet (21%). Less than one in five (16%) say they use a desktop computer.

There is no consensus among internet users in Scotland who watch short video clips online regarding the device they mostly use for this activity. Around three in ten say they mostly use a smartphone (33%), a laptop or netbook (28%) or a tablet (26%). Internet users in Scotland who say they surf or browse online are as likely to say they mostly use a smartphone (34%) or a laptop (29%) for this activity, with fewer mentioning a tablet (22%) or desktop computer (14%). This is also true for buying things online; around three in ten adults in Scotland say they mostly use a laptop or netbook (32%) or a smartphone (29%).

There is only one difference among internet users in Scotland compared to the UK overall, across each of these five activities. Internet users in Scotland are less likely to say they watch short video clips online mostly using a smartphone (33% vs. 43%).

Mobile activities

As in the UK overall, the five most commonly-mentioned mobile phone activities ever carried out by mobile users in Scotland are calls (100%), texts (97%), taking photos (87%), photo messages (79%) and taking videos (76%).

Mobile phone users in Scotland are more likely, compared to all users, to say they have ever undertaken five activities: taking videos (76% vs. 67%), downloading apps (70% vs. 62%), looking at social media sites or apps (69% vs. 59%), uploading or sharing videos or photos online (59% vs. 50%) and banking online (45% vs. 36%).

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 (70% for both Scotland and the UK).

As shown in Figure 13, more than half (57%) of all mobile users in Scotland have ever used their mobile phone to watch short video clips online (such as on YouTube) with one-third (33%) saying they do this at least weekly. There are no differences in either of these incidences compared to the UK overall. Around one in four mobile users in Scotland (27%) say they have ever used their mobile phone to watch TV programmes or films online through broadcaster services, with one in ten (9%) saying they do this on their phone at least weekly. These incidences are also no different to those for the UK overall.

Knowledge and understanding

How people assess the accuracy of media sources, the extent to which they understand how media are 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 believe that content on TV (89%) and in the press/ newspapers (65%) is regulated. While one in ten adults in Scotland (9%) are unsure whether television content is regulated, this increases to one in five (22%) for press/ newspaper regulation. Each of these incidences are in line with those for the UK as a whole.

In 2015, adults were also asked about how much of what can be seen and read online they believe to be regulated. One in four adults (23%) in Scotland are unsure how much is regulated, while 8% believe that all online content is regulated, and 5% think that no online content is regulated. The most common responses are, therefore, that 'some' (36%) or

'most' (27%) of what can be seen and read online is regulated. Compared to the UK average, internet users in Scotland are equally likely to say that all online content is regulated (8% vs. 11%) but are more likely to say that most of it is regulated (27% vs. 20%).

More than half of all search engine users in Scotland (55%) agree that "some of the websites returned will be accurate or unbiased and some won't be", which is similar to the UK as a whole (62%). One in five (19%) think that if websites have been listed by the search engine, they will contain accurate and unbiased information, which is also comparable to the UK average (18%). Around one in ten in Scotland (11%) are unsure about the level of accuracy or bias in the results returned by search engines.

In 2015, adults who use search engine websites were shown a picture of the results returned by Google for an online search for 'walking boots'. Their attention was drawn to the first three results at the top of the list, which were distinguished by an orange box with the word 'Ad' written in it. They were then prompted with three options and were asked whether any of these applied to these first three results. The options they were prompted with⁴ were:

- These are adverts/ sponsored links/ paid to appear here
- These are the best results/ the most relevant results
- These are the most popular results used by other people

The results are shown in Figure 17. More than half of adults in Scotland who use search engines (53%) stated that the first three results were sponsored links/ advertising/ paid to appear there. One in four (24%) search engine users in Scotland said they were the best or most relevant results, and less than one in five said that they were the most popular results used by other people (17%). Around one in eight users in Scotland (13%) said they were unsure. Each of these measures is comparable to those for the UK as a whole.

Internet users were asked whether (before deciding to buy a product or service) they had read any online reviews about that product or service by members of the public. They were also asked whether they had ever written any online reviews for other people to read after buying a product or service. As in the UK as a whole, internet users in Scotland are much more likely to read reviews (85%) than they are to write them (50%). Compared to the UK average, however, internet users in Scotland are more likely to read (85% vs 78%) and to write (50% vs. 39%) online reviews.

Media concerns

Concern among media users in Scotland about what is on the television (32%), and concern about apps (27%) and mobile phones (22%), is similar to that found among media users in the UK as a whole. Compared to all UK internet users, those in Scotland are more likely to have concerns about what is on the internet (61% vs. 49%).

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 (43%). They are, however, more likely to have concerns relating to risks to others/ society (40% vs. 24%) and to security or fraud (30% vs. 21%). As for all UK internet users, around one in ten internet users in Scotland have concerns relating to personal privacy (11%) or any type of advertising (7%).

As already mentioned, adults in Scotland with television in the household are as likely as all UK adults to have any concerns about what is on television (32% vs. 39%). Although they are no more likely to have any of the specific concerns shown in Figure 21, adults in

⁴ They were also allowed to nominate some other reason, or say that they were unsure

Scotland are less likely to say they are concerned about the quality of content or repeats (13% vs. 21%).

In 2015, internet users were prompted with four options and were asked to say which one best applied to how they felt in general about using apps on a mobile phone or a tablet to buy something online. The results are shown in Figure 22. Half of internet users in Scotland (49%) say they are happy to do this, which is higher than for all UK internet users (36%). One in four users in Scotland (24%) say they have some security concerns about doing this but would still do it, while one in ten (9%) would not buy something online through an app due to security concerns. These last two measures do not differ from the UK average.

Online safety and security

Internet users were asked the extent to which they agreed with the statement: "I tend to use the same passwords online". A majority of internet users in Scotland agreed overall (56%) with 32% saying they agreed strongly, compared to only 23% in the UK overall.

Home internet users were asked whether they were aware of seven online security measures or safety features, and for each 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 seven features does not vary when comparing Scotland to the UK average. However, use of one of the security features is lower in Scotland compared to the UK overall: anti-virus software (66% vs. 74%). A majority of home internet users in Scotland use firewalls (64%) and around two in five use home Wi-Fi protection from unauthorised access (44%) or email filters that block unwanted or spam emails (43%) with each of these measures 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 (Figure 26). Compared to all UK internet users, those in Scotland were less likely to say they had experienced any of the ten events in the past 12 months (54% vs. 65%); this is attributable to their being less likely to say they have experienced spam email from companies trying to sell them something (43% vs. 53%). All the other negative online events had been experienced by around one in five (or fewer) internet users in Scotland, as for the UK overall.

1.2 Wales

Key findings

Compared to all UK adults, in 2015 those in Wales are:

- more likely to say that, of all devices, they would most miss the TV set;
- less likely to use a smartphone;
- less likely to think that television programmes are regulated;
- more likely say they are unsure about the extent to which online content is regulated; and
- more likely to have concerns about offensive content on television.

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

- spending less time online per week, due to spending less time online at work and in locations outside the home;
- less likely to say they use 'lots of websites or apps they haven't used before';
- less likely to have ever undertaken six of our 35 online activities;
- less likely to say they mostly use a smartphone for certain online activities: looking at news websites or apps, surfing/ browsing online and buying things, and being more likely to use a laptop/ netbook for these first two activities;
- less likely to identify paid-for results/ advertising that appear in a Google search;
- more likely to disagree with the statement "I tend to use the same passwords online";
- less likely to use online security measures/ features on devices used to go online at home; and
- less likely to say they have seen something online they consider to be 'nasty or offensive' in the previous 12 months.

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

- less likely to say they have ever used their mobile for 19 of our 24 activities.

Take-up and use

When asked which media device they would miss the most, 37% of adults in Wales chose a TV set, 31% said they would most miss their mobile phone and 13% their desktop or laptop computer. A similar number would miss a tablet computer (6%) or radio (5%) with 2% saying they would most miss books, magazines or newspapers, or a DVR. Compared to all UK adults, those in Wales are more likely to miss the television set (37% vs. 30%).

As shown in Figure 2, around one in five (18%) adults in Wales only use devices other than a desktop computer or laptop to go online, with 5% only using a smartphone to go online. Both of these measures are comparable to the UK average.⁵

In 2015 the overall claimed volume of internet use per week among users in Wales was lower than for all UK adult users (17.8 hours vs. 21.6 hours); this difference is attributable to differences in location of use. Although internet users in Wales say they spend comparable amounts of time online at home (12.1 vs. 13.4 hours for the UK overall), they spend less

⁵ Ofcom's key measures for take-up of media can be found in our annual CMR publication, at www.ofcom.org.uk/cmr.

time online in the workplace or place of education (4.1 vs. 6.0 hours) and elsewhere (1.6 vs. 2.2 hours).

When asked to think about “most weeks when they go online”, close to half of all adult internet users in Wales say they usually only use websites or apps that they've used before (46%) while 40% use one or two websites or apps they had not used before (40%). Fourteen per cent say they use lots of websites or apps that they haven't used before; this is lower than the UK average (21%).

Online activities

Internet users were prompted with a list of 35 online activities and were asked to say how frequently they undertook each of them. Three activities have ever been carried out by at least four in five internet users in Wales: general surfing or browsing (95%), sending or receiving emails (93%) and buying things online (85%).

In 2015, compared to all UK adult users, there were no types of online activity that users in Wales were more likely to have ever undertaken, and six activities that internet users in Wales were less likely to have ever done:

- using instant messaging (69% vs. 78%)
- listening to streamed music online (42% vs. 50%)
- filling in a job application online (32% vs. 43%)
- playing games online (32% vs. 41%)
- looking at political or campaigning websites (24% vs. 37%)
- looking at adult-only websites (7% vs. 14%)

As shown in Figure 7, two of the thirty-five activities looked specifically at the frequency with which internet users watched video content online. More than seven in ten internet users in Wales have ever watched short video clips online (72%), while 43% do this at least weekly. Six in ten internet users in Wales (62%) say they have ever watched TV programmes or films online through broadcasters' services, with 38% saying they do this at least weekly. There are no differences in the frequency of watching either types of online video content by internet users in Wales compared to the UK overall.

