
Ofcom's Adults' Media Literacy Tracker

Confirmation of changes to future surveys (2021 and beyond)

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1. Overview

Response summary

This document summarises feedback Ofcom received in response to its consultation on proposed changes to future surveys (2021 and beyond) for the Adults' Media Literacy quantitative research, which ran from 4 to 25 March 2021.

Overall Summary

Ofcom received no responses to the consultation.

We will therefore be going ahead with the proposed changes as outlined in the consultation paper from May 2021.

2. Original consultation content

Background to our research

The Adults' Media Literacy Tracker has historically been used to provide detailed evidence on media use, attitudes and understanding and how these change over time, among UK adults aged 16 and over.

Up to 2019, the fieldwork was conducted once a year via a face-to-face c. 50-minute CAPI¹ questionnaire. As a face-to-face survey, it crucially also measured the incidence of individuals who 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 post-to-web² and post to paper³ methodologies, and an online panel.

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 users' 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 CAPI: Computer Assisted Personal Interview.

² A post-to-web methodology involves a letter being posted out to the general UK population inviting individuals aged 16 and above to complete an online survey.

³ A post-to-paper methodology involves a letter being posted out to the general UK population inviting individuals aged 16 and above to request and complete a paper version of the survey.

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

The current survey can take up to c. 50 minutes for completion. We recognise that this is too long to consistently maintain participant engagement. In our 2020 survey we addressed this by reducing the survey length to 20 minutes for those completing online and a shorter paper version of the survey which took around 15-20minutes to complete. We will continue this approach as we adapt our research for the future.

We also recognise that to ensure participant engagement, we need to adapt our surveys to better reflect behaviours and experiences online.

But we must also ensure we capture the offline population

It is essential that at least an element of Ofcom's research into adults' media literacy is fully nationally representative, and therefore able to capture those not online and provide a measure of digital exclusion among the UK population. 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 Adults' Media Literacy Tracker has provided trend data to help us understand adults' use, attitudes and understanding of media over time. However, by reviewing and refreshing our approach to this research, there will be some impact on the ability to provide trend data for previous years.⁴

However, we 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 be unable to compare 2020 data to previous years.

What we are proposing – in brief

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

Split the existing Adults' 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 + online, once a year
2. Online behaviours & attitudes tracker: conducted via an online panel, twice a year
3. Online knowledge & understanding tracker: conducted via an online panel, once a year

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 25 March 2021**.

3. Proposed changes to the Adults' Media Literacy Tracker, 2021 and beyond

Moving from one to three trackers

In this rapidly evolving environment, adults' 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 and larger sample sizes. 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 both a face-to-face methodology and online, ensuring capture of the offline population. This will include a set of standard key metrics to be measured once a year. The sample size will be increased from 2000 to 3500.

b) **Online behaviours & attitudes tracker**

This will be conducted via an online panel, focusing on social media, online gaming, news & misinformation etc. 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 sample size for this tracker will be 3000 per wave (6000 per year)

c) **Online knowledge & understanding tracker**

This will be conducted via an online panel, focusing on the critical understanding elements of media literacy. This will be measured once a year. The sample size for this tracker will be 3000 per year.

The review of our media literacy trackers aligns with the award of a new research contract from 2021 for the adults' quantitative research, of which the successful supplier was announced in February 2021. The successful agency was Critical Research. 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 and considering the different methodologies.

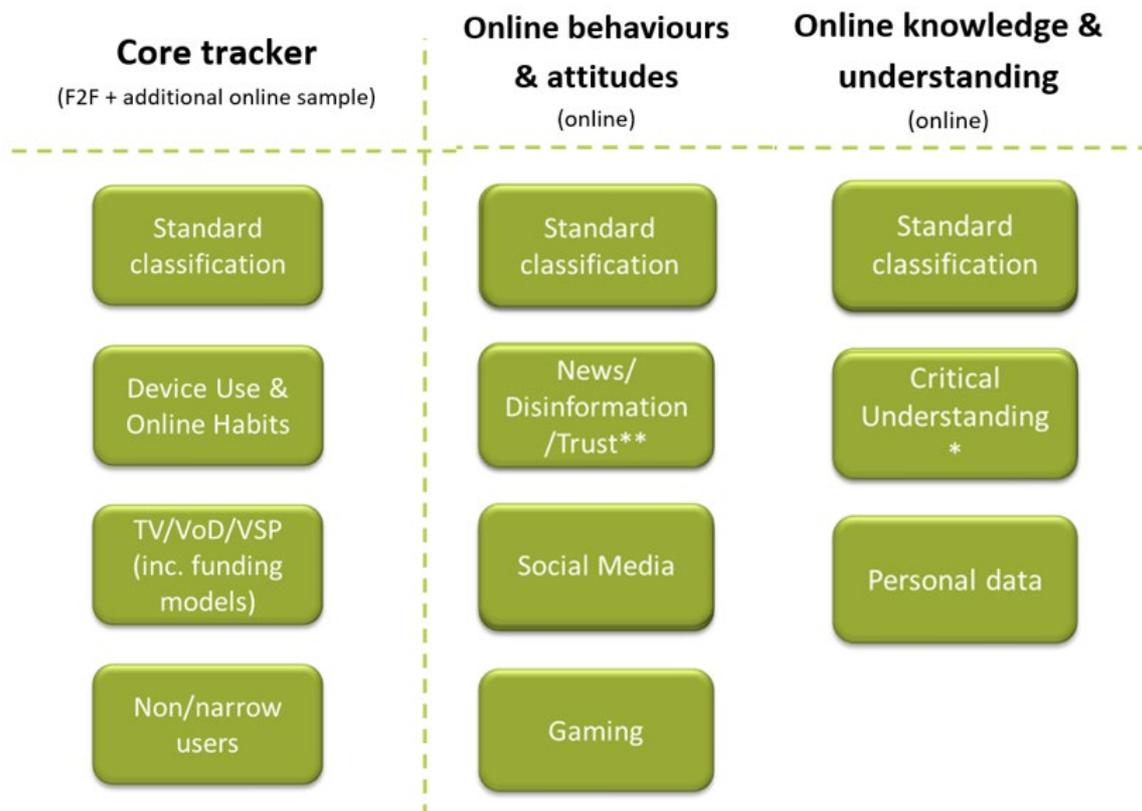
Content of the trackers

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 Adults' Media Literacy tracker will remain, although having more trackers will allow us more opportunities for additions and enhancements to the survey. The Adults' Media Literacy tracker will continue to ask about basic harms with regards to media literacy, while the more detailed components of online harms will remain on a separate

dedicated online harms survey. Details of the new online harms survey will be confirmed later in the year.

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

The question wording within each tracker will also be considered and reviewed, to ensure minimal impact to key metrics. Standard classification questions will also be included in each tracker: such as household demographics (age, gender, income, nation, region, ethnicity and urbanity etc.). There are also a set of core questions asked in each tracker (i.e. devices and attitudes towards online use), which are required to measure and subsequently account for the differences across methodologies.



*Critical understanding module to be enhanced.
 **News/Disinformation/Trust to be added.

Timeline

To address the need to be more sensitive to a 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 Online knowledge & understanding trackers, and two waves of the Online behaviours & attitudes tracker.

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

Our proposed plan of fieldwork is laid out below.⁵ The dates of reporting the new surveys are to be confirmed.

⁵ 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.



Stakeholder involvement

As in previous years, we appreciate the advice and enthusiasm from our stakeholders. 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. We welcome your comments on this consultation and will in due course, be sharing the surveys with you.