

---

## **Children and parents: media use and attitudes report 2019**

Annex – Background, research methodology and analysis, and additional and external research

---

# Contents

---

A1. Background	1
A2. Research methodology and analysis	2
A3. Additional research	4
A4. External research	5

# A1. Background

The promotion of media literacy is a responsibility placed on Ofcom by Section 11 of the Communications Act 2003. Under Section 14 (6a) of the Act we have a duty to make arrangements for the carrying out of research into the matters mentioned in Section 11 (1).

Media literacy enables people to have the skills, knowledge and understanding they need to make full use of the opportunities presented both by traditional and by new communications services. Media literacy also helps people to manage content and communications and protect themselves and their families from the potential risks associated with using these services.

Ofcom's definition of media literacy is:

*"the ability to use, understand and create media and communications in a variety of contexts".*

This report is designed to give an accessible overview of media literacy among children aged 5-15 and their parents, as well as an overview of media use by children aged 3-4. Where possible, within the sample of children aged 5-15 and their parents, demographic analysis is conducted by age (of the child interviewed), by nation, by gender, and by household socio-economic group.<sup>1</sup> Where differences exist by demography these are commented on in the report.

The report forms part of our wider programme of work, *Making Sense of Media*, which aims to help improve the online skills, knowledge and understanding of UK adults and children. We do this through cutting-edge research, and by bringing together organisations and individuals with expertise in media literacy to share ideas and to support their activities. To find out more about our *Making Sense of Media* programme and for details on how to join our network, please go to [www.ofcom.org.uk/making-sense-of-media](http://www.ofcom.org.uk/making-sense-of-media).

The key objectives of this research are:

- to provide a rich picture of the different elements of media literacy across the key platforms: the internet, television, games, and mobile phones;
- to provide a focus on data about children's internet habits/opinions and parents' strategies to protect their children online; and
- to identify emerging issues and skills gaps that help to target stakeholders' resources for the promotion of media literacy and the development of wider policy.

---

<sup>1</sup> Socio-economic groups are the social classification (ABC1 system) used by industries including market research. The classification assigns every household to a grade, usually based upon the occupation and employment status of the Chief Income Earner, but in some cases using other characteristics. This report focuses on differences seen between AB and DE households.

Social grade AB consists of higher managerial, intermediate managerial, administrative and professional occupations; social grade C1 consists of supervisory, clerical and junior managerial, administrative and professional occupations; social grade C2 comprises of skilled manual workers; and social grade DE comprises of semi-skilled and unskilled manual workers, casual and lowest grade workers, unemployed with state benefits only, and state pensioners.

## A2. Research methodology and analysis

This report provides an update to the reports on children's media literacy published in 2006, 2008, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018 and 2019.<sup>2</sup> It draws on the following surveys:

### **Media Literacy Tracker with children and parents:**

A quantitative tracking survey conducted in 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018 and 2019<sup>3</sup>.

In April/ May/ June/ July 2019, 2,343 in-home interviews with parents of 5-15s and children aged 8-15 were conducted, along with 900 interviews with parents of children aged 3-4. In April/ May/ June 2018, 1,430 in-home interviews with parents of 5-15s and children aged 8-15 were conducted, along with 630 interviews with parents of children aged 3-4. In April/ May/ June 2017, 1,388 in-home interviews with parents and children aged 5-15 were conducted, along with 677 interviews with parents of children aged 3-4. In April/ May/ June 2016, 1,375 in-home interviews with parents and children aged 5-15 were conducted, along with 684 interviews with parents of children aged 3-4. In April/ May/ June 2014, 1,660 in-home interviews were conducted with parents and children aged 5-15 as well as 731 interviews with parents of children aged 3-4. In March/ April 2011, 1,717 in-home interviews with parents and children aged 5-15 were conducted. In April/ May and September/ October 2009, 2,131 in-home interviews with parents and children aged 5-15 were conducted.

### **Interviews conducted with parents of 3-4 year-old children**

As detailed above, from 2013 onwards the *Media Literacy Tracker* was also conducted with parents of children aged 3-4, with a total of 900 interviews conducted in-home in April/ May/ June/ July 2019. Findings have been shown for 3-4s wherever possible and comparing the findings for children aged 3-4 and the older children interviewed for this survey. Data for children aged 3-4 are not included in the overall analysis for all children aged 5-15, both because the media habits of pre-school children are likely to differ substantially from those of school-age children, and because including them in the larger group would impede our ability to compare results over time.

---

<sup>2</sup> [www.ofcom.org.uk/research-and-data/media-literacy-research/childrens](http://www.ofcom.org.uk/research-and-data/media-literacy-research/childrens)

<sup>3</sup> Across most of the Figures in the report and chart pack, findings from the 2010, 2011, 2013, 2014, 2015 and 2016 Media Literacy Trackers have been removed to reduce data overcrowding.