Seven of the 35 activities that internet users were asked about can be grouped under the heading of accessing public or civic services online. Around three in four internet users in Wales have ever looked for news about or events in their local area (73%). More than three in five have ever looked for public service information on government websites such as gov.uk and HMRC (64%), looked for information on public services provided by the local council (64%) or completed government processes online such as registering for tax credits, renewing a driving licence, car tax or passport, or completing a tax return online (63%). More than one in three internet users in Wales say they have ever signed an online petition (37%) while 24% have looked at political or campaigning websites and 18% have ever contacted a local councillor or their MP online. The incidence of having ever undertaken six of the seven public or civic activities online, among internet users in Wales, does not differ from the UK overall. Internet users in Wales are, however, less likely to say they have ever looked at political or campaigning websites (24% vs. 37%).

In 2015, internet users who undertook five specific activities online were asked to nominate the device they used most for each activity. There is no device mostly used for social media by a majority of internet users in Wales, although close to half (48%) say they mostly use a smartphone, followed by a tablet (23%) or a laptop/ netbook (17%). Less than one in ten (6%) internet users in Wales say they mostly use a desktop computer for this purpose.

Internet users in Wales who watch short video clips online (such as on YouTube) are most likely to say they use a smartphone for this purpose (37%), followed by a laptop/ netbook (30%) or a tablet (18%). Less than one in ten (7%) internet users in Wales say they mostly use a desktop computer for this purpose.

There are no differences in the incidence of the devices mostly used for social media or for watching short video clips among internet users in Wales, compared to the UK overall.

While 41% of internet users in the UK say they mostly use a smartphone to visit news websites or apps, this proportion is lower in Wales, at 24%; internet users in Wales are more likely to say they mostly use a laptop/ netbook (43% vs. 26% for the UK overall). This is also true for surfing/ browsing online; 34% of internet users in the UK say they mostly use a smartphone to do this, compared to only 24% in Wales. Internet users in Wales are more likely to use a laptop/ netbook for this activity compared to all UK internet users (40% vs. 30% for the UK overall).

Close to half (46%) of internet users in Wales who buy things online say they mostly use a laptop/ netbook for this purpose, which is comparable to the UK average (37%). Internet users in Wales are, however less likely than the UK average to say they use a smartphone for this purpose (15% vs. 24%).

Mobile activities

As in the UK overall, the five most commonly-mentioned mobile phone activities ever carried out by mobile users in Wales are calls (99%), texts (93%), taking photos (72%), photo messages (64%) and taking videos (56%).

Mobile phone users in Wales are less likely than all users to say they have ever undertaken 19 of the 24 activities they were asked about, as shown in Figure 11. This is probably because some mobile phone activities that we asked about are more likely to be undertaken by people who use a smartphone, and adults in Wales are less likely than all UK adults to use a smartphone (57% for Wales vs. 70% for the UK).

As shown in Figure 13, 39% of all mobile users in Wales have ever used their mobile phone to watch short video clips online (such as on YouTube) with more than one in four (27%) saying they do this at least weekly. Both of these incidences are lower than for the UK overall. One in five mobile users in Wales (20%) say they have ever used their mobile phone to watch TV programmes or films online through broadcasters' services, with 14% saying they do this on their phone at least weekly. Mobile users in Wales are less likely than all users to have ever used their phone to do this (20% vs. 30%) but there is no difference in the weekly incidence compared to the UK overall.

Knowledge and understanding

How people assess the accuracy of media sources, the extent to which they understand how media is 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 Wales believe that TV programmes (84%) and the press/ newspapers (72%) are regulated. Compared to the UK average, adults in Wales are less likely to say that TV programmes are regulated (84% vs. 89%).

In 2015, adults were asked how much of what can be seen and read online they believe to be regulated. More than one in four adults (27%) in Wales were unsure how much is regulated; this is higher than for the UK overall (20%). Five per cent of adults in Wales

believe that all online content is regulated - lower than for the UK overall (11%) - and a similar proportion say that no online content is regulated (4%). As in the UK overall, the most common responses are that 'some' (44%) or 'most' (20%) of what can be seen and read online is regulated.

Two-thirds of all search engine users in Wales (68%) agree that "some of the websites returned will be accurate or unbiased and some won't be", which is similar to the UK as a whole (62%). One in seven (15%) think that if websites have been listed by the search engine, they will contain accurate and unbiased information, which is also comparable to the UK average (18%). Less than one in ten in Wales (7%) are unsure about the level of accuracy or bias in the results returned by search engines.

In 2015, adults who use search engine websites were shown a picture of the results returned by Google for an online search for 'walking boots'. Their attention was drawn to the first three results at the top of the list, which were distinguished by an orange box with the word 'Ad' written in it. They were then prompted with three options and were asked whether any of these applied to these first three results. The options they were prompted with⁶ were:

- These are adverts/ sponsored links/ paid to appear here
- These are the best results/ the most relevant results
- These are the most popular results used by other people

The results are shown in Figure 17. Less than half of adults in Wales who use search engines (45%) stated that the first three results were sponsored links/ advertising/ paid to appear there. One in four (23%) said they were the best or most relevant results, and one in five said that they were the most popular results used by other people (19%). More than one in five (22%) said they were unsure. Compared to the UK as a whole, search engine users in Wales are less likely to say that the results were advertising (45% vs. 60% for the UK overall) and are more likely to be unsure (22% vs. 12%).

Internet users were asked whether (before deciding to purchase a product or service) they had read any online reviews about that product or service written by members of the public. They were also asked whether they had ever written any online reviews for other people to read after buying a product or service. As for the UK as a whole, internet users in Wales are much more likely to read reviews (79%) than they are to write them (44%). There are no differences in the incidence of reading or writing reviews for internet users in Wales compared to the UK overall.

Media concerns

More than half of all internet users in Wales have concerns about what is on the internet (52%), while more than two in five TV viewers have concerns about what is on television (43%). Around one in three app users (34%) have concerns about apps, and 26% mobile phone users in Wales have concerns about mobiles. 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 (40%) with 28% citing risks to others or to society, and 23% saying they have security or fraud concerns (23%). A similar proportion of internet users in Wales are concerned about personal privacy (8%) or online advertising (5%). None of these incidences differ from all UK internet users.

⁶ They were also allowed to nominate some other reason, or say that they were unsure.

Compared to all UK adults, adults in Wales with televisions in the household are equally likely to have concerns about the quality of content or repeats (25%), diversity in content (7%), advertising or sponsorship (6%) or relating to a lack of trust (3%). Adults in Wales are, however, more likely to be concerned about offensive content (28% vs. 20% for the UK overall).

In 2015, internet users were prompted with four options and were asked to say which one best applied to how they felt in general about using apps on a mobile phone or a tablet to buy something online. The results are shown in Figure 22. A third of internet users in Wales (33%) said they were happy to do this, in line with the UK average. Three in ten users in Wales (29%) said they had some security concerns about doing this but would do it, while one in ten (9%) would not buy something online through an app due to security concerns. These last two measures do not differ from the UK average.

Online safety and security

Internet users were asked the extent to which they agreed with the statement: "I tend to use the same passwords online". A majority of internet users in Wales disagreed overall (57%) which is higher than for the UK overall (43%).

Home internet users were asked whether they were aware of seven online security measures or safety features, and for each they were aware of, whether these were installed on any of the devices they used to go online at home. Awareness of two of the seven features was lower among home internet users in Wales compared to the UK overall: deleting cookies from the web browser (46% vs. 60%) and ad-blocking software (36% vs. 48%).

Use of six of the seven security features is lower in Wales than in the UK overall: anti-virus software (65% vs. 74%), home Wi-Fi protection from unauthorised access (28% vs. 42%), email filters to block unwanted or spam emails (30% vs. 41%), deleting cookies from the web browser (19% vs. 36%), anti-spyware (23% vs. 34%) and ad-blocking software (1% vs. 23%).

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 (Figure 26). Around half of internet users in Wales said they had received spam email from companies trying to sell them something in the past 12 months (51%), the same as the UK average. All other negative online events had been experienced by around one in five internet users in Wales, as in the UK overall. Compared to all UK internet users, those in Wales are as likely to say they had experienced any of the ten events in the past 12 months (60% vs. 65%). They are, however, less likely than all UK internet users to say they have seen something online that they considered to be nasty or offensive (7% vs. 13%) or to have been scammed or deceived online through buying something that wasn't what it was supposed to be (0% vs. 5%).

1.3 Northern Ireland

Key findings

Compared to all UK adults, in 2015 those in Northern Ireland are:

- more likely to most miss a mobile phone and less likely to miss a desktop or laptop computer;
- more likely to only use devices other than a desktop computer/ laptop, and more likely to only use a smartphone to go online;
- less likely to say that TV programmes are regulated;
- more likely say they are unsure about the extent to which online content is regulated; and
- less likely to have concerns relating to quality of content/ repeats on television.

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

- less likely to have ever undertaken 12 of our 35 online activities, and more likely to have undertaken one activity;
- less likely to watch online video (either short video clips or content from broadcasters' websites) at least weekly;
- more likely to say they mostly use a smartphone for social media;
- more likely to say they mostly use a tablet for watching short video clips and for buying things online;
- more likely to say that websites listed in search engines results will have accurate and unbiased information;
- less likely to identify paid-for results/ advertising that appear in a Google search;
- less likely to say they read online reviews before purchasing a product or service;
- more likely to have concerns about the risks to others or to society from the internet;
- more likely to say have security concerns about purchasing through apps;
- more likely to agree with the statement "I tend to use the same passwords online";
- less likely to be aware of, and use online security measures/ features on devices used to go online at home; and
- less likely to say they have experienced most negative types of online activity in the past 12 months.

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

- more likely to have ever used their phone for seven of the 24 mobile activities they were asked about.

Take-up and use

When asked which media device they would miss the most, the majority of adults in Northern Ireland (51%) chose their mobile phone, while 31% chose the TV set. Five per cent or fewer adults in Northern Ireland nominated any other device: radio (5%), desktop computer/ laptop (4%), tablet (3%), books, magazines or newspapers (2%) and DVRs (1%). Compared to the UK overall, adults in Northern Ireland are more likely to miss their mobile phone (51% vs. 38%) and are less likely to miss a computer (4% vs. 12%).

As shown in Figure 2, one in three (32%) adults in Northern Ireland only use devices other than a desktop computer or laptop to go online. This is more likely than for the UK overall (16%). One in ten (11%) adults in Northern Ireland only use a smartphone to go online; this is also higher than the UK average (6%).⁷

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 (18.6 vs. 21.6 hours). Similarly, there are no differences in internet use by location when comparing Northern Ireland and the whole of the UK. Overall, adults in Northern Ireland and those in the UK as a whole spend a similar amount of time online at home (11.5 vs. 13.4 hours), in the workplace or place of education (4.8 vs. 6.0 hours) and elsewhere (2.3 vs. 2.2 hours).

When asked to think about “most weeks when they go online”, half of all adult internet users in Northern Ireland say they usually only use websites or apps that they’ve used before (50%) while 34% usually use ‘maybe one or two’ websites or apps they have not used before. Sixteen per cent say they use lots of websites or apps that they haven’t used before. There are no differences in any of these measures compared to the UK overall.

Online activities

Internet users were prompted with a list of 35 online activities and were asked to say how frequently they undertook each of them. Three activities have ‘ever’ been carried out by at least four in five internet users in Northern Ireland: general surfing or browsing (97%), sending or receiving emails (93%) and using instant messaging services (81%).

In 2015, compared to all UK adult users, those in Northern Ireland are more likely to say they have ever gambled online (13% vs. 8%). In contrast, internet users in Northern Ireland are less likely than all UK internet users to have ever undertaken 12 of the 35 activities asked about (Figure 5 and Figure 6).

As shown in Figure 7, two of the 35 activities looked specifically at the frequency with which internet users watched video content online. Three in four internet users in Northern Ireland had ever watched short video clips online (74%) and three in ten (31%) did this at least weekly. The majority of internet users in Northern Ireland (55%) say they have ever watched TV programmes or films online through broadcasters’ services, with around one in eight (13%) saying they do this at least weekly. Compared to the UK average, internet users in Northern Ireland are as likely to have ever watched short video clips online (74% vs. 78%), but they are less frequent users, less likely to do this at least weekly (31% vs. 48%) and more likely to do it less often than quarterly (21% vs. 10%). Users in Northern Ireland are also less likely than all UK users to have ever watched TV programmes or films online through broadcasters’ services (55% vs. 67%) or to do this at least weekly (13% vs. 34%).

Seven of the 35 activities that internet users were asked about can be grouped under the heading of accessing public or civic services online. Three in four internet users in Northern Ireland have ever looked for news about or events in their local area (75%). More than half have ever looked for information on public services provided by the local council (57%) or have looked for public services information on government websites such as gov.uk and HMRC (52%), and slightly fewer have ever completed government processes online such as registering for tax credits, renewing a driving licence, car tax or passport, or completing a tax return online (49%). More than one in three internet users in Northern

⁷ Ofcom’s key measures for take-up of media can be found in our annual CMR publication, at www.ofcom.org.uk/cmr.

Ireland say they have ever looked at political or campaigning websites (36%) and one in four (27%) have signed an online petition. Fourteen per cent say they have ever contacted a local councillor or their MP online. Compared to the UK average, internet users in Northern Ireland are less likely to say they have ever: looked for public service information (52% vs. 68%), completed government processes online (49% vs. 66%), signed an online petition (27% vs. 39%) or contacted a local councillor or their MP online (14% vs. 21%).

In 2015, internet users who undertook five specific activities online were asked to nominate the device they used most for each activity. Two in three internet users in Northern Ireland (67%) said they mostly used a smartphone for social media; this is more likely than among all UK internet users (67% vs. 57%). While less than one in five internet users in Northern Ireland say they mostly use a laptop or netbook (17%) or tablet (12%) for social media, both these figures are comparable to the incidence among all UK internet users.

Internet users in Northern Ireland who watch short video clips online (such as on YouTube) are most likely to say they use a smartphone for this purpose (43%), followed by a tablet (30%) or a laptop/ netbook (20%). Less than one in ten (3%) internet users in Northern Ireland say they mostly use a desktop computer for this purpose. Compared to the UK overall, internet users in Northern Ireland who watch short video clips are more likely to say they mostly use a tablet for this purpose (30% vs. 21%) and are less likely to say they mostly use a desktop computer (3% vs. 11%).

No single device is 'mostly' used by a majority of internet users in Northern Ireland who visit news websites or apps. As in the UK overall, a smartphone (37%) is the device mostly used to access this type of content online, followed either by a tablet (27%) or a laptop/ netbook (25%). This is also the case for surfing or browsing the internet; one in three (35%) mostly use a smartphone, followed by either a laptop/ netbook (28%) or a tablet (27%). None of these incidences differ to those seen for the UK overall.

There is no consensus among internet users in Northern Ireland as to the device mostly used for buying things online; 36% opt to use a laptop/ netbook and a similar proportion say they mostly use a tablet (31%). One in four say they mostly use a smartphone (25%). Internet users in Northern Ireland are more likely to say they most use a tablet (31% vs. 20%) to purchase things online.

Mobile activities

As in the UK overall, the five most commonly-mentioned mobile phone activities ever carried out by mobile users in Northern Ireland are calls (99%), texts (97%), taking photos (83%), photo messages (79%) and taking videos (76%).

Mobile phone users in Northern Ireland are more likely, compared to all users, to say they have ever undertaken seven activities: taking videos (76% vs. 67%), sending or receiving video clips (74% vs. 58%), downloading apps (70% vs. 62%), uploading or sharing videos or photos online (62% vs. 50%), playing games loaded on the phone (57% vs. 46%), using an app to order a taxi (28% vs. 18%) and using a phone to make a payment (26% vs. 15%).

Some mobile phone activities that we asked about are more likely to be undertaken by people who use a smartphone. However, adults in Northern Ireland are no more or less likely than all UK adults to use a smartphone (67% for Northern Ireland vs. 70% for the UK).

As shown in Figure 13, three in five (61%) mobile users in Northern Ireland have ever used their mobile phone to watch short video clips online (such as on YouTube) with more than a third (38%) saying they do this at least weekly. There are no differences in either of these incidences compared to the UK overall. One in three mobile users in Northern Ireland (34%)

say they have ever used their mobile phone to watch TV programmes or films online through broadcasters' services, with one in ten (11%) saying they do this on their phone at least weekly. These incidences are also no different to those for the UK overall.

Knowledge and understanding

How people assess the accuracy of media sources, the extent to which they understand how media is 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 Northern Ireland believe that content on TV (80%) and in the press/newspapers (71%) is regulated. Adults in Northern Ireland are less likely than those in the UK as a whole to say that television programmes are regulated (80% vs. 89%) and are twice as likely to be unsure (14% vs. 7% for the UK). There are no differences compared to the UK overall regarding awareness of press regulation.

In 2015, adults were asked about how much of what can be seen and read online they believe to be regulated. One in three adults (33%) in Northern Ireland is unsure how much is regulated, higher than the UK average. Around one in three adults in Northern Ireland (35%) say that 'some' online content is regulated, while 17% feel that 'most' is regulated. One in ten (10%) believe that all online content is regulated, and 6% think that no online content is regulated.

More than half of all search engine users in Northern Ireland (55%) agree that "some of the websites returned will be accurate or unbiased and some won't be", which is similar to the UK as a whole (62%). Around three in ten (27%) think that if websites have been listed by the search engine, they will contain accurate and unbiased information; this is higher than for the UK overall (18%). Around one in ten in Northern Ireland (12%) are unsure about the level of accuracy or bias in the results returned by search engines.

In 2015, adults who use search engine websites were shown a picture of the results returned by Google for an online search for 'walking boots'. Their attention was drawn to the first three results at the top of the list, which were distinguished by an orange box with the word 'Ad' written in it. They were then prompted with three options and were asked whether any of these applied to these first three results. The options they were prompted with⁸ were:

- These are adverts/ sponsored links/ paid to appear here
- These are the best results/ the most relevant results
- These are the most popular results used by other people

The results are shown in Figure 17. Close to three in ten adults in Northern Ireland who use search engines (28%) stated that the first three results were sponsored links/ advertising/ paid to appear there. Nearly half (46%) said they were the best or most relevant results and 17% said that they were the most popular results used by other people. One in five users in Northern Ireland (20%) said they were unsure. Compared to the UK as a whole, search engine users in Northern Ireland are less likely to say that the results are advertising (28% vs. 60% for the UK overall), are more likely to say they are the best or most relevant results (46% vs. 23%), and are more likely to be unsure (20% vs. 12%).

Internet users were asked whether (before deciding to buy a product or service) they had read any online reviews about that product or service written by members of the public. They were also asked whether they had ever written any online reviews for other people to read after buying a product or service. As in the UK as a whole, internet users in Northern Ireland

⁸ They were also allowed to nominate some other reason, or say that they were unsure

are much more likely to read reviews (61%) than they are to write them (32%). Compared to the UK average, however, internet users in Northern Ireland are less likely to say they read online reviews (61% vs. 78%).

Media concerns

Half of all adult internet users in Northern Ireland have concerns about what is on the internet (50%). One in three TV viewers have concerns about what is on television (33%) and a similar proportion of app users have concerns about apps (32%). Around one in four adult mobile phone users in Northern Ireland have concerns about mobiles (23%). 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 (50% vs. 49%). When looking at specific types of concern, internet users in Northern Ireland are as likely as all UK internet users to have concerns relating to offensive or illegal content (32%) or security or fraud (18%), and are more likely to have concerns about risks to others/ to society (32% vs. 24%). They are less likely to be concerned about personal privacy (2% vs. 8%) or advertising (1% vs. 6%).

As already mentioned, adults in Northern Ireland with television in the household are as likely as all UK adults to have any concerns about what is on television (33% vs. 39%). Those in Northern Ireland are, however, less likely to say they are concerned about the quality of content or repeats (12% vs. 21%), about advertising/ sponsorship (2% vs. 7%) and about diversity in content (3% vs. 6%).

In 2015, internet users were prompted with four options and were asked to say which one best applied to how they felt in general about using apps on a mobile phone or a tablet to buy something online. The results are shown in Figure 22. A quarter of internet users in Northern Ireland (26%) say they are happy to do this, which is lower compared to all UK internet users (36%). Close to half of users in Northern Ireland (46%) say they have some security concerns about doing this but would still do it, which is higher than for the UK as a whole (31%).

Online safety and security

Internet users were asked the extent to which they agreed with the statement: "I tend to use the same passwords online". Two-thirds of internet users in Northern Ireland agreed (67%) compared to 42% in the UK overall.

Home internet users were asked whether they are aware of seven online security measures or safety features, and for each they were aware of, whether these were installed on any of the devices they used to go online at home. Awareness and use of all seven features is lower in Northern Ireland than the UK average for each safety feature.

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 (Figure 26). Compared to all UK internet users, those in Northern Ireland were less likely to say they had experienced any of these ten events in the past 12 months (37% vs. 65%); this is attributable to their being less likely to say they have experienced six of the individual events. One in five (21%) internet users in Northern Ireland said they had received spam email from companies trying to sell them something; this is more than twice as high in the UK overall (53%). All other negative online events were experienced by around one in eight or fewer internet users in Northern Ireland.

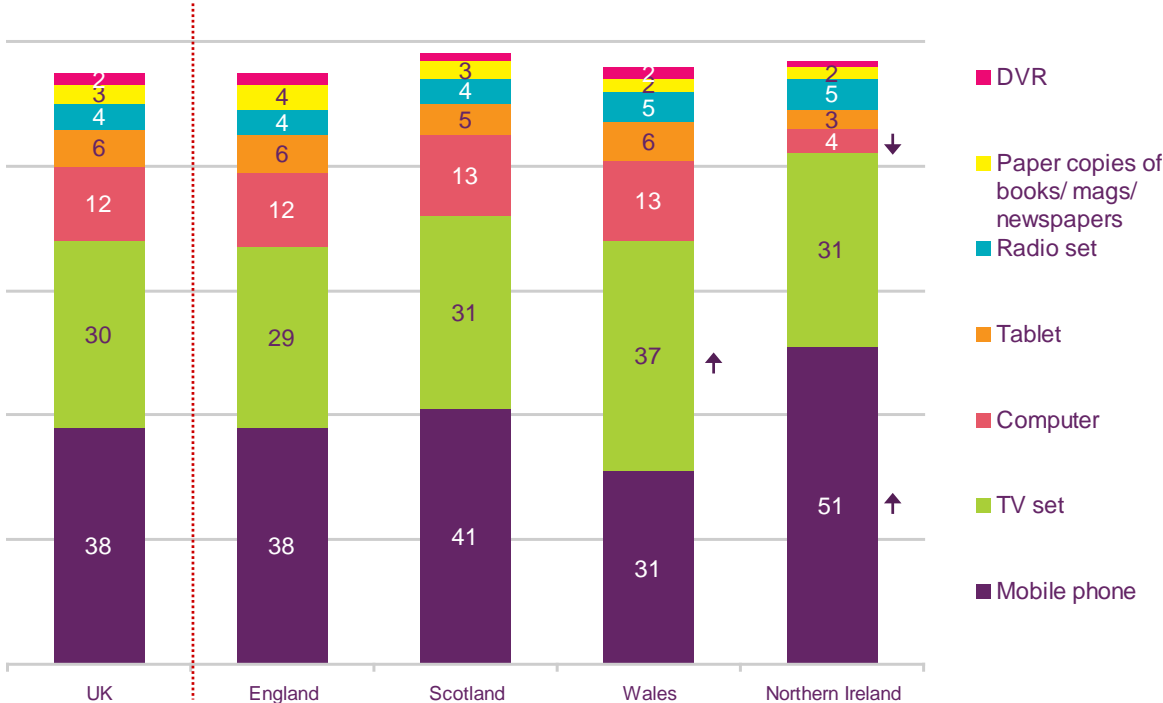
Section 2

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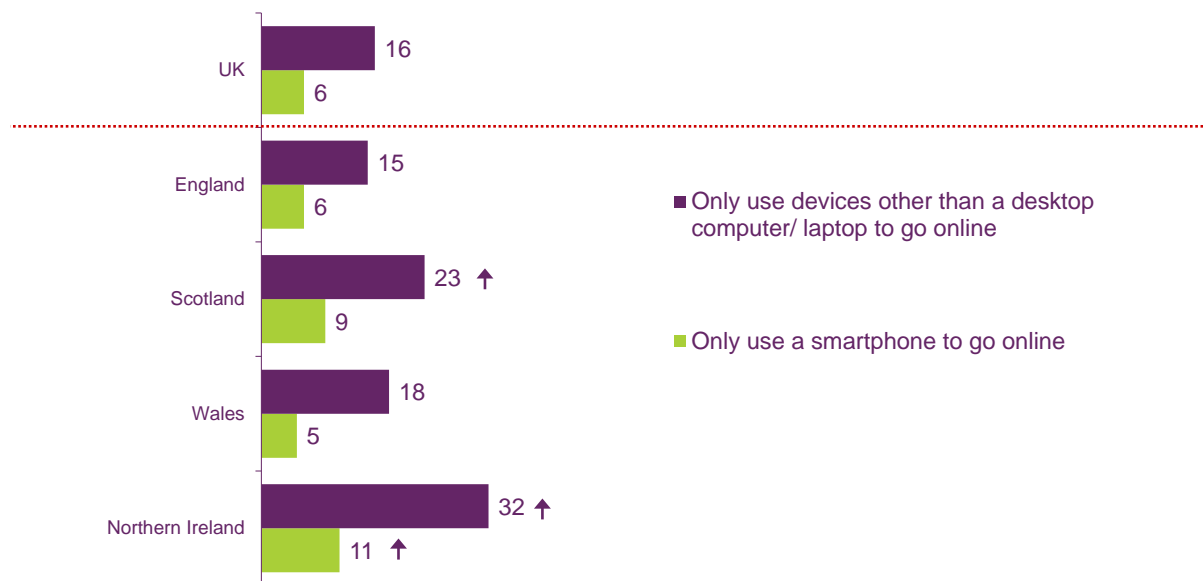
Media literacy, by nation: charts

Figure 1: Most-missed media device, by nation: 2015



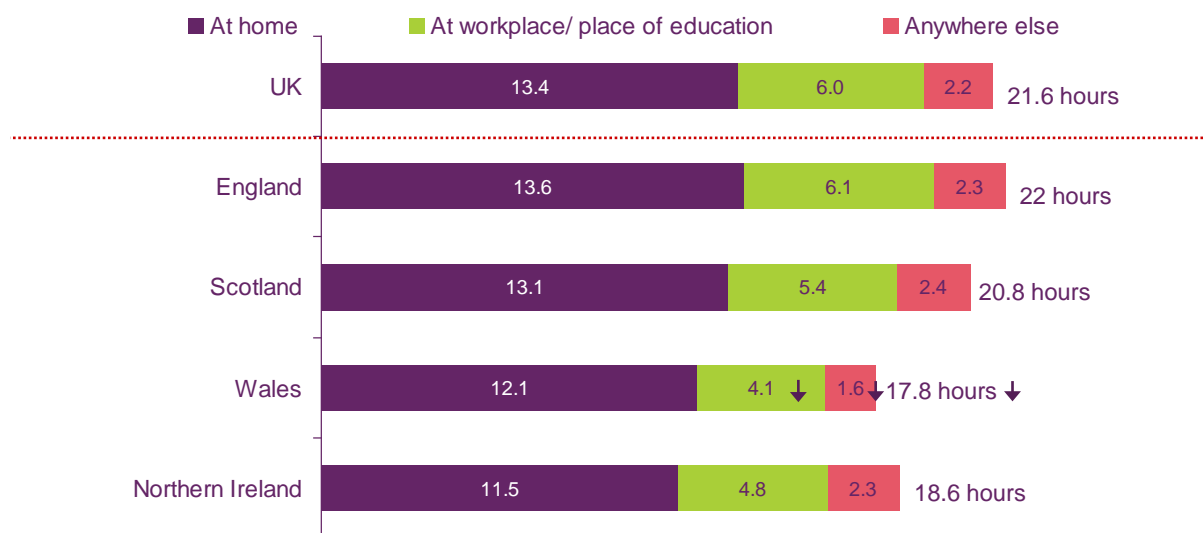
A3 – Which one of these things you use would you miss the most if it got taken away? (Prompted responses, single coded)
 Base: All adults aged 16+ (1841 UK, 1169 England, 223 Scotland, 225 Wales, 224 Northern Ireland). Showing responses by >2% of all adults.
 Significance testing shows any difference between any nation and the UK.

Figure 2: Use of devices other than a desktop computer or laptop to go online, by nation: 2015



IN1/ IN2/ IN3 - Do you or does anyone in your household have access to the internet at home / Do you have and use any of the items shown on this card to go online at home/ Do you ever use any of these devices to go online when you are not at home, this could be when you are at work, at a friend's house, in a library, when travelling somewhere or when out and about (Prompted responses, multi coded)
 Base: All adults aged 16+ (1841 UK, 1169 England, 223 Scotland, 225 Wales, 224 Northern Ireland). Showing responses by >2% of all adults.
 Significance testing shows any difference between any nation and the UK

Figure 3: Claimed volume of internet use per week, by nation: 2015



IN6A-C – How many hours in a typical week would you say you use the internet at home/ at your workplace or place of education/ anywhere else? (Unprompted responses, single coded)
 Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).
 Significance testing shows any difference between any nation and the UK.

Figure 4: Use of websites or apps not used before, by nation: 2015



IN14 – In most weeks when you go online do you usually..... (Prompted responses, single coded)
 Base: All adults aged 16+ who go online at home or elsewhere - excludes 'Don't know' responses (1423 UK, 932 England, 165 Scotland, 159 Wales, 167 Northern Ireland).
 Significance testing shows any difference between any nation and the UK.