## Changes that were made after 2014

Changes were made to the questions asked of parents and children on the Media Literacy Tracker surveys in 2014 regarding the child's use of media. Before 2014 parents and children were asked to consider the child's use of media within the home. With the growth in ownership and use of mobile devices – such as smartphones and tablets – we decided to ask, from the 2014 survey onwards, about the child's use of media in any location, not just at home.

As in previous surveys, the detail in this report on the devices used and the volume of use is based on responses from parents of 3-4s and 5-7s, and responses from children aged 12-15. Since 2014 we have extended the questions asked of children aged 8-11 to cover devices used and volume of use, as well as increasing the number of questions aimed at gauging 8-11s' critical understanding.

Since 2016, we have reviewed the questionnaire in order to ensure that the language used is easy for children to understand. While we believe this has increased the accessibility of the questionnaire for children, there are some questions where it has affected our ability to make comparisons over time. These instances are noted in the report.

## Significance testing

Significance testing at the 95% confidence level was carried out. This means that where findings are commented on in the report, there is only a 5% or less probability that the difference between the samples is by chance<sup>4</sup>. Statistically significant findings are indicated in the figures in the report by arrows.

Where possible, findings are shown for 5-15s as well as for the specific age groups (5-7, 8-11 and 12-15). However, some questions in earlier surveys, and some questions in the current survey, were not asked of all age groups. It is also worth noting that in some instances where there is a change over time among all children aged 5-15, this may not be accompanied by a change among 5-7s, 8-11s or 12-15s for that measure, due to smaller base sizes for these sub-groups.

---

<sup>4</sup> If a finding is not statistically significant it may be referenced in the report as being unchanged or that it does not differ when compared to another measure (i.e. when comparing, for example, boys aged 12-15 to girls aged 12-15). In some instances, the two percentages compared could differ by as much as 15 percentage points, but due to low base sizes for one (or both) of these groups the difference is not registering as statistically significant.

## A3. Additional research

### News Consumption survey 2019

Alongside Ofcom's annual News Consumption Survey conducted among adults aged 16+, a further 1,000 online interviews were carried out with children aged 12-15. The purpose of this research is to gain a deeper understanding of older children's interest in and attitudes towards news, the sources used for news, and awareness of and exposure to fake news.

The online interviews were conducted through a research panel in two waves (November-December 2018 and March-April 2019), and combined for reporting. The initial approach is to the child's parent (the panel member) to gain their permission to interview the child aged 12-15, before gaining permission from the child. Quotas are set by age, gender and nation.

The 2019 report followed the previous waves which were conducted during November-December 2017 and March-April 2018, resulting in 1,001 interviews.<sup>5</sup>

---

<sup>5</sup> A full discussion of the methodology and findings from the adults' and children's news consumption research is available here: <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/news-media/news-consumption>

## A4. External research

### BARB

To complement our research, we include findings from BARB, the UK's television audience measurement body. BARB has two sources of data: the BARB panel and device-based census data for online TV viewing.

The BARB panel is a sample of carefully recruited households and together, these represent television viewing across the nation. On behalf of BARB, Ipsos Mori interviews over 1000 households each week for the BARB Establishment Survey. BARB can also identify from the Establishment Survey changing forms of television viewing, such as the use of SVOD services like Netflix and Amazon Prime Video. Ultimately, the Establishment Survey helps to find homes that are willing to be members of the panel. The target is to maintain a panel of 5,300 homes (including 200 broadband-only homes) that are representative of household type, demographics, TV platform and geography. There are over 12,000 people living in these homes, helping BARB to measure what you watch.

Having recruited a representative sample of homes, BARB then starts to measure what people are watching and when. Kantar Media fits every TV set in the panel home with a meter. Software meters are also installed on PCs and tablets so that we can monitor viewing of BVOD services on these devices.

The following analysis has been conducted to help Ofcom's research into children's viewing behaviour.

### Time spent watching the TV set

In 2018, data from BARB shows that children aged 4-15 watched an average of nine hours of consolidated broadcast television, on the TV set per week (including live viewing and time-shifted viewing up to seven days later). This was down by over an hour since 2017 and we have seen this downwards trend continue into the first half of 2019 where viewing fell to just under eight hours per week. BARB data also shows that younger children watch more TV than older children. In 2018, younger children (aged 4-9) watched an average of just under 10 hours a week compared to older children (10-15 years) who watched under eight hours. In H1 2019, younger children watched an average of nine hours per week compared to older children who only watched under seven hours per week.

The amount of time children (aged 4-15) spend viewing the main five PSB channels (BBC One, BBC Two, ITV, Channel 4 and Channel 5) and their respective portfolios in 2018 was just under five and a half hours (a decline of 5% compared to 2017). This viewing time was slightly higher with younger children (just over five and a half hours) whereas older children only watched just over five hours. In H1 2019 children's viewing to the PSB channels saw a further decline of just over one hour (to just over four and a half hours) compared to H1 2018. This has been one of the steepest declines we have seen in recent years and the decline was even greater among older children (down by just under one and a half hours).