Figure 5: Online activities ever carried out, by nation (1-18 of 35): 2015

% of internet users	UK	England	Scotland	Wales	Northern Ireland
General surfing/ browsing the internet	95%	95%	94%	95%	97%
Send or receive emails	93%	93%	91%	93%	93%
Buy things online	82%	82%	86%	85%	75% ↓
Find information for your leisure time including cinema and live music	81%	81%	83%	77%	79%
Watch short video clips online (such as on YouTube)	78%	78%	82%	72%	74%
Use Instant Messaging such as Facebook Messenger, Whats App, Windows Live Messenger or Skype Chat	78%	78%	81%	69% ↓	81%
Look at news websites or apps	77%	77%	82%	73%	76%
Look at social media sites or apps (such as Facebook, Twitter, LinkedIn, Instagram, Tumblr or Pinterest)	76%	76%	84% ↑	73%	77%
Find information about health related issues	76%	76%	74%	78%	74%
Look for news about, or events in your local area	73%	72%	79%	73%	75%
Upload or share videos or photos online	70%	69%	78% ↑	65%	74%
Look for public services information on government sites such as gov.uk and HMRC	68%	69%	69%	64%	52% ↓
Find information for your work or your job or your studies	67%	68%	67%	60%	57% ↓
Watch TV programmes of films online through services such as iPlayer, ITV Player or All4	67%	68%	66%	62%	55% ↓
Bank and pay bills online	67%	66%	74%	65%	57% ↓
Complete government processes online – such as register for tax credits, renew driving licence, car tax or passport, complete tax return	66%	67%	66%	63%	49% ↓
Look for information on public services provided by your local council	62%	62%	66%	64%	57%
Download software	61%	61%	66%	54%	50% ↓

Watch online video	Play games	Access public or civic services
Listen to audio content	Browse/ search for content and access news	Other activities
Communicate/ participate	Transact	

IN15/ IN16 - When using any of the devices you said you use to go online at home or elsewhere, how often, if at all, do you do any of the following? (Prompted responses, single coded)
 Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Figure 6: Online activities ever carried out, by nation (19–35 of 35): 2015

% of internet users	UK	England	Scotland	Wales	Northern Ireland
Make or receive telephone or video calls, using services like Skype or FaceTime	57%	58%	52%	53%	56%
Share links to websites or online articles – perhaps on Twitter, Facebook, Reddit or Pinterest	54%	53%	62%	53%	56%
Look at job opportunities	52%	52%	59%	45%	44%
Listen to streamed music online (such as Spotify or Apple Music)	50%	50%	57%	42% ↓	48%
Contribute comments to a website or blog	50%	50%	56%	44%	42%
Access files through a cloud service such as iCloud, Dropbox, Google Drive or OneDrive	48%	47%	53%	42%	52%
Listen to radio stations online	47%	47%	45%	40%	46%
Fill in a job application online	43%	44%	45%	32% ↓	25% ↓
Play games online	41%	42%	35%	32% ↓	35%
Sell things online	41%	41%	43%	33%	40%
Sign an online petition	39%	39%	35%	37%	27% ↓
Look at political or campaigning websites	37%	37%	35%	24% ↓	36%
Set up or maintain a website or blog	29%	29%	27%	24%	21% ↓
Do an online course to achieve a qualification	21%	22%	14%	16%	12% ↓
Contact a local councillor or your MP online	21%	21%	18%	18%	14% ↓
Look at adult-only websites	14%	14%	15%	7% ↓	18%
Online gambling	8%	7%	13% ↑	5%	13% ↑

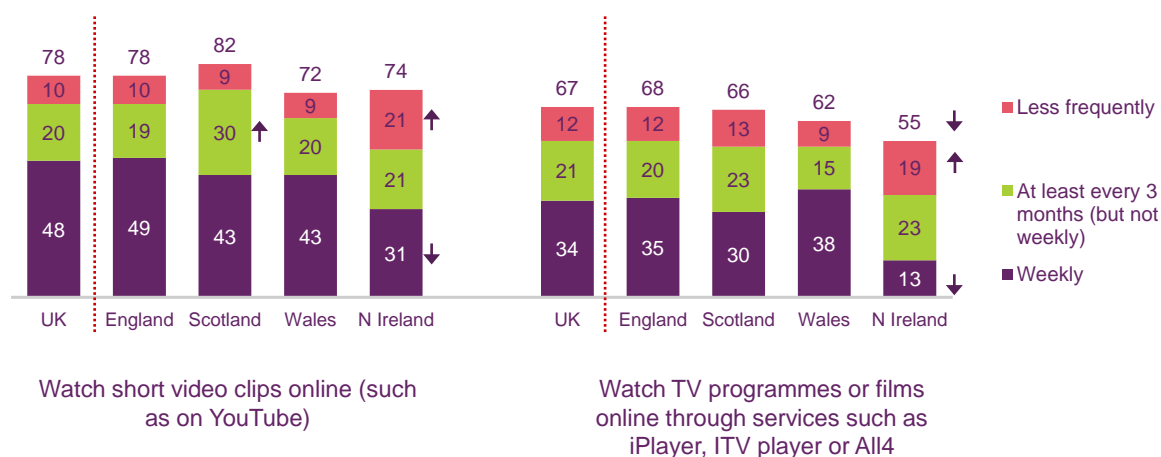
■ Watch online video	■ Play games	■ Access public or civic services
■ Listen to audio content	■ Browse/ search for content and access news	■ Other activities
■ Communicate/ participate	■ Transact	

IN15/ IN16 -When using any of the devices you said you use to go online at home or elsewhere, how often, if at all, do you do any of the following? (Prompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 7: Watching online video, by nation: 2015



IN15/ IN16 - When using any of the devices you said you use to go online at home or elsewhere, how often, if at all, do you do any of the following? (Prompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

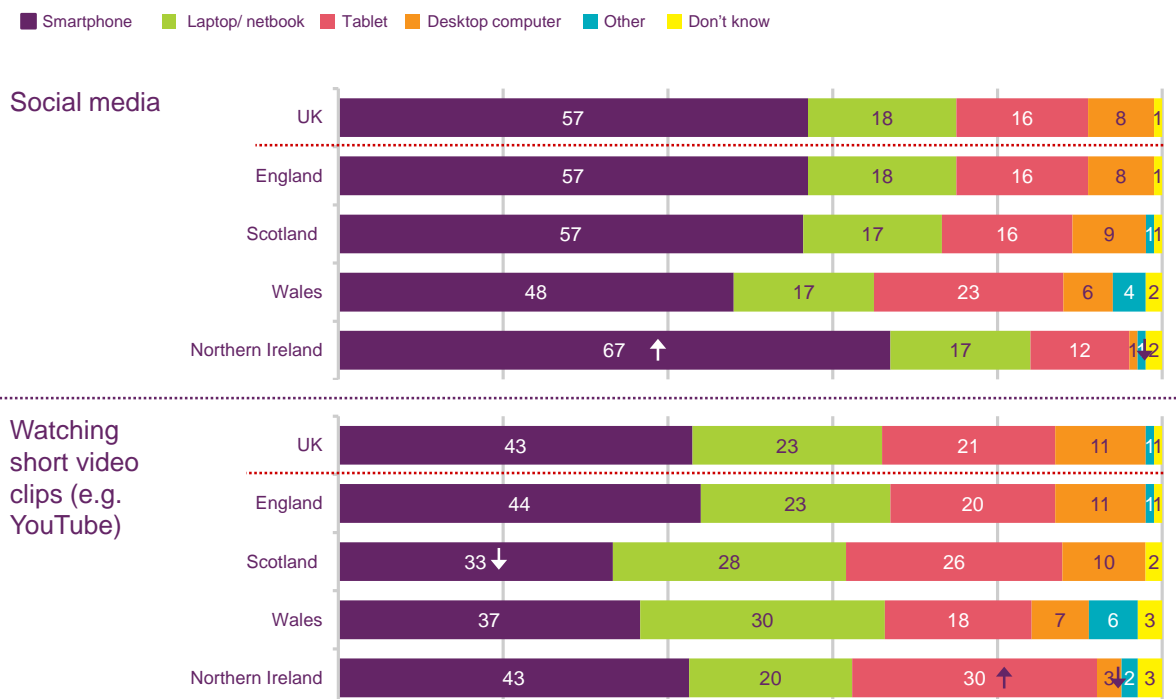
Significance testing shows any difference between any nation and the UK.

Figure 8: Use of public or civic services online, by nation: 2015

	All UK internet users	England	Scotland	Wales	Northern Ireland
Base	1458	957	168	163	170
Look for news about or events in your local area	73%	72%	79%	73%	75%
Look for public services information on government sites such as gov.uk and HMRC	68%	69%	69%	64%	52% ↓
Complete government processes online such as register for tax credits, renew driving licence, car tax or passport, complete tax return	66%	67%	66%	63%	49% ↓
Look for information on public services provided by your local council	62%	62%	66%	64%	57%
Sign an online petition	39%	39%	35%	37%	27% ↓
Look at political or campaigning websites	37%	37%	35%	24% ↓	36%
Contact a local councillor or your MP online	21%	21%	18%	18%	14% ↓

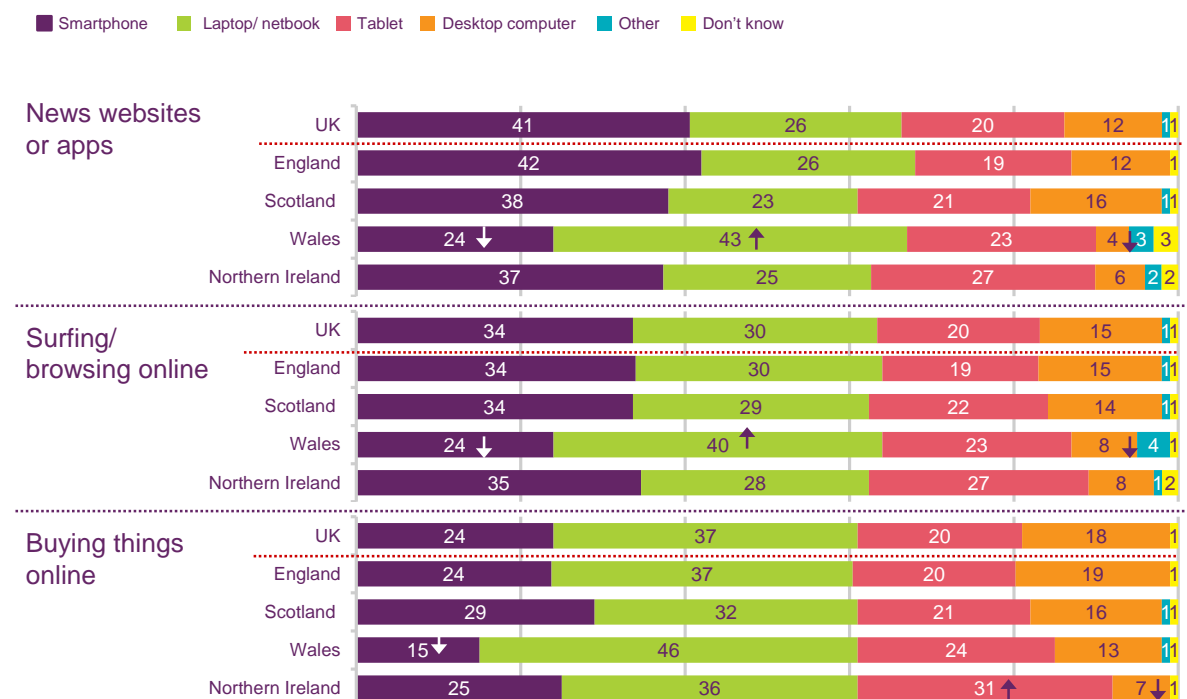
IN15/ IN16 - When using any of the devices you said you use to go online at home or elsewhere, how often, if at all, do you do any of the following? (Prompted responses, single coded)
 Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).
 Significance testing shows any difference between any nation and the UK.

Figure 9: Device used most often for online activities, by nation (1-2 of 5): 2015



IN20A-I - Please take a look at this list of devices that can be used to go online. You told me earlier that you use the following devices to go online. Which one of these devices do you use most for (ACTIVITY)? (Prompted responses, single coded).
 Base: All adults aged 16+ who go online at home or elsewhere that ever undertake each activity (variable base).
 Significance testing shows any difference between any nation and the UK.

Figure 10: Device used most often for online activities, by nation (3-5 of 5): 2015



IN20A-I -Please take a look at this list of devices that can be used to go online. You told me earlier that you use the following devices to go online. Which one of these devices do you use most for (ACTIVITY)? (Prompted responses, single coded).

Base: All adults aged 16+ who go online at home or elsewhere that ever undertake each activity (variable base). Significance testing shows any difference between any nation and the UK.

Figure 11: Mobile phone activities ever carried out, by nation (1-12 of 24): 2015

% of mobile users	UK	England	Scotland	Wales	Northern Ireland
Make or receive calls	100%	100%	100%	99%	99%
Send or receive text messages	96%	96%	97%	93% ↓	97%
Take photos	83%	83%	87%	72% ↓	83%
Send or receive photo messages	73%	73%	79%	64% ↓	79%
Take videos	67%	66%	76% ↑	56% ↓	76% ↑
Send or receive emails	63%	63%	70%	52% ↓	69%
Use features such as Maps or satellite navigation to get to where you want to go/ plot a route to your destination	63%	63%	64%	47% ↓	66%
Download apps (including games)	62%	62%	70% ↑	51% ↓	70% ↑
Use Instant messaging services	59%	59%	61%	42% ↓	66%
Look at social media sites or apps	59%	58%	69% ↑	46% ↓	65%
Send or receive video clips	58%	58%	62%	51%	74% ↑
Listen to music stored on the phone	56%	55%	64%	46% ↓	64%

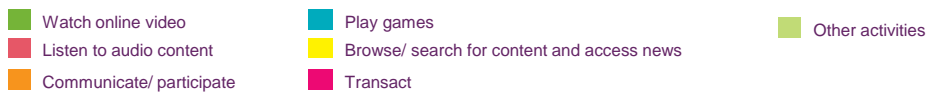
M3/ M4 – Please tell me from this list, the types of things you use your mobile phone for, and how often you do each. (Prompted responses, single coded).

Base: All adults aged 16+ who use a mobile phone (1520 UK, 987 England, 171 Scotland, 185 Wales, 177 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 12: Mobile phone activities ever carried out, by nation (13-24 of 24): 2015

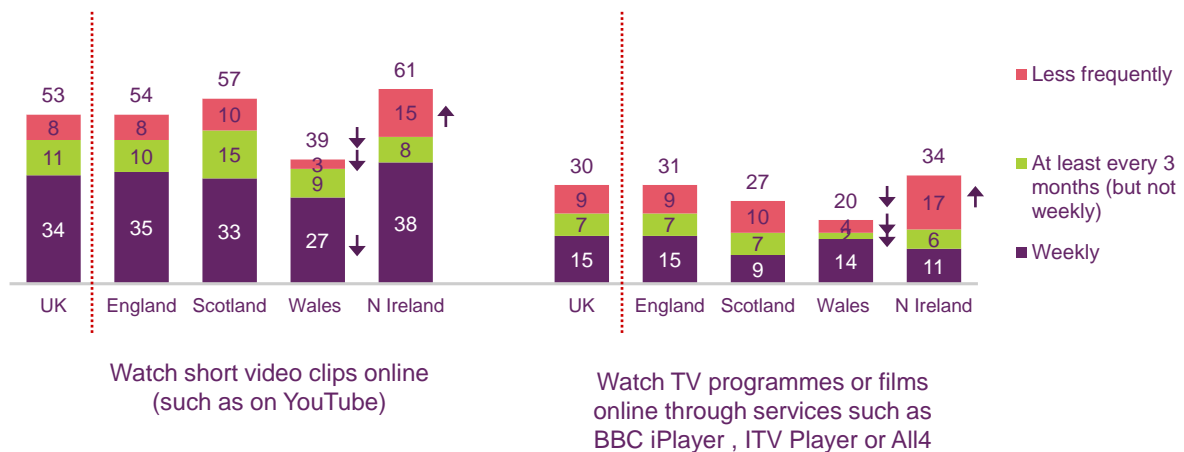
% of mobile users	UK	England	Scotland	Wales	Northern Ireland
Watch short video clips online (such as on YouTube)	53%	54%	57%	39% ↓	61%
Upload or share videos or photos online	50%	50%	59% ↑	39% ↓	62% ↑
Play games that are loaded on the phone	46%	47%	42%	33% ↓	57% ↑
Buy things online	46%	46%	47%	39%	52%
Make or receive telephone or video calls using services like Skype or FaceTime	36%	37%	31%	26% ↓	43%
Bank online	36%	36%	45% ↑	28% ↓	41%
Watch TV programmes or films online through services such as BBC iPlayer, ITV Hub or All4	30%	31%	27%	20% ↓	34%
Use your phone as a ticket or a boarding pass or as an entry ticket to an event	26%	27%	27%	12% ↓	32%
Play games online	26%	27%	22%	16% ↓	30%
Use an app on your mobile to order taxis (e.g Uber, Kabee etc)	18%	18%	14%	6% ↓	28% ↑
Send tweets through Twitter	16%	16%	17%	16%	14%
Use your phone to make a payment in a shop by touching it against a contactless reader	15%	16%	11%	11%	26% ↑



M3/ M4 – Please tell me from this list, 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 (1520 UK, 987 England, 171 Scotland, 185 Wales, 177 Northern Ireland). Significance testing shows any difference between any nation and the UK.

Figure 13: Watching video content on a mobile phone, by nation: 2015



M3/ M4 – Please tell me from this list, 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 (1520 UK, 987 England, 171 Scotland, 185 Wales, 177 Northern Ireland).

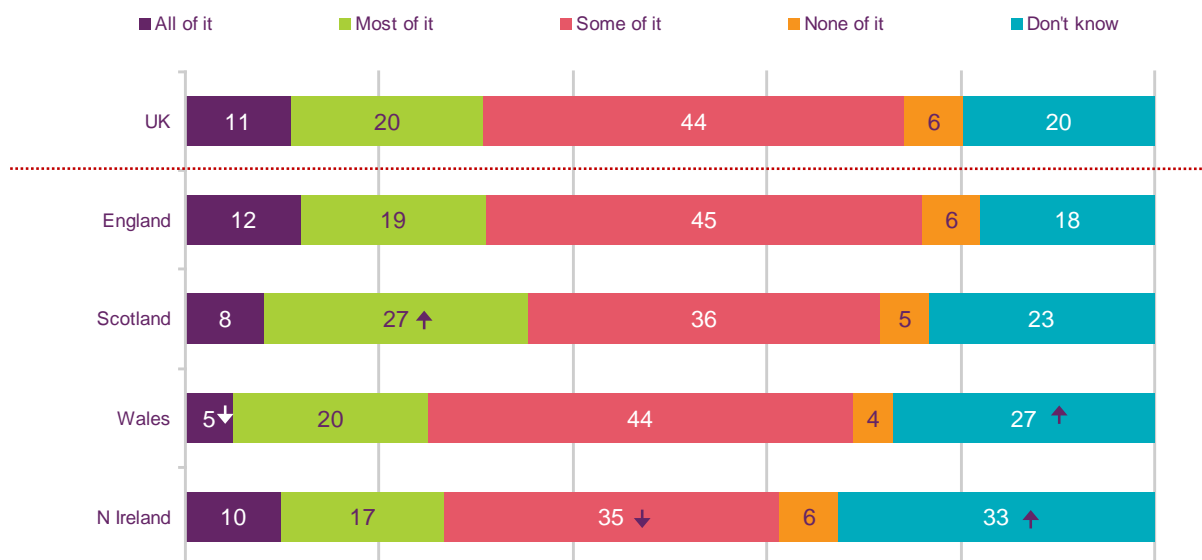
Significance testing shows any difference between any nation and the UK.

Figure 14: Belief that content is regulated, by nation: 2015



T6/ 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+ (1841 UK, 1169 England, 223 Scotland, 225 Wales, 224 Northern Ireland).
 Significance testing shows any difference between any nation and the UK.

Figure 15: Opinions on extent to which online content is regulated, by nation: 2015



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+ (1841 UK, 1169 England, 223 Scotland, 225 Wales, 224 Northern Ireland).
 Significance testing shows any difference between any nation and the UK.