Looking across the nations in 2018, all of them saw a decline in the amount of broadcast TV watched by children compared to 2017. Children in Wales watched the most amount of broadcast television per week (nine and a half hours) in 2018 although this was a decline of 11% compared to 2017. Children's viewing in England showed the most resilience and dropped the least (down 10% since 2017) to 9 hours. Children in Scotland watched the least amount of TV, just a few minutes less than those in Northern Ireland, at eight and a half hours.

In the first half of 2019, children in Wales continued to watch the most amount of broadcast television per week but this fell to 8.4 hours. In H1 2019, all of the nation's saw a drop in the numbers of hours of broadcast TV children watched compared to H1 2018. Ireland showed a much greater decline than any other nation (down 31%) and children in Northern Ireland also watched the least amount of broadcast television (6.6 hours).

Children in Northern Ireland also watched the least amount of content on the PSBs and their portfolio channels with an average of just over four hours a week in H1 2019. Children in Wales watched the most at over 5 hours a week which was above the UK average of 4.7 hours.

For children aged 4-15, unmatched viewing on the TV set, which includes subscription video-on-demand like Netflix, apps on smart TVs, DVDs and gaming, increased in H1 2019 to 65 minutes per child per day. This was an increase of 5% compared to H1 2018. On average, per week, children's live viewing (watching something at the time it was broadcast) decreased by just under an hour from 2017 to 2018, while 8-28-day time-shifted viewing increased slightly. For the first half of 2019, this pattern has continued with unmatched and 8-28 day time shifted viewing increasing compared to H1 2018.

## What children watch on the TV set

Most of children's TV viewing is to programming not classified as being children's airtime and the proportion of this has increased. In 2018 66% of the time children spent watching broadcast TV was to programming that falls outside of children's airtime (up from 63% in 2017).

The top programme for children aged 4-15 so far in 2019 (Jan -June 2019) was ITV's Britain's Got Talent with 1.3 million children watching. ITV had nine programmes feature in the top 20 list with BBC One following closely behind with eight. The majority of the programmes were on during peak family viewing time and four children's films featured in the top 20 list the highest rated being Inside Out which aired on BBC One and had an average audience of 820,000 children 4-15. Looking across the nations Britain's Got Talent was also the top programme in England and Scotland and came second in Northern Ireland after an episode of Derry Girls. The top programme in Wales was The Six Nation's Rugby: Wales vs Ireland which aired on 16th March 2019.

Post watershed viewing (9pm onwards) accounted for 17% of all day viewing in the first half of 2019 and this has remained stable since 2015. Two of the top 20 programmes in H1 2019 were those that aired after the watershed; Britain's Got Talent: Results aired on ITV at 9.30pm and had an average child audience of over 500,000 and Love Island on ITV2 aired at 9pm and had an average child audience of 416,000.

**Top 20 programme with children (4-15 years) in the UK for H1 2019**

Channel	Programme Title	Date	Start Time	Duration	000's Avg	Share %
ITV	Britain's Got Talent	13/04/2019	20:02:00	01:19:51	1,261	69.3
BBC One	Film: Inside Out	01/01/2019	17:02:00	01:26:08	820	41.7
BBC One	Doctor Who	01/01/2019	19:00:00	00:59:59	805	35.3
ITV	In For A Penny	27/04/2019	19:30:00	00:26:58	608	41.5
ITV	Dancing On Ice	06/01/2019	18:01:00	01:53:21	570	37.0
ITV	The Voice UK	19/01/2019	20:03:00	01:27:35	559	35.5
BBC One	The Eurovision Song Contest	18/05/2019	20:00:00	04:10:42	533	44.4
BBC One	The Greatest Dancer	19/01/2019	20:02:00	01:05:27	516	31.3
BBC One	Comic Relief	15/03/2019	18:58:00	03:00:04	507	44.0
ITV	Britain's Got Talent Results	27/05/2019	21:33:00	00:27:34	501	45.9
ITV	Ninja Warrior UK	27/04/2019	18:29:00	00:55:54	476	39.0
BBC One	Michael McIntyre's Big Show	12/01/2019	19:09:00	00:59:36	474	26.6
ITV	The Brit Awards	20/02/2019	20:03:00	02:15:23	460	40.8
Sky Cinema	Film: Incredibles 2	06/04/2019	10:14:00	01:52:59	430	39.6
Sky Cinema Family	Film: Hotel Transylvania 3	23/03/2019	07:47:00	01:33:24	424	43.2
ITV	Film: Fantastic Beasts And Where	05/01/2019	17:38:00	02:18:08	421	30.1
ITV2	Love Island	07/06/2019	21:00:00	01:17:39	416	41.3
BBC One	FA Cup Match Of The Day Live	25/01/2019	19:28:00	02:30:44	412	36.1
BBC One	Eastenders	04/01/2019	19:58:00	00:29:51	399	29.2
ITV	Coronation Street	02/01/2019	19:31:00	00:26:26	398	27.4

Source: BARB