Figure 16: Understanding of how search engines operate, by nation: 2015



IN51 – 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 (1328 UK, 872 England, 157 Scotland, 152 Wales, 147 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 17: Understanding of paid-for results returned by Google searches among search engine users, by nation: 2015

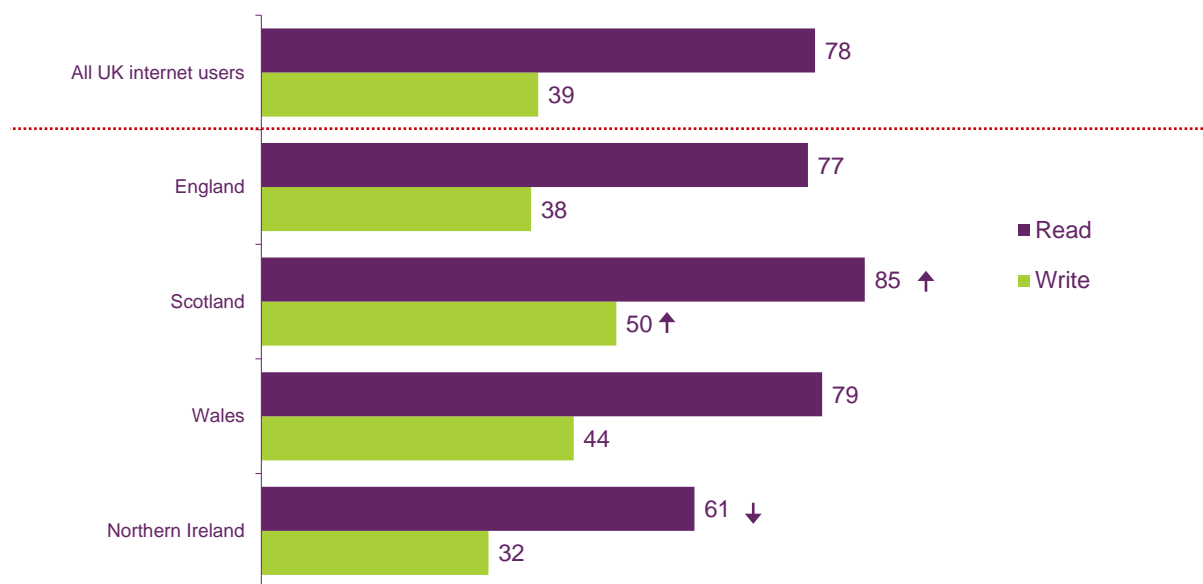
All UK internet users who use search engine websites		England	Scotland	Wales	Northern Ireland
Base	1328	872	157	152	147
These are adverts/ sponsored links/ paid to appear here	60%	62%	53%	45% ↓	28% ↓
These are the best results/ the most relevant results	23%	23%	24%	23%	46% ↑
These are the most popular results used by other people	20%	21%	17%	19%	17%
Don't know	12%	12%	13%	22% ↑	20% ↑
ONLY SELECTED THE CORRECT RESPONSE AND NOTHING ELSE	49%	50%	48%	38% ↓	22% ↓

IN52 - Here's an image (SHOWCARD OF IMAGE) from a Google search for 'walking boots'. Do any of these apply to the first three results that are listed? (Prompted responses, multi-coded)

Base: All adults aged 16+ who ever use search engines (1328 UK, 872 England, 157 Scotland, 152 Wales, 147 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 18: Reading and writing online reviews, by nation: 2015

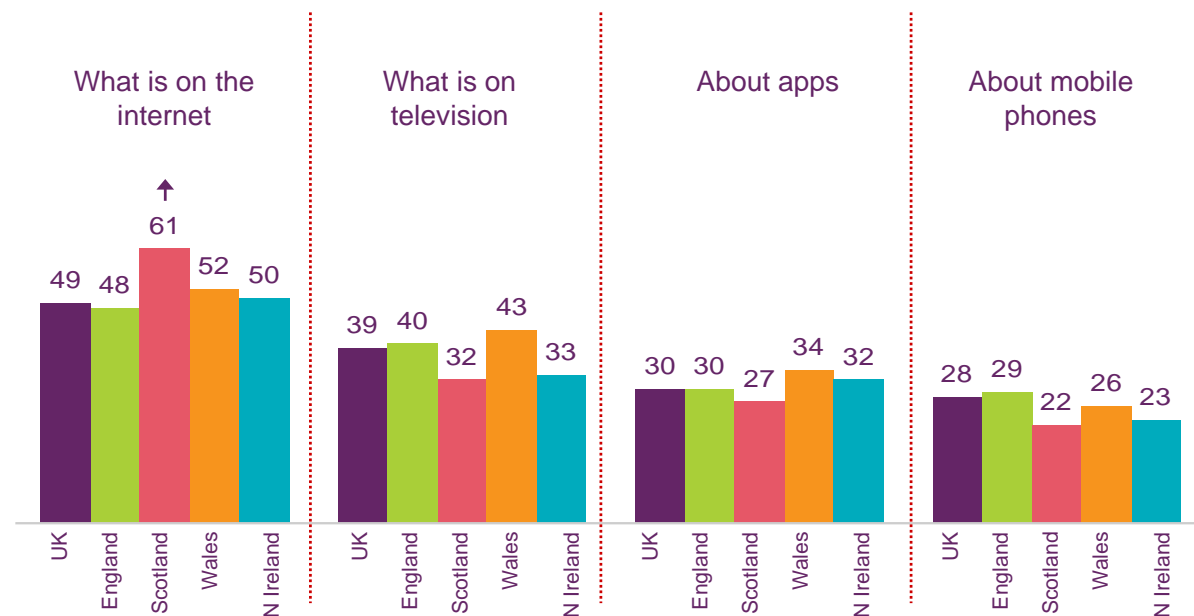


IN49/ 50- Before you decide to purchase a product or use a service, do you read reviews that other members of the public have written or posted online about that product or service? / After purchasing a product or using a service, do you write online reviews for other people to read about that product or service (Unprompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 19: Concerns about media among users, by nation: 2015



IN34/ T4/ M1/ IN23 – Can you tell me if you have any concerns about what is on the internet/ TV. Do you have any concerns about mobile phones/ apps? (Unprompted responses, multi-coded)

Base: Adults aged 16+ who use each platform (variable base).

Significance testing shows any difference between any nation and the UK.

Figure 20: Concerns about the internet among users, by nation: 2015

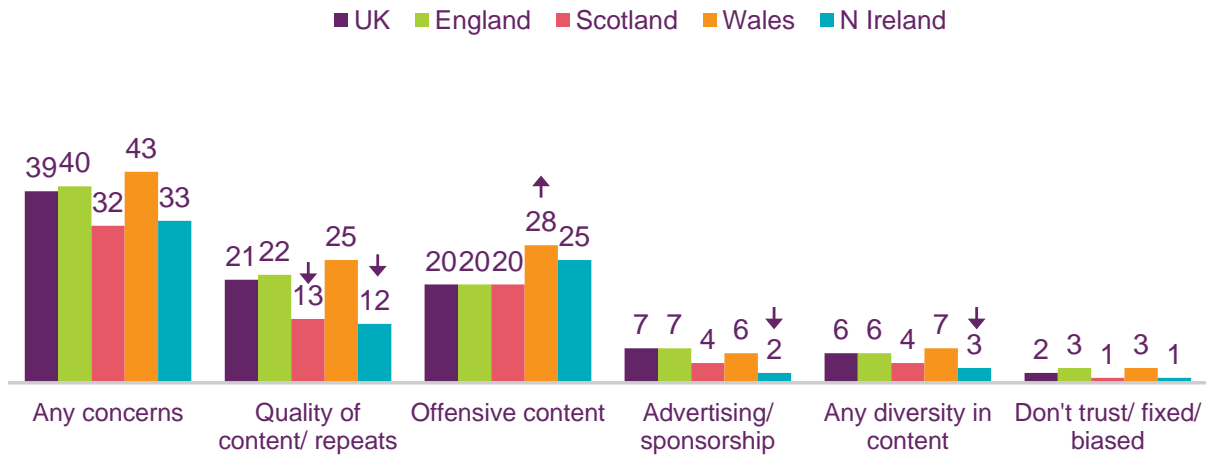


IN34 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)

Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 21: Concerns about television among users, by nation: 2015

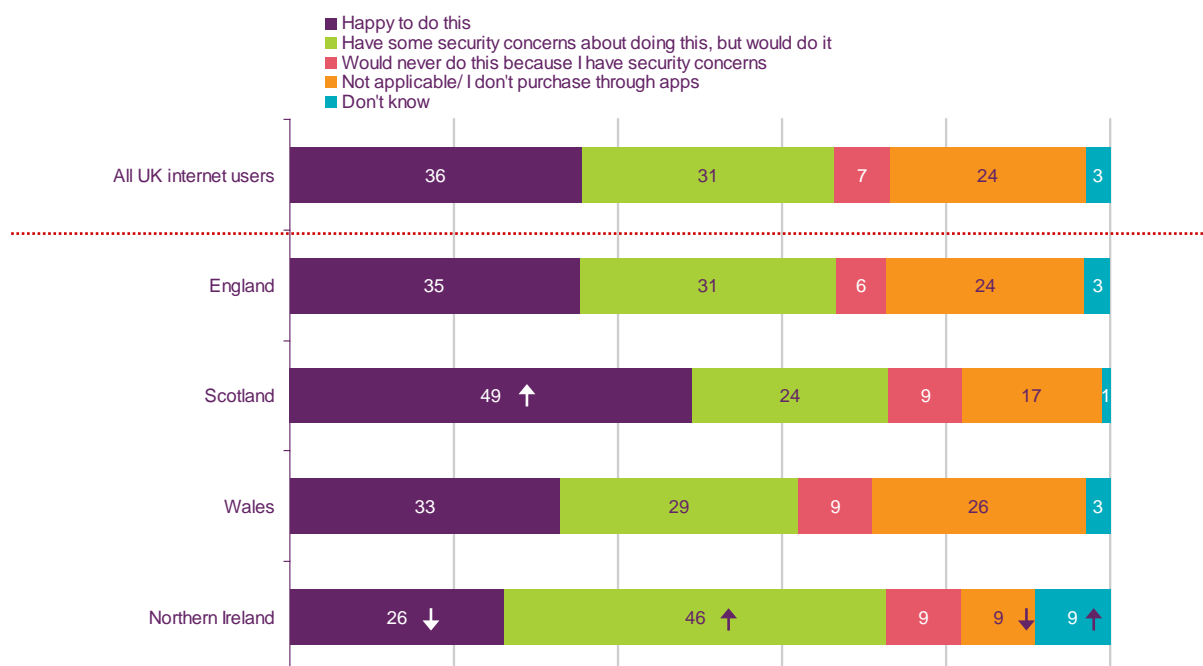


T4 – Can you tell me if you have any concerns about what is on TV? (Spontaneous responses, multi-coded)

Base: Adults aged 16+ with any TVs in the household (1800 UK, 1143 England, 215 Scotland, 220 Wales, 222 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 22: Security concerns about using apps for purchasing, by nation: 2015

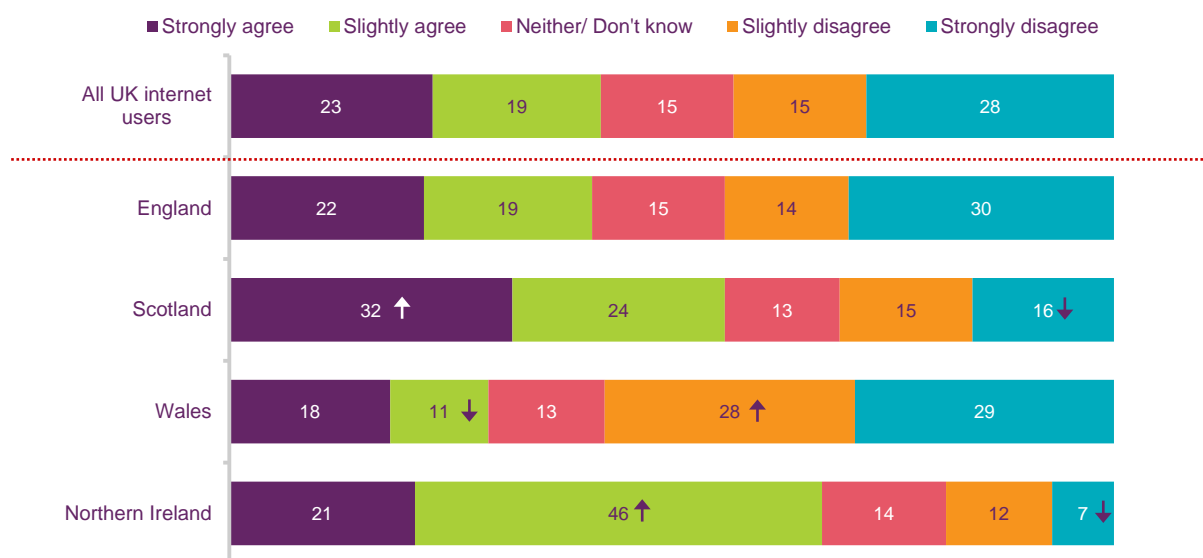


IN40 - Can you please say which option best applies to how you feel in general about using apps on a mobile phone or tablet to buy something online? (Prompted responses, single coded)

Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 23: Extent of agreement with statement: “I tend to use the same passwords online”, by nation: 2015

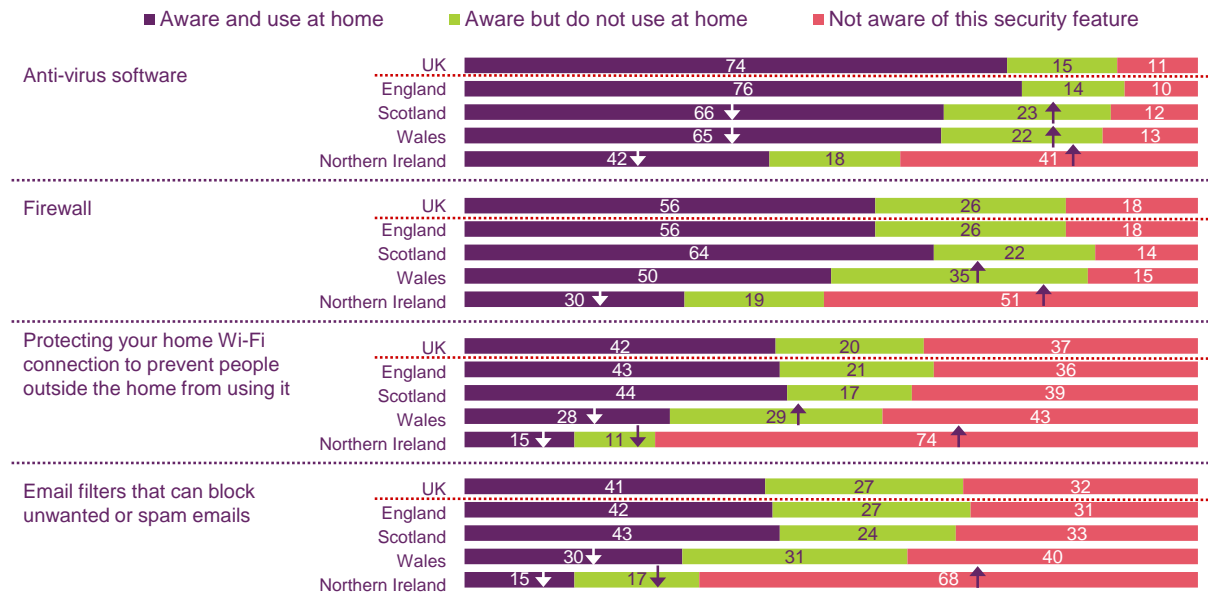


IN44E - Please take a look at the six statements shown on this card and tell me which number on this scale from 1 to 5 best describes the extent to which you agree or disagree with each statement – I tend to use the same passwords online

Base: All adults aged 16+ who go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

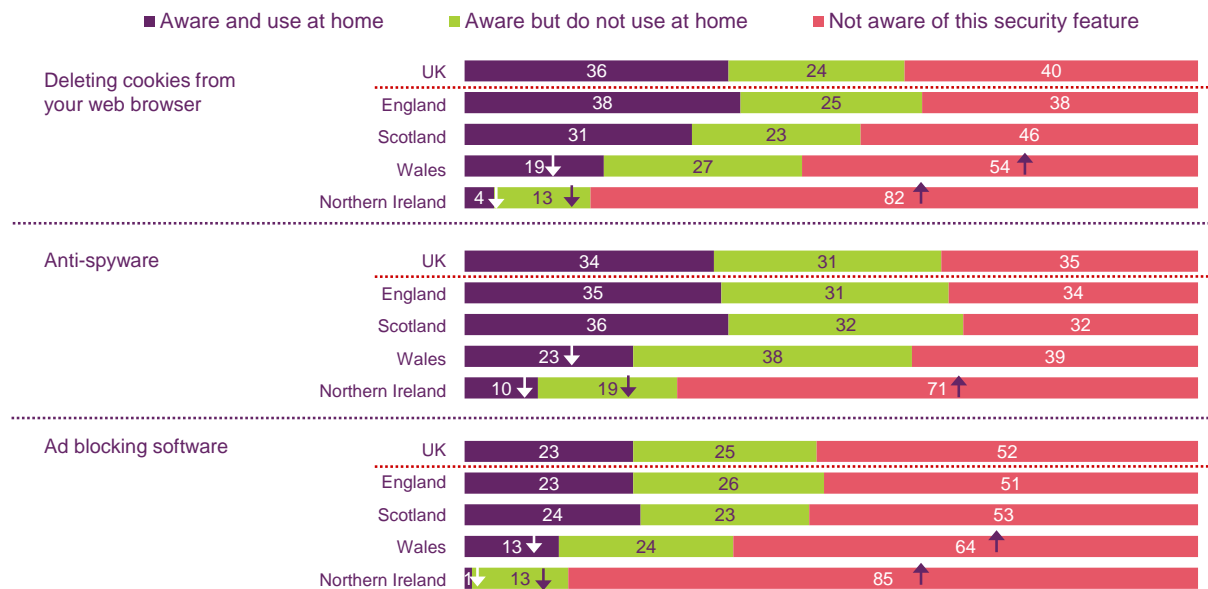
Figure 24: Awareness and use of online security measures/ features, by nation (1-4 of 7): 2015



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 you use to go online at home that are owned by you or a member of your household? (Prompted responses, multi-coded)
 Base: Adults aged 16+ who go online at home (1398 UK, 920 England, 157 Scotland, 156 Wales, 165 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 25: Awareness and use of online security measures/ features, by nation (5-7 of 7): 2015



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 you use to go online at home that are owned by you or a member of your household? (Prompted responses, multi-coded)
 Base: Adults aged 16+ who go online at home (1398 UK, 920 England, 157 Scotland, 156 Wales, 165 Northern Ireland).

Significance testing shows any difference between any nation and the UK.

Figure 26: Experience of negative types of online activity in past 12 months, by nation: 2015

	UK	England	Scotland	Wales	Northern Ireland
Received spam or unwanted emails from companies trying to sell you something	53%	55%	43% ↓	51%	21% ↓
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.)	28%	29%	22%	21%	13% ↓
Getting a computer virus on your home PC, laptop or netbook	20%	21%	14%	16%	9% ↓
Seen something online that you consider to be nasty or offensive	13%	14%	10%	7% ↓	4% ↓
Emails being sent from your email address or social media account without your permission	9%	9%	7%	9%	3% ↓
Someone accessing your email account or social media account without your permission	9%	9%	7%	8%	6%
Buying something online which wasn't what it was supposed to be (i.e. it was misrepresented/ got scammed or ripped off)	5%	5%	3%	0% ↓	1% ↓
Your credit card details or bank details being stolen after using them online	4%	4%	3%	4%	1%
Someone using any of your personal information online without your permission or knowledge (i.e. online identity theft)	3%	3%	2%	4%	1%
Being 'trolled' online – an anonymous person making hurtful or harmful comments to you	2%	2%	0%	1%	2%
ANY OF THESE	65%	67%	54% ↓	60%	37% ↓

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 go online at home or elsewhere (1458 UK, 957 England, 168 Scotland, 163 Wales, 170 Northern Ireland).

Significance testing shows any difference between any nation and the UK